

A 20-Point Proposal Evaluation Checklist

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Originally published in Next Level Purchasing's
PurchTips Newsletter Edition #205

What Does a Compliant Proposal Look Like?

Proposals can contain a lot of information and are the basis on which procurement decisions are made. So you must evaluate them carefully for compliance with your requirements. Use the following checklist to simplify your proposal evaluations and ensure that a supplier is worthy of being considered.

Did the supplier:

- Submit its proposal on time?
- Confirm its ability to comply with the specification or provide an acceptable specification?
- Answer all required questions?
- Provide pricing in the proper currency and unit of measure?
- Refrain from charging "over-and-above" fees?
- Confirm its ability to provide the required quantity?
- Confirm its ability to deliver to, or perform at, the desired location(s)?
- Confirm its acceptance of the specified payment terms or propose acceptable payment terms?
- Confirm its ability to comply with the specified freight terms or propose acceptable freight terms?
- Confirm its ability to comply with the specified delivery/performance dates or lead time or propose acceptable delivery/performance dates or lead time?
- Confirm its ability to comply with the specified warranty or propose an acceptable warranty?
- Refrain from taking exception to your contract terms?
- Provide financial statements?
- Provide a cost breakdown?
- Offer value creating or cost saving ideas?
- Comply with proposal expiration date requirements?
- Provide the information necessary to be set up in the purchasing system?
- Provide evidence of any required certifications?
- Provide any required samples?
- Demonstrate that it has the capacity to handle the additional work if awarded your business?