

Proposal Compliance Checklist

Before you submit, make sure you've answered what the government actually asked for.

Don't lose before the government starts scoring.

Federal proposals aren't evaluated solely on whether you have the best solution. Before evaluators can consider how good your approach is, your proposal must follow the solicitation.

Page limits. File formats. Required forms. Section organization. Certifications. Technical requirements. Past performance. Pricing instructions. Small compliance mistakes can create significant proposal risk.

Use this checklist as a final structured review before your proposal goes out the door. Each worksheet is designed so it can also be printed and used separately.

If the government asks for it, track it.

If the government evaluates it, address it.

This checklist is an educational and organizational tool. It does not determine whether a proposal complies with a particular solicitation, and nothing in it constitutes legal advice. Review all content against your internal requirements and company structure, and have your legal counsel review as appropriate. The solicitation and applicable amendments remain the controlling requirements.

The Solicitation Is Your Instruction Manual

Proposal compliance starts with carefully reviewing the entire solicitation — not simply the Statement of Work or Performance Work Statement. The requirements that decide whether your proposal is even fully evaluated are usually spread across instructions, evaluation factors, attachments, forms, and amendments.

SECTION L — INSTRUCTIONS TO OFFERORS

Section L generally tells the contractor how to prepare and submit the proposal: volumes, page limits, formatting, ordering, and submission mechanics.

SECTION M — EVALUATION FACTORS

Section M generally explains how the government intends to evaluate the proposal, including the factors, their relative importance, and what will be assessed.

STRUCTURES VARY

Do not assume every procurement uses the same section numbering or format. Commercial item solicitations, task order requests, and agency-specific templates often organize instructions and evaluation criteria differently.

HOW TO USE THIS PACKET

- ☐ Capture the opportunity basics on the next page.
- ☐ Work the Solicitation Administration checklist first — these items are the easiest to verify early.
- ☐ Complete a volume checklist for each volume your solicitation requires.
- ☐ Build a compliance matrix so every requirement has an owner and a location.
- ☐ Crosswalk the evaluation factors to the evidence an evaluator will find.
- ☐ Run the 24-hour final review with someone who did not write the proposal.

Opportunity Information

PROPOSAL COMPLIANCE CHECKLIST

Solicitation Administration Checklist

- ☐ Solicitation number verified
- ☐ Due date verified
- ☐ Due time and time zone verified
- ☐ Submission method confirmed
- ☐ Submission destination confirmed
- ☐ File naming requirements identified
- ☐ File format requirements identified
- ☐ File size limitations identified
- ☐ Required volumes identified
- ☐ Page limits documented
- ☐ Font requirements documented
- ☐ Margin requirements documented
- ☐ Electronic submission requirements reviewed
- ☐ All amendments acknowledged
- ☐ Questions deadline identified
- ☐ Proposal validity period identified

ADDITIONAL REQUIREMENTS SPECIFIC TO THIS SOLICITATION

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Technical & Management Volumes

TECHNICAL VOLUME

- ☐ Technical approach addresses solicitation requirements
- ☐ Required technical elements are addressed
- ☐ Technical solution aligns with PWS/SOW
- ☐ Required methodologies are explained
- ☐ Deliverables are addressed
- ☐ Quality requirements are addressed

MANAGEMENT VOLUME

- ☐ Management approach included
- ☐ Organizational structure included
- ☐ Staffing approach addressed
- ☐ Key personnel identified
- ☐ Recruitment/retention addressed if applicable
- ☐ Transition approach addressed
- ☐ Quality control addressed
- ☐ Risk management addressed

Past Performance & Key Personnel

PAST PERFORMANCE

- ☐ Required number of examples included
- ☐ Projects meet recency requirements
- ☐ Projects meet relevancy requirements
- ☐ Contract values provided where required
- ☐ Customer information provided
- ☐ Period of performance included
- ☐ Scope clearly demonstrates relevance
- ☐ Past performance questionnaires addressed if required

KEY PERSONNEL

- ☐ Required resumes included
- ☐ Resume format follows instructions
- ☐ Page limitations followed
- ☐ Required qualifications demonstrated
- ☐ Certifications included where required
- ☐ Letters of commitment included where required

Price / Cost Volume Checklist

- ## PRICING NOTES AND OPEN QUESTIONS

Compliance Matrix

A compliance matrix turns solicitation requirements into trackable proposal actions. Each requirement should have an owner and a known location in the final proposal. Status: Not Started / In Progress / Complete / Needs Review / Issue Identified.

[illegible]

Compliance Matrix (continued)

[illegible]

Evaluation Criteria Crosswalk

[illegible]

Requirements Traceability

Strong proposals make one relationship easy to trace from end to end:

Government Requirement → Proposal Response → Evidence → Evaluation Factor

ILLUSTRATIVE EXAMPLE — NOT SPECIFIC TO ANY SOLICITATION

REQUIREMENT

Contractor must provide nationwide inspection coverage.

RESPONSE

Explain the nationwide delivery model.

EVIDENCE

Relevant past performance, staffing coverage, geographic presence, systems, and metrics.

EVALUATION

Technical Capability / Management Approach

TRACE YOUR OWN REQUIREMENTS

REQUIREMENT	RESPONSE LOCATION	EVIDENCE	EVALUATION FACTOR

24-Hour Final Compliance Review

CONTENT

- ☐ Every solicitation requirement addressed
- ☐ Every evaluation factor addressed
- ☐ Claims supported with evidence
- ☐ Required attachments included
- ☐ No placeholder text remains
- ☐ No unresolved comments remain

FORMATTING

- ☐ Page limits verified
- ☐ Fonts verified
- ☐ Margins verified
- ☐ Headers/footers correct
- ☐ Tables readable
- ☐ Graphics readable
- ☐ Page numbering correct

24-Hour Final Review (continued)

DOCUMENTS

- ☐ Required forms signed
- ☐ Certifications included
- ☐ Representations completed where applicable
- ☐ Pricing files included
- ☐ Past performance attachments included
- ☐ Resumes included
- ☐ Teaming documentation included where required

SUBMISSION

- ☐ File names correct
- ☐ File formats correct
- ☐ File sizes acceptable
- ☐ Files open successfully
- ☐ Final versions confirmed
- ☐ Submission instructions independently verified
- ☐ Submission confirmation retained

Independent Review & Risk Snapshot

DON'T LET THE PROPOSAL WRITER PERFORM THE ONLY COMPLIANCE REVIEW

The person who wrote the proposal reads what they meant to say. Whenever possible, someone who did not write the proposal should perform the final compliance review — working from the solicitation forward, not from the proposal backward.

- Compliance Review** Did we follow the instructions?
- Evaluator Review** Did we make it easy to score?
- Executive Review** Does our proposal clearly explain why we're the right choice?

PROPOSAL RISK SNAPSHOT

Administrative Compliance	complete / total
Technical Requirements	complete / total
Evaluation Criteria	complete / total
Required Documents	complete / total
Submission Requirements	complete / total

GREEN — Ready for Final Review **YELLOW — Attention Required** **RED — Significant Risk**

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Federal proposal development is a learned skill. GovCon Learning provides practical education for companies that want to compete more effectively in the federal marketplace — from understanding solicitations and building compliance matrices to developing win themes and preparing for evaluation. Visit GovConLearning.com.

Proposal Compliance Checklist · Tiffany Lederle Consulting