

# Opportunity/Bid Intake Form

*Pre-Bid Opportunity Screening Tool*

This tool captures critical solicitation details upfront and creates a structured intake record before any go/no-go decision, compliance review, or proposal work begins.

It prevents:

- chasing misaligned opportunities
- missing early red flags
- disorganized bid workflows

***Disclaimer:*** This tool is for planning and intake purposes only and does not replace solicitation instructions or legal review.

## Section A — Basic Opportunity Information

Field	Entry
Opportunity Title	_____
Solicitation Number	_____
Issuing Agency / Buyer	_____
Buyer Type	<input type="checkbox"/> Federal <input type="checkbox"/> State <input type="checkbox"/> Local <input type="checkbox"/> Corporate <input type="checkbox"/> Utility
Contract Type	<input type="checkbox"/> RFP <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input type="checkbox"/> Other
Procurement Method	<input type="checkbox"/> Open <input type="checkbox"/> Set-Aside <input type="checkbox"/> Sole Source <input type="checkbox"/> Invitation
Estimated Contract Value	_____
Prime or Subcontract Role	<input type="checkbox"/> Prime <input type="checkbox"/> Sub
Proposal Due Date & Time	_____
Submission Method	<input type="checkbox"/> Portal <input type="checkbox"/> Email <input type="checkbox"/> Physical
Q&A Deadline	_____
Pre-Bid / Site Visit Required	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Section B — Eligibility & Threshold Screening

(If any answer is “No” flag for review)

Question	Yes	No	Notes
Is the opportunity open to our size/type	<input type="checkbox"/>	<input type="checkbox"/>	_____
Do we meet all stated eligibility criteria?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Are required registrations active (SAM.gov, SIGMA, portals, etc.)?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Are required certifications held (if applicable)?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Can insurance/bonding requirement be met?	<input type="checkbox"/>	<input type="checkbox"/>	_____

## Section C — Scope & Capability Alignment

Area	Alignment (Yes/No)	Notes
Scope matches core services	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Technical requirements understood	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Past performance is relevant	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Staffing capability exists	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____
Subcontractor identified (if needed)	<input type="checkbox"/> Yes <input type="checkbox"/> No	_____

## Section D — Strategic & Practical Considerations

Consideration	Favorable	Unfavorable	Notes
Strategic value to business	<input type="checkbox"/>	<input type="checkbox"/>	_____
Competitive landscape manageable	<input type="checkbox"/>	<input type="checkbox"/>	_____
Timeline is realistic	<input type="checkbox"/>	<input type="checkbox"/>	_____
Internal resources available	<input type="checkbox"/>	<input type="checkbox"/>	_____
Risk level acceptable	<input type="checkbox"/>	<input type="checkbox"/>	_____

## Section E — Initial Financial Snapshot Risk

Item	Confirmed	Notes
Pricing approach viable	<input type="checkbox"/>	_____
Cash-flow impact acceptable	<input type="checkbox"/>	_____
Payment terms reviewed	<input type="checkbox"/>	_____
Financial risk identified	<input type="checkbox"/>	_____

## Section F — Intake Outcome

Item	Entry
Intake Reviewer	_____
Intake Date	_____
Initial Recommendation	<input type="checkbox"/> Proceed to GO/NO-GO <input type="checkbox"/> Do Not Proceed
Key Issues to Resolve	_____
Documents to Collect	_____

## Next Steps

- **If recommended to proceed** → *complete the Standalone Go/No-Go Decision Tool*
- **If approved** → *complete Pre-Bid Compliance Checklist and Compliance Matrix Template*

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