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	☐ Federal ☐ State ☐ Local ☐ Corporate ☐ Utility
Contract Type	☐ RFP ☐ RFQ ☐ IFB ☐ Other
Procurement Method	☐ Open ☐ Set-Aside ☐ Sole Source ☐ Invitation
Estimated Contract Value	______
Prime or Subcontract Role	☐ Prime ☐ Sub
Proposal Due Date & Time	______
Submission Method	☐ Portal ☐ Email ☐ Physical
Q&A Deadline	______
Pre-Bid / Site Visit Required	☐ Yes ☐ 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	☐	☐	______
Do we meet all stated eligibility criteria?	☐	☐	______
Are required registrations active (SAM.gov, SIGMA, portals, etc.)?	☐	☐	______
Are required certifications held (if applicable)?	☐	☐	______
Can insurance/bonding requirement be met?	☐	☐	______

Section C — Scope & Capability Alignment

Area	Alignment (Yes/No)	Notes
Scope matches core services	☐ Yes ☐ No	______
Technical requirements understood	☐ Yes ☐ No	______
Past performance is relevant	☐ Yes ☐ No	______
Staffing capability exists	☐ Yes ☐ No	______
Subcontractor identified (if needed)	☐ Yes ☐ No	______

Section D — Strategic & Practical Considerations

Consideration	Favorable	Unfavorable	Notes
Strategic value to business	☐	☐	________
Competitive landscape manageable	☐	☐	________
Timeline is realistic	☐	☐	________
Internal resources available	☐	☐	________
Risk level acceptable	☐	☐	________

Section E — Initial Financial Snapshot Risk

Item	Confirmed	Notes
Pricing approach viable	☐	________
Cash-flow impact acceptable	☐	________
Payment terms reviewed	☐	________
Financial risk identified	☐	________

Section F — Intake Outcome

Item	Entry
Intake Reviewer	________
Intake Date	________
Initial Recommendation	☐ Proceed to GO/NO-GO ☐ 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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