This list is general in nature. Once a GSA Acquisition Project Manager (PM) is assigned, he/she will assist clients with gathering information needed to create a complete requirements package. The PM will provide templates and sample documents, if needed.

**Phase I Documents/Information Required:**

- Interagency Agreement (Part A)
- Funding Documentation (Part B)
- Broad Agency Announcement, Any Agency Supplements, and All Amendments
- SBIR/STTR Topic Number and Topic Information
- Number of Proposals Received
- Number of Awards Anticipated/Made
- Copy of All Phase I Proposals
- Technical Selection Documents and Supporting Materials
- Independent Government Cost Estimate (with the data sources used, estimation methodologies used to derive cost, and preparer's signature, title and date)
- Security Requirements (DD Form 254)
- Market Research Report
- Acquisition Plan
- Small Business Coordination (DD Form 2579)
- SAM Exclusions Check (upon receipt of proposal)
- Any applicable Determinations & Findings
- Quality Assurance Documentation (e.g. QASP)
- Award Recommendation
- Notice of Selection for Award
- Any Unsuccessful Offeror Letters
- COR Nomination Package (evidence of current training, no conflict of interest, signed by COR’s supervisor) and/or Technical Subject Matter Expert

**Phase II**

- Interagency Agreement (Part A)
- Funding Documentation (Part B) (For incremental funding, we also need the funding schedule)
- Broad Agency Announcement, Any Agency Supplements, and All Amendments
- SBIR/STTR Topic Number and Topic Information for All Topics covered by the Phase II Award
- Number of Proposals Received
- Number of Awards Anticipated/Made
- Copy of Phase I Contract for Phase II Selectee
- Copy of All Phase II Proposals
- Technical Selection Documents and Supporting Materials
- Independent Government Cost Estimate (with the data sources used, estimation methodologies used to derive cost, and preparer's signature, title and date)
- Security Requirements (DD Form 254)
- Market Research Report
Acquisition Plan
Small Business Coordination (DD Form 2579)
SAM Exclusions Check (upon receipt of proposal)
Any applicable Determinations & Findings
Quality Assurance Documentation (e.g. QASP)
Award Recommendation
Notice of Selection for Award
Any Unsuccessful Offeror Letters
COR Nomination Package (evidence of current training, no conflict of interest, signed by COR’s supervisor) and/or Technical Subject Matter Expert
Information on Government-approved accounting or purchasing system (Cost Reimbursable Contracts)

Phase III

Interagency Agreement (Part A)
Funding Documentation (Part B) (For incremental funding, we also need the funding schedule)
Broad Agency Announcement, Any Agency Supplements, and All Amendments
SBIR/STTR Topic Number and Topic Information for All Topics covered by the Phase III Award
Number of Proposals Received
Number of Awards Anticipated/Made
Copy of Phases I and II Contracts for Phase III Selectee
Copy of All Phases I and II Proposals
Technical Selection Documents and Supporting Materials
Independent Government Cost Estimate (with the data sources used, estimation methodologies used to derive cost, and preparer's signature, title and date)
PWS/SOO/SOW
Security Requirements (DD Form 254)
Market Research Report
Acquisition Plan
SAM Exclusions Check (upon receipt of proposal)
Any applicable Determinations & Findings
Quality Assurance Documentation (e.g. QASP)
Award Recommendation
Notice of Selection for Award
Any Unsuccessful Offeror Letters
Signed Scope Determination Document (certifying that the work “derives from, extends, or completes” prior SBIR/STTR work)
COR Nomination Package (evidence of current training, no conflict of interest, signed by COR’s supervisor) and/or Technical Subject Matter Expert
Any Unique Documentation (e.g. sale of SBIR/STTR technology to another company)
Information on Government-approved accounting or purchasing system (Cost Reimbursable Contracts)