RFP Detector

HANDBOOK 3 OF 5



THE RFP DETECTOR HANDBOOKS

How to Respond to an RFP and Write a Winning Proposal

From the first read of the solicitation to the debrief: shred the RFP, plan to win, write every volume, price it, review it and submit on time.

8 chapters | All levels | About 125 min read | 2026 edition

RFP Detector

How to Respond to an RFP and Write a Winning Proposal

Handbook 3 of 5 in the RFP Detector handbook series

EDITION	LAST UPDATED	SERIES
November 2026 edition	November 13, 2026	Handbook 3 of 5

READ ONLINE rfpdetector.com/guides/how-to-write-a-winning-proposal

⚠ General information, not legal advice

This handbook is general information for businesses, consultants and nonprofits. It is not legal, tax, financial or bidding advice. Registration, certification, bonding and procurement rules change and vary by agency and jurisdiction. Confirm current requirements with the buying agency or a qualified advisor before you rely on them.

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HOW TO USE THIS HANDBOOK

TIP
A quicker or smarter way to do something.

PRO TIP
What experienced bidders do differently.

NOTE
Context worth knowing before you act.

WARNING
A rule, deadline or risk to check carefully.

COMMON MISTAKE
An error that costs bidders points or eligibility.

EXAMPLE
A realistic sample you can adapt.

- Checklists print with empty boxes, and templates print in a bordered form with every [PLACEHOLDER] highlighted and explained.
- Section numbers (3.2 is chapter 3, section 2) match the contents and the PDF bookmarks.
- Links in this PDF open the matching page on rfpdetector.com, where every chapter is kept up to date.

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BEFORE YOU BEGIN

Foreword

Public buyers rarely pick the best company. They pick the best proposal: the one that follows every instruction, answers every requirement and makes its value easy to see and score. That is good news for small and mid-sized firms, because proposal craft can be learned. This handbook teaches it step by step, from the first read of the solicitation to the debrief after award.

It is written for business owners, proposal managers, consultants and nonprofit staff, many bidding public work for the first time, and for experienced teams that want a sharper process. Examples come from New York, New Jersey and Connecticut and from federal solicitations, and every chapter flags where a low-bid invitation for bids (IFB), won on price alone, works differently from a best-value request for proposals (RFP), won on overall merit.

How the handbook follows a bid

01 **Understand**
Chapter 1: **read and shred the RFP** into a compliance matrix.

02 **Strategize**
Chapter 2: **capture planning, hot buttons and win themes**.

03 **Structure**
Chapter 3: **outline, formatting and compliance**.

04 **Write**
Chapters 4 to 6: **executive summary**, **technical and management approach**, **past performance**.

05 **Price**
Chapter 7: **pricing strategy and cost proposals**.

06 **Review and learn**
Chapter 8: **reviews, submission and debriefs**.

TIP **Working on a live bid right now?**

Start with **How to Read and Shred an RFP** the day the solicitation lands, and keep the **proposal templates** open alongside. Each chapter ends with answers to common questions and links to the next step. Already decided to bid and short on time? Build the **compliance matrix** first, then work through the **final compliance check** before you upload. The complete handbook is also available as one PDF to print and share with your team.

WHAT YOU WILL LEARN

- Shred any solicitation into a compliance matrix and an outline that mirrors it
- Tell low-bid IFBs from best-value RFPs and adjust your strategy to each
- Build win themes and discriminators from customer hot buttons, with proof evaluators can score
- Write executive summaries, technical approaches and past performance that earn documented strengths
- Price competitively and defensibly, then run reviews and submit on time
- Learn from every debrief so each proposal is stronger than the last

WHO IT IS FOR
Business owners, proposal managers, consultants and nonprofit staff responding to government and private RFPs, from a first bid to an experienced team

LEVEL
All levels

CHAPTERS
8 chapters, about 125 minutes of reading

Every chapter is also published online and kept current:
rfpdetector.com/guides/how-to-write-a-winning-proposal



01

CHAPTER 1

How to Read and Shred an RFP

A step-by-step method for reading any solicitation, pulling out every requirement and turning it into a compliance matrix your whole team can work from.

16 min read · 9 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Read the basis of award first: a low-bid IFB rewards the lowest responsive, responsible price; a best-value RFP rewards the proposal evaluators rate highest for the money.
- Shredding means copying every requirement, word for word, into a compliance matrix with its source, owner and the place your proposal answers it.
- Treat every 'shall', 'must' and 'is required' as mandatory until the issuer says otherwise in writing.
- Ask questions early, in writing, through the named contact only, and log and acknowledge every amendment.

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Knowing how to read an RFP is the skill every winning proposal is built on. Before anyone writes a word, someone has to take the solicitation apart, find every instruction, requirement and scoring rule, and put them in a list the team can work from. Proposal professionals call this **shredding an RFP**, and the list it produces is the **compliance matrix**. This chapter shows you how to do both, with a first-read checklist, sample matrix rows and the red flags that should make you stop and think.

The method works for a 400-page federal solicitation and a 12-page school district request alike. Still deciding whether to bid? Use the **bid/no-bid decision framework**.

> **NOTE** **Before you start**
>
> Download the whole package (attachments, exhibits, price forms, sample contract, Q&A documents, every amendment) into one folder, with the issue date in each file name. If you track the opportunity in RFP Detector, your **pipeline and alerts** keep you posted when it changes.

SECTION 1.1

Anatomy of an RFP: the six parts that matter

Every solicitation is built from the same blocks. Federal solicitations under FAR Part 15 use the **uniform contract format**, with lettered sections A through M. State, city and county RFPs number things their own way, but the same pieces are always there.

TABLE **Where to find each part of an RFP**

Part	What it tells you	Federal (uniform contract format)	Typical state or local name
Scope of work	What the buyer wants done, and to what standard	Section C: statement of work (SOW), performance work statement (PWS) or statement of objectives (SOO)	Scope of services, specifications
Instructions	How to organize, format and deliver your proposal	Section L: instructions, conditions and notices to offerors	Submission requirements, instructions to proposers
Evaluation criteria	How proposals are scored and the winner chosen	Section M: evaluation factors for award	Evaluation criteria, basis of award
Terms and conditions	The contract you sign if you win	Sections B and D to J: prices, delivery, clauses, attachments	Sample contract, general terms

Part	What it tells you	Federal (uniform contract format)	Typical state or local name
Forms and certifications	What you must sign, certify and attach	Section K: representations and certifications, plus the SF 33 or SF 1449 cover form	Required forms, disclosure forms, vendor questionnaires
Amendments	Changes after release	Amendments, commonly on Standard Form 30	Addenda, Q&A bulletins

Section L can require a set format or separate volumes, and Section M must name the significant evaluation factors and their relative importance. The 2025 to 2026 FAR overhaul renumbers Part 15, but the C, L and M structure carries over.

> ☆ PRO TIP **Pro tip: read L, M and C side by side**
>
> Compliance mistakes live in the gaps. Section L may ask for a staffing plan that Section M never scores, or Section M may score 'transition risk' that Section L never asks you to describe. Note every mismatch: each is either a question for the issuer or a topic your outline must cover twice.

Glossary

Solicitation	The buyer's formal request for offers: an RFP, IFB, RFQ or RFI (see **types of solicitations**).
SOW, PWS, SOO	A statement of work says how to do the job, a performance work statement sets results and standards, and a statement of objectives states goals and leaves the approach to you.
Responsive	Your offer meets the solicitation's requirements and instructions in all material respects.
Responsible	You can actually perform. New York State law frames it as financial ability, legal capacity, integrity and past performance.

SECTION 1.2

Low bid or best value? Read the basis of award first

Before you shred anything, find the sentence that says how the winner will be picked. It tells you whether evaluators will score your writing at all.

TABLE **Low-bid IFB vs best-value RFP**

Question	Low-bid IFB (sealed bidding)	Best-value RFP (negotiated)
Who wins?	The lowest-priced responsive bid from a responsible bidder	The proposal offering the best overall value under the stated method
What is evaluated?	Federal sealed bidding considers only price and price-related factors	Technical approach, management, past performance and price, as weighted
What sinks an offer?	A missing form, signature, bond or acknowledgment, or a condition that changes the terms	Ignored instructions, unaddressed requirements, weak proof or an unrealistic price
Local example	New York municipalities generally must bid public works over $35,000 and purchases over $20,000 and award to the lowest responsible bidder (as of 2026)	New York State awards most service contracts on best value: optimizing quality, cost and efficiency

Best value has variants. A federal **tradeoff** award can go to a higher-priced proposal if its extra benefits are worth the cost. **Lowest price technically acceptable (LPTA)** checks the technical proposal pass/fail, then picks the lowest price. Put the exact award language at the top of your matrix.

SECTION 1.3

How to read an RFP the first time: a two-hour checklist

Your first read is not for writing. It decides whether you can bid and captures the facts the team will need daily. Read the whole package once, quickly, then fill in this checklist.

First-read checklist (print and fill in) — CHECKLIST · 12 ITEMS

- [ ] Solicitation number, title, agency and the named contact
- [ ] Due date, time **and time zone**, and the exact delivery method

- [ ] Question deadline, pre-proposal conference or site visit, and whether attendance is mandatory
- [ ] Basis of award and the evaluation factor weights
- [ ] Set-aside, certification or eligibility rules (small business, MWBE, SDVOB, local preference)
- [ ] Minimum qualifications: licenses, years in business, similar contracts, key staff credentials
- [ ] Contract type, term, options and estimated value, if stated
- [ ] Page limits, volumes, format rules and number of copies
- [ ] Bonds and insurance required with the proposal or at award (see **bonds explained**)
- [ ] Required forms, signatures, notarizations and amendment acknowledgments
- [ ] Wage rules: prevailing wage, living wage or federal wage determinations
- [ ] Anything impossible, unclear or unusually risky (add it to your questions list)

✕ COMMON MISTAKE **Common mistake: trusting the cover page**

The cover page, portal listing and instructions sometimes disagree on the due date or delivery address, especially after an amendment. The latest amendment governs. If documents conflict, ask the issuer in writing which one applies.

SECTION 1.4

How to shred an RFP, step by step

Shredding means going through the solicitation sentence by sentence and pulling every requirement into its own row, in the issuer's words. It is tedious, and it is your best protection against losing on a technicality. Give it to one owner: a committee shred produces gaps and duplicates.

The shred in seven steps

1. **Collect and code the package**
   Give each document a short code (RFP, ATT-A, AMD-1) so every matrix row can cite its source.

2 **Search for requirement words**

Find and highlight *shall*, *must*, *will*, *should*, *may*, *required*, *submit*, *describe* and *demonstrate*. Embedded questions ('How will the offeror ensure continuity?') are requirements too.

> **Tip:** Read each surrounding paragraph. Requirements also hide in tables and footnotes that a keyword search misses.

3 **Split compound sentences**

'The contractor shall provide a project manager and a quality control plan within 10 days of award' is three requirements. Give each its own row.

4 **Record the exact source**

Note document, section, page and paragraph, and paste the requirement word for word. Paraphrasing now is how requirements quietly get lost.

5 **Tag the type**

Instruction, evaluation, scope, form or contract term; then mandatory or desirable.

6 **Map to your outline and name an owner**

Decide where each requirement is answered and who writes it. Rows with no home signal a missing section; see how to mirror the solicitation.

7 **Reconcile and keep it live**

Check that every evaluation factor maps to a row and every row to a proposal section. Update the matrix with each amendment, noting the version.

> **TIP** **Where requirements hide**
>
> Check attachments and exhibits, the sample contract and its insurance schedule, clauses incorporated by reference (they bind you as if printed in full), wage determinations, the instructions tab of pricing workbooks, and the question-and-answer document.
>
> Federal solicitations also include an order-of-precedence clause for conflicts (the schedule first, the specifications last), but ask about conflicts anyway.

SECTION 1.5

Building the RFP compliance matrix (with sample rows)

The compliance matrix is the output of the shred: a spreadsheet with one row per requirement. Use these columns: **ID** (a code like L-014 for meetings), **source**, **requirement text** (verbatim), **type**, **mandatory or desirable**, **proposal location**, **owner** (one named person) and **status and notes** (including the amendment number). Add columns for themes or hot buttons only if they earn their place.

TABLE **Sample compliance matrix rows (illustrative county facilities maintenance RFP)**

ID	Source	Requirement (verbatim)	Type	M/D	Proposal location	Owner
L-007	RFP §4.2, p. 9	Technical proposals shall not exceed 25 pages, 12-point font, 1-inch margins.	Instruction	M	All of Vol. I	Proposal manager
L-012	RFP §4.3(c), p. 10	Proposers must submit a Certificate of Insurance meeting Exhibit C limits with the proposal.	Form	M	Vol. III, Tab 4	Operations lead
M-02	RFP §5.1, p. 12	Technical approach (40 points): clarity and feasibility of the preventive maintenance program.	Evaluation	D	Vol. I, §2	Technical lead
C-031	EXH-A §3.4	The contractor shall respond on site to emergency calls within 2 hours, 24/7/365.	Scope	M	Vol. I, §2.2, Fig. 2-2	Service manager
C-032	EXH-A §3.4	Response times shall be reported monthly.	Scope	M	Vol. I, §4.1	Service manager
K-004	AMD-2, item 3	Acknowledge Addenda 1 and 2 on Form 7, signed by an authorized officer.	Form	M	Vol. III, Tab 1	Contracts administrator

Notice what the sample does. Rows C-031 and C-032 come from one paragraph but are split, so the reporting duty cannot hide behind the response-time promise. Row K-004 exists only because of an amendment, which is why the matrix stays live until you submit.

> **NOTE** **Compliance matrix vs cross-reference matrix**
> The compliance matrix is internal. Some RFPs also require a cross-reference matrix that shows evaluators where each requirement is answered. Build it from the internal one, minus owners and notes; see the cross-reference matrix sample.

If you track the RFP in RFP Detector, add critical items (insurance certificate, notarized forms, amendment acknowledgments) to the tracked RFP's Checklist tab so the team sees progress. A copy-ready matrix is in the compliance matrix template.

SECTION 1.6

Mandatory vs desirable requirements

Mandatory requirements are pass/fail gates: miss one and your proposal can be rejected before anyone scores it. **Desirable requirements** (rated or scored) earn points; missing one costs score, not eligibility. Many state and local RFPs screen mandatory items first and score only the proposals that pass.

TABLE How to tell them apart

Signal in the text	Usually means	How to treat it
shall, must, is required	Mandatory	Comply exactly and show where
minimum qualifications, pass/fail	Mandatory gate	Prove it with licenses, references, certificates
should, preferred, desirable, may	Desirable or scored	Address it if you can; extra points live here
points, weights, adjectival ratings	Scored evaluation	Spend pages in proportion to the weight

WORKED EXAMPLE

Weak reading: 'Experience with Medicaid billing is preferred.'

✕ WEAK

The team treats it as a must-have and passes on a contract it could have won.

WORKED EXAMPLE

Strong reading: 'Experience with Medicaid billing is preferred.'

✓ STRONG

> The team flags it as desirable, finds it is a subfactor worth 5 of 100 points, and adds a subcontractor with that experience to pick up the points.

⚠ WARNING **When in doubt, treat it as mandatory**

If you cannot tell, assume it is mandatory and ask the issuer. Over-complying costs a few sentences; under-complying can cost the bid.

SECTION 1.7

Questions to the issuer and key deadlines

Almost every RFP sets a window for written questions. Use it: good questions remove ambiguity and sometimes change the solicitation in your favor. Answers usually go to every bidder, so ask without revealing your strategy.

A typical RFP calendar (your solicitation governs)

Release — **RFP issued**
Start the first read and the shred the same day.

Week 1 — **Pre-proposal conference or site visit**
Attend, always if mandatory. Spoken answers bind no one until they appear in a written amendment.

Weeks 1 to 2 — **Question deadline**
Send consolidated, numbered questions in writing to the named contact. Late questions often go unanswered.

Weeks 2 to 3 — **Answers and amendments**
Update your matrix, outline and pricing.

Final days — **Proposal due**
Submit early. Federal rules treat a proposal arriving after the exact due time as late, with narrow exceptions; many state and local issuers allow none.

Contact rules are strict. New York State's procurement lobbying law sets a **restricted period** from the start of the solicitation until award, when you may contact only the designated contacts named in the RFP; a knowing and willful violation can lead to a non-responsibility finding that generally bars award.

Federally, the contracting officer is the focal point once the RFP is out, and information given to one potential offeror must be made available to all.

Strong vs weak questions

Strong question

- ✓ Cites the conflict: 'RFP §C.3.4 requires a 2-hour response; Exhibit B, p. 3 says 4 hours. Which governs?'
- ✓ Asks for a decision: 'Do résumés count toward the 25-page limit?'
- ✓ Suggests a fix: 'Would the County accept insurance certificates at award?'

Weak question

- ✗ Vague: 'Can you tell us more about the scope?'
- ✗ Reveals your solution or pricing to every competitor
- ✗ Is phoned in to a program manager instead of the named contact

TEMPLATE

Questions to the issuer (submission format)

Copy-ready online

A full letter version is in the **questions to the issuer letter**.

WHEN TO USE Send once, before the question deadline, to the named contact by the method the RFP specifies. Use the issuer's own form instead if it provides one.

QUESTIONS REGARDING [SOLICITATION_NUMBER]: [SOLICITATION_TITLE]

Submitted by: [COMPANY_LEGAL_NAME]
Contact: [CONTACT_NAME], [TITLE], [EMAIL], [PHONE]
Date submitted: [DATE]
Submitted to: [NAMED_CONTACT], by [METHOD_REQUIRED_BY_RFP]

Question 1
Reference: [DOCUMENT], Section [SECTION], Page [PAGE]
Text cited: '[EXACT_REQUIREMENT_TEXT]'
Question: [YOUR_QUESTION]
Suggested clarification (optional): [PROPOSED_CHANGE]

(Repeat the block above for each question, numbered in order.)

We understand that answers may be shared with all prospective proposers and that only a written amendment changes the solicitation.

FIELDS TO FILL IN · 3

[NAMED_CONTACT]	The contracting officer or designated contact named in the RFP, nobody else
[EXACT_REQUIREMENT_TEXT]	Quote the sentence word for word so the issuer knows exactly which requirement you mean
[PROPOSED_CHANGE]	A specific, reasonable alternative; leave blank if it would reveal your approach

WARNING **Raise problems before the deadline, not after**

If a defect is obvious before proposals are due (conflicting requirements, an unfair term, a spec only one product meets), ask or object before the due date. Under federal bid protest rules, a protest about a solicitation problem apparent before closing generally must be filed before closing. Silence usually means you accepted the terms.

This is general information, not legal advice. Rules differ by jurisdiction; confirm with the issuer's rules or a qualified advisor.

SECTION 1.8

Tracking amendments and addenda

An amendment (or addendum) changes the solicitation after release: a new due date, a revised price form, an answer that adds a requirement. Under the FAR, the contracting officer must amend the solicitation when requirements or terms change, and offerors must acknowledge each amendment by the time it sets. State and city RFPs work the same way, often with an addenda acknowledgment form.

Your amendment routine

1. **Check every day**

   Check the issuing portal daily in the final two weeks. In RFP Detector, the 'Tracked RFP amended' notification (in-app and email, on by default) tells you when a due date moves, documents are added or details change on an RFP your organization tracks; the change also shows in the tracked RFP's Activity tab.

   Tip: Still confirm against the official solicitation before you submit. Every amendment is your responsibility.

2. **Log and re-shred**

   Record the number, date and what changed; add, revise or retire matrix rows; move superseded files to an 'old' folder.

3 **Tell the team the same day**

A writer working from last week's scope is a classic cause of noncompliance.

4 **Acknowledge exactly as instructed**

On the cover form, a separate form or in the portal. Federal amendments commonly arrive on Standard Form 30, which has its own acknowledgment block.

> ✕ COMMON MISTAKE **Common mistake: missing the last amendment**
>
> Amendments often land after your 'final' review. Check the portal again on the morning you submit: one missing acknowledgment can make an excellent offer nonresponsive, especially in sealed bidding.

SECTION 1.9

Red flags to catch on the first read

Flag these and take them to your **bid/no-bid discussion**; some are fixable with a good question.

TABLE **RFP red flags and what to do about them**

Red flag	Why it matters	What to do
Requirements only one firm could meet (a brand name, an oddly specific credential)	The RFP may be written around an incumbent	Ask whether an equivalent is acceptable; weigh your odds honestly
Evaluation criteria missing or at odds with the scope	Hard to write to; more protest and cancellation risk	Ask for the weights in writing
Unlimited liability or pay-when-paid terms	Risk you cannot insure or finance	Ask whether exceptions are allowed and how they are evaluated
Insurance or bonding far above the contract value	Excludes small firms or signals hidden risk	Ask whether limits can be reduced or provided at award
A scope far larger than the budget	You lose on price or lose money performing	Price the realistic scope or no-bid

> ☆ PRO TIP **Pro tip: find out who held the contract before**
>
> For a recompete, look up the incumbent in RFP Detector's public **contractor profiles**, which show contract history, agencies served and a **Contractor Score**. Then read **competitor and incumbent analysis**.

Frequently asked questions

What does it mean to shred an RFP?

Shredding an RFP means breaking the solicitation into individual requirements, one per row, in the issuer's exact words, with the source of each. The result is a compliance matrix listing every instruction, evaluation criterion, scope requirement, form and contract term, with an owner and the place your proposal answers it.

What is a compliance matrix in a proposal?

A compliance matrix is a table of every requirement in a solicitation with its source, type, whether it is mandatory, the proposal section that answers it and an owner. It drives the outline, the writing assignments and the final check. Some RFPs require a submitted version, called a cross-reference matrix.

What is the difference between Section L and Section M?

In federal solicitations, Section L holds the instructions (how to organize, format and submit) and Section M holds the evaluation factors (what will be assessed and how much each matters). Follow L to stay compliant and write to M to score well. State and local RFPs have the same parts under names like 'submission requirements' and 'evaluation criteria'.

How long does it take to shred an RFP?

A short state or local RFP can take a few hours; a large federal solicitation with many attachments can take an experienced person a day or more. Start on release day: the shred drives your bid decision, questions and outline, and the question deadline often comes early.

What happens if I miss an RFP amendment?

Your proposal can be found nonresponsive and rejected, or evaluated against requirements you did not meet. Read the acknowledgment instructions, keep checking the portal up to the due date and acknowledge every amendment exactly as directed.

Can I contact the agency while an RFP is open?

Only through the channel the solicitation names, usually the contracting officer or a designated contact, and usually in writing during the question period. New York State's procurement lobbying law limits contact during the restricted period to designated contacts. Contacting evaluators or program staff directly can get you disqualified.

Q What is the difference between mandatory and desirable requirements?

Mandatory requirements are pass/fail and usually say 'shall', 'must' or 'is required'; missing one can get your proposal rejected unscored. Desirable requirements are scored or optional: meeting them earns points. When the wording is unclear, treat the requirement as mandatory and ask.

→ KEEP GOING

Capture Planning and Win Themes
Turn what the shred taught you into a strategy
rfpdetector.com/guides/how-to-write-a-winning-proposal/capture-planning-and-win-themes

Proposal Structure, Formatting and Compliance
Build the outline and cross-reference matrix
rfpdetector.com/guides/how-to-write-a-winning-proposal/proposal-structure-and-compliance

Types of solicitations: RFP, RFQ, IFB and RFI
rfpdetector.com/guides/how-to-find-government-contracts/types-of-solicitations-rfp-rfq-ifb-rfi

Bid/no-bid decision framework
rfpdetector.com/guides/how-to-find-government-contracts/bid-no-bid-decision-framework

Pricing and compliance templates
A copy-ready compliance matrix
rfpdetector.com/guides/proposal-templates/pricing-and-compliance-templates

Track bids, deadlines and amendments
Pipeline, checklist and amendment alerts
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

RFPs closing soon
rfpdetector.com/rfps/closing-soon

END OF CHAPTER 1

Next: 02 Capture Planning and Win Themes

02

CHAPTER 2

Capture Planning and Win Themes

How to position your business to win before the RFP is released, and how to turn what you learn into a few win themes evaluators remember.

15 min read · 8 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Capture is the work of understanding the customer, the competition and your own edge, mostly before the RFP is released.
- Hot buttons are the customer's real worries and goals. Find them in evaluation weights, repeated words, pre-solicitation material and public records.
- A discriminator matters to the customer, is something competitors cannot match, and can be proven.
- Write each win theme as feature, benefit and proof, tied to a hot button. Three to five themes is plenty.
- Ghost competitors by stressing the risks your approach avoids, never by naming them or using information you should not have.

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2.8 Worked example: turning a strength into a win theme 31

Capture planning is the work of positioning your company to win a specific contract, ideally before the solicitation is released. Win themes are how that work shows up in the proposal: a few short, provable messages that tell evaluators why you are the better, safer choice. This chapter explains both in plain terms, with a capture plan outline you can copy and a worked example that turns an ordinary strength into a theme that scores.

Capture is not only for big defense contractors. A five-person IT firm in Westchester or a landscaper in Bergen County can run a lighter version in a few hours per opportunity. For spotting opportunities early, read **procurement forecasts and early intelligence** alongside this chapter.

SECTION 2.1

What is capture planning?

Capture planning means finding an opportunity early, learning what the customer needs and fears, sizing up the competition, and shaping your solution, team and price so that you are already the strongest candidate when the RFP arrives. Proposal work starts when the RFP is released; capture starts earlier and hands the proposal its strategy.

The capture lifecycle

01 **Identify**
Spot the opportunity through forecasts, expiring contracts, budgets and alerts.

↓

02 **Qualify**
A first bid/no-bid gate: does it fit, and can you realistically win?

↓

03 **Position**
Learn the customer, study competitors, close gaps with partners or hires, draft themes.

↓

04 **Prepare**
Turn the capture plan into a proposal strategy and outline before release.

↓

05 **Propose**
Confirm the bid decision on the final RFP, then write, review and submit.

How early? For large federal or state programs, capture teams often start a year or more before the expected RFP. For a typical city, county or school district contract, a few weeks to a few months is realistic. If the RFP is already out, do a compressed version: one page on the customer, the competition and your themes, finished before writing starts.

> **NOTE** **Capture for low-bid IFBs**
>
> In a sealed-bid IFB nobody scores your narrative, so win themes matter little. Capture still pays, but it is about price and eligibility: knowing the scope precisely, getting sharper supplier and subcontractor quotes, learning what the last contract cost and meeting every responsiveness and responsibility rule. The rest of this chapter is aimed at best-value RFPs.

SECTION 2.2

How to find the customer's hot buttons

A **hot button** is a concern or goal that drives the customer's decision: fear of another failed transition, pressure to cut response times, an audit finding to fix, a new commissioner's priority. Hot buttons are often bigger than the written requirements, and proposals that name and answer them show evaluators you understand the job, not just the paperwork.

TABLE **Where hot buttons show up**

Signal	Where to find it	Possible hot button
A factor with unusually high weight	Evaluation criteria	What the agency fears most, such as transition risk
The same phrase repeated through the scope	Scope of work, background section	A priority like 'resident experience' or 'data security'
Detailed penalties or service levels	Sample contract, performance standards	Problems with a previous vendor
Questions in an RFI or draft RFP	Pre-solicitation notices, industry days	What the agency has not decided and worries about
Audit findings, budget testimony, board minutes	Public meetings, audit reports, adopted budgets	Problems leadership has promised to fix

Five legitimate ways to learn hot buttons

1. **Read what the agency publishes**
   Strategic plans, budgets, audit reports and board minutes show what leadership is measured on. A school district that just failed a facilities audit cares about documentation more than price.

2. **Respond to RFIs and attend industry days**
   Federal rules encourage pre-solicitation exchanges such as requests for information, draft RFPs, industry conferences and one-on-one meetings. What the agency asks about reveals what it is unsure of.

3. **Talk to the customer before the RFP**
   Before release you can usually meet program staff to learn their challenges (not to lobby for a spec). Once the RFP is out, contact generally goes through the named contact only, and New York State's restricted period limits it to designated contacts. See **relationship building within the rules**.

4. **Listen to users, not just buyers**
   Facility managers, caseworkers and IT staff who live with the contract often describe the real problems most clearly. Conferences and public meetings are good places to listen.

5. **Use your debriefs**
   A debrief from a past bid with the same agency tells you what its evaluators valued. See **how to get the most from a debrief**.

> ✕ COMMON MISTAKE **Common mistake: hot buttons from your own catalog**
> Teams often list their own strengths and call them the customer's priorities. Write down the customer's fears, goals and constraints before you mention anything you sell. If a hot button cannot be traced to evidence, label it an assumption and try to confirm it.

SECTION 2.3

Competitor and incumbent analysis

Evaluators compare proposals, so you need a realistic picture of who else will bid and what they will say. Start with the incumbent, then add firms holding similar contracts nearby, firms at the pre-proposal conference and likely teaming partners.

RFP Detector's public **contractor profiles** are a practical start for New York State work: each shows a contractor's state contract history, the agencies it serves and a **Contractor Score**. Add award notices, meeting minutes and what you hear at conferences. The **competitor research tutorial** walks through it.

TABLE **Sample bidder comparison (illustrative; 1 = weak, 5 = strong)**

Factor (from the evaluation criteria)	Your firm	Incumbent	Competitor B
Technical approach	4	3	4
Relevant past performance	3	5	4
Key personnel	4	3	3
Transition risk	4	5 (no transition)	2
Price position	3	3	5
Local presence and response	5	3	2

The table tells a story. The incumbent is strong on past performance and has no transition risk, Competitor B will likely be cheapest, and your edge is people and local response. Your themes must neutralize transition risk (a credible plan with named staff) and make local response matter to evaluators.

> ☆ PRO TIP **Pro tip: the incumbent's weak spots are in the new RFP**
>
> When an agency rewrites the scope, adds service levels or raises a factor's weight, it is often reacting to something the current contract did not deliver. Compare the new RFP with the previous solicitation and contract if they are public. Every new requirement is a clue.

> ⚠ **WARNING** **Stay on the right side of procurement integrity**
>
> Competitive intelligence must come from public or properly obtained sources. Federal procurement integrity rules prohibit knowingly obtaining a competitor's bid or proposal information, or the agency's source selection information, before award, and states have similar rules. Never ask a competitor's former employee for old proposals or pricing, and never ask agency staff what others bid. This is general information, not legal advice.

SECTION 2.4

Discriminators: what only you can claim

A **discriminator** is a feature of your offer that the customer values, that competitors cannot match and that you can prove. Most 'strengths' fail the test: 'experienced', 'customer-focused' and 'committed to quality' are claims every bidder makes.

TABLE **The three-question discriminator test**

Question	If the answer is no
Does the customer care (is it tied to a hot button or evaluation factor)?	It is just a feature. Mention it briefly or drop it.
Is it different from what likely competitors offer?	It is table stakes. Prove it, but do not lead with it.
Can you prove it with numbers, names, documents or references?	It is a claim. Find the proof or stop making it.

Weak claims vs real discriminators (illustrative)

Real discriminator

- ✓ Our depot is 6 miles from the county complex, so technicians reach any building in under 30 minutes.
- ✓ The proposed project manager led this agency's last system migration and knows its data structure.
- ✓ We already hold the certification the RFP requires by month three, removing that schedule risk.

Weak claim

- ✗ We are a customer-focused company with years of experience.
- ✗ Our team is highly qualified and dedicated.
- ✗ We follow industry best practices.

SECTION 2.5

How to write win themes: feature, benefit, proof

A **win theme** is a short statement that links a discriminator or strength to something the customer cares about, and backs it up. The standard formula taught across the proposal profession has three parts:

- **Feature**: what you offer (a tool, person, process, location or certification).
- **Benefit**: what the customer gains, in their terms: less risk, faster results, lower total cost, higher quality, fewer complaints.
- **Proof**: evidence the benefit is real: past-contract data, a reference, a certification, a named person's r ecord.

Lead with the benefit, because that is what evaluators care about, and keep the proof right beside it. A theme without proof is a wish; a feature without a benefit is a brochure. The two examples below are illustrative.

WORKED EXAMPLE
Weak win theme

✕ WEAK

> 'Our firm uses a state-of-the-art maintenance management system to deliver excellent service.' A feature with adjectives: no benefit to the customer and no proof.

WORKED EXAMPLE
Strong win theme

✓ STRONG

> '**You will see every work order from request to close-out in real time.** Our maintenance management system gives your facilities staff a live dashboard and monthly reports; on our current contract with a comparable school district, open work orders fell by a third in six months (reference in Volume II).'

TABLE **Where win themes appear in the proposal**

Location	How to use the theme
Executive summary	State all three to five themes, each tied to a hot button (see executive summary structure)
Section openings	Open each major section with a one- or two-sentence theme statement
Graphics and captions	Let the action caption carry the theme: what the reader should conclude

Location	How to use the theme
Résumés and past performance	Show the person or project that makes the theme true
Price narrative	Explain how the theme lowers total cost or risk, where narratives are allowed

> **TIP** **How many themes?**
> Three to five for the whole proposal, plus section-level themes that support them. More, and evaluators remember none. Test each: would a competitor struggle to say it truthfully? If not, it is not a theme yet.

SECTION 2.6

Ghosting the competition, ethically

Ghosting means drawing attention to the risks of a competitor's likely approach, without naming the competitor, by explaining why your approach avoids them. Done well, it raises a question in the evaluator's mind that the other proposal then struggles to answer.

Ethical ghosting vs crossing the line

Ethical ghosting

- ✓ 'Our staff already know your systems, so there is no learning curve on day one.' (ghosts a newcomer's transition risk)
- ✓ 'Our price includes all after-hours calls, with no emergency surcharges.' (ghosts a low bidder who adds fees later)
- ✓ 'Every call is answered by our own staff in Newark, never an outsourced call center.'

Over the line

- ✗ Naming a competitor, or hinting so heavily that the target is obvious
- ✗ Claiming a competitor failed when you cannot prove it
- ✗ Using anything from a competitor's proposal, pricing or internal documents

A good rule: if the incumbent's project manager read your ghost statement aloud in a debrief, you should not be embarrassed. Ghost the approach, never the people, and be careful with incumbents: the agency chose them, and evaluators may like their staff.

SECTION 2.7

A capture plan outline you can copy

A capture plan does not need to be long. For a mid-sized state or local bid, two to four pages is enough. What matters is that every action has an owner and a date, and that you update the plan at each bid/no-bid gate.

TEMPLATE

One-page capture plan

Copy-ready online

A compact capture plan for a single opportunity, from snapshot to actions. Feed its decision into the **bid/no-bid scorecard**.

WHEN TO USE — Use it for any best-value opportunity you plan to bid, ideally before the RFP is released. For a low-bid IFB, complete sections 1, 4, 6 and 7 only.

CAPTURE PLAN: [OPPORTUNITY_NAME]
Agency or issuer: [AGENCY] Solicitation no. (if known): [NUMBER]
Capture lead: [NAME] Last updated: [DATE]

1. OPPORTUNITY SNAPSHOT
Scope in one sentence: [SCOPE_SUMMARY]
Estimated value and term: [VALUE] / [TERM_AND_OPTIONS]
Expected RFP release: [RELEASE_DATE] Expected award: [AWARD_DATE]
Basis of award (if known): [BASIS_OF_AWARD]
Set-aside or certification rules: [SET_ASIDE]
Incumbent: [INCUMBENT]

2. CUSTOMER
Decision makers and evaluators (roles): [ROLES]
Goals this contract supports: [GOALS]
Hot buttons, with evidence:
- [HOT_BUTTON_1] (source: [EVIDENCE_1])
- [HOT_BUTTON_2] (source: [EVIDENCE_2])
- [HOT_BUTTON_3] (source: [EVIDENCE_3])
Our relationship today: [RELATIONSHIP]

3. COMPETITION (bidder / strengths / weaknesses / likely price position)
- [COMPETITOR_1]
- [COMPETITOR_2]
- [COMPETITOR_3]

4. OUR POSITION
Discriminators (valued, unique, provable): [DISCRIMINATORS]
Gaps (past performance, staff, certifications, price): [GAPS]
How we close the gaps: [GAP_ACTIONS]

5. WIN STRATEGY
Win themes (feature, benefit, proof):
- [THEME_1]
- [THEME_2]
- [THEME_3]
Ghost themes (risks our approach avoids): [GHOST_THEMES]

6. TEAMING AND PRICE
Partners and roles: [PARTNERS]
Price strategy and target range: [PRICE_STRATEGY]

7. ACTIONS AND GATES
- [ACTION_1] / owner: [OWNER_1] / due: [DUE_1]
- [ACTION_2] / owner: [OWNER_2] / due: [DUE_2]
Next bid/no-bid gate: [GATE_DATE]
Our estimated probability of win: [PWIN]

FIELDS TO FILL IN · 7

[BASIS_OF_AWARD]	Lowest price, LPTA or best-value tradeoff; it decides how much of this plan you need
[HOT_BUTTON_1]	The customer's worry or goal in their words, with the document or meeting where you found it
[COMPETITOR_1]	Name, main strength, main weakness and whether they tend to bid low or high
[DISCRIMINATORS]	Only items that pass all three tests: the customer cares, competitors lack it, you can prove it
[GAP_ACTIONS]	Teaming partners, hires, certifications or references you will secure, with dates
[PRICE_STRATEGY]	Your target range and the assumptions behind it; see the pricing chapter
[PWIN]	An honest percentage estimate; revisit it at every gate

For teaming partners, see **teaming agreements and joint ventures**; for price strategy, see **price to win**.

SECTION 2.8

Worked example: turning a strength into a win theme

Here is the whole process for an illustrative company (all details invented). Hudson Mechanical, a 40-person HVAC contractor in Yonkers, is bidding a best-value RFP for preventive and emergency HVAC maintenance across 22 Westchester County buildings. Technical approach is worth 40 points, past performance 25, price 25 and local participation 10.

From raw strength to finished theme

1. **Start with the raw strength**
   The first draft says: 'Hudson Mechanical has a 24/7 dispatch center.' True, but every serious competitor will say the same.

2. **Tie it to a hot button**
   The RFP background mentions repeated heating outages last winter, the sample contract has a 2-hour emergency standard with penalties, and the county's budget testimony promised fewer no-heat days in senior centers. The hot button: **no-heat emergencies in occupied buildings**.

3. **Find the discriminator**
   The main competitors are based on Long Island and in New Jersey. Hudson's depot is 15 minutes from the county center, and its trucks carry boiler parts for the county's equipment models. Valued, unique and provable.

4. **Gather the proof**
   Twelve months of dispatch logs from a comparable public contract show an average emergency arrival of 52 minutes, with 97% of calls inside a 2-hour standard. That client's facilities director agrees to be a reference.

5. **Write the theme**
   '**Heat restored faster in county buildings**: our Yonkers depot and parts-stocked trucks put a technician on site in under an hour on average, half the County's 2-hour standard, as our 12-month dispatch record on a comparable public contract shows.'

6. **Add the ghost**
   In the technical approach: 'Because our technicians are based in Westchester, response times do not depend on bridge or parkway traffic.' No one is named; the evaluator draws the conclusion.

7

Place it everywhere it counts

Executive summary (theme), technical approach opening (theme plus a response-time graphic), staffing plan (named technicians and locations), past performance (the reference) and the price narrative (no emergency surcharges).

WORKED EXAMPLE

The finished action caption

✓ STRONG

> *Figure 2-3.* Our Westchester depot puts a technician at any county building in under an hour on average, half the required response time, so occupied buildings are not left without heat.

Captions like this carry your themes to evaluators who skim. The next chapter covers **graphics and action captions** and how to build an outline that keeps every theme where evaluators will look for it.

Frequently asked questions

Q

What is capture planning in government contracting?

Capture planning is the work of positioning your business to win a specific contract before and during the solicitation: learning the customer's needs and hot buttons, analyzing competitors, closing gaps in your team or experience, and developing win themes and a price strategy. It produces a capture plan that hands the proposal team its strategy when the RFP is released.

Q

What is the difference between capture management and proposal management?

Capture management decides whether and how to win: customer insight, competitive position, teaming, solution and price strategy, mostly before the RFP. Proposal management turns that strategy into a compliant, persuasive document once the RFP is out: outline, schedule, writing, reviews and submission. In small firms one person often does both, but the jobs are different.

Q

When should capture planning start?

As early as you can. For large federal or state programs, teams often start a year or more ahead of the expected RFP; for typical local contracts, weeks to a few months is realistic. If the RFP is already out, a one-page assessment of the customer, competitors and themes before writing still helps.

Q

What is a win theme in a proposal?

A win theme is a short, memorable message that tells evaluators why to choose you. It links a feature of your offer to a benefit the customer cares about and backs it with proof. Win themes appear in the executive summary, section openings, graphic captions and the evidence sections. Most proposals need three to five.

Q What is the difference between a win theme and a discriminator?

A discriminator is the fact: something the customer values that competitors cannot match and you can prove, such as a nearby depot or a key person with directly relevant experience. A win theme is the message built on that fact, written in terms of the customer benefit and repeated through the proposal.

Q What does ghosting the competition mean?

Ghosting means highlighting the weaknesses or risks of a competitor's likely approach without naming the competitor, by showing how your approach avoids them, for example stressing a no-surcharge price where a rival is known to add fees. It must stay factual and must never rely on improperly obtained information.

Q Is capture planning worth it for a small business?

Yes, scaled to the opportunity. A small firm can capture a local contract in a few hours: read the agency's public documents, attend the pre-proposal conference, look up the incumbent, list hot buttons and draft three themes. That preparation also improves bid/no-bid decisions, so you spend proposal effort where you can win.

→ KEEP GOING

How to Read and Shred an RFP
Find the evaluation factors your themes must answer
rfpdetector.com/guides/how-to-write-a-winning-proposal/how-to-read-and-shred-an-rfp

Proposal Structure, Formatting and Compliance
Put your themes where evaluators look
rfpdetector.com/guides/how-to-write-a-winning-proposal/proposal-structure-and-compliance

Writing a Winning Executive Summary
rfpdetector.com/guides/how-to-write-a-winning-proposal/writing-a-winning-executive-summary

Pricing Strategy and Cost Proposals
rfpdetector.com/guides/how-to-write-a-winning-proposal/pricing-strategy-and-cost-proposals

Procurement forecasts and early intelligence
rfpdetector.com/guides/how-to-find-government-contracts/procurement-forecasts-and-early-intelligence

Researching contractors and competitors
rfpdetector.com/guides/how-to-use-rfp-detector/researching-contractors-and-competitors

Contractor profiles
Contract history and Contractor Scores
rfpdetector.com/contractors

END OF CHAPTER 2

Next: 03 Proposal Format, Structure and Compliance

03

CHAPTER 3

Proposal Format, Structure and Compliance

How to organize, format and package a proposal so evaluators can find every answer, and so it is never rejected on a technicality.

16 min read · 9 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Organize the proposal exactly as the solicitation's instructions require, with its numbering and headings, even if you would have chosen a different order.
- Treat page limits, fonts, margins and file rules as pass/fail. Agencies may refuse to read pages past the limit.
- Write to the evaluation criteria: echo their language, spend pages in proportion to their weight and make strengths easy to find.
- Use headings, short paragraphs and graphics with action captions so a skimming evaluator still gets your message.
- Run a final compliance review before you submit. A compliant, plain proposal beats a brilliant one that breaks the rules.

IN THIS CHAPTER

3.1 Proposal structure: build an outline that mirrors the solicitation 36

3.2 Proposal format rules: what font, margins and page limits should you use? 38

3.3 Required forms, certifications and signatures 39

3.4 The cross-reference matrix: show evaluators where everything is 40

3.5 Write to the evaluation criteria 41

3.6 Readability, headings and graphics with action captions 43

3.7 File naming, file formats and portal submission 44

3.8 Final proposal compliance checklist 45

3.9 Why compliant-but-dull beats brilliant-but-noncompliant 46

Proposal format and structure decide whether evaluators can find your answers, and sometimes whether they read your proposal at all. A strong solution in the wrong order, over the page limit or missing a signed form can be marked noncompliant before anyone scores it. This chapter shows you how to structure an RFP response that mirrors the solicitation, follows every formatting rule, includes every required form and passes a final compliance review.

It builds on the compliance matrix from **How to Read and Shred an RFP**. If you have not shredded the solicitation yet, start there: every outline decision below comes from it.

SECTION 3.1

Proposal structure: build an outline that mirrors the solicitation

Evaluators score against a checklist built from the evaluation criteria, often across many proposals. Make their job easy: use the solicitation's structure, numbering and words. If the instructions list five items for the technical volume in a set order, your technical volume has five sections, in that order, with those names.

How to build a mirrored outline

1. **Start from the instructions**
   Use Section L (or the RFP's submission requirements) as the skeleton: volumes, tabs, sections and their order. If the instructions say 'Tab 3: Staffing Plan', your third tab is 'Staffing Plan'.
2. **Layer in the evaluation criteria**
   Give every evaluation factor and subfactor a heading. If a factor is scored but missing from the instructions, add a subsection where an evaluator would look for it.
3. **Slot in the scope requirements**
   Place each scope row from your compliance matrix under the heading where it fits. Rows with no home reveal a missing subsection.
4. **Number like the solicitation**
   Reuse the RFP's numbering or show it in the heading, for example '2.1 Preventive Maintenance Program (RFP §4.2.1)'.
5. **Assign page budgets and owners**
   Give each section a page allowance and one writer before drafting (see the **page budget example**).

WORKED EXAMPLE

Weak outline

✕ WEAK

> 1. About Us. 2. Our Services. 3. Why Choose Us. 4. Our Team. 5. Pricing. The order follows the company brochure, so evaluators must hunt for the transition plan and quality control approach the RFP asked for, and may not find them.

WORKED EXAMPLE

Strong outline

✓ STRONG

> Volume I, Technical. 1. Understanding of Requirements (RFP §4.1). 2. Technical Approach (§4.2): 2.1 Preventive Maintenance; 2.2 Emergency Response; 2.3 Reporting. 3. Transition Plan (§4.3). 4. Quality Control Plan (§4.4). 5. Key Personnel (§4.5). Every heading matches an instruction and an evaluation factor.

✕ COMMON MISTAKE **Common mistake: reusing the last proposal's structure**

Boilerplate is useful for content and dangerous for structure. Build every outline fresh from the instructions, then pull reusable text into it and edit as you go.

ⓘ NOTE **Sealed bids are different**

In a low-bid IFB there is usually no narrative to outline. Structure means completing the bid form exactly as issued, in the issuer's line items and units, with every required attachment in the listed order. Do not add conditions or exceptions that qualify your price: under federal sealed-bidding rules, a bid must comply in all material respects with the invitation, and state and local rules are similar.

SECTION 3.2

Proposal format rules: what font, margins and page limits should you use?

Formatting rules are requirements, not style suggestions; agencies set them so proposals compete on equal terms. Federal bid protest decisions have upheld agencies that declined to evaluate pages beyond a limit and that found proposals noncompliant for using smaller type than allowed. Whether the whole proposal can be rejected, rather than just the excess pages, depends on the solicitation's wording.

TABLE **Formatting rules to find and follow (what solicitations commonly specify)**

Rule	Common wording	Watch out for
Page limit	A maximum per volume or section, such as 25 or 50 pages	What counts: covers, contents pages, résumés, tabs and letters may or may not be excluded
Page size	8.5 x 11 inches; 11 x 17 foldouts sometimes allowed	Foldouts often count as two pages
Font	12-point body text, sometimes a named typeface	Smaller type allowed only in tables, graphics and captions, with a stated minimum
Margins and spacing	1-inch margins, single spacing	Headers and footers that intrude into the margin
Volumes	Separate technical and price volumes	Price details in the technical volume when forbidden
Copies and media	Originals and copies, or one searchable PDF per volume	Signed originals, size limits, password-protected files

⚠ WARNING **Don't game the page limit**

Condensed fonts, squeezed line spacing, text pasted into graphics to dodge the font rule and 7-point tables all get noticed. At best they annoy evaluators; at worst the material is treated as noncompliant or simply not read. If you are over the limit, cut words, not type size.

> ☆ PRO TIP **Pro tip: build the template first**
>
> Before anyone writes, create a document template that already meets every rule: page size, margins, fonts, heading styles, a header or footer with the solicitation number, page numbering and caption style. Writers draft inside it, so the final reformatting crisis never happens.

SECTION 3.3

Required forms, certifications and signatures

Forms are where good proposals die quietly. A missing signature, an unacknowledged amendment or an unnotarized affidavit can make an offer nonresponsive however strong the technical volume is. Put every form in your compliance matrix with an owner, and start first on those that need third parties: insurers, notaries, sureties and subcontractors.

TABLE **Forms you are likely to meet (examples only; each solicitation lists its exact set)**

Issuer	Common forms and certifications
Federal	The cover form (SF 33, or SF 1449 for commercial buys) signed by an authorized person; amendment acknowledgments (often on SF 30); representations and certifications in Section K or confirmed through your federal entity registration; a small business subcontracting plan when required
New York State	Vendor Responsibility Questionnaire; procurement lobbying affirmation and disclosure forms; MWBE utilization plan and EEO staffing plan where goals apply; Form ST-220-CA sales tax certification, notarized, for covered contracts over $100,000
New York City	Questionnaires and documents completed in PASSPort, plus agency forms such as addenda acknowledgments and M/WBE participation documents
New Jersey (state)	Offer and Acceptance Page, Ownership Disclosure, Disclosure of Investment Activities in Iran, Disclosure of Investigations, Source Disclosure (services) and a Subcontractor Utilization Plan if you use subcontractors; a Business Registration Certificate before award
Connecticut	Nondiscrimination, ethics and campaign contribution certifications named in the solicitation
Most issuers	Signed cover letter, insurance certificates, bid bond for many construction bids, W-9, licenses and certification letters

> **NOTE** **General information, not legal advice**
> Form names and rules change. Confirm the current requirements with the issuing agency or a qualified advisor. Registration and certification steps are covered in the **registration handbook**.

Signature and forms check

CHECKLIST · 8 ITEMS

- [ ] Signed by someone authorized to bind the company (with proof of authority if an agent signs)
- [ ] Every amendment acknowledged in the way the solicitation requires
- [ ] Notarized forms notarized, with the stamp legible on scanned copies
- [ ] Legal name, address and identifiers (UEI, EIN, vendor ID) identical across all forms
- [ ] Insurance certificates meet the required limits and name the right certificate holder (see **certificates of insurance**)
- [ ] Bid bond or other security in the required form and amount, if requested
- [ ] Subcontractor forms signed by the subcontractors, not by you
- [ ] Certification letters (MWBE, SDVOB, small business) current on the due date

SECTION 3.4

The cross-reference matrix: show evaluators where everything is

A **cross-reference matrix** is a table, usually right after the table of contents, that maps solicitation requirements to the pages where you answer them. Some RFPs require one. If yours does not, include it when space allows, or ask whether it counts toward the page limit. Evaluators who can find your answers can score them.

TABLE **Sample cross-reference matrix (illustrative)**

Solicitation reference	Requirement	Evaluation factor	Proposal section	Page
§4.2.1; Exh. A §3.1	Preventive maintenance program	M.2 Technical approach	Vol. I, 2.1	6
§4.2.2; Exh. A §3.4	Emergency response within 2 hours, 24/7	M.2 Technical approach	Vol. I, 2.2	9
§4.3	Transition plan for the first 30 days	M.3 Management	Vol. I, 3	13
§4.5	Key personnel résumés	M.3 Management	Vol. I, App. A	A-1
§4.6	Three past performance references	M.4 Past performance	Vol. II, 1	1
§6.1; Amendment 2	Price form, Attachment F (revised)	M.5 Price	Vol. III, Tab 2	4

Keep the internal compliance matrix and this submitted matrix in sync. The internal one holds owners, status and notes; the submitted one holds only what helps the evaluator. Fill in page numbers after final layout, not before.

SECTION 3.5

Write to the evaluation criteria

In a best-value procurement, evaluators read your proposal against each factor and record strengths, weaknesses and deficiencies. Your job is to make strengths easy to find and hard to miss. Three habits help:

- **Echo the criteria's language.** If the factor is 'feasibility of the transition approach', use the word *feasibility* and show it: tasks, dates, named people, risks and mitigations.
- **Spend pages where the points are.** After reserving space for anything mandatory, split your page budget roughly in proportion to the factor weights.
- **State the benefit and prove it.** Do not make evaluators infer why a feature matters (see **feature, benefit, proof**).

TABLE **Example page budget: 25-page technical volume (price, worth 10 more points, is scored separately)**

Section	Weight	Pages	Notes
Executive summary	Not scored separately	1	Keep it inside the limit unless the RFP excludes it
Understanding of requirements	10 points	2	Show the agency's problem; do not restate the scope
Technical approach	40 points	11	The heart of the volume and home of the key graphics
Management and transition	25 points	7	Org chart, transition timeline, quality control
Key personnel	15 points	4	Summaries here; full résumés in an appendix if excluded from the limit

Answering a requirement (illustrative)

Strong: shows how, with proof

- ✓ 'We meet the 2-hour emergency standard by dispatching from our Yonkers depot, 15 minutes from the county center, with an on-call technician for each zone (Figure 2-2).'
- ✓ 'Quality control has three checks: technician self-inspection, a supervisor spot-check of 10% of work orders, and a monthly report to the County (Section 4.1).'

Weak: restates the requirement

- ✗ 'We will respond to all emergencies within 2 hours as required.'
- ✗ 'We are committed to quality and will implement a robust quality control plan.'

TIP **Write the strength the evaluator will copy**

Evaluators usually must justify each strength in writing. Hand them a sentence they can lift almost word for word: what you will do, why it benefits the agency, and the proof. The less work a strength takes to document, the less it depends on an evaluator's patience.

SECTION 3.6

Readability, headings and graphics with action captions

Some evaluators read every word; senior decision makers often skim. Write for both. Use headings that echo the requirement, open each section with a short theme statement, keep paragraphs to two to four sentences and put the main point first. Plain language is not dumbing down: short sentences, active voice and common words make a proposal faster to evaluate.

Graphics earn their space when they show something faster than text: a transition timeline, an org chart with named people, a process flow, a map of response zones. Give every graphic a number, a title and an **action caption**: one or two sentences telling the reader what to conclude and why it matters to them.

WORKED EXAMPLE

Weak caption

✕ WEAK

> 'Figure 3. Organizational chart.' It labels the picture but tells the evaluator nothing.

WORKED EXAMPLE

Strong action caption

✓ STRONG

> 'Figure 3-1. One accountable manager and three zone supervisors: every County building has a named supervisor reachable directly, 24/7, so issues never wait in a general queue.'

- Mention each graphic in the text before it appears, and place it close by.
- One idea per graphic; if it needs a paragraph of explanation, simplify it.
- Keep text inside graphics at or above the solicitation's minimum type size.
- Number figures by section (Figure 2-1, 2-2) so cross-references stay stable.
- Use real names, numbers and places; stock images add nothing.
- Check that charts read clearly in black and white and do not rely on color alone.

For graphics inside the technical volume, such as work plans, staffing charts and transition timelines, see graphics and action captions.

SECTION 3.7

File naming, file formats and portal submission

Most public proposals are now submitted electronically, through an agency portal or by email, and electronic submission has its own compliance rules: file names, formats, size limits, file counts and proof of receipt. Upload-day timing and the late-is-late rule are covered in **submission logistics**.

TABLE **Portal and file rules to confirm**

Item	What to check
File names	Any required convention; otherwise include the solicitation number, volume and company name
File format	Usually searchable PDF for narrative and spreadsheet files for price workbooks
Size and count limits	Maximum size per upload or email; split volumes only as instructed
Signatures	Whether electronic signatures are accepted or wet-ink originals are needed
Portal setup	Account roles and any prequalification needed before you can submit
Confirmation	What receipt the portal gives and whether you can revise after submitting

Two tri-state examples. New York City's PASSPort guidance suggests naming uploads with the section and question number, document name and legal business name (such as `S2Q3_OrgChart_YourLegalName`), and a submitted response cannot be edited; while the RFx is still open, you can duplicate it, revise and resubmit, then withdraw the original. New Jersey's state purchasing division expects quotes in NJSTART with all required forms attached. Read each solicitation's own instructions, because rules vary and change.

Submission-day routine

1. **Rehearse the upload**
   Log in days ahead, confirm your account roles and try a test upload if the portal allows drafts.
2. **Finish a day early**
   Federal rules generally treat a late electronic proposal as late unless it reached the government by 5:00 p.m. one working day before the due date (among narrow exceptions), and many state and local issuers allow no exceptions.

3 **Open what you upload**

Open each final file from the submission folder: page counts, embedded fonts, signatures.

4 **Keep the receipt**

Save the confirmation, screenshot or receipt number with its time stamp.

> ✕ COMMON MISTAKE **Common mistake: submitting at 4:55 p.m.**
>
> Portals slow down near deadlines, uploads fail and large emails bounce or queue. 'The system was slow' is rarely accepted as an excuse. Plan to be finished the day before.

SECTION 3.8

Final proposal compliance checklist

Run this review after final layout, with someone who did not write the proposal holding the compliance matrix. It is separate from the quality reviews known as **color teams**: those ask whether the proposal persuades; this asks whether it is complete and compliant. Delivery itself is covered in **submission logistics**.

Final compliance review (print and initial each line) CHECKLIST · 13 ITEMS

- [ ] Every compliance matrix row complete, with its final page reference checked
- [ ] Outline, headings and numbering match the solicitation's instructions
- [ ] Every evaluation factor and subfactor addressed under a findable heading
- [ ] Page counts within limits, counted exactly as the instructions define
- [ ] Fonts, margins, page size and spacing meet the rules, including tables and captions
- [ ] No price information in the technical volume, if forbidden
- [ ] All required forms completed, signed and, where required, notarized
- [ ] Every amendment acknowledged; latest price forms and attachments used
- [ ] Staffing, schedule and price consistent across volumes
- [ ] Résumés, references and letters in the format and number requested

- [ ] Cross-reference page numbers updated after final layout
- [ ] Files named, formatted and sized as instructed; PDFs searchable and opening correctly
- [ ] Delivery method and due time confirmed against the latest amendment

Printable versions of this and other bid checklists are in **bid management templates and checklists**.

SECTION 3.9

Why compliant-but-dull beats brilliant-but-noncompliant

Evaluators are bound by the solicitation. They generally cannot credit an answer that is not where they were told to look, read pages past the limit or accept an unsigned offer, however strong the content. A noncompliant proposal may be rejected or marked down; a compliant one at least gets read, scored and compared.

Dull is not the goal, though. Compliance is the floor and persuasion is the ceiling, and the order of work matters:

Compliant, then responsive, then persuasive

STEP 01
Compliant
Follows every instruction: structure, format, forms, deadline.

→

STEP 02
Responsive
Answers every requirement with a specific how.

→

STEP 03
Persuasive
Shows the customer benefit, proves it and stands apart from competitors.

A proposal that skips the first step rarely gets the chance to benefit from the third. For the persuasive layer, continue with the **executive summary** and **technical and management approach** chapters.

Frequently asked questions

Q **How should I format a proposal for an RFP?**

Follow the solicitation's instructions exactly: its volumes, section order, headings, page limits, font, margins and file rules. Where the RFP is silent, use a clean, readable layout: 8.5 x 11 pages, a standard 11- or 12-point font, one-inch margins, numbered headings that echo the requirements, a table of contents, a cross-reference matrix and numbered figures with action captions.

What font and size should a government proposal use?

Use whatever the solicitation specifies; many federal and state RFPs require 12-point type for body text and allow smaller type only in tables and graphics, down to a stated minimum. If no font is named, choose a common, readable typeface and stay at 11 or 12 points. Never shrink type to fit a page limit.

Do cover pages and tables of contents count toward the page limit?

Only if the solicitation says so, or fails to exclude them. Many RFPs exclude covers, tables of contents, tabs and résumés, but some count everything. If the instructions are unclear, ask during the question period, and until you get an answer, assume they count.

What happens if my proposal goes over the page limit?

Usually the evaluators stop reading at the limit, so anything after it is not evaluated, and some solicitations allow the whole proposal to be rejected. Federal bid protest decisions have generally upheld agencies that refused to evaluate excess pages when the solicitation warned they would. Cut content until you are inside the limit.

What is a cross-reference matrix in a proposal?

A cross-reference matrix is a table, usually placed after the table of contents, mapping each solicitation requirement and evaluation factor to the section and page where your proposal answers it. It helps evaluators find and score your answers. Some RFPs require it; it is built from your internal compliance matrix without the owners and notes.

Can I submit my proposal after the deadline if the portal fails?

Don't count on it. Federal rules allow late proposals only in narrow cases, such as an electronic proposal that reached the government's initial point of entry by 5:00 p.m. one working day before the due date, and many state and local issuers allow no exceptions. Submit at least a day early and keep your receipt.

Should I include brochures or marketing material?

Generally no, unless the solicitation asks for product literature. Glossy brochures count toward page limits, rarely answer the stated requirements and can make a proposal look generic. Put the specific facts evaluators need into the sections that ask for them.

→ KEEP GOING

How to Read and Shred an RFP
Build the compliance matrix first

rfpdetector.com/guides/how-to-write-a-winning-proposal/how-to-read-and-shred-an-rfp

Capture Planning and Win Themes
Decide what your proposal must say

rfpdetector.com/guides/how-to-write-a-winning-proposal/capture-planning-and-win-themes

Writing a Winning Executive Summary
rfpdetector.com/guides/how-to-write-a-winning-proposal/writing-a-winning-executive-summary

Reviews, Submission and Debriefs
Color teams and submission day

rfpdetector.com/guides/how-to-write-a-winning-proposal/reviews-submission-and-debriefs

Cover letter and transmittal templates
rfpdetector.com/guides/proposal-templates/cover-letter-and-transmittal-templates

New York City vendor registration
Get set up before you need to submit

rfpdetector.com/guides/how-to-register-for-government-contracts/new-york-city-vendor-registration

Search open RFPs
rfpdetector.com/search

END OF CHAPTER 3

Next: 04 Writing a Winning Proposal Executive Summary

04

CHAPTER 4

Writing a Winning Proposal Executive Summary

The executive summary is the page evaluators read first and the one decision-makers may read alone. Here is how to structure and write one that frames your whole proposal, with real examples and a sample to adapt.

16 min read · 10 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- An executive summary is a sales argument, not a table of contents: lead with the customer's goal, then your solution, the benefits, the proof and why you are the safest choice.
- Evaluators score the stated evaluation factors, so every claim in the summary must also be proven in the body, where points are awarded.
- Follow the solicitation first: a page limit, format or required content for the summary beats any best practice.
- Draft it early to align the team on win themes, then rewrite it last so it matches the finished proposal.
- In a low-bid procurement (an invitation for bids) price decides, so skip the summary unless the bid documents ask for one.

IN THIS CHAPTER

4.1 What is a proposal executive summary for? 50
4.2 Executive summaries in low-bid vs best-value procurements 51
4.3 Before you write: inputs and timing 52
4.4 A proven executive summary structure: goal, solution, benefits, proof, why us 52
4.5 Turn features into benefits and proof 54
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4.7 Strong vs weak executive summary examples 56
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A **proposal executive summary** is the short opening section that tells evaluators, in a page or two, what you will deliver, why it matters to them and why your team is the lowest-risk choice. It is often the first thing a reviewer reads and sometimes the only part a senior decision-maker reads closely. This chapter covers who reads it, a structure that mirrors how evaluators think, length rules, strong and weak examples, common mistakes and an annotated sample you can adapt.

It builds on the win themes from **Capture Planning and Win Themes** and the outline from **Proposal Structure and Compliance**. For fill-in versions by bid type, see **Executive Summary Templates**.

SECTION 4.1

What is a proposal executive summary for?

Think of the executive summary as your closing argument, delivered first. It frames how evaluators read everything that follows: which strengths to look for, which risks you have already handled and what makes your offer different.

Evaluators skim. Many review several proposals in a short window, on top of their regular duties. They scan headings, bold lead-ins, graphics and first sentences. Write for that reader: put the point first, keep paragraphs short and make the benefit visible without a second read.

TABLE **Who reads your executive summary, and what each reader wants**

Reader	What they look for	What to give them
Technical evaluator	Proof you understand the work and have a credible approach	Your solution in plain language, mapped to the requirements they score
Contracting officer	A compliant, complete offer	Clear commitments, no buried exceptions, consistency with the price volume
Program manager or end user	A contractor who makes their job easier from day one	Benefits in their terms: faster service, fewer complaints, less staff time
Source selection authority or award board	A defensible reason to choose you	Two or three memorable discriminators with proof they can cite in the award decision

> **NOTE** **Is the executive summary scored?**
>
> Usually not directly. In a federal best-value procurement, evaluators may score only the evaluation factors stated in the solicitation (Section M in the federal uniform contract format). Unless the instructions make the summary part of an evaluated volume, it earns no points by itself.
>
> It still matters: it shapes first impressions, the decision-maker may read it, and any inconsistency with the body costs credibility. Write it to frame the scored sections, never to replace them.

SECTION 4.2

Executive summaries in low-bid vs best-value procurements

How much effort the summary deserves depends on how the award is decided. Read the evaluation and award section first (see **How to Read and Shred an RFP**) and confirm which **type of solicitation** you are answering.

TABLE **How the award method changes the job of your summary**

Award method	How the winner is chosen	What the summary should do
Invitation for bids (IFB), sealed low bid	Lowest price from a responsive, responsible bidder; no technical scoring	Usually nothing. Submit exactly the forms requested; if a summary is requested, keep it to a short **IFB summary letter**
Lowest price technically acceptable (LPTA)	Rated acceptable or unacceptable; the cheapest acceptable offer wins	Short and factual: confirm you meet every requirement and make it easy to verify
Best-value tradeoff RFP	Non-price factors and price are weighed; a better proposal can win at a higher price	The full job: goal, solution, benefits, proof and discriminators that justify paying for quality
State and local best-value RFPs (for example New York State and New York City service contracts)	The offer that best optimizes quality, cost and efficiency under the RFP's criteria	Mirror the scoring criteria and weights; lead with outcomes the agency named in its scope of work

> **PRO TIP** **Pro tip**
>
> If the RFP publishes a points table (say 40 for approach, 25 for experience, 20 for price, 15 for staffing), let it set the order of emphasis: lead with the factor worth the most points. The **RFP Detector Score** and your Fit score help you decide which bids deserve this effort; see **Searching RFPs and Reading Scores**.

SECTION 4.3

Before you write: inputs and timing

> **NOTE** **Before you start**
>
> Have these in hand: the instructions and evaluation factors, your compliance matrix, the customer's top three concerns (hot buttons), your two to four win themes, your solution outline and at least one proof point per theme. Without win themes the summary turns into a list of capabilities, so if you skipped that step, go back to **capture planning**.

Write it twice. Draft a rough version at kickoff, even half a page, so writers, pricers and reviewers share one story. Rewrite it last, once the technical, management and past performance sections are final, so every claim matches the body.

Glossary

Hot button	A concern the customer cares about most, such as avoiding service disruption or cutting overtime. Often unstated; you learn it from capture work, the scope of work and pre-proposal questions.
Win theme	A short, repeatable reason to choose you that links a benefit the customer wants to a feature of your offer and proof that it is real.
Discriminator	A feature the customer values that competitors cannot easily match. If a competitor could make the same claim, it is not a discriminator.
Ghosting	Highlighting the weakness of a competing approach without naming the competitor, for example by explaining how your transition plan avoids the gaps a cold start can cause.

SECTION 4.4

A proven executive summary structure: goal, solution, benefits, proof, why us

Most strong summaries follow the same arc: start with the customer, move to your answer, show what they gain, prove it and close with why your team is the safe choice. The order keeps the opening lines on the customer, exactly where skimmers decide whether to keep reading.

The five-part executive summary

01 **Customer goal**
Their mission, problem and priorities, in their words

↓

02 **Solution**
Your approach in two or three sentences

↓

03 **Benefits**
Measurable outcomes tied to their hot buttons

↓

04 **Proof**
Results, references and credentials

↓

05 **Why us**
Discriminators, low risk and a clear commitment

How to write each part

1 **Open with the customer's goal**

State what the agency is trying to achieve and why it matters now, in the language of its scope of work. One to three sentences. Do not open with your founding year or how pleased you are to submit.

> **Tip:** Could your first sentence appear unchanged in a competitor's proposal? If so, make it more specific to this customer.

2 **State your solution in plain language**

Two or three sentences a non-specialist can follow, naming the method, team structure or tool that makes it work. Save detail for the technical approach.

3 **Translate features into benefits**

For each win theme, say what the customer gets: shorter response times, fewer change orders, lower audit risk. Quantify where you honestly can, and tie each benefit to a hot button or evaluation factor.

4 **Prove it**

Back every benefit with evidence: a result on a similar contract, a rating, a certification, a key person's record. One strong number beats three adjectives. Point to where the full proof sits, such as your past performance write-ups.

5 **Close with why us and a commitment**

End with your strongest discriminator and a commitment the customer can hold you to. Evaluators often reread the first and last paragraphs. Skip filler such as “we look forward to the opportunity.”

As a rough guide, give about a fifth of the space to the customer's goal, a fifth to the solution, the largest share to benefits and proof organized by win theme, and a short paragraph to why us. If the solicitation prescribes content or an order for the summary, follow it instead.

SECTION 4.5

Turn features into benefits and proof

Writers default to features because features are what they know: our staff, our software, our process. Evaluators score benefits they can believe. Here the same facts become statements an evaluator can lift straight into a strength.

TABLE **Feature, benefit, proof: one facilities maintenance bid (illustrative figures)**

Feature (what you do)	Benefit (what the customer gets)	Proof (why they should believe it)
Maintenance software with mobile work orders	Managers see every request's status in real time, so fewer follow-up calls	On a 40-building school district contract, average closeout fell from 9 days to 4 in year one
Two crews based within 20 minutes of every site	Emergency calls reached inside the response window, even in winter	Response logs from the current county contract, available on request
Monthly report against agreed service levels	The facilities director can show the board measurable results	Sample report included in the management approach

> ⚠ **WARNING** **Use only numbers you can back up**
>
> The figures in this chapter's examples are illustrative. In a real proposal, use only results you can document: evaluators check them with your references and, on federal work, against official performance records.

SECTION 4.6

How long should an executive summary be?

The solicitation decides. If it sets a page limit for the summary or its volume, stay inside it: pages over a limit are often removed or not read. Check whether the summary counts against the technical page limit, because every page spent there is a page lost to scored content. When the solicitation is silent, these ranges reflect common practice:

TABLE **Typical executive summary length when the solicitation sets no limit**

Bid	Typical length	Notes
Small local RFP or quote	A paragraph to half a page	Often folded into the cover letter
Mid-size state, city or school district RFP	One to two pages	Usually its own section after the cover letter
Large best-value RFP with separate volumes	Two to four pages	May include one graphic summarizing the solution
Low-bid IFB	None, unless requested	Price and responsiveness decide the award

> ✕ **COMMON MISTAKE** **Common mistake**
>
> Padding the summary to fill a page limit. A tight one-page summary a skimmer absorbs in a minute beats three pages of restated requirements. The evaluators wrote the requirements; they do not need them read back.

SECTION 4.7

Strong vs weak executive summary examples

Two openings for the same bid: a fictional county housing authority hiring a vendor to run its resident call center. Read the weak one first and notice how little the evaluator learns.

WORKED EXAMPLE

Weak opening

✕ WEAK

> "ABC Solutions, founded in 2009, is a leading provider of innovative customer service solutions. We are pleased to submit our proposal in response to RFP 26-104. Our experienced team is committed to excellence and will meet all requirements of the scope of work using industry best practices."
>
> **Why it is weak:** it is about the vendor, not the customer. Every sentence could appear in any proposal, "leading" and "best practices" cannot be proven, and the evaluator still does not know what ABC will do.

WORKED EXAMPLE

Strong opening

✓ STRONG

> "The Authority's goal is clear: residents should reach a person who can solve their problem on the first call, in English, Spanish or Chinese, without 20 minutes on hold. Our plan gets you there within 90 days. We will staff a bilingual team sized to your call volume by hour, route calls by topic so rent and repair questions reach trained specialists, and report hold times and first-call resolution to you weekly. We do this today for a 9,000-unit housing provider in the region, where average hold time fell from 14 minutes to under 3 in the first year."
>
> **Why it is strong:** it opens with the customer's goal in their terms, states the solution as three concrete moves, promises measurable outcomes and proves them with a comparable result.

SECTION 4.8

Common executive summary mistakes and how to fix them

TABLE The mistakes evaluators see most often

Mistake	Why it costs you	Fix
Company-first opening	Spends the most-read lines on facts that earn no points	Lead with the customer's goal; move company facts to corporate experience
Generic, reusable text	Signals boilerplate and an untailored solution	Name the customer, its sites, its numbers and its priorities
Claims without proof	Evaluators cannot record a strength they cannot verify	Pair every claim with a result, reference or credential
New ideas that appear only in the summary	Creates inconsistency and gives evaluators nothing to score	Add the idea to the body first, or cut it
Contradicting the staffing or price volumes	Raises doubts about the whole offer	Check consistency across all volumes during reviews
Burying the strongest discriminator	Skimmers never reach it	Put it in the first or second paragraph and repeat it in the close
Ignoring summary instructions or page limits	Can make the proposal noncompliant	Check the instructions and your **compliance matrix** first

SECTION 4.9

Annotated sample executive summary

This sample answers a fictional best-value RFP from a suburban New York school district for districtwide HVAC maintenance. The bracketed numbers match the annotations below. Use it as a model of structure and tone, not as text to copy.

WORKED EXAMPLE

Sample executive summary: districtwide HVAC maintenance

✓ STRONG

> **[1] Keeping every classroom open and comfortable.** The District's priority is plain in its scope of work: no school day lost to a heating failure, and fewer emergency calls that pull custodial staff from their duties. Northline Mechanical will deliver that through preventive maintenance on a fixed

calendar, a guaranteed two-hour emergency response and a single point of contact who knows all 14 of your buildings.

[2] How we will do it. In the first 30 days we will inventory and tag every unit, load it into our maintenance software and build a preventive schedule around the school calendar, so major work happens during breaks and on weekends. Two technicians will be assigned to the District full time, backed by an on-call emergency crew.

[3] What the District gains. Fewer breakdowns in the heating season, a complete equipment history for capital planning, and a monthly report of response times, completed work orders and upcoming replacements, ready for the board.

[4] Why you can rely on it. We hold similar contracts with two nearby districts. On the larger one (22 buildings), emergency calls fell by a third in the second year of scheduled maintenance, and the district renewed our contract for three more years. Both facilities directors are references in Section 4.

[5] Our commitment. A named project manager, a two-hour emergency response written into our quality control plan, and a transition that starts the day after award with no gap in coverage.

TABLE **What each paragraph of the sample is doing**

Paragraph	Technique	Why it works
[1] Headline and opening	Customer goal in the district's words, then a three-part solution	A skimmer who reads only this knows the goal, the offer and the discriminator
[2] How we will do it	Concrete actions with a timeline	A credible approach without detail that belongs in the body
[3] What the District gains	Benefits tied to hot buttons: school days, staff time, board reporting	Ready-made strengths for evaluators to record
[4] Why you can rely on it	Comparable result plus a renewal	Proof lowers perceived risk; the pointer to Section 4 makes it verifiable
[5] Our commitment	Specific, checkable promises	Ends on the discriminator, in the lines evaluators reread

TEMPLATE

Executive summary outline (five-part structure)

Copy-ready online

A fill-in outline that follows the structure in this chapter. Replace each bracketed field, then cut anything that does not support a win theme. Versions for low-bid letters, construction, IT and nonprofit bids are in **Executive Summary Templates**.

WHEN TO USE Best-value RFPs and any proposal whose instructions allow or require an executive summary. Draft at kickoff; rewrite once the body is final.

[HEADLINE THAT STATES THE CUSTOMER BENEFIT]

[AGENCY NAME]'s goal is **[CUSTOMER GOAL IN THEIR WORDS]**, so that **[WHY IT MATTERS NOW]**. **[YOUR COMPANY]** will deliver this through **[SOLUTION ELEMENT 1]**, **[SOLUTION ELEMENT 2]** and **[SOLUTION ELEMENT 3]**.

How we will do it
In the first **[NUMBER]** days we will **[FIRST CONCRETE ACTION]**. Our **[TEAM OR METHOD]** will then **[ONGOING APPROACH]**, with **[KEY PERSON OR ROLE]** accountable for results.

What **[AGENCY NAME]** gains
- **[BENEFIT 1 TIED TO A HOT BUTTON OR EVALUATION FACTOR]**
- **[BENEFIT 2 WITH A MEASURE OF TIME, COST OR QUALITY]**
- **[BENEFIT 3 THAT REDUCES RISK]**

Why you can rely on it
On **[COMPARABLE CONTRACT]**, **[RESULT WITH A NUMBER]**. **[SECOND PROOF POINT: RATING, CERTIFICATION OR KEY PERSON]**. Details are in **[SECTION REFERENCE]**.

Our commitment
[STRONGEST DISCRIMINATOR]. **[SPECIFIC COMMITMENT THE CUSTOMER CAN HOLD YOU TO]**.
We are ready to begin on **[START DATE OR MILESTONE]**.

FIELDS TO FILL IN · 5

[CUSTOMER GOAL IN THEIR WORDS]	Paraphrase the objective from the scope of work, using the agency's own terms.
[SOLUTION ELEMENT 1–3]	The three moves that make your approach work: a method, a team structure, a tool or a guarantee.
[BENEFIT 1–3]	What the customer gets, each tied to a hot button or evaluation factor; quantify only what you can document.
[COMPARABLE CONTRACT]	Your most relevant project, ideally one also listed in your past performance section.
[SPECIFIC COMMITMENT]	A checkable promise: a response time, a named manager or a transition date.

SECTION 4.10

Executive summary review checklist

Before the summary goes to final review — CHECKLIST · 8 ITEMS

- [ ] Follows any instructions, format and page limit set for the summary
- [ ] The first sentence is about the customer, not your company
- [ ] Two to four win themes, each with a benefit and proof
- [ ] Every claim also appears, fully supported, in the scored sections
- [ ] Consistent with staffing, schedule and price in the other volumes
- [ ] No unprovable superlatives such as world-class or best-in-class
- [ ] The strongest discriminator appears early and again in the close
- [ ] Scored against the evaluation criteria at a color-team review (see **Reviews, Submission and Debriefs**)

A quick test: give the summary to a colleague who has not seen the RFP, allow 60 seconds, then ask what the customer wants, what you offer and why you should win. If they cannot answer all three, revise.

Frequently asked questions

How long should a proposal executive summary be?

Follow the solicitation's page limit if it sets one. If not, one to two pages suits most state, city and school district RFPs, and two to four pages suits large proposals with separate volumes. For small quotes, a short paragraph in the cover letter is often enough.

Should I write the executive summary first or last?

Both. Draft a rough version at kickoff so the team writes to the same win themes, then rewrite it last so it matches the finished proposal and introduces nothing new.

What should an executive summary include?

The customer's goal, your solution in plain language, the benefits, proof that you can deliver (comparable results, references, credentials) and why your team is the lowest-risk choice. If the solicitation lists required content for the summary, include that first, in its order.

Is the executive summary scored by evaluators?

In most federal best-value procurements, evaluators score only the stated evaluation factors, so the summary is not scored unless the instructions make it part of an evaluated volume. It still shapes first impressions and may be read by the decision-maker. In state and local RFPs, check the scoring criteria: some require a summary and some do not.

Should I mention price in the executive summary?

Usually not. Many solicitations require price to appear only in the price volume, and putting it elsewhere can make your proposal noncompliant. Describe value, such as avoided costs, without figures. If price is allowed, keep it identical to your **price proposal**.

Do I need an executive summary for a low-bid IFB?

Usually not. An invitation for bids is awarded to the lowest responsive, responsible bidder, so the bid form and price decide. Submit exactly what the bid documents ask for; extra material that adds conditions or exceptions can make your bid nonresponsive.

→ KEEP GOING

Capture Planning and Win Themes

Develop the themes your summary is built on

rfpdetector.com/guides/how-to-write-a-winning-proposal/capture-planning-and-win-themes

Writing the Technical and Management Approach

Where the summary's claims get proven

rfpdetector.com/guides/how-to-write-a-winning-proposal/technical-and-management-approach

Past Performance, Case Studies and References

Proof points for your summary

rfpdetector.com/guides/how-to-write-a-winning-proposal/past-performance-and-references

Executive Summary Templates

Fill-in versions for different bid types

rfpdetector.com/guides/proposal-templates/executive-summary-templates

Reviews, Submission and Debriefs

Test the summary at color-team reviews

rfpdetector.com/guides/how-to-write-a-winning-proposal/reviews-submission-and-debriefs

Search open RFPs

Find a bid worth a full proposal

rfpdetector.com/search

END OF CHAPTER 4

Next: 05 How to Write a Technical Approach and Management Plan

05

CHAPTER 5

How to Write a Technical Approach and Management Plan

The technical and management approach is where most best-value proposals are won or lost. Learn to answer the scope of work requirement by requirement and prove you can manage the job, with strong and weak examples and a reusable section skeleton.

16 min read · 11 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Mirror the solicitation: use its numbering and headings, and answer every “shall” where an evaluator expects to find it.
- For each requirement, show understanding, then how, who, when and proof. Restating the requirement earns nothing.
- The management approach proves you can deliver: organization, key personnel, schedule, quality control, risk and transition.
- In best-value RFPs specific strengths earn points; in LPTA and low-bid procurements, clear compliance matters more than extras.
- Give every graphic an action caption that tells the evaluator the benefit.

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5.2 How to write a technical approach requirement by requirement 65
5.3 Describe a methodology, not a promise 66
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5.11 A technical approach section skeleton you can reuse 73

The **technical and management approach** (often called the technical volume) is the part of your RFP response that explains exactly how you will do the work and how you will manage it. In most best-value procurements it carries the most weight, and it is where evaluators record the strengths and weaknesses that decide the award. This chapter shows how to write a technical approach that answers the scope of work requirement by requirement, and covers methodology, the work plan, staffing and key personnel, quality control, risk, transition, graphics, strong vs weak paragraphs and a reusable section skeleton.

Start from your compliance matrix and annotated outline (**Proposal Structure and Compliance**). If you have not yet broken the solicitation into individual requirements, do that first with **How to Read and Shred an RFP**. Fill-in plans are in **Technical and Management Plan Templates**.

SECTION 5.1

What do evaluators look for in a technical approach?

Evaluators ask three questions of every section: does this offeror understand what we need, is the approach specific and credible, and how risky is it? They record strengths, weaknesses and deficiencies. A single deficiency can sink an otherwise good proposal, so compliance comes first and persuasion second.

TABLE **How the award method changes your technical writing**

Award method	How the technical part is judged	How to write it
Low-bid IFB (sealed bidding)	Not scored; the bid must conform to the specifications and the lowest responsive, responsible bidder wins	Usually no narrative. Complete forms and submittals exactly, with no conditions or exceptions
Lowest price technically acceptable (LPTA)	Pass or fail against stated minimums; extra quality earns no credit	Prove each requirement is met, clearly and briefly. Don't gold-plate: extras raise price, not rating
Best-value tradeoff	Rated against the evaluation factors; strengths can justify a higher price	Answer every requirement and build in strengths: specific methods, measurable benefits, lower risk
State and local RFPs scored on points	Criteria and points listed in the RFP, such as approach, experience, staffing and cost	Use the criteria as headings, give the highest-point criteria the most space, answer every question

Glossary

Statement of work (SOW)	The part of the solicitation describing the work, often in detail and sometimes including how to do it.
Performance work statement (PWS)	A scope written as outcomes and measurable standards. You propose the method; the agency judges results.
Statement of objectives (SOO)	A short list of goals. You define the tasks yourself, often by writing your own work statement.
Strength, weakness, deficiency	Evaluator findings: an advantage to the agency, a flaw that raises the risk of failure, or a failure to meet a requirement.
Key personnel	Named people the solicitation treats as essential, usually with minimum qualifications, resumes and sometimes signed commitment letters.
Quality control plan (QCP)	Your plan for checking your own work. The agency's plan for checking you, common in performance-based contracts, is the quality assurance surveillance plan (QASP).

SECTION 5.2

How to write a technical approach requirement by requirement

The surest way to lose points is to make an evaluator hunt. Evaluators work from a checklist built from the solicitation, so follow the order and numbering of the instructions and the scope of work, and answer every “shall” and “must” where they expect it.

Answering one requirement

1. **Cite the requirement**
   Open each subsection with the reference and the agency's own words, for example “PWS 3.2.1 Help Desk Support.” The evaluator knows exactly which checklist line you are answering.

2. **Show you understand it**
   In a sentence or two, explain what the requirement is for and what makes it hard here: peak volumes, aging equipment, many sites, regulatory deadlines. Add insight; do not paraphrase it back.

3 **Explain how**

Describe the method step by step, naming the tools, standards and procedures. “Tickets are triaged within 15 minutes using a three-level priority matrix” beats “we use industry best practices.”

4 **Say who and when**

Name the responsible role or person, the labor categories and the schedule or frequency. Tie deliverables to the solicitation's due dates.

5 **State the benefit and the proof**

Close with what the agency gains and evidence that it works: a result on a similar contract, a metric, a certification. This is the sentence that becomes a strength.

> **Tip:** Write the benefit so an evaluator could paste it into the evaluation report almost word for word.

TABLE **Sample compliance matrix rows (see the full method in How to Read and Shred an RFP)**

Reference	Requirement (short form)	Where answered	Proof or win theme	Owner
PWS 3.2.1	Respond to priority 1 tickets within 30 minutes, 24/7	Vol. I, 2.3.1, p. 7; Figure 4	No missed priority 1 windows in 18 months on current county contract	J. Rivera
Section L.4.2(b)	Describe transition from the incumbent	Vol. I, 3.6, pp. 18–19	45-day transition with parallel operations	M. Chen

SECTION 5.3

Describe a methodology, not a promise

Your methodology is the “how” behind the whole job: the phases, processes and tools that tie individual requirements together. Evaluators want a logical approach that fits this customer, not a process diagram pasted from your last bid.

- **Name it and explain it.** If you use a recognized framework or standard, say which one and how you apply it here.
- **Show the phases:** planning, startup, steady-state operations and continuous improvement, and what triggers each move.
- **Connect it to the customer:** their sites, volumes, users, regulations or legacy systems.
- **Answer what, how, who, when and why** for every major element. Evaluators notice the missing one.

> **PRO TIP** **Pro tip**
>
> After each paragraph, ask what a skeptical evaluator would ask next (“How exactly?” “Who does that?” “What if it fails?”) and answer it in the next sentence. That habit turns vague promises into a credible method.

SECTION 5.4

Work plan and schedule

A work plan shows you have thought the job through from day one. Break the work into tasks that match the scope numbering, show dependencies and milestones, and tie each deliverable to the solicitation's dates. Larger efforts call for a work breakdown structure and a Gantt chart; for a small municipal contract, a table of tasks, owners and dates is enough.

Sample work plan: 12-month records digitization project

Weeks 1–2 — **Kickoff and planning**
Kickoff with the agency, confirm priorities, finalize the project management and quality control plans.

Weeks 3–6 — **Setup and pilot**
Install scanning stations, scan a 5,000-page pilot batch; the agency reviews image quality and indexing.

Months 2–10 — **Production**
Scan and index by priority, with weekly progress reports and monthly quality audits.

Month 11 — **Acceptance**
Agency tests a random sample; rejected batches are reworked.

Month 12 — **Closeout**
Deliver final indexes, return originals, hand over documentation and lessons learned.

Keep the schedule realistic and consistent. Evaluators compare it with your staffing and price: a schedule that needs four people for a job priced for two is a weakness or worse (see **basis of estimate** in the pricing chapter).

SECTION 5.5

Staffing plan and key personnel

The staffing plan answers “who will actually do this, and are there enough of them?” Show an organization chart with names for key roles, how your team works with agency staff, where subcontractors fit and who can make decisions. A staffing matrix mapping roles to tasks makes it easy to check; there is a fill-in **staffing plan template**.

TABLE **Sample staffing matrix**

Role	Name	FTE	SOW tasks	Key person?
Project manager	Dana Ortiz, PMP	1.0	1.0 Management, 5.0 Reporting	Yes
Senior systems engineer	Raj Patel	1.0	2.0 Operations, 4.0 Security	Yes
Help desk technicians	Recruiting from incumbent staff where possible	4.0	3.0 Help desk	No
Quality control manager	Lena Brooks	0.25	6.0 Quality	No

For each key person, map education, certifications and experience directly to the solicitation's minimum qualifications, in the required resume format, and show where their experience matches this work. A ready format is the **key personnel resume template**.

Round out the management approach with how you will communicate: the status reports you will deliver and how often, regular meetings with the agency's contract manager, how scope or schedule changes are requested and approved, and the escalation path from a day-to-day issue to a company executive.

Key personnel checklist

CHECKLIST · 6 ITEMS

- [ ] Each key person meets or exceeds every stated minimum qualification
- [ ] Resumes follow the required format and page limit
- [ ] Signed commitment letters are attached for every key person, if required
- [ ] You have a reasonable basis to expect each named person to be available at the start

- [ ] Contingent hires, such as incumbent staff, are labeled honestly as contingent
- [ ] Backup or succession for each key role is described

> ⚠ **WARNING** **Never propose people you cannot deliver**
>
> Name only people who have agreed to work on the contract. If the solicitation requires signed commitment letters, a missing letter can make your proposal unacceptable, and federal protest decisions have overturned awards where an offeror proposed key personnel it had no reasonable basis to expect would be available. This is general information, not legal advice: read each solicitation's key personnel clause carefully.

SECTION 5.6

Quality control plan

Your quality section explains how you will catch problems before the customer does. In performance-based contracts the agency checks your work against its own surveillance plan, so make your controls cover the same standards. Cover five things (or start from the **quality control plan template**):

- **Standards:** what “good” means for each deliverable, using the solicitation's acceptance criteria.
- **Inspections:** who checks what, how often and how, such as a weekly sample of completed work.
- **Independence:** the checker is not the doer, ideally reporting outside the project line.
- **Corrective action:** how you find root causes, fix them and confirm the fix, with time frames.
- **Reporting:** the metrics you report to the agency, and how often.

WORKED EXAMPLE

Strong quality control paragraph ✓ STRONG

> “Our quality control manager, who reports to our operations director rather than the project manager, inspects a random 10% of completed work orders each week against the PWS acceptance criteria. Any defect opens a corrective action record within 24 hours; the project manager identifies the root cause and fix within five business days, and the quality control manager verifies it. The monthly status report shows first-time acceptance rate, open corrective actions and trends.”

SECTION 5.7

Risk management

Evaluators know things go wrong; they want proof you have identified this contract's specific risks and planned for them. Generic risks (“staff turnover”) earn little. Specific risks with a mitigation and an owner earn credibility, and in a best-value evaluation a strong mitigation can become a strength. A blank **risk register template** is in the templates handbook.

TABLE **Sample risk register**

Risk	Likelihood	Impact	Mitigation	Owner
Incumbent staff decline offers, slowing transition	Medium	High	Early outreach with competitive offers; two trained backups per role from our bench	Project manager
Records arrive in worse condition than sampled	Medium	Medium	Pilot batch recalibrates throughput; weekly forecast to the agency	Operations lead
Winter storm closes sites at peak season	Low	High	Remote plan for office tasks; on-call crew with four-wheel-drive vehicles	Field supervisor

SECTION 5.8

Transition plan

If someone else does the work today, the agency's biggest fear is a service gap at changeover. A transition-in (phase-in) plan shows how you will take over without disruption. Many service contracts also ask for a phase-out plan for handing the work to a successor at the end. See the **transition-in plan template**.

A typical transition-in sequence

01 **Award to kickoff**
Mobilize the transition team; agree the schedule with the agency

↓

02 **Knowledge transfer**
Interview incumbent staff, review documentation, shadow operations

↓

03 **Staffing and setup**
Hire or retain staff; set up accounts, tools, badges and space

↓

04 **Parallel operations**
Work alongside the incumbent where allowed, with readiness checks

↓

05 **Full responsibility**
Assume all work on an agreed date; report daily at first

> TIP **Incumbent or challenger?**
> Incumbents should stress continuity, retained staff and the improvements they will add, and never assume evaluators know their record: they can score only what is in the proposal. Challengers should own the transition risk with a detailed schedule, readiness criteria the agency can verify and, where appropriate, offers to incumbent staff.

SECTION 5.9

Graphics and action captions

Graphics let skimmers grasp a process, organization or schedule at a glance. Good candidates are process flows, organization charts, schedules, maps of sites and coverage, and before-and-after comparisons. Number each one, refer to it in the text and keep it readable at the font sizes the solicitation allows. Layout, headings and white space are covered in **readability and graphics**.

Label vs action caption (illustrative figures)

Action caption: states the benefit

- ✓ Figure 3. Topic-based routing sends rent and repair calls straight to trained specialists, cutting resident hold times.
- ✓ Figure 5. Two crews based within 20 minutes of every school reach emergency calls inside the two-hour window.
- ✓ Figure 7. Parallel operations in weeks 4–6 keep every service running while our team takes over.

Label only

- ✗ Figure 3. Call flow.
- ✗ Figure 5. Map of crew locations.
- ✗ Figure 7. Transition schedule.

✗ COMMON MISTAKE **Common mistake**

Graphics crammed with tiny text, or attractive images that say nothing about this customer. If a graphic would fit any proposal, cut it or rework it around this agency's sites, users or process.

SECTION 5.10

Strong vs weak technical paragraphs

One requirement, answered two ways: “The contractor shall provide snow and ice removal at all 12 District facilities, with parking lots and walkways cleared before 6:30 a.m. on school days.”

WORKED EXAMPLE

Weak response

✗ WEAK

> “Our company has extensive experience in snow removal and will provide snow and ice removal at all District facilities in accordance with the requirements of the RFP. We have a dedicated team and modern equipment, and we are committed to safety and customer satisfaction.”
>
> **Why it is weak:** it restates the requirement, gives no method, names no people or equipment, ignores the 6:30 a.m. deadline and offers no proof.

WORKED EXAMPLE

Strong response

✓ STRONG

> "**PWS 4.3 Snow and Ice Removal.** We will clear all 12 facilities before 6:30 a.m. on school days using three plow routes of four sites each, sequenced so the two high schools with early buses are finished first (Figure 6). Crews deploy at 2:00 a.m. whenever 2 inches or more is forecast; a separate hand crew clears and treats walkways with a concrete-safe de-icer. Field supervisor Tom Walsh confirms each site is clear by text to the facilities director by 6:15 a.m. Last winter, using the same routing for a neighboring district, we met the opening deadline on all 31 storm days."
>
> **Why it is strong:** it cites the requirement, gives a specific method, names the accountable person, commits to the deadline with a verification step and proves it with a comparable result.

SECTION 5.11

A technical approach section skeleton you can reuse

Use this skeleton for each major requirement or evaluation factor. It enforces the order evaluators expect and keeps writers out of boilerplate. Swap in the solicitation's own headings and numbering.

TEMPLATE

Technical approach section skeleton (one requirement)

Copy-ready online

One subsection per requirement or evaluation factor, in the order evaluators read. Matching management, staffing, quality control, transition and risk templates are in **Technical Approach and Management Plan Templates**.

WHEN TO USE Best-value and points-based RFPs. For LPTA bids, keep Understanding, Our approach and Who and when, and trim the rest to stay brief.

[SOLICITATION REFERENCE] [REQUIREMENT HEADING IN THE AGENCY'S WORDS]

Understanding
[ONE OR TWO SENTENCES ON WHAT THIS REQUIREMENT IS FOR AND WHAT MAKES IT DIFFICULT FOR THIS AGENCY]

Our approach
1. **[STEP 1: ACTION, TOOL OR STANDARD]**
2. **[STEP 2]**
3. **[STEP 3]**

See Figure **[NUMBER]**: **[ACTION CAPTION STATING THE BENEFIT]**.

Who and when
[ROLE OR KEY PERSON] is responsible, supported by **[LABOR CATEGORIES]**. **[FREQUENCY, MILESTONES OR DELIVERABLE DATES FROM THE SOLICITATION]**.

Quality and risk
We will measure **[METRIC]** against **[STANDARD]**. If **[RISK]** occurs, we will **[MITIGATION]**.

Benefit to **[AGENCY NAME]**
[MEASURABLE BENEFIT TIED TO A HOT BUTTON OR EVALUATION FACTOR]

Proof
On **[COMPARABLE CONTRACT]**, **[RESULT WITH A NUMBER]**. See **[REFERENCE OR SECTION]**.

FIELDS TO FILL IN · 5

[SOLICITATION REFERENCE]	The exact paragraph number, such as PWS 3.2.1 or Section L.4.2(b), matching your compliance matrix.
[STEP 1–3]	Concrete actions naming tools, standards or procedures; add steps as needed.
[ACTION CAPTION STATING THE BENEFIT]	A full sentence saying what the graphic shows and why it matters to the agency.
[METRIC / STANDARD]	Use the solicitation's performance standards or acceptance criteria where they exist.
[COMPARABLE CONTRACT]	A project from your past performance section; only results you can document.

Frequently asked questions

What is the difference between a technical approach and a management approach?

The technical approach explains how you will do the work: methods, tools and processes for each requirement. The management approach explains how you will run the contract: organization, key personnel, staffing, schedule, communication, quality control, risk and transition. Some solicitations combine them in one volume; others score them as separate factors.

How detailed should a technical approach be?

Detailed enough that an evaluator can see exactly how each requirement will be met, by whom and when, and within the page limit. Specific beats long: name methods, tools, standards and metrics instead of adding adjectives. Give the most space to the most heavily weighted factors.

Should I copy the language of the statement of work?

Use the solicitation's terms and headings so evaluators can find your answers, but do not simply restate requirements. Every subsection should add your understanding, your method, the people responsible and proof. Copying the requirement back earns no strengths.

What if I have not identified all my key personnel yet?

Check the solicitation first: if it requires named key personnel with resumes or commitment letters, you must provide them. If it allows it, describe the qualifications and your recruiting plan for unfilled roles, and label contingent hires honestly. Never name someone who has not agreed to be proposed.

What should a quality control plan include in a proposal?

Performance standards for each deliverable, inspection methods and frequency, who performs inspections and their independence from production, how defects are corrected and verified, and the metrics you will report to the agency.

What is a transition plan in a proposal?

A transition-in (phase-in) plan shows how you will take over work from the current contractor or start a new service without disruption: knowledge transfer, hiring, setup, any period of parallel operations and the date you assume full responsibility. Some solicitations also require a phase-out plan for handing the work to a successor at the end of the contract.

How do I write a technical approach for an LPTA solicitation?

Prove that you meet every minimum requirement clearly and briefly, following the instructions exactly. Extra features earn no credit and may raise your price, so focus on compliance, completeness and low risk. Then compete on price.

→ KEEP GOING

How to Read and Shred an RFP
Pull out every requirement before you write
rfpdetector.com/guides/how-to-write-a-winning-proposal/how-to-read-and-shred-an-rfp

Writing a Winning Executive Summary
Frame the approach for skimming evaluators
rfpdetector.com/guides/how-to-write-a-winning-proposal/writing-a-winning-executive-summary

Past Performance, Case Studies and References
The proof behind your approach
rfpdetector.com/guides/how-to-write-a-winning-proposal/past-performance-and-references

Pricing Strategy and Cost Proposals
Keep staffing, schedule and price consistent
rfpdetector.com/guides/how-to-write-a-winning-proposal/pricing-strategy-and-cost-proposals

Technical and Management Plan Templates
Fill-in plans for staffing, quality and transition
rfpdetector.com/guides/proposal-templates/technical-and-management-plan-templates

Tracking Bids, Pipeline and Alerts
Keep deadlines and questions on schedule
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

END OF CHAPTER 5

Next: 06 Past Performance, Case Studies and References

06

CHAPTER 6

Past Performance, Case Studies and References

Past performance tells evaluators how risky you are. Learn what they check, how to choose and write up projects with results, how to prepare references and questionnaires, and how to compete when your record is thin.

16 min read · 9 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Past performance is about risk: evaluators judge how relevant your work is (scope, size, complexity), how recent it is and how well you performed.
- Submit fewer, stronger projects, say explicitly why each is relevant, and describe results rather than duties.
- No record is not a dead end: under federal rules an offeror with no relevant past performance gets a neutral rating, and subcontracts, key personnel, commercial work and teaming partners can all help.
- Brief every reference before you list them, and manage past performance questionnaires like a deadline.
- In low-bid procurements past performance is usually checked as part of responsibility rather than scored, but a poor record can still cost you the award.

IN THIS CHAPTER

6.1 What is past performance in a proposal? 78
6.2 What evaluators look for: relevance, recency and quality 79
6.3 How to choose which projects to submit 79
6.4 How to write a past performance write-up with results 81
6.5 What if you have little or no past performance? 83
6.6 How to handle a bad rating or a problem project 85
6.7 Choosing and preparing references 85
6.8 Past performance questionnaires (PPQs) 87
6.9 Build a past performance library and case studies 88

Past performance is the evidence that you have done similar work well, and in most best-value proposals it is one of the most heavily weighted factors after the technical approach. Evaluators use it to predict risk: a strong, relevant record builds confidence, a weak or irrelevant one creates doubt. This chapter explains what evaluators look for, how to choose and write up projects with measurable results, how to prepare references and past performance questionnaires, and what to do when you have little or no past performance.

Your best proof points also feed the **executive summary** and the **technical approach**. Fill-in forms are in **Past Performance and Resume Templates**.

SECTION 6.1

What is past performance in a proposal?

Past performance is a specific set of contracts you select to show how well you performed on work like this. It is not the same as experience, which is everything your company and people have done. A firm with twenty years of experience can have little relevant past performance for a particular bid, and a young firm can have a short but highly relevant record.

Evaluators assess it from two directions: what you tell them and what they find themselves. On federal work that includes official evaluations in CPARS (the Contractor Performance Assessment Reporting System) and answers from your references. State and local agencies call references, send questionnaires and check their own records. New York City agencies, for example, record vendor performance evaluations in PASSPort, where an unsatisfactory overall rating is entered as a caution (see **New York City Vendor Registration**).

TABLE **How past performance counts under different award methods**

Award method	How past performance is used	What it means for you
Low-bid IFB	Not scored; the agency confirms the low bidder is responsible, which can include its performance record	Keep your record clean and references current: a poor history can cost you the award even at the lowest price
LPTA	Rated acceptable or unacceptable	Show clearly that you meet the threshold; extra projects add little
Best-value tradeoff	Rated for relevance and quality, often as a confidence rating	Choose and write projects to win: relevance, results and strong references
State and local best-value RFPs	Usually a scored criterion such as experience, references or past performance	Match the RFP's format and count, and make relevance obvious

New York State law, for example, defines a responsible vendor partly by its past performance and awards service contracts on best value: the offer that optimizes quality, cost and efficiency.

SECTION 6.2

What evaluators look for: relevance, recency and quality

Most solicitations define relevance by scope, size and complexity, and set a recency window. Read those definitions closely: they tell you exactly how your projects will be judged.

TABLE **The relevance tests, and how to pass each one**

Test	What evaluators ask	How to show it
Scope	Was it the same kind of work?	Map the project's tasks to the new scope of work, by section number where you can
Size	Similar value, staff or volume?	Give total and annual value, staff count, sites, users or transaction volumes
Complexity	Similar challenges?	Name them: many sites, 24/7 operations, regulated data, tight deadlines
Recency	Recent enough to count?	Give start and end dates; lead with ongoing or recently completed work
Role	Did your company do the work?	State whether you were prime, subcontractor or joint venture partner, and your share
Quality	How well did you perform?	Results, ratings, renewals and options exercised, plus references who will say so

Many federal evaluations rate each reference for relevance (from very relevant to not relevant), then assign an overall confidence rating in your ability to perform. The solicitation sets the recency window, often three to five years. As of 2026, federal agencies may use official performance evaluations from within three years of the work's completion, or six years for construction and architect-engineer contracts.

PRO TIP **Pro tip**

Forced to choose, many experienced proposal managers pick a project with excellent results and solid relevance over a perfectly relevant project that went badly. You can explain relevance; you cannot explain away a poor reference.

SECTION 6.3

How to choose which projects to submit

Submit exactly the number of projects the solicitation asks for, no more. Then pick the set that together covers the most of the new scope, with the strongest results and the most reliable references.

1. **List every candidate**
   Pull every contract, subcontract and significant commercial job from the last five to seven years, with values, dates, scope and contacts.
2. **Screen for eligibility**
   Drop anything outside the recency window or excluded by the solicitation. Check whether it accepts work by subcontractors, teaming partners or key personnel.
3. **Score relevance and performance**
   Rate each candidate 1–5 on scope, size, complexity and recency, plus the strength of its results and reference.
4. **Cover the scope as a set**
   Two medium projects that span every task area can beat one large project that covers half of it.
5. **Confirm the references**
   Call each reference before you commit. One who has retired, moved agencies or barely remembers your work is a risk.

TABLE **Worked example: choosing three projects for a city parks maintenance RFP (scores 1–5, fictional projects)**

Candidate	Scope	Size	Complexity	Recency	Results and reference	Total
County parks grounds maintenance, $1.2M a year, ongoing	5	5	4	5	4	23
School district athletic fields, $400K a year, ended 2025	4	3	3	5	5	20
Corporate campus landscaping, $650K a year, ongoing	3	4	3	5	5	20
Town snow removal subcontract, $90K, ended 2021	2	1	2	2	3	10

The top three go in. Together they cover grounds, athletic turf and large-site landscaping, all are recent, and two references are public agencies. The snow removal job is small, old and off-scope, so it stays out.

SECTION 6.4

How to write a past performance write-up with results

Follow the solicitation's format exactly; many provide a form. When you have room for narrative, use the same structure for every project so evaluators can compare quickly:

1. **Contract facts:** customer, contract number and type, value, period of performance, your role and a point of contact.
2. **The challenge:** what the customer needed and what made it hard.
3. **What you did:** the work you performed, in the new solicitation's terms.
4. **Results:** measurable outcomes, ratings, renewals and problems solved.
5. **Relevance:** one or two sentences tying the project to the new scope, size and complexity.

WORKED EXAMPLE

Weak write-up

✕ WEAK

> "Facilities support services for a state agency. Ace Facility Group provided janitorial, maintenance and grounds services in accordance with the contract. Our team performed all tasks professionally and to the customer's satisfaction."
>
> **Why it is weak:** no size, dates or role; duties instead of results; an unproven claim of satisfaction; and no link to the new bid.

WORKED EXAMPLE

Strong write-up

✓ STRONG

> "**Facilities support, state office campus (2023–present). Prime contractor, $2.4M a year, firm fixed price.** The agency needed one vendor to replace three contracts across six buildings (610,000 square feet) without disrupting 24/7 operations in its data center building. We consolidated janitorial, preventive maintenance and grounds work under one manager and introduced mobile work orders with photo verification. **Results:** work-order backlog cut from 340 to under 40 in six months, 98% of preventive maintenance completed on time, and the first option year exercised early. **Relevance:** the same three service lines, similar square footage and the same 24/7 critical-site constraint as Section C.3 of this RFP."
>
> **Why it is strong:** complete facts, measurable results, the hard part named and relevance spelled out against the new scope.

TEMPLATE

Past performance project write-up

Copy-ready online

One write-up per project, in the order evaluators compare them. Use the solicitation's own form instead whenever it provides one. A longer project profile, a case study and resume formats are in **Past Performance Templates**.

WHEN TO USE — Best-value and points-based RFPs that ask for project descriptions or case studies, and as the master record in your past performance library.

[PROJECT TITLE], [CUSTOMER NAME]
Contract number: [CONTRACT NUMBER] Type: [CONTRACT TYPE]
Period of performance: [START DATE] to [END DATE OR ONGOING]
Value: [TOTAL VALUE] ([ANNUAL VALUE] per year)
Role: [PRIME, SUBCONTRACTOR OR JV PARTNER], performing [SHARE OF WORK]
Point of contact: [NAME], [TITLE], [PHONE], [EMAIL]

The challenge
[ONE OR TWO SENTENCES ON WHAT THE CUSTOMER NEEDED AND WHAT MADE IT DIFFICULT]

What we did
[THE WORK YOU PERFORMED, IN THE NEW SOLICITATION'S TERMS: SERVICES, SITES, USERS, VOLUMES]

Results
- [MEASURABLE RESULT 1]
- [MEASURABLE RESULT 2]
- [RATING, AWARD, RENEWAL OR OPTION EXERCISED]

Relevance to [SOLICITATION NUMBER]
Scope: [MATCHING TASKS AND SECTION NUMBERS]. Size: [COMPARABLE VALUE, STAFF OR VOLUME]. Complexity: [SHARED CHALLENGES].

FIELDS TO FILL IN · 4

[SHARE OF WORK]	The portion you performed yourself, as a percentage or task list; required context when you were a subcontractor or JV partner.
[MEASURABLE RESULT]	A documented outcome: time saved, backlog reduced, deadlines met, satisfaction scores. Verify it with the customer first.
[RATING, AWARD, RENEWAL OR OPTION EXERCISED]	Independent signs of good performance, such as a formal rating, an option year or a follow-on contract.
[MATCHING TASKS AND SECTION NUMBERS]	Cross-walk to the new scope of work, for example “C.3.1 janitorial, C.3.2 preventive maintenance”.

SECTION 6.5

What if you have little or no past performance?

Every contractor starts somewhere. Under FAR Part 15, an offeror without a record of relevant past performance, or whose record is not available, may not be evaluated favorably or unfavorably on past performance: in practice, a neutral rating. The rule carried over into the reorganized Part 15 that agencies adopted during the 2025–2026 FAR overhaul. Neutral keeps you in the competition, but in a tradeoff a rival with a strong record can still look safer, so use every legitimate source of relevant performance.

TABLE **Ways to show relevant performance when your own record is thin**

Source	How it can count	What to watch
Subcontract work	Work as a subcontractor is still performance, and many solicitations accept it	State your role and share. On federal contracts with a subcontracting plan, a small business first-tier subcontractor can ask the prime for a rating
Key personnel	Federal evaluations may consider the relevant experience of key personnel; many state and local RFPs score staff experience directly	Describe what the person did, not what their former employer did, and secure their commitment

Source	How it can count	What to watch
Predecessor companies	Work by a business you acquired or grew out of can be considered	Explain what carried over: people, systems, contracts
Commercial, nonprofit and state or local work	Agencies can consider private-sector and non-federal contracts	Give the same facts as for government work, in the solicitation's terms
Teaming partners and joint ventures	Federal evaluations may consider subcontractors performing major or critical parts of the work, and a joint venture's partners	The partner must actually do that work. In SBA mentor-protégé joint ventures, the protégé cannot be held to the same past performance criteria as other offerors
Smaller contracts	Small awards build a record quickly	Federal micro-purchases (up to $15,000) and simplified acquisitions (up to $350,000), as of 2026, often have lighter requirements

Neutral
Federal rating with no relevant record
Neither favorable nor unfavorable (FAR Part 15)

30 days
To request a subcontract rating
After the prime contract's performance period ends (SBA rule)

15 days
For the prime to provide it
Calendar days from your request

3 / 6 years
Federal evaluation use window
Six for construction and architect-engineer work, as of 2026

> **NOTE** **General information, not legal advice**
> Rules on past performance, subcontract ratings and joint ventures change and vary by agency. Check each solicitation's instructions and confirm with the contracting officer, your local APEX Accelerator or a qualified advisor before relying on them.

Build a record deliberately while you bid. Target subcontracts with primes who already win the work you want (see **Subcontracting and Teaming Opportunities**); the **Contractors** directory shows which organizations hold New York State contracts and which agencies they serve. Certifications can open set-aside work too (**which certifications to pursue**).

SECTION 6.6

How to handle a bad rating or a problem project

Hiding a problem rarely works, because evaluators can find it themselves. Federal solicitations must let offerors identify past contracts and describe problems encountered and the corrective actions taken. Use that opportunity: say briefly what happened, what you changed and what results since then show the fix worked.

- **Respond when the evaluation is issued.** Federal contractors get up to 14 calendar days from notification to comment on a performance evaluation, and the comments stay with it. In New York City, a vendor must answer a performance evaluation report within 15 days, with a corrective action plan for any deficiencies.
- **Address it in the proposal if it is likely to surface:** two or three factual sentences on the issue, the cause, the corrective action and the evidence of improvement.
- **Show the trend.** Evaluators consider trends; strong recent performance after a fix can outweigh an older problem.

> ✕ COMMON MISTAKE **Common mistake**
>
> Blaming the customer. Even when responsibility was shared, describe the facts neutrally and focus on what you changed. Evaluators read defensiveness as risk.

SECTION 6.7

Choosing and preparing references

A reference is only as good as their memory of your work and their willingness to respond. Choose people who were close to the work, such as the project manager or contracting officer's representative rather than the executive who signed, and who saw you solve problems. More reference and questionnaire emails are in the templates handbook.

Reference preparation checklist — CHECKLIST · 6 ITEMS

- [ ] Ask permission for each specific bid, every time
- [ ] Confirm current title, organization, phone and email
- [ ] Send a short briefing on the opportunity, the project you are citing and the results you will mention

- [ ] Tell them when an evaluator may call or a questionnaire may arrive
- [ ] Never script answers or ask a reference to overstate
- [ ] Thank them afterward and share the outcome

TEMPLATE

Reference briefing email

Copy-ready online

A short, respectful request that gives the reference the facts they need to answer accurately.

WHEN TO USE Before you list anyone as a reference or send them a past performance questionnaire.

Subject: Reference request: [YOUR COMPANY] proposal to [AGENCY], [SOLICITATION NUMBER]

Dear [REFERENCE NAME],

Thank you again for the chance to work with your team on [PROJECT NAME]. We are submitting a proposal to [AGENCY] for [SHORT DESCRIPTION OF THE NEW WORK], and with your permission we would like to list you as a reference for that project.

Here is what we plan to say about the work:
- Period of performance: [DATES]; value: [VALUE]
- Scope: [TWO OR THREE MAIN TASKS]
- Results: [ONE OR TWO MEASURABLE RESULTS]

[AGENCY] may contact you by phone or email between [START DATE] and [END DATE].
If a questionnaire is involved, it must go directly to [CONTRACTING OFFICER NAME] at [CONTRACTING OFFICER EMAIL] by [QUESTIONNAIRE DEADLINE]; the form is attached.

Could you confirm that you are able to serve as a reference, and that these details are still correct?
[REFERENCE TITLE], [ORGANIZATION], [PHONE], [EMAIL]

Thank you for considering it.

[YOUR NAME]
[YOUR TITLE], [YOUR COMPANY]
[YOUR PHONE]

FIELDS TO FILL IN · 3

[RESULTS]	The same results you claim in the proposal, so the reference can confirm them.
[START DATE / END DATE]	Your best estimate of the evaluation period, usually the weeks after the proposal due date.
[QUESTIONNAIRE DEADLINE]	The date in the solicitation, often the proposal due date; delete this sentence if no questionnaire applies.

SECTION 6.8

Past performance questionnaires (PPQs)

Many solicitations include a past performance questionnaire: a form you send to your references, who rate your performance and return it directly to the contracting officer. You usually fill in only the contract details at the top, and you may never see the completed form.

How a PPQ moves

01 **Get the form**
Use the exact form attached to the solicitation

↓

02 **Fill in your part**
Contract facts only; leave ratings blank

↓

03 **Send to references**
Early, with a briefing note and the deadline

↓

04 **Reference returns it**
Directly to the contracting officer, on time

↓

05 **Confirm and track**
Follow up politely and submit any required list of recipients

> ⚠ **WARNING** **Treat PPQs like a proposal deadline**
>
> Solicitations often say the government may, but need not, consider questionnaires received after the due date, and evaluators are not obliged to chase every reference. Send PPQs as soon as the solicitation is released, follow up a week before the deadline, and log who received the form and when.

SECTION 6.9

Build a past performance library and case studies

The fastest way to write strong past performance is to stop starting from zero. Keep one record per project, updated at milestones and closeout: contract facts, scope by task area, metrics, awards, photos, reference contacts and a ready-to-edit write-up.

- **Capture results as they happen.** Monthly reports, customer emails and closeout letters are tomorrow's proof points.
- **Request your ratings.** If you subcontract on federal work, put the 30-day window to request a rating from the prime on your calendar.
- **Turn the best projects into case studies:** one page with the challenge, solution, results and a customer quote, for proposals, capability statements and your website (see the **case study template**).
- **Publish your record where buyers look.** Your free RFP Detector **vendor profile** has a past performance section for up to 20 projects, shown as self-reported, plus captioned work-sample photos. See **Building Your Vendor Profile**.

Frequently asked questions

Q **Can I win a government contract with no past performance?**

Yes. Under federal rules an offeror with no relevant past performance gets a neutral rating rather than a negative one, and many contracts, especially small purchases and low-bid procurements, do not score past performance at all. Strengthen your case with subcontract work, key personnel experience, commercial or state and local work and teaming partners, then compete hard on approach and price.

Q **What counts as relevant past performance?**

Work similar in scope, size and complexity to the new requirement, performed within the solicitation's recency window. The solicitation defines relevance, so read it, then show the match explicitly for each project, ideally task by task against the new scope of work.

How many past performance references should I include?

Exactly the number the solicitation asks for, in its format. Three to five is common in federal and state RFPs. If no number is given, choose the few projects that best cover the scope rather than listing everything.

How recent does past performance need to be?

The solicitation sets the window, often three to five years before the proposal due date and sometimes longer for construction. Ongoing work usually counts if it has a meaningful record. As of 2026, federal agencies may use official performance evaluations from within three years of completion, or six years for construction and architect-engineer work.

Does commercial or nonprofit work count as past performance?

Usually, yes. Agencies can consider private-sector, nonprofit and state or local contracts. Present them with the same facts as government work (value, dates, scope, results and a reference) and describe the work in the solicitation's terms.

What is a past performance questionnaire?

A form included in some solicitations that you send to your references. They rate your performance and return it directly to the contracting officer by a deadline. Fill in only your part, send it early, brief the reference and follow up, because late or missing questionnaires can weaken your evaluation.

Can I use a subcontractor's past performance?

Often, if that subcontractor will perform a major or critical part of the work and the solicitation allows it. Show what they will do on this contract, how it matches their past work, and their commitment to your team. Check the evaluation section, because some solicitations limit how much teammate experience counts.

→ KEEP GOING

Writing a Winning Executive Summary

Put your best proof up front

rfpdetector.com/guides/how-to-write-a-winning-proposal/writing-a-winning-executive-summary

Writing the Technical and Management Approach

Tie proof to each requirement

rfpdetector.com/guides/how-to-write-a-winning-proposal/technical-and-management-approach

Past Performance and Resume Templates

Fill-in forms and resume formats

rfpdetector.com/guides/proposal-templates/past-performance-and-resume-templates

Subcontracting and Teaming Opportunities

Build a record through primes and partners

rfpdetector.com/guides/how-to-find-government-contracts/subcontracting-and-teaming-opportunities

Building Your Vendor Profile

Show your past performance to buyers

rfpdetector.com/guides/how-to-use-rfp-detector/building-your-vendor-profile

Browse New York State contractors

Find primes and teaming partners in your field

rfpdetector.com/contractors

END OF CHAPTER 6

Next: 07 Pricing Strategy and Cost Proposals: How to Price a Bid That Wins

07

CHAPTER 7

Pricing Strategy and Cost Proposals: How to Price a Bid That Wins

Your price is scored, compared and checked for realism. Learn to build a defensible price from the bottom up, test it against what wins, and present it so evaluators trust it.

16 min read · 9 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- Know how price will be judged first: a low-bid IFB goes to the lowest responsive, responsible bidder; a best-value RFP weighs price against quality.
- The contract type decides who carries cost risk, and since 2026 fixed price is the federal default.
- Build each labor rate through fringe, overhead, G&A and profit by multiplying the layers. Adding percentages underprices your work.
- Compare your bottom-up cost with a researched price-to-win, and close gaps by changing the solution, not by erasing profit.
- A traceable basis of estimate and honest assumptions make your number believable.

IN THIS CHAPTER

7.1 How price is evaluated: low bid vs best value 92
7.2 Contract types and what they mean for your price 93
7.3 How do you price a government contract from the bottom up? 94
7.4 Wrap rate calculation: a worked example 96
7.5 Price to win: the core of a government contract pricing strategy 97
7.6 Writing the basis of estimate and cost narrative 98
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7.8 How prevailing wage changes your bid price 101
7.9 Common pricing mistakes and how to avoid them 102

A strong **government contract pricing strategy** does two jobs: it wins the evaluation, and it leaves you able to deliver the work at a profit. First-time bidders often miss one of them. They guess low and lose money on every invoice, or they price from habit and never learn why someone else won. This chapter covers how price is judged, contract types, fully loaded rates, price-to-win, and how to write a **cost proposal** an evaluator can follow line by line.

Pricing comes last in the proposal, but it starts at the beginning. Your price depends on the staffing in your technical and management approach and the strategy set during capture planning. If the two teams work apart, the volumes contradict each other.

> **NOTE** **Before you start**
>
> Gather the price form and pricing instructions, the evaluation criteria, any wage determination or prevailing wage schedule, and your actual costs from the last full year (payroll, benefits, rent, insurance, admin salaries). Shred the solicitation first with How to Read and Shred an RFP.

SECTION 7.1

How price is evaluated: low bid vs best value

The first pricing question is how the buyer will use your number. The solicitation type usually tells you; see how best value and low bid differ by solicitation type, and find the basis of award on your first read of the RFP.

TABLE **Low-bid (IFB) pricing vs best-value (RFP) pricing**

	Low bid: Invitation for Bids	Best value: Request for Proposals
Who wins	The **lowest responsive, responsible bidder**: the bid meets every requirement, and you can perform.	The best overall value, which may not be the cheapest offer.
Federal rule	Sealed bidding (FAR Part 14) considers only price and price-related factors.	A **tradeoff**, or **lowest price technically acceptable (LPTA)**, which is now restricted.
New York rule	Municipalities generally must bid purchase contracts over $20,000 and public works over $35,000 (General Municipal Law §103, as of 2026).	The state awards services on best value and commodities on lowest price (State Finance Law §163).
After submission	Bids are opened publicly; prices cannot change, and added conditions can make a bid nonresponsive.	The solicitation says how price ranks against other factors; negotiation may follow.

	Low bid: Invitation for Bids	Best value: Request for Proposals
Pricing strategy	Meet the specification exactly and sharpen every line. Extras earn nothing.	Price the solution that earns strengths, then prove the value.

Evaluators also test price three ways. **Reasonableness**: is it too high compared with competitors, past contracts or the government estimate? **Realism**: is it too low to deliver what you promised? **Balance**: are individual lines or option years priced oddly, such as a cheap base year and expensive options?

> ☆ PRO TIP **Pro tip: find the weighting sentence**
>
> Paste the sentence that ranks price against non-price factors at the top of your pricing workbook. “Approximately equal” means strong technical scores can carry a modest premium. “Significantly less important than price” means a price fight, whatever the document is called.

SECTION 7.2

Contract types and what they mean for your price

The contract type decides how you are paid and who absorbs overruns. Federal types are defined in FAR Part 16; state and local buyers use the same ideas.

TABLE **Common contract types and their pricing risk**

Contract type	How you are paid	Cost risk	Pricing implication
Firm fixed price (FFP)	One price for defined work, whatever it costs you	You	Estimate carefully and allow for known risks. Overruns come out of profit.
Fixed price with economic price adjustment	Fixed price that moves with a named index or cost	Shared on adjusted items	For volatile costs like fuel. Read exactly what adjusts.
Time and materials (T&M)	Fixed loaded hourly rates plus materials at cost	Mostly the buyer, up to a ceiling	Rates must include wages, fringe, overhead, G&A and profit. Work past the ceiling is at your risk.
Labor hour	Like T&M, without materials	Mostly the buyer, up to a ceiling	Common for professional and IT services.

Contract type	How you are paid	Cost risk	Pricing implication
Cost reimbursement (for example cost-plus-fixed-fee)	Allowable costs plus a fee	Mostly the buyer	Needs an adequate accounting system; fee is capped.
Unit price	Price per unit times actual quantity	You on unit cost; buyer on quantity	Common in construction and requirements contracts. Avoid unbalanced unit prices.

10%

Fee cap on most federal cost-plus-fixed-fee contracts

Of estimated cost, excluding fee (FAR Part 15)

15%

Fee cap for research and development work

Experimental, developmental or research

6%

Cap for architect-engineer design services

Of the estimated construction cost

⚠ WARNING **2026 change: fixed price is the federal default**

An April 2026 executive order made fixed price the default and preferred federal contract type. Under the FAR overhaul's Part 16 deviations, solicitations issued from July 15, 2026 need a gency-head approval to use another type above set dollar thresholds. Expect more fixed-price a nd fixed unit price solicitations. Rulemaking continues, so check each solicitation's clauses. Co st-plus-a-percentage-of-cost contracting is prohibited outright.

SECTION 7.3

How do you price a government contract from the bottom up?

Every defensible price is built in layers, whether you bid janitorial work for a school district or an IT help desk for a federal office.

How a labor dollar becomes a price

01 **Direct labor**
Base hourly pay per labor category

↓

02 **+ Fringe**
Payroll taxes, benefits, paid time off

↓

03 **+ Overhead**
Indirect costs of delivering the work

↓

04 **+ G&A**
Cost of running the company

↓

05 **+ Profit**
Your return for risk

↓

06 **= Billing rate**
The hourly price you bid

Glossary

Fringe	Costs that follow each employee: payroll taxes, health insurance, retirement, paid time off. Usually a percentage of direct labor.
Overhead	Indirect delivery costs: non-billable supervisors, equipment, field offices, training.
G&A (general and administrative)	Company-wide costs: executive and accounting salaries, headquarters rent, insurance, proposal writing.
ODCs (other direct costs)	Non-labor costs charged to one contract, such as travel, materials and licenses.
Wrap rate	The multiplier that turns a dollar of direct labor into a billable price. A cost wrap stops before profit; a price wrap includes it.

Your indirect rates come from your books: divide each cost pool by its allocation base for the last full year, then adjust for known changes. New companies use a budget and should say so. Apply the same method on every bid; inconsistency is what reviewers question first.

SECTION 7.4

Wrap rate calculation: a worked example

A senior technician earns $83,200 a year ($40.00 an hour). This example company applies fringe to labor, overhead to labor plus fringe, and G&A to total cost. Your bases may differ; each rate must hit the right subtotal, in sequence.

TABLE **One fully loaded hourly rate (example rates, not benchmarks)**

Layer	Rate	Applied to	Adds	Running total
Direct labor		Base pay	$40.00	$40.00
Fringe	30%	$40.00	$12.00	$52.00
Overhead	40%	$52.00	$20.80	$72.80
G&A	12%	$72.80	$8.74	$81.54
Total cost (cost wrap 2.04)				**$81.54**
Profit	8%	$81.54	$6.52	$88.06
Billing rate (price wrap 2.20)				**$88.06**

WORKED EXAMPLE

The additive mistake, in dollars

✕ WEAK

> A bidder adds 30% + 40% + 12% + 8% = 90% and bids $40.00 × 1.90 = $76.00. That is $12.06 an hour short, about 14%. Over 2,000 hours, $24,120 is gone before the first problem. Multiply the layers (40 × 1.30 × 1.40 × 1.12 × 1.08); never add them.

With loaded rates, the price build is arithmetic. This 12-month firm-fixed-price IT support bid uses the same 2.20 wrap, and materials carry G&A and profit under the company’s disclosed practice.

TABLE **Example price build: 12-month IT support, firm fixed price**

Line	Base rate	Loaded rate	Hours or basis	Extended price
Project manager	$55.00	$121.08	200 hours	$24,216
Senior technician	$40.00	$88.06	1,600 hours	$140,896
Technician	$28.00	$61.64	1,000 hours	$61,640
Materials, travel, licenses			$6,500 + G&A + profit	$7,862
Total firm fixed price				**$234,614**

✕ COMMON MISTAKE **Common mistake: pricing 2,080 billable hours**

A full-time year is 2,080 paid hours, but holidays, vacation and sick days mean fewer reach the customer. Recover that time through fringe, and if a post must be covered all year, price the backfill hours.

SECTION 7.5

Price to win: the core of a government contract pricing strategy

Price to win (PTW) is a researched estimate of the price that wins this competition, given the budget, the evaluation method and likely competitors. Proposal professionals treat it as competitive assessment, not accounting. Your bottom-up price says what the work costs you; PTW says whether that number can win.

Price-to-win for a small team

1 **Find budget signals**

Look for a government estimate, stated budget, not-to-exceed figure or board resolution. Local budgets often appear in council or board agendas.

2. **Study the incumbent and past awards**
   Find what similar contracts were awarded for and who won. **Contractor profiles** show contract history, agencies served and contract-type mix; see **researching competitors** and **expiring contracts and recompetes**.

   > **Tip:** Adjust old values for inflation, scope changes and new wage schedules.

3. **Sketch likely competitors**
   A large firm with a downtown office and a lean local firm price very differently. Estimate each one's s tructure and staffing.

4. **Set and compare a target range**
   Write the range and your reasoning, for example "$1.05 to $1.20 million over three years," then compare it with your honest cost plus fair profit.

5. **Close gaps with the solution**
   Change the labor mix, add a qualified lower-cost subcontractor or remove management layers, then re-check the technical volume. See **teaming**.

6. **Make the call**
   Leadership signs off on price and risk. If reaching the range means a loss, use the **bid/no-bid scoring matrix** and consider walking away.

> ⚠ **WARNING** **Do not buy in blindly**
> Bidding below cost can win once, but you must perform at that price for every option year, a reviewer may rate it unrealistic, and it resets expectations for the recompete. If you invest in a contract, set the affordable loss deliberately and never misstate costs.

SECTION 7.6

Writing the basis of estimate and cost narrative

A **basis of estimate** (BOE) explains each number: hours, labor categories, rates and why. Write one even when only a price form is required; it catches errors and answers buyer questions.

WORKED EXAMPLE

Weak basis of estimate

✕ WEAK

> "Help desk support: 1,600 hours, based on our experience." No workload driver, no history, no link to the requirement. Nothing can be checked.

WORKED EXAMPLE

Strong basis of estimate

✓ STRONG

> "Help desk (Task 3, PWS 3.2): 1,600 senior technician hours. The PWS states 320 tickets a month. On our current school district contract (2,100 users, 2025 data), Tier 2 tickets averaged 0.42 hours. 320 × 12 × 0.42 = 1,613, reduced to 1,600 because self-service resets remove some tickets (Section 2). Rates: 2025 payroll escalated 3% for 2026."

TEMPLATE

Labor basis of estimate (one task)

Copy-ready online

Fill-in narrative for one task in a cost volume or pricing narrative.

WHEN TO USE — When the solicitation asks for a cost narrative or supporting detail, and as an internal record for every price you submit.

TASK: [TASK_NAME] ([SOLICITATION_REFERENCE])

Workload driver: [DRIVER_AND_QUANTITY] per [PERIOD], from [SOURCE_OF_DRIVER].

Method: [METHOD]

Calculation: [QUANTITY] x [HOURS_PER_UNIT] hours x [NUMBER_OF_PERIODS] = [TOTAL_HOURS] hours.

Evidence for hours per unit: [PRIOR_CONTRACT], [YEAR]: [HISTORICAL_RESULT].

Labor mix:
- [LABOR_CATEGORY_1]: [HOURS_1] hours, because [REASON_1]
- [LABOR_CATEGORY_2]: [HOURS_2] hours, because [REASON_2]

Rates: Direct rates from [RATE_SOURCE], escalated [ESCALATION_PERCENT] per year. Indirect rates per our established practice: fringe [FRINGE_RATE], overhead [OVERHEAD_RATE], G&A [GA_RATE].

Consistency: Matches Technical Volume Section [TECH_SECTION].

Task assumptions: [ASSUMPTIONS_OR_NONE]

FIELDS TO FILL IN · 6

[SOLICITATION_REFERENCE]	The buyer's task and paragraph number, such as Task 3, PWS 3.2.
[DRIVER_AND_QUANTITY]	What drives effort: tickets, square feet, sites, inspections, students.
[METHOD]	Historical actuals (strongest), analogy to a similar contract, or a reasoned engineering estimate.
[HISTORICAL_RESULT]	A measured result, such as 0.42 hours per ticket in 2025.
[RATE_SOURCE]	Current payroll, offer letters, a wage determination or a salary survey.
[TECH_SECTION]	The technical section describing the same staffing.

Order and number the narrative like the price form, just as the **proposal structure** chapter mirrors the solicitation. A longer version is in **pricing narrative and basis of estimate**.

SECTION 7.7

Pricing assumptions and exceptions

Assumptions state conditions your price depends on; exceptions refuse a term. In a sealed-bid IFB, almost any condition can make the bid nonresponsive. In an RFP, exceptions belong only where the instructions allow, and evaluators may score them as risk.

Assumptions that help vs assumptions that hurt

Helpful

- ✓ "Pricing assumes building access 7 a.m. to 6 p.m., per Section C.4."
- ✓ "Priced at 320 tickets a month (PWS 3.2); volumes above 400 would be handled under the changes clause."
- ✓ Each one restates the solicitation or fills a gap you raised in the question period.

Harmful

- ✗ "Price subject to change based on final scope." It turns an offer into a non-offer.
- ✗ "Agency provides all equipment," when the solicitation says you do. That is an exception in disguise.
- ✗ Boilerplate lists copied from another bid. See **assumptions and exceptions wording**.

> ☆ PRO TIP **Pro tip: turn assumptions into questions**
> If a gap would change your price, ask it in writing before the **question deadline**. The answer, issued to every bidder as an addendum, removes the need for the assumption.

SECTION 7.8

How prevailing wage changes your bid price

Many public contracts require at least a published wage and benefit rate for each trade or job title. These rates often exceed private-market pay, and they affect more than the hourly wage.

TABLE **Prevailing wage rules you are likely to meet (as of 2026)**

Rule	Where it applies	Pricing effect
Davis-Bacon (federal)	Federal construction, alteration and repair contracts over $2,000	Wage and fringe rates per craft from the wage determination, on every subcontract tier.
Service Contract Act (federal)	Federal service contracts over $2,500	Minimum wages plus a health and welfare benefit per hour, vacation and holidays.
New York Labor Law Article 8	Public work construction	County and trade schedules, updated each July 1; New York City publishes its own.
New York Labor Law Article 9	Building service work (cleaning, security, maintenance)	Separate schedules, also updated annually.
New Jersey and Connecticut laws	Public works above state thresholds, which change	Use the schedule in the solicitation for the project location.

- **Price the supplements.** Benefits are listed per hour; whatever your plans do not cover is paid as cash.
- **Escalate out-years.** Schedules change yearly. Read the price adjustment clause before assuming new rates will be paid.
- **Add compliance cost.** Certified payroll and apprenticeship rules take admin time.
- **Check subcontractor quotes.** Their shortfall becomes your liability.

> **NOTE** **General information, not legal advice**
> Coverage, rates and thresholds change. Use the schedule attached to the solicitation and confirm questions with the agency, the state labor department or a qualified advisor. See also **bonding, insurance and compliance**.

SECTION 7.9

Common pricing mistakes and how to avoid them

Most unprofitable bids fail on avoidable errors. Run this list during the **pricing review**.

Pricing quality check — CHECKLIST · 10 ITEMS

- [ ] The buyer's price form is completed exactly as instructed, with no added or deleted lines.
- [ ] Every extension and total recalculates (unit price × quantity = extended price).
- [ ] Rates multiply layers in sequence.
- [ ] Hours and staffing match the technical volume and resumes.
- [ ] Option years include escalation; no year is oddly low or high.
- [ ] Prevailing wage rates and annual increases are included.
- [ ] Subcontractor quotes are written, current and on the same scope.
- [ ] Assumptions hide no exceptions; all addenda are reflected.
- [ ] Bid security, if required, is the correct amount and form.
- [ ] Someone else checked the math, and an authorized officer approved the price in writing.

> **COMMON MISTAKE** **Common mistake: unbalanced unit prices**
> Loading cost into items you expect to grow looks clever, but buyers check. A materially unbalanced bid can be rejected, and an unprovable math error may bind you. Price each line at its real cost.

Approved prices move to final reviews and submission in the **next chapter**. Track the deadline on your **pipeline board**.

Frequently asked questions

How do you calculate a wrap rate for a government contract?

Multiply the direct hourly rate by each indirect layer in sequence: fringe, overhead, G&A, then profit. For example, $40.00 × 1.30 × 1.40 × 1.12 × 1.08 = $88.06, a price wrap of about 2.20. Your allocation bases depend on your accounting system, but the layers are multiplied, never added.

What is the difference between firm fixed price and time and materials?

Firm fixed price pays one agreed price for defined work, so you keep savings and absorb overruns. Time and materials pays fixed loaded hourly rates for hours worked plus materials at cost, up to a ceiling. Federal rules allow T&M only when the work cannot be estimated accurately, and since 2026 fixed price is the federal default.

Does the lowest price always win a government contract?

Only in low-bid procurements. A sealed-bid IFB goes to the lowest bidder that is responsive (meets every requirement) and responsible (able to perform). In a best-value RFP, price is weighed against technical approach and past performance, and a stronger offer can win at a higher price.

What is price to win?

A researched estimate of the price range likely to win a specific competition, based on the budget, past awards, the incumbent and likely competitors. If your cost plus fair profit fits the range, bid with confidence; if not, change the solution or decline to bid.

Do small businesses have to submit certified cost or pricing data?

Rarely on competitive bids. Federal rules require it mainly for larger negotiated contracts without adequate price competition, above a statutory threshold that rose to $10 million for defense contracts entered into after June 30, 2026. Check the current figure in the solicitation, and keep records, because buyers can still request other supporting data.

What profit margin should I use on a government bid?

On a competitive fixed-price bid there is no set legal margin; the competition sets it. Base your rate on the risk you carry, the capital tied up, and what still wins. Legal caps apply mainly to cost-plus-fixed-fee contracts (10% of estimated cost, 15% for research and development), and defense buyers use a structured weighted guidelines method when they negotiate profit without competition.

What should a basis of estimate include?

For each task: the requirement it prices, the workload driver and quantity, the estimating method, the hours calculation, evidence for hours per unit (ideally your own historical data), the labor mix, the source of rates and escalation, and a check that staffing matches the technical volume. Write it so an evaluator who does not know your business can follow every number.

Should I price low to win my first government contract?

Price to real cost plus reasonable profit, then compare with what wins. Below-cost pricing leaves you performing at a loss for the full term, may be judged unrealistic, and lowers expectations for the next round.

→ KEEP GOING

Reviews, Submission and Debriefs
Next: pricing review, submission, debriefs
rfpdetector.com/guides/how-to-write-a-winning-proposal/reviews-submission-and-debriefs

Technical and Management Approach
The solution your price must match
rfpdetector.com/guides/how-to-write-a-winning-proposal/technical-and-management-approach

Pricing and Compliance Templates
Copy-ready pricing forms
rfpdetector.com/guides/proposal-templates/pricing-and-compliance-templates

Bid/No-Bid Decision Framework
Walk away from unwinnable prices
rfpdetector.com/guides/how-to-find-government-contracts/bid-no-bid-decision-framework

Contractor profiles
Contract history for price-to-win research
rfpdetector.com/contractors

Search open RFPs
Find bids that fit your strengths
rfpdetector.com/search

END OF CHAPTER 7

Next: 08 Proposal Reviews, Submission, Debriefs and What Happens After Award

08

CHAPTER 8

Proposal Reviews, Submission, Debriefs and What Happens After Award

The last stretch decides more bids than the first draft. Review like an evaluator, submit without drama, and turn every award or loss into a better next proposal.

16 min read · 10 sections · Updated November 13, 2026

Read this chapter online

KEY TAKEAWAYS

- A simple proposal review process (blue, pink, red, gold) catches what writers cannot see, even with a team of two or three.
- Late is late: submit at least one business day early and keep proof of upload or delivery.
- Clarifications, discussions, orals and BAFOs each have rules about what you may change.
- Debriefing deadlines are short (3 days federally, 15 calendar days for New York State agencies), so request one in writing right away.
- Win or lose, a lessons-learned review within two weeks makes the next bid stronger.

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8.7 How do you request a debriefing, and what should you ask? 111
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8.9 After award: contract kickoff and the first 90 days 115
8.10 Close the loop: lessons learned for the next bid 116

A disciplined **proposal review process** is what separates a draft from a winning submission. After weeks of writing, your team can no longer see gaps, contradictions or missed requirements; a structured review can. This chapter covers color team reviews scaled for small businesses, the final compliance check, submission logistics, clarifications, orals and best and final offers, what happens at award, how to get a useful debriefing, protests at a high level, and how to start the contract well.

> **NOTE** **Before you start**
>
> Have your **compliance matrix**, your outline from **proposal structure and compliance** and your win themes from **capture planning**. Reviewers judge the draft against all three.

SECTION 8.1

Color team reviews: blue, pink, red and gold

Color team reviews are checkpoints named by a long-standing industry convention. Each asks one question at one stage, so reviewers are not trying to fix strategy, wording and formatting at once. Names vary between companies; the questions matter more than the colors.

TABLE **The core color team reviews**

Review	When	Question it answers	Who reviews
Blue team (strategy)	Before writing starts	Are we bidding the right solution, with themes that match the evaluation criteria?	Owner, capture lead, pricing lead
Pink team (outline or first draft)	About a third of the way through	Does every requirement have a home, and does the story hold together?	Section leads plus one outsider
Red team (full draft)	Near-final, with days left to fix	How would an evaluator score this against the stated criteria?	People who did not write it
Green team (price)	Alongside red	Is the price competitive, approved and consistent with the technical volume?	Pricing lead, finance, executive
Gold team (sign-off)	After red-team fixes	Will we commit to this price and these promises?	Officer who can bind the company
White glove (production)	The day before submission	Is every file, page, form and signature right?	A fresh pair of eyes

PRO TIP **Pro tip: score with the buyer's words**

Give red team reviewers the evaluation criteria and the rating scale from the solicitation, and ask for findings as strengths, weaknesses, deficiencies and risks. That is how the real evaluators will write them up. For the summary, use the **executive summary review checklist**.

SECTION 8.2

How to run the proposal review process with a small team

You do not need a proposal department. Merge blue and pink if time is short, fold green into red on simple fixed-price bids, and keep red team independent. Borrow a reviewer from a teaming partner, an advisor or your local APEX Accelerator if no one inside is free.

Example: a 15-business-day response with three people

Days 1–2 — **Shred and blue huddle**
Build the compliance matrix and outline, then a 60-minute strategy check of solution, themes and price target.

Day 5 — **Pink review**
Bulleted or rough sections against the matrix. Fix structure now, while it is cheap.

Day 9 — **Red and green review**
Complete draft and draft price. An outside reviewer scores it; pricing is checked against the staffing.

Days 10–11 — **Fix findings**
Resolve every red finding, highest-scoring factors first.

Day 12 — **Gold sign-off**
An officer approves final price, commitments and exceptions.

Days 13–14 — **White glove and submit**
Production check, final compliance check, then upload a day early.

WORKED EXAMPLE

Weak reviewer comment

✕ WEAK

> "Section 3 is weak. Needs more punch." The writer cannot tell what is wrong, where, or why it matters to the score.

WORKED EXAMPLE

Strong reviewer comment

✓ STRONG

> "Section 3.2 never answers PWS 4.1(c), weekend coverage. Factor 2 rates staffing coverage, so an evaluator would likely assign a weakness. Add the weekend on-call rotation from the staffing plan and cite PWS 4.1(c) in the heading."

✕ COMMON MISTAKE **Common mistake: reviewers who rewrite**

Reviewers should find and explain problems, not redraft sections. Rewrites arrive late, clash with the rest of the volume and bury the real findings. Writers own the fixes.

SECTION 8.3

The final compliance check

Run this after the last edit, not before. Late edits break page counts, cross-references and price totals. Use the buyer's instructions and your compliance matrix as the master list; the structural checks are in the compliance review checklist.

Final compliance checklist CHECKLIST · 9 ITEMS

- [ ] Every requirement in the compliance matrix points to a page in the final version.
- [ ] Page limits, fonts, margins, file formats and file names follow the instructions exactly.
- [ ] Every addendum is acknowledged in the way the solicitation requires (see tracking amendments).
- [ ] Required forms are complete and signed by an authorized person, and notarized where required.
- [ ] Price math rechecked after the last change; price appears only where the instructions allow.
- [ ] Bid security, insurance evidence, licenses and certifications are attached as required.
- [ ] State or local forms (for example New York's vendor responsibility questionnaire) and any diversity u tilization plan are included when required.
- [ ] PDFs open, are searchable, and contain no tracked changes, comments or hidden text.
- [ ] Hard copies: correct number of originals, copies and drives, sealed and labeled as instructed.

SECTION 8.4

Submitting your proposal: portals, hard copies and late is late

Submit without drama

1. **Register on the portal early**
   Accounts, user roles and approvals on e-procurement portals can take days. Set them up when you decide to bid, using your vendor registrations.

2. **Test the upload**
   Check file size limits, accepted formats and how many files each field takes. Split or compress files before deadline day.

3. **Upload at least one business day early**
   Treat the real deadline as a day earlier. Portals slow down near closing, and a stuck upload is still late.

   > **Tip:** Save the confirmation receipt and a screenshot with the time stamp.

4. **Plan hard-copy delivery**
   Use a tracked courier or deliver by hand. Allow for building security and confirm the exact room. The buyer's time stamp, not yours, decides.

5. **Avoid email if you can**
   If email is required, watch size limits and ask for a confirmation of receipt.

> ⚠ **WARNING** **Late is late**
>
> Federal rules (FAR Part 15) allow only narrow exceptions for late proposals: an electronic proposal that reached the government's initial point of entry by 5:00 p.m. one working day before the deadline, a proposal already under government control at the designated office, or the only proposal received, a nd then only if accepting it would not delay the award. Federal bid protest decisions have generally r efused to stretch the government-control exception to electronic submissions. Many state and local b uyers return late bids unopened. Plan as if no exception exists.

For a sealed-bid IFB, bids are opened and usually read aloud at the stated time. You can attend or ask for the bid tabulation. Your price is fixed once bids are opened, and mistakes found afterward are handled under strict rules, not by revising.

SECTION 8.5

Clarifications, orals and BAFO

In negotiated procurements the buyer may contact you after submission. Know which kind of exchange it is, because the rules on changing your proposal differ. Low-bid IFBs have none of these steps.

TABLE **Exchanges after submission**

Exchange	What it is	Can you revise?	How to respond
Clarification	Limited questions when the buyer plans to award without discussions	No	Answer exactly what is asked, on time, using a **clarification response letter**.
Communications	Questions before the competitive range is set, often about past performance	No	Clear up ambiguity without adding new content.
Discussions	Negotiations with offerors in the competitive range; the buyer must raise deficiencies and significant weaknesses	Yes	Fix every issue and check that fixes do not break other sections or the price.
Oral presentation	A live or virtual presentation, sometimes replacing written sections	As the solicitation says	Rehearse with the people who will do the work, and keep to time.
BAFO or final proposal revision	Your last chance to revise after discussions	Yes, then it is final	Submit a complete, compliant revision and rerun all math and compliance checks.

PRO TIP **Pro tip: BAFO means best, not lowest**

State and local buyers call it a best and final offer; federal rules call it a final proposal revision. Cut price only where your basis of estimate supports it; see **pricing strategy**. Strengthening weak sections can matter as much as price.

SECTION 8.6

Award: what happens when you win or lose

Evaluation can take weeks or months. When it ends, the buyer notifies offerors, but the notice is not always the final step. Watch for the dates in each notice, because debriefing and protest clocks start from them.

- **Federal:** unsuccessful offerors get written notice. On small business set-asides, a pre-award notice names the apparent winner, and a size protest generally must reach the contracting officer within 5 business days.
- **New York State:** most agency contracts over $50,000 need approval from the state's contract a pproval authority before they take effect (some agencies have higher limits).
- **New York City:** contracts must be registered before they take effect; see **insurance and compliance for NYC contracts**.
- **New Jersey state contracts:** bidders receive a notice of intent to award, and awards are held 10 business days for protests.

> ✕ COMMON MISTAKE **Common mistake: starting work on a phone call**
>
> Do not hire, buy materials or start work until you hold a fully executed contract, purchase order or written notice to proceed. Costs incurred earlier may never be paid.

SECTION 8.7

How do you request a debriefing, and what should you ask?

A debriefing is the buyer's explanation of how your proposal was evaluated. It is the cheapest lesson y ou will get, whether you won or lost. Deadlines are short, so request one in writing the day the notice a rrives.

TABLE **Debriefing rights and deadlines (as of 2026)**

Procurement	Your right	When to ask
Federal negotiated (FAR Part 15)	Required on timely written request	Within 3 days of the award or exclusion notice; usually held within about 5 days
Federal defense awards	Enhanced debriefing with written follow-up questions	Follow-up questions within 2 business days of the debriefing

Procurement	Your right	When to ask
Federal simplified acquisitions	Usually a brief explanation on request; larger task orders can carry debriefing rights	Promptly after notice
New York State agencies	Required on request (State Finance Law §163)	Within 15 calendar days of the notice that you were unsuccessful
Sealed-bid IFBs	No debrief; bids are opened publicly	Request the bid tabulation
Other state, local and private buyers	Varies; many agree if asked	Within a week, or as the solicitation says

Questions to ask in a debriefing

CHECKLIST · 7 ITEMS

- [ ] What were the significant strengths, weaknesses and any deficiencies in our proposal?
- [ ] What ratings did we and the awardee receive on each factor, and how did our evaluated price compare?
- [ ] How was our past performance rated?
- [ ] What was the main reason for the award decision?
- [ ] Was anything hard to find, unclear or noncompliant?
- [ ] What would make our next proposal to your office stronger?
- [ ] Are related or follow-on procurements expected?

TEMPLATE

Debriefing request

Copy-ready online

A short email request. A formal letter with federal, New York State and other-buyer versions is in the **debrief request letter template**.

WHEN TO USE Send by email the same day you receive an award or exclusion notice, addressed to the contracting officer or the contact named in the solicitation.

Subject: Debriefing request: [SOLICITATION_NUMBER], [SOLICITATION_TITLE]

Dear [CONTACT_NAME],

Thank you for your notice dated [NOTICE_DATE] regarding [SOLICITATION_NUMBER]. [COMPANY_NAME] respectfully requests a debriefing [REGULATION_REFERENCE].

We would welcome an oral debriefing by phone or video, or a written debriefing if you prefer. We are available [AVAILABLE_DATES].

To use your time well, we would appreciate discussing our proposal's significant strengths, w eaknesses and any deficiencies; our ratings and evaluated price compared with the awardee's; th e basis for the award decision; and any suggestions for future proposals.

Point of contact: [POC_NAME], [POC_TITLE], [POC_PHONE], [POC_EMAIL].

Thank you for your consideration.

[SIGNATORY_NAME]
[SIGNATORY_TITLE], [COMPANY_NAME]

FIELDS TO FILL IN · 3

[NOTICE_DATE]	The date on the award or exclusion notice. Deadlines run from it, so send promptly.
[REGULATION_REFERENCE]	Optional, for example "under FAR Part 15" or "under State Finance Law §163." Leave blank if unsure.
[AVAILABLE_DATES]	Two or three windows within the next week.

COMMON MISTAKE **Common mistake: arguing in the debrief**

Listen, take notes and thank the evaluators. Buyers will not share point-by-point comparisons or competitors' confidential pricing, so do not push. A defensive debrief costs goodwill you will need n ext time.

SECTION 8.8

Bid protests at a high level

A protest is a formal challenge claiming the buyer broke the rules or its own evaluation criteria. It is not an appeal of reasonable judgment calls. Protest when the record shows a clear, material error that likely changed the outcome.

TABLE **Where protests go (deadlines are short and strictly enforced)**

Forum	Typical deadline	Notes
Federal agency-level protest	Solicitation problems before the closing time; award issues generally within 10 days	Filed with the contracting officer or as the solicitation directs. Often faster and cheaper.
GAO (federal)	Solicitation defects before closing; otherwise 10 calendar days from when you knew the basis, or 10 days after a required debriefing	Decides within 100 calendar days. A fast filing generally pauses performance. Task order protests only above $10 million (civilian) or $35 million (defense).
New York State	As the agency's procedure in the solicitation s tates	Agency first; appeal to the state's contract a pproval authority within 10 business days of t he decision. No automatic stay.
New Jersey state contracts	10 business days after notice of intent to award	Filed with the Division of Purchase and Property.
NYC, Connecticut and local buyers	As the solicitation and the buyer's rules state	Often short; check calendar versus business days.

NOTE **General information, not legal advice**

Protest rules are changing in 2025–2026 with the FAR overhaul and new defense rules. Confirm deadlines in the solicitation and talk to procurement counsel quickly. You can file at GAO without a lawyer, but only attorneys can see protected material.

Is it worth protesting?

Grounds that can succeed

- ✓ The buyer used criteria or weights the solicitation never stated.
- ✓ Your proposal was scored on something it did not say, or a clear statement was ignored.
- ✓ Discussions were held with some offerors but not others.
- ✓ The winner did not meet a mandatory requirement.

Grounds that usually fail

- ✗ "Our approach was better." Evaluators get deference on reasonable judgments.
- ✗ Complaints about solicitation terms raised only after award.
- ✗ Issues you learned of weeks ago, filed after the deadline.
- ✗ Errors that would not have changed who won.

SECTION 8.9

After award: contract kickoff and the first 90 days

Winning starts a new clock. The first weeks set the tone for the whole contract and for the reference you will cite next time, so treat start-up as a project with its own owner and checklist.

1. **Return the paperwork fast**
   Signed contract, insurance certificates (often naming the buyer as additional insured), performance and payment bonds, tax forms. See **bonding and insurance**.
2. **Set up to get paid**
   Complete payee setup with the buyer, such as a New York State Statewide Financial System vendor ID, and confirm invoice format and approver.
3. **Hand off internally**
   Brief the delivery team on every promise. Your compliance matrix becomes the performance checklist.
4. **Hold the kickoff meeting**
   Confirm contacts, reports, schedule, invoicing, key personnel and subcontractors. Only the contracting officer can change the contract.
5. **Earn your past performance**
   Early wins and clean records shape future references and federal performance evaluations; add each project to your **past performance library**. Templates are in **post-award contract templates**.

SECTION 8.10

Close the loop: lessons learned for the next bid

Within two weeks of any outcome, hold a 45-minute review: what worked, what evaluators flagged, and what to change. Save reusable sections and actual hours to sharpen the next **basis of estimate**.

In RFP Detector, move the bid on your **pipeline board** to Won or Lost, recording the award amount and date or the loss reason (Price, Technical, Past performance, Eligibility, Other), and add debrief notes to the item. Reports then show outcomes by month and your most common loss reasons. Set an alert for the **recompete** and **search** for the next fit, or revisit the **bid/no-bid framework**.

Frequently asked questions

What are color team reviews in proposal writing?

Staged reviews, each named for a color, that test a proposal at different points: blue for strategy, pink for structure, red for an evaluator-style score of the full draft, green for price, gold for executive sign-off and white glove for final production. Small teams combine some stages but should keep an independent red team.

What is the difference between a pink team and a red team review?

Pink team reviews an early outline or rough draft to confirm every requirement has a home and the story works. Red team reviews a near-final draft as evaluators would, scoring it against the solicitation's c riteria, and should be done by people who did not write it.

How do I request a debriefing after losing a government contract?

Email a written request to the contracting officer or named contact as soon as you get the notice. Federal negotiated procurements require a request within 3 days of the notice; New York State agencies require one within 15 calendar days. Name the solicitation, ask for an oral or written debriefing, and list the topics you want covered.

What questions should I ask in a debriefing?

Ask for the significant strengths, weaknesses and deficiencies in your proposal; your ratings and evaluated price compared with the winner's; how your past performance was rated; the main reason for t he award; and what would make your next proposal stronger. Do not expect point-by-point comparisons o r competitors' confidential data.

Q Will a late proposal ever be accepted?

Rarely. Federal rules allow narrow exceptions, such as an electronic proposal that reached the government's system by 5:00 p.m. one working day before the deadline, and only if accepting it w ould not delay award. Many state and local buyers allow none. Submit at least a day early and keep p roof.

Q What is a BAFO in an RFP?

A best and final offer is the last revised proposal the buyer requests after discussions or negotiations. Federal rules call it a final proposal revision. It replaces your earlier offer, so it must be complete and compliant, and price changes should be supported by your estimate.

Q How long do I have to file a bid protest?

Usually days, not weeks. Federal protests at GAO generally must be filed within 10 calendar days of when you knew the basis, and solicitation problems before the closing time. New York State and New Jersey state procedures count in business days. Check the solicitation and talk to counsel immediately.

Q What happens after a government contract is awarded?

The winner signs the contract and returns insurance certificates, bonds and other required documents. Some contracts must also be approved or registered before they take effect, as in New York State and New York City. Then the buyer holds a kickoff meeting, work begins under a notice to proceed, and invoicing and performance reporting start. Do not begin work until the contract is fully executed.

→ KEEP GOING

Pricing Strategy and Cost Proposals
Previous: build a price that survives review
rfpdetector.com/guides/how-to-write-a-winning-proposal/pricing-strategy-and-cost-proposals

Proposal Structure and Compliance
The matrix every review checks against
rfpdetector.com/guides/how-to-write-a-winning-proposal/proposal-structure-and-compliance

Bid Management Templates and Checklists
Review forms and submission checklists
rfpdetector.com/guides/proposal-templates/bid-management-templates-and-checklists

Tracking Bids, Pipeline and Alerts
Record outcomes and watch for recompetes
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

RFPs closing soon
Deadlines coming up
rfpdetector.com/rfps/closing-soon

Create an account
Save RFPs and track every bid
rfpdetector.com/sign-up

END OF CHAPTER 8

RFP Detector

Put this handbook to work. Find your next RFP.

RFP Detector brings government, education, nonprofit and private-sector RFPs into one place, so you spend less time hunting and more time writing proposals you can win.

- Search and filter open RFPs from public and private buyers
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- Save RFPs, track bids on your pipeline board and get alerts for new matches
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1. How to Find Government Contracts and RFPs
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3. How to Respond to an RFP and Write a Winning Proposal
   You are reading this handbook
4. RFP Response and Proposal Templates
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