

# TOTAL OPTIM BID

## RFP Compliance Checklist Guide

*Master the Minimum Requirements for Government Contracting Success*

### How to Use This Guide

This checklist helps you systematically identify and track mandatory and requested requirements in government RFPs. Missing even one mandatory requirement typically results in disqualification. Follow these steps:

- Read the entire RFP carefully, highlighting every "shall," "must," "will," and "required"
- Work through this checklist section by section, marking items that apply
- Create a customized checklist with RFP-specific page numbers and deadlines
- Assign responsibility for each requirement to specific team members
- Review completed sections against this checklist before final submission

## Part 1: Document Organization Requirements

### Mandatory Submission Elements

- Signed cover letter or transmittal letter (if required)
- Completed and signed bid/proposal form
- All required certifications and representations
- Original signatures where specified (wet signatures vs. electronic)
- Specified number of copies (original plus copies)
- Proper binding or packaging method
- Labeled tabs or sections as outlined in instructions

### Format Compliance

- Page limits for each section
- Font size and type specifications
- Margin requirements
- Paper size requirements
- File format requirements (for electronic submissions)
- File naming conventions (for electronic submissions)

## Part 2: Legal and Administrative Requirements

### Registration and Eligibility

- Active registration in SAM.gov (federal) or state vendor registration
- DUNS/UEI number included and current
- Business license valid in jurisdiction
- Required certifications (SBA 8(a), HUBZone, WOSB, etc.)
- Not on excluded parties list

### Insurance and Bonding

- Certificate of Insurance with specified coverage amounts
- Additional insured endorsements (if required)
- Bid bond (percentage or dollar amount specified)
- Performance bond requirements acknowledged
- Payment bond requirements acknowledged
- Workers compensation coverage proof

### Legal Certifications

- Non-collusion affidavit
- Debarment and suspension certification
- Lobbying certification (federal)
- Drug-free workplace certification
- Equal opportunity employer statement
- Conflict of interest disclosure
- Certification of independent price determination

## Part 3: Technical Requirements

### Scope of Work Compliance

- All deliverables addressed individually
- Timeline and milestones feasible and documented
- Location requirements met (local presence, service area)
- Staffing levels and qualifications meet minimums
- Equipment and technology specifications met
- Subcontracting plan (if required or anticipated)

### Qualifications and Experience

- Minimum years of experience in relevant work
- Similar project examples (number specified)
- Project references with complete contact information
- Staff resumes meeting qualification requirements
- Professional licenses or certifications
- Past performance documentation

### Technical Approach

- Methodology clearly described for each requirement
- Quality control measures outlined
- Risk mitigation strategies addressed
- Innovation or value-added services (if requested)
- Transition plan (for existing services)
- Safety program documentation

## Part 4: Pricing and Financial Requirements

### Cost Proposal Elements

- Pricing submitted on required form or format
- All line items priced (no blanks)
- Unit prices and extensions calculated correctly
- Pricing valid for specified period
- Payment terms acknowledged
- Price escalation clauses (if allowed)
- Separate pricing for options or alternates

### Financial Capability

- Financial statements (years specified)
- Bank reference letters
- Surety letter (for bonding capacity)
- Credit references
- Audited financials (if required)

### Cost Breakdown

- Direct labor costs detailed
- Overhead rates explained
- Subcontractor costs identified separately
- Travel and expenses itemized (if applicable)
- Bill of materials or equipment costs

## Part 5: Submission Requirements

### Deadline Compliance

- Submission deadline date and time noted
- Timezone for deadline verified
- Delivery method specified (mail, hand delivery, electronic)
- Delivery address confirmed and complete
- Electronic portal login credentials tested (if applicable)

### Packaging and Labeling

- Sealed envelope requirements
- Exterior labeling requirements
- Separation of technical and price proposals (if required)
- CD/USB requirements for electronic copies
- Confidential/proprietary information marked

## Part 6: Evaluation Criteria Alignment

### Understanding Point Values

- Technical evaluation criteria and weights noted
- Price evaluation method understood
- Mandatory pass/fail criteria identified
- Preference points available (local, small business, etc.)
- Evaluation methodology (lowest price, best value, etc.)

### Response Strategy

- Each evaluation criterion addressed explicitly
- Responses organized to match evaluation sections
- Point-scoring opportunities maximized
- Weaknesses mitigated or explained

## Part 7: Special Requirements

### Industry-Specific

- Security clearances or background checks
- Environmental compliance documentation
- Safety certifications (OSHA, etc.)
- Product testing or certification reports
- Manufacturer authorizations or dealership agreements

### Social and Economic Programs

- Small business subcontracting plan
- Disadvantaged business enterprise (DBE) goals
- Local hiring or apprenticeship commitments
- Prevailing wage compliance acknowledgment
- Buy American Act compliance
- Section 3 compliance (HUD-funded)

## Part 8: Pre-Submission Verification

### Final Review Checklist

- All questions answered or addressed
- No contradictions between sections
- Cross-references accurate
- Attachments match reference list
- Pagination continuous and correct
- Table of contents matches content
- Grammar and spelling reviewed
- All required signatures obtained
- Copies made before submission
- Tracking information for delivery



## Important Notes

This guide covers common requirements but is not exhaustive. Always defer to the specific RFP language.

Some RFPs use different terminology. "Mandatory" might be called "required," "essential," or preceded by "must" or "shall."

**Missing even one mandatory requirement typically results in disqualification.**

When in doubt about whether something is mandatory, treat it as if it is or seek clarification through the official question process.

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