Checklist for Proposal Kick-Off Meeting

Instructions: After a decision has been made to respond to a funding opportunity, the next step is to gather together (virtually or in-person) everyone who will be working on the proposal to discuss the technical approach for the response along with more “housekeeping” matters related to where drafts of the proposal will be stored, how the review process will work, and the timeline for completing the response. There may need to be more than one meeting to cover everything, and maybe the technical discussion will be held separately from the meeting focused on logistics, but by the end of the first week of the proposal process you should have agreement on the basic organization of the proposal and how the team will function.

Some suggested topics to cover during the initial team meeting include:

❒ The roles and responsibilities of each team member

❒ Contact information for each team member (collected on a template such as this one)

❒ The proposal timeline

  ❒ When will each draft of the technical proposal be due?

  ❒ How many reviews will there be and when will they take place?

  ❒ When will the budget pieces be due?

  ❒ When will the supporting materials/attachments be due (e.g. CVs)?

  ❒ When will the proposal be mailed/emailed/uploaded?

❒ The team communication plan

  ❒ How will proposal updates be shared with team members? By email? By a Web-based platform like SharePoint?

  ❒ How will drafts of the proposal be circulated? By email? or will SharePoint or a similar platform be used to store drafts for team members to “check out”?

  ❒ How often will proposal updates be sent to team members?

  ❒ How often will the team meet?

❒ The proposal outline

  ❒ What will be the overall theme/strategy (big picture)?

  ❒ What key points should be covered in each section of the proposal?

❒ Q&A and review of next steps (next meeting date, first deadline etc.)