

PROPOSAL REQUIREMENT CHECKLIST

☐ **COVER LETTER**

- Point of contact: Contact person by name, title address, e-mail, and phone number.
- Contract signatory: Name, title, email, and phone number (if different from above)
- The letter should briefly describe your qualifications, the primary technical track, or groups for which the consultant is submitting and why you or your firm is a good match for the project.

☐ **RESUMES: PROFESSIONAL EXPERIENCE (FOR ALL KEY PERSONNEL, MAXIMUM OF 5)**

- Length of time/years the consultant has been providing one or more of the mentioned services: (In-Person Course Delivery, In-Person Course Development, Online Course Delivery, or Online Course Development)
- Description of clients served; number of training participants; others special professional attributes.
- Examples of the larger customers served by the consultant, including project scope and schedule and whether the products and services were delivered on time and within budget. Include names of key customers/clients.
- Professional/Academic Degrees and certifications
- Fluency in additional languages-spoken and/or translation
- Applicable professional certifications, awards, honors and/or other recognition
- Attendance at NeighborWorks Training or other Adult Education Training
- Volunteer work, community activities
- Professional associations/publications

☐ **REFERENCES or LETTERS of REFERENCE FOR PROSPECTIVE CONSULTANTS**

- All prospective consultants must provide two (2) references or reference letters from recent (within the past 5 years) performance related to at least one technical track. References or reference letters should include: the nature of the services provided, dates of performance, client name, contact person, address, email address, telephone number. It is important that the references reflect the vendor's experience in areas for which it would like to compete -Course Delivery and/or Course Development. Please Note: Current NeighborWorks America Training Division Staff may not provide references on this RFP.

☐ **VIDEO SUBMISSION**

- As part of your application, please submit one video answering the question below. Length: 3–5 minutes total. Videos over 5 minutes will not be reviewed in full. Practice keeping your answers focused before recording.
- Format: Any standard video file format (MP4, MOV, AVI, WEBM, etc.) or a shareable link via YouTube, Vimeo, Google Drive, Dropbox, or Loom with viewing access enabled. If submitting a link, you are solely responsible for ensuring the link is set to "anyone with the link can view" (or equivalent) before submission. Links that are private, restricted, or require a password or sign-in request will not be reviewed, and we will not follow up to request corrected access. Please test your link in a private/incognito browser window before submitting to confirm it works without you being logged in.
- Quality expectations: We're evaluating what you say, not production value. A phone recording is completely acceptable. What matters:
 - Stable camera (propped up or on a tripod. No handheld)
 - Quiet space with minimal background noise
 - Simple background, with adequate lighting so your face is visible
 - Clear audio: test that you can be heard before submitting
 - No editing, graphics, or special production is expected or necessary.

- Please answer the question in your video: Pick one area where you have real, hands-on expertise. Briefly describe your experience in it, then tell us: what's the biggest way you think that specific area will need to change in the next 5–7 years, and why are you positioned to teach it?
- You may speak from notes, but please don't read a script. We are looking for how you think and communicate, not a polished performance.
- Attachment A – Information Governance Policy
- Attachment B – Course Delivery Preparation Expectations & Course Delivery Fee Schedule
- Attachment C – PROPOSAL REQUIREMENT CHECKLIST
- Attachment D – Technical Proposal Form (Survey Link)

Commented [BC1]: These need to be verified they are named correctly