Production Resource Checklist

|  |  |
| --- | --- |
|  | **Checklist Items** |
| **Name(s)** | Production Personnel |
|  | Proposal Manager |
|  | Proposal Coordinator |
|  | Production Manager; Manager, Proposal Operations  |
|  | Graphic Designers |
|  | Editors |
|  | Desktop Publishers |
|  | Reviewers (include only proposal department staff for security/continuity) |
| ✓Confirmed | **Production Resources** |
|  | IT/facilities support for computers and printers |
|  | Emergency plans—develop an emergency procedure and make it available to the proposal team in case you lose electricity, computers, network, or facility during proposal production |
|  | Backups (or backup procedure) for electronic documents |
|  | Network/collaborative system (e.g., SharePoint) |
|  | Confirm with IT staff that backups are made in real-time |
|  | Test system and know how to get to backups in case of emergency |
|  | Portable backup systems—during production, back up proposal files to portable backup systems every hour in case of catastrophic failure of computers/network (thumb drive, portable hard drive, CD/DVD, email to yourself (alternate email address accessible from outside the network)) |
|  | Backup proposal production site identified and confirmed to complete proposal production and submit/upload proposal in case of need to move proposal offsite |
| Time Required | **Production Time Estimates** |
|  | Desktop publishing |
|  | Editing |
|  | Final graphics revisions |
|  | Time to prep files |
|  | Printing—including time required to send files to printers (both standalone printers and production shops or outside vendors) |
|  | CD/DVD burning, testing, and insertion into cases/sleeves |
|  | CD label printing and affixing |
|  | CD case insert printing and insertion |
|  | Paper punching (for three-ring binders or alternate binding method) |
|  | Binding (three-ring binders, spiral binding, other binding method) |
|  | Paper folding (inserts)—manual or folding machine, e.g., Z folder |
|  | Collating—different sections of proposal |
| Time Required | **Production Time Estimates** |
|  | Inserting special inserts or 11”x17” pages that have been punched appropriately and folded |
|  | Proposal covers/spine—confirm info on covers/spines, print, trim, and stuff in binders |
|  | Final page checking/book checking |

|  |  |
| --- | --- |
| Time Required | Production Time Estimates |
|  | Packaging (stuffing boxes, inserting packing lists per RFP instructions, sealing/labeling, putting in vehicles)* Double-check packing list to be sure everything is inserted into proper boxes
* Prepare packing labels ahead of time and confirm against last amendment for any delivery location changes
 |
|  | Second backup delivery set/in-house set preparation (add required time to estimates)—prepare a complete backup/second delivery set of proposal and package for delivery and use it as the in-house set if first set is delivered successfully (store in limited-access locked room until delivery is confirmed) |
| Est. Cost | **Production Supplies/Costs Estimated (if necessary)** |
| $ | Hardcopy printing |
| $ | Rush? |
| $ | Color? |
| $ | Black & white? |
| $ | Full bleed? |
| $ | Double-sided? |
| $ | Paper  |
| $ | Binder covers/spines (usually heavyweight 11”x17” and trimmed to size) |
| $ | Proposal “meat” (usually 8.5”x11” and 11”x17” for foldouts) |
| $ | Colored paper for inserts |
| $ | Tab/divider inserts  |
| $ | Boxes |
| $ | Off-the-shelf |
| $ | Recycled binder boxes |
| $ | Binding |
| $ | Binders (check binders for damage upon delivery) |
| $ | Inserts |
| $ | CDs/DVDs |
| $ | Case inserts |
| Est. Cost | **Delivery**  |
| $ | Employee cars (mileage, parking) |
| $ | Commercial vendor, e.g., FedEx, UPS, USPS, courier |
| $ | Employee delivery via airline—airfare |
| $ | Food |
| $ | Hotel |
| $ | Rental car(s) |