Production Checklist

| **Complete ✓** | **Checklist Item** | **Owner** | **Due Date/Time** |
| --- | --- | --- | --- |
| Before Production Day |
| ☐ | Take inventory of supplies (e.g., shipping box, packing tape, packing peanuts, brown paper, bubble wrap, labels for box/packages, padded envelope for CD, CD jewel cases, rewritable CDs, binders in various sizes, tabs, 28lb paper in letter and 11x17, toner/ink, etc.) |  | **Week Before** |
| ☐ | Purchase supplies (as needed) |  |
| ☐ | Notify printer of schedule |  |
| ☐ | Develop delivery plan:* Hand delivery vs. mail
* Who will deliver?
* Backup deliverer?
* Backup delivery plan?
* Map of route (if hand delivery)
* Times/location of FedEx/UPS/other
 |  |
| ☐ | **Re-read RFP instructions** and prepare printing instructions, including list of tabs |  |
| ☐ | Prepare two copies of all signature pages:* One for electronic submission (**with** signatures)
* One for hardcopy submission (**without** signatures—original signature required after print)
 |  |
| ☐ | Finalize electronic documents: * Inspect document (Word function)
* Accept tracked changes
* Delete comments
* Examine page numbers and headers
* Ensure electronic signatures are in appropriate places
* Run final table of contents update
 |  | **Night Before**  |
| ☐ | Finalize documents for print: * Create PDF of entire sections/volumes for printer
* Ensure attachments are inserted (e.g., SF 1449, amendments, appendices, teaming agreements)
* Ensure signature pages are “blank”
 |  |
| ☐ | Email or upload files to printer FTP (if applicable):* Files for print
* List of tabs
* Production instructions
* Delivery time, address, and poc
* Artwork for covers, spines, title pages, CD labels
 |  |
| ☐ | Call printer to notify that files were sent and walk through instruction document over the phone (if applicable) |  |

| **Complete ✓** | **Checklist Item** | **Owner** | **Due Date/Time** |
| --- | --- | --- | --- |
| Production Day: OUTSOURCED PRODUCTION |
| ☐ | Printer produces and assembles all books, covers, spines, CD labels, etc.  |  | **Overnight/Morning** |
| ☐ | Printer delivers books/CDs |  |
| ☐ | Create labels for all boxes (outside of box)—in large font—include label for five sides of box |  |
| ☐ | Create labels for all volumes (each set of volumes will be wrapped in brown paper and a label placed on outside) |  |
| ☐ | Create labels for CD padded envelope |  |
| ☐ | Book check |  |
| ☐ | **Original signatures** (on ALL copies): cover letter, SF1449, amendments, title pages, and any other section required |  |
| ☐ | Wrap all copies of each volume with brown paper (like a present) and place label on each “package” |  |
| ☐ | Burn CDs with electronic proposals |  |
| ☐ | Check CDs on two computers (all files open and look the same) |  |
| ☐ | Place CD labels on each CD |  |
| ☐ | Check CDs again on two computers (all files open and look the same) |  |
| ☐ | Place CD covers/spines/backs in jewel cases |  |
| ☐ | Insert CDs into matching CD cases  |  |
| ☐ | Ensure all CDs face up/centered in case |  |
| ☐ | Place CDs (or sets) in padded envelope and seal label to envelope |  |
| ☐ | Upload electronic copy to client site (or email), as required |  | **5pm night before due date** *(per FAR)* |
| ☐ | Assemble boxes |  |
| ☐ | Pack boxes: Neatly stack binders and CD envelope. Place Cover Letter on top. Fill with peanuts/bubble wrap/brown paper, as appropriate**NOTE:** Have two boxes ready: one for delivery and one as backup. (*Each box should include the original + XX copies each volume in hardcopy; original + XX copies each volume on CD)* |  |
| ☐ | Place mailing/box labels on five sides of each box (four walls and top) |  |
| ☐ | Prepare and print delivery receipt (if hand delivering) |  |
| ☐ | Give delivery box(es) to designated deliverer |  |
| ☐ | Ensure backup set is in a safe place and at least two people know where it is |  |
| ☐ | Deliverer either 1) takes package to shipper or 2) hand delivers |  |
| ☐ | Deliverer provides receipt to Proposal Manager, either 1) shipping receipt with tracking information or 2) receipt from client that they received the boxes on time |  |

| **Complete ✓** | **Checklist Item** | **Owner** | **Due Date/Time** |
| --- | --- | --- | --- |
| Production Day: in-house PRODUCTION |
| ☐ | **Print** all materials using 28lb bright white 3-hole punched paper (or card stock for covers/spines):* Volume content – XX copies
* Covers and spines (print full-bleed 11”x17” and trim down to size) – XX copies
* Title pages (full bleed optional) – XX copies
* CD labels and covers (full bleed optional) – XX copies
* Cover letters – XX copies
 |  | **Morning** |
| ☐ | Assemble all binders:* Insert covers/spines into binders
* Insert title pages into binder (ensure copy number matches on cover, spine, and title page)
* Insert “meat” of proposal, including all attachments
* Insert tabs before each section (use table of contents to guide you)
 |  |
| ☐ | Create labels for all boxes (outside of box)—in large font—include label for five sides of box |  |
| ☐ | Create labels for all volumes (each set of volumes will be wrapped in brown paper and a label placed on outside) |  |
| ☐ | Create labels for CD padded envelope |  |
| ☐ | Book check |  |
| ☐ | Original signatures (on ALL copies): cover letter, SF1449, amendments, title pages, and any other section required |  |
| ☐ | Wrap all copies of each volume with brown paper (like a present) and place label on each “package” |  |
| ☐ | Burn CDs with electronic proposals |  |
| ☐ | Check CDs on two computers (all files open and look the same) |  |
| ☐ | Place CD labels on each CD |  |
| ☐ | Check CDs again on two computers (all files open and look the same) |  |
| ☐ | Place CD covers/spines/backs in jewel cases |  |
| ☐ | Insert CDs into matching CD cases  |  |
| ☐ | Ensure all CDs face up/centered in case |  |
| ☐ | Place CDs (or sets) in padded envelope and seal label to envelope |  |
| ☐ | Upload electronic copy to client site (or email), as required |  | **5pm night before due date** *(per FAR)* |
| ☐ | Assemble boxes |  |
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| Production Day: in-house PRODUCTION |
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| ☐ | Give delivery box(es) to designated deliverer |  |
| ☐ | Ensure backup set is in a safe place and at least two people know where it is |  |
| ☐ | Deliverer either 1) takes package to shipper or 2) hand delivers |  |
| ☐ | Deliverer provides receipt to Proposal Manager, either 1) shipping receipt with tracking information or 2) receipt from client that they received the boxes on time |  |
| After Production Day |
| ☐ | Track package, if necessary |  | **Ongoing** |
| ☐ | Backup set: destroy or use as “in-house” copy |  | **Morning** |
| ☐ | Shred any leftover materials(e.g., from review teams, extra copies of draft materials) |  |
| ☐ | Clean up war room and production room |  |
| ☐ | Breathe a sigh of relief |  | **Ongoing** |