

# Sound Proposal Checklist

## Before You Submit a Proposal

- Download the offline proposal form to use as you draft your proposal.
- Watch the **Create a Sound Proposal** video.

## Continuing Education Eligibility

- Do not include sales pitches.
- Do not promote or endorse any organization, product, or service.
- Focus on education, not marketing.
- If submitted by a consultant or vendor, include a provider or user as the primary speaker (recommended).
- Ensure there is no commercial or vendor bias and/or influence.

## Content Quality & Evidence

- Start with a theme that will resonate with the intended audience.
- Create an outline to build out a potential title that frames the session.
- Create the summary description next, followed by the learning objectives. The title, summary description, and learning objectives must be in sync.
- Provide clear, detailed content explanations.
- Include results, KPIs, and/or measurable outcomes.
- Details to be presented have already been implemented prior to your submission.
- Submit only when final data and outcomes are available.
- Ensure your ideas can be validated.
- Include the good, the not so good, and the ugly.
- Demonstrate the adoption and optimal use of health information and technology.
- A sound proposal sounds professional and polished.

- AI is a tool, but there is no substitute for a SME who knows the content really well. Use AI to add the polish to the proposal and be sure to remove any statements that "NNN generated this information" or similar.

### **Proposal Completeness**

- Complete all required sections.
- Do not use NA, TBD, or TBA.
- Include links to relevant charts, graphs, or figures.
- Cite existing research or sources where appropriate.
- Include links to opensource tools or websites if applicable.

### **Sources, Permissions & Approvals**

- Identify and cite all sources.
- Include all required acknowledgements.
- Obtain written permission for any reused figures, tables, or text.
- Credit original sources in captions or footnotes.
- Secure all required approvals before submission.

### **Compliance & Integrity**

- Ensure the proposal contains no plagiarism.
- Protect privacy and confidentiality.
- Avoid copyright or proprietary violations.
- Exclude harmful, false, or defamatory content.

### **Writing & Review**

- Follow the [Call for Proposals - Writing Guidelines](#).
- Keep responses clear, concise, and nonrepetitive.
- Proofread carefully for spelling and grammar.