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 |  |
| ☐ | 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) |  |
| Production Day: in-house PRODUCTION | | | |
| ☐ | Place mailing/box labels on five sides of each box (four walls and top). |  | **5pm night before due date** *(per FAR)* |
| ☐ | 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 |  |
| 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** |