Proposal Compliance Checklist

RFP No.: __________________________________________________________

Title: ____________________________________________________________

Offeror: __________________________________________________________

Contracts Specialist: __________________ PI: ____________________________

Does the proposal have a restriction on disclosure and use of proposal data?
☐ Yes    ☐ No

If yes, (1) is the title page marked with the following legend: "This proposal includes data that shall not be disclosed outside The Pennsylvania State University or the Government and shall not be duplicated, used, or disclosed -- in whole or in part -- for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of -- or in connection with -- the submission of this data, The Pennsylvania State University or the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit The Pennsylvania State University or the Government's right to use information contained in this data if obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets]." And (2) is each sheet of data the offeror wishes to restrict marked with the following legend: "Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal."

If the proposal is not marked properly, it should be returned to the offeror.

☐ If yes above, stamp Copy A, B, and C of proposal "Do not copy, do not distribute" - Do not stamp Copy D

☐ Proposal date stamped

☐ Proposal copies numbered and logged in

☐ Memo prepared to send to the PI requesting a technical evaluation
   Issue date: __________ Response due: __________

☐ Proposal copies distributed
   1 copy (Copy A) – PI (with memo, conditions of offer, and cover letter)
   2 copies (Copy B & D) – Central File
   1 copy (Copy C) – Contracts Specialist (PI memo, conditions of offer, and cover letter)
   Representations & Certifications - Log in and file in the central "Reps & Certs" drawer

Proposal Validity: ____________________________________________
   (EOC requires a minimum bid acceptance period of 180 calendar days)
Four (4) copies Volume I – Technical/Management Proposal
Must include:
1.1.1 Brief engineering description of the proposed approach and understanding of problems and work contained in the schedule
1.1.2 A checklist noting compliance or exception with each paragraph of the SOW
1.1.3 Any proposed options or optional features
1.1.4 Information relating to the offeror's past experience in the work required or related fields
1.1.5 Key personnel
1.1.6 List describing available facilities and place where the work will be performed
1.1.7 List describing any Government-owned facilities or equipment

Four (4) copies Volume II – Pricing Proposal
Must include:
1.2.1 Estimated costs broken out at the Task level by each direct and indirect cost element and by fee. Each direct and indirect cost proposed shall identify applicable rate information
1.2.2 For equipment proposed, identify the item, quantity, and price
1.2.3 For material proposed, list the material (supply) item/grouping, quantity, and price – For any procurement >$2,500 did the offeror state whether the material procurement was competitive or sole sourced?
Yes ☐ No ☐
1.2.4 For travel proposed, supply a description of the purpose, number of individuals traveling and duration for each budgeted trip; and a detailed cost breakdown for each trip
1.2.5 Description of any lower-tier suppliers proposed
1.2.6 Staff hours of technical effort proposed
1.2.7 Escalation rates used for labor, travel, subcontracts, purchased equipment, or other proposed costs
1.2.8 Monthly spending plan for the proposed subcontract period of performance
1.2.9 List of Government Property to be used
1.2.10 Any Government support that the offeror has requested
1.2.11 Information as to whether the offeror and/or lower-tier subcontractor has an effective Forward Pricing Rate Agreement (FPRA) in place – Have rates been audited in the last year?
1.2.12 Cost reductions that are attributed to commonality with other programs
1.2.13 Written narrative that addresses the three profit/fee factors: performance risk, contract type risk, and facilities capital employed
Is the fee <8%?
Yes ☐ No ☐

One (1) signed original Representations, Certifications, and Acknowledgments

One (1) signed Conditions of Offer
Must be submitted as a stand alone document. If the offeror takes no exceptions, the offeror's proposal shall so state.

One (1) original Small Business Subcontracting Plan (if applicable)

Is the offeror willing or unwilling to begin the performance of work prior to the execution a subcontract?
Willing ☐ Unwilling ☐

Is a Certificate of Current Cost or Pricing Data required?
Yes ☐ No ☐

Proposed Amount $ __________________
Which of the following is required?
Rate Verification ☐ Audit ☐ None (Why? _____________________)

Has the offeror worked with PSU or the government?
Yes ☐ No ☐