

Checklist for Go / No Go Criteria (First Selection):

Go / No Go Criteria	Remarks
Knock-out Criteria (if any of those answer “no”, no reason to go for the opportunity)	
Do we have enough time to prepare a proposal? (time until deadline – or date to send off the proposal)	
Do we comply with the eligibility criteria?	
Are we in the possibility to provide all documents asked for in the administrative compliance?	
Do we have people available at the time of the execution of the assignment / project?	
Does the assignment / Call fit within our thematic and geographic areas?	
Do we think the Guidelines make sense? (Expected outputs of the project / assignment – budget - time frame)	
Do we have any question about the Guidelines or Terms of Reference? If so is there time to ask them? (Deadline requests for information)	
Is there a reasonable balance between costs and benefits e.g. the time we have to invest in the proposal writing process in relation to the size and interest of the project presented?	
Is the budget/more/less sufficient to permit for a gross margin of x %?	
Capacity	
Do we have sufficient references and staff working in these areas of expertise. If no, can we team up with other?	
Do we have sufficient capacity in the organisation? If not, can we team up with organisations with complementary expertise?	
Are the project components which are belonging to our core competences making us an attractive partner for others?	

Do we have capacity to write the proposal? (If not, and the assignment is interesting, do we know someone who can write for us? Or: can we team up with an organisation that is willing to take the lead?	
Chances to win	
Do we know our competitors? What dis/advantages do they have compared to us? Would we increase our chance if we team up with one or more competitors?	
Do we have a relevant track record to present? If not, team up?	
Are we financially competitive enough?	
What is our image with the client/donor? Can we do it alone or would we seek additional expertise?	
Other questions	
What are the benefits for us (financially and/or otherwise)?	
Security in the area?	
Risks involved?	
Languages?	

Checklist for Prequalification (Concept Note)

Prequalification	Remarks
Is the prequalification dossier complete? (Usually a table of contents is provided)	
What is the deadline for submission (date and hour)?	
What is the deadline for requests for additional information?	
What is the language to be used?	
What eligibility rules apply or is derogation granted?	
What is the address for submission?	
How many originals are required?	
How many copies (and CD-ROM?) are required?	
Is the prequalification reference number and title clearly stated on the envelopes?	
Is it clearly stated on the outer envelope that it is 'not to be opened before the opening session'?	
Have instructions on how to put the documents in separate envelopes (e.g. inner and outer envelopes) been followed?	
Which of the following documents are required? Is there a prescribed format to be used?	
<ul style="list-style-type: none"> • declaration of intent to tender • <i>in case of consortia: this document should indicate the lead firm</i> 	
<ul style="list-style-type: none"> • (copies of) original documents defining the constitution and/or legal status, and establishing the place of registration and/or statutory seat. • <i>in case of consortia: one for each consortium member</i> 	

<ul style="list-style-type: none"> • a document dated less than 90 days previously, drawn up by a recognised and competent authority certifying that the applicant is registered in a EU or ACP member state. • <i>in case of consortia: one for each consortium member</i> 	
<ul style="list-style-type: none"> • statement that the firm is not in any of the following situations: bankruptcy, suspension of payment, legal proceedings involving an order to suspension of payment, convicted of crime or offence in professional conduct, guilty of misrepresentation in an invitation to tender, in breach of contract with the contracting authority on another contract • <i>in case of consortia: one for each consortium member</i> 	
<ul style="list-style-type: none"> • reports on your accounting and financial standing as required • <i>in case of consortia: one for each consortium member</i> 	
<ul style="list-style-type: none"> • company profile justifying your technical qualification to supply the services required • <i>in case of consortia: one for each consortium member</i> 	
<ul style="list-style-type: none"> • in case of consortia: description of areas of complementarity between the partners and a specification of the inputs to the project for each of the responsibilities for provision of personnel and back-up support 	
<ul style="list-style-type: none"> • experience record 	
<ul style="list-style-type: none"> • a document giving evidence of the methodology and approach to be adopted 	
<p>ANY OTHER CHECKS YOU NEED TO MAKE?</p>	



Please note that this checklist serves as a reminder only.

Read the prequalification dossier carefully to see if any other checks are appropriate!

Make sure you have the latest documents regarding procurement rules and regulations of the donor organisation!

Checklist for Writing the Proposal

Writing the proposal	Remarks
What is the language to be used?	
In what currency has the financial offer to be expressed?	
To what extent is sub-contracting allowed?	
Are variant solutions allowed?	
What is the maximum amount available for the project?	
Is there a specific order to be followed in the writing of the proposal?	
Which of the following documents are required? Is there a prescribed format to be used?	
<ul style="list-style-type: none"> • proposal form 	
<ul style="list-style-type: none"> • (copies of) original documents defining the constitution and/or legal status, and establishing the place of registration and/or statutory seat. • <i>in case of consortia: one for each consortium member?</i> 	
<ul style="list-style-type: none"> • statement that the firm is not in any of the following situations: bankruptcy, suspension of payment, legal proceedings involving an order to suspension of payment, convicted of crime or offence in professional conduct, guilty of misrepresentation in an invitation to tender, in breach of contract with the contracting authority on another contract • <i>in case of consortia: one for each consortium member?</i> 	
<ul style="list-style-type: none"> • statement that the rule of origin will be followed 	
<ul style="list-style-type: none"> • for consortia, the confirmation of association and designation of a lead partner, signed by all consortium members 	

<ul style="list-style-type: none"> for sub-contracting, a statement regarding the context and extent of sub-contracting foreseen and the identity of the sub-contractor. 	
<ul style="list-style-type: none"> reports on your accounting and financial standing as required <i>in case of consortia: one for each consortium member?</i> 	
<ul style="list-style-type: none"> company profile justifying your technical qualification to supply the services required <i>in case of consortia: one for each consortium member?</i> 	
<ul style="list-style-type: none"> in case of consortia: description of areas of complementarity between the partners and a specification of the inputs to the project for each of the responsibilities for provision of personnel and back-up support 	
<ul style="list-style-type: none"> experience record 	
<ul style="list-style-type: none"> curricula vitae 	
<ul style="list-style-type: none"> statements on the availability of experts, signed by each expert concerned 	
<ul style="list-style-type: none"> statements on the language skills of experts, signed by each expert concerned 	
<ul style="list-style-type: none"> fixed format for price breakdown 	
<p>ANY OTHER CHECKS YOU NEED TO MAKE?</p>	



Please note that this checklist serves as a reminder only.

**Read the Tender dossier carefully to see if any other checks are appropriate!
Make sure you have the latest documents regarding procurement rules and regulations of the donor organisation!**

Checklist for Submission of Proposal

Submission of the proposal	Remarks
Has the proposal been checked on spelling mistakes?	
Has the financial offer been checked on arithmetical mistakes?	
Does the lay-out of the proposal look neat and tidy?	
What is the deadline for submission (date and hour)?	
What is the address for submission?	
How many originals are required?	
How many copies (+ CD ROM?) are required?	
Is the Call for Proposal reference number and title clearly stated on the envelopes?	
Is it clearly stated on the envelope that it is 'not to be opened before opening session'?	
Have instructions on how to put the proposal in separate envelopes (e.g. inner and outer envelopes, two-envelope system for service tenders) been followed?	
When and where is the proposal opening session?	
ANY OTHER CHECKS YOU NEED TO MAKE?	