RFP Detector

HANDBOOK 4 OF 5



THE RFP DETECTOR HANDBOOKS

RFP Response and Proposal Templates

Copy-ready, fill-in templates for every document in a bid, from the intent-to-bid letter and capability statement to the executive summary, compliance matrix, past performance and post-award forms, with guidance on adapting each one.

8 chapters | All levels | About 295 min read | 2026 edition

RFP Detector

RFP Response and Proposal Templates

Handbook 4 of 5 in the RFP Detector handbook series

EDITION
November 2026 edition

LAST UPDATED
November 13, 2026

SERIES
Handbook 4 of 5

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⚠ 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

Most proposals are not lost for lack of good ideas. They are lost to the blank page and the clock: a cover letter written at midnight, a capability statement that does not match the registrations, a compliance matrix nobody built. A team that starts every document from a tested structure spends its limited hours on what evaluators actually score: understanding the buyer's need, proving capability and pricing sensibly. This handbook gives you copy-ready **RFP response templates** for every document in a bid, from the first letter you send to the forms you use after award, each with guidance on when to use it, what every placeholder means and how to adapt it.

It is written for small and mid-sized businesses, consultants and nonprofits bidding on public work in New York, New Jersey and Connecticut and on federal contracts, and it works just as well for private-sector and foundation RFPs. New to public contracting? Start with the first two chapters: the letters and the capability statement you will use before a solicitation is even released. Bidding regularly? Jump straight to the document on your desk today.

How to use a template in this handbook

1. **Read the solicitation first**
   List every instruction that affects the document: required forms, page limits, outline, wording, signatures and file names. Those always override the template.
2. **Copy the template and replace every placeholder**
   Each template is plain text with [SQUARE_BRACKET] fields and a field guide explaining what goes in each one. Search for the bracket character before you finish, so nothing slips through.
3. **Tailor it to how you will be scored**
   Reorder, cut and add so the document answers the evaluation criteria in the buyer's own words, and keep your win themes consistent from the cover letter to the price narrative.
4. **Review it like an evaluator**
   Have someone who did not write it check it against the solicitation and the compliance matrix, then save the final version, signed where required, in your bid file.

TABLE **Which templates do you need right now?**

If you are...	Start with
Introducing your company to buyers, primes or purchasing offices	**Capability Statement Templates** and the **bidders list request letter**
Deciding whether to bid	The **bid/no-bid framework**, then the **intent-to-bid** or **no-bid** letter
Writing the proposal itself	**Executive Summary Templates**, **Technical Approach and Management Plan Templates** and **Past Performance, Case Study and Resume Templates**
Pricing the bid and proving compliance	**Pricing Narrative and Compliance Matrix Templates**
Running the bid team and schedule	**Bid Management Templates and Checklists**
Submitting the package	The **proposal cover letter and sealed-bid transmittal templates**
Starting a contract you just won	**Post-Award Contract Management Templates**

TIP **The one rule that beats every template**

The solicitation always wins. If an RFP supplies its own form, outline, page limit or required wording, follow it exactly and use these templates only to fill in the substance. Each chapter links to the matching how-to chapter in **How to Respond to an RFP and Write a Winning Proposal**, and you can find solicitations to put the templates to work on with **RFP Detector search** and **alerts**.

WHAT YOU WILL LEARN

- Start every bid document from a proven structure, from the cover letter and capability statement to the executive summary, technical approach and pricing narrative
- Adapt each template for construction and trades, IT, professional services and nonprofit human services bids
- Build compliance matrices, schedules and checklists that keep a proposal on track and fully responsive
- Present past performance, key personnel and pricing in formats evaluators can score quickly
- Handle intent-to-bid, no-bid, clarification and debrief correspondence professionally, so every contact strengthens the relationship
- Run the first months of a new contract with ready-made post-award templates

WHO IT IS FOR
Small and mid-sized businesses, consultants and nonprofits preparing public or private bids who want a strong, compliant first draft fast

LEVEL
All levels

CHAPTERS
8 chapters, about 295 minutes of reading

Every chapter is also published online and kept current:
rfpdetector.com/guides/proposal-templates



01

CHAPTER 1

RFP Cover Letter, Transmittal and Intent-to-Bid Templates

Six copy-ready letters that open, accompany, announce, decline and request bids, with guidance on what each must say, who signs it, and how to adapt it for construction, IT, professional services and nonprofit work.

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

Read this chapter online

KEY TAKEAWAYS

- The solicitation's instructions beat any template: if the buyer supplies a transmittal form or cover-page format, use it exactly and add nothing it does not ask for.
- An RFP cover letter is a one- to two-page business letter that confirms compliance, previews three provable reasons to choose you and is signed by someone authorized to bind your company.
- A sealed-bid transmittal letter is a signed checklist: what is enclosed, which addenda you acknowledge, how long your prices stay firm and who can commit the company. Prices stay on the bid form.
- A letter of intent to bid is usually non-binding, but some solicitations make it mandatory to receive addenda or to submit at all, so treat its deadline like a due date.
- A short, courteous no-bid letter protects your place on bidders lists that drop vendors who never respond, and it gives the buyer feedback that can reshape the next solicitation.
- Bidders list requests work best when they name exact service codes, certifications and a monitored contact, and when you pair them with your own saved searches and alerts.

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A strong **RFP cover letter** will not win a contract on its own, but a careless one can lose points, or the whole bid, before an evaluator reaches page one. The other letters around a bid do quieter work: they put you on the list that receives addenda, confirm that a sealed bid contains everything the buyer asked for, keep the door open when you decline, and introduce your company to purchasing offices before their next solicitation. This chapter gives you an RFP cover letter template and five more copy-ready templates, explains what each letter must say, and shows how to adapt them for construction, IT, professional services and nonprofit bids.

Every template uses [SQUARE_BRACKET] placeholders and comes with a field guide. Copy it, replace every placeholder, then check the result against the solicitation's instructions line by line. For how the cover letter fits into the full proposal package, read **Proposal Structure, Formatting and Compliance** in the proposal-writing handbook.

SECTION 1.1

Which bid letters do you need, and when do you send each one?

Most small businesses only think about the cover letter. Over the life of one opportunity you may send four or five different letters, to different people, with very different stakes. Knowing which is which keeps you from over-writing the simple ones and under-preparing the one that can disqualify you.

TABLE **The bid letters in this chapter, side by side**

Letter	When you send it	Who receives it	Typical length	What is at stake
Proposal cover letter	With the proposal, as its first page or a separate upload	The contracting officer or evaluation committee named in the RFP	1 to 2 pages	First impression; may carry required statements and an authorized signature
Sealed-bid transmittal letter	Inside the sealed bid package or as the first file uploaded	The purchasing office or bid clerk named in the invitation for bids	1 page, often on the buyer's form	Can be a responsiveness item: a missing signature or addendum acknowledgment can sink the bid
Electronic submission email	When the solicitation allows delivery by email	The designated contact or submission mailbox	Under 1 page	Proof of what you sent and when; a clean record if a file fails to open

Letter	When you send it	Who receives it	Typical length	What is at stake
Letter of intent to bid	After your bid decision, by the intent deadline if one is set	The designated procurement contact	Under 1 page	Usually non-binding; sometimes required to receive addenda or to submit
No-bid letter	As soon as you decide not to bid, before the due date	The procurement contact or whoever invited you	Under 1 page	Protects the relationship and your place on the bidders list
Bidders list request	Any time, ideally before the buyer's next buying cycle	The purchasing or procurement office	1 page plus your capability statement	Invitations to quotes and informal bids that are not widely advertised

Glossary

Transmittal letter — A formal letter that accompanies (transmits) a bid or proposal, lists what is enclosed and confirms required statements. Buyers also call it a letter of submittal, offer letter or proposal cover page, and many supply their own form.

Bidder and offeror — The company submitting the offer. *Bidder* is the usual word in sealed bidding (invitations for bids); *offeror* is the usual word in negotiated RFPs. The difference is explained in **Types of Solicitations**.

Authorized signatory — A person with legal authority to commit your company to a contract: usually an owner or officer, or someone with written delegation. Many solicitations require the cover letter, bid form or affidavits to be signed by this person.

Acceptance period (bid validity) — How long your prices and offer stay open for the buyer to accept. The solicitation normally states it. Never shorten it in your letter.

Addendum (amendment) — A formal change to the solicitation issued before the due date. Buyers often require you to acknowledge each one by number and date.

Designated contact — The procurement person you may communicate with during the solicitation. In New York State procurements, the Procurement Lobbying Law limits contact during the restricted period to the designated contacts named in the solicitation, and many other buyers have similar rules. See **New York State procurement rules for bidders**.

Responsive and responsible — A *responsive* bid conforms to all material requirements of the solicitation. A *responsible* bidder is one the buyer judges able to perform (finances, experience, integrity). A non-responsive bid can be rejected without evaluation.

SECTION 1.2

Before you write: what the solicitation may already dictate

Government buyers often prescribe the form, content and signature of the cover letter or transmittal letter. Federal negotiated solicitations commonly include standard instructions requiring the first page of a proposal to show the solicitation number, your name, address and contact details, a statement of the extent to which you agree with the solicitation's terms, the names of the people authorized to negotiate for you, and the name, title and signature of the person authorized to sign.

State and local RFPs frequently attach their own transmittal form instead. When a form exists, use it as written and fill in only the blanks. Some buyers state outright that an unsigned or altered transmittal letter makes the proposal non-responsive. A template is for the many cases where the buyer asks for a cover letter but does not say what goes in it.

> **TIP** **Before you start**
>
> Search the solicitation for these words: *cover letter*, *transmittal*, *letter of submittal*, *offer letter*, *proposal form*, *signature*, *acknowledg* (to catch both acknowledge and acknowledgment), *validity*, *page limit* and *format*. Copy every requirement you find into your compliance matrix before you draft a word.
>
> The **compliance matrix template** and **How to Read and Shred an RFP** show how to build that matrix in under an hour.

Confirm these eight points before drafting any bid letter — CHECKLIST · 8 ITEMS

- [ ] Is there a required form, cover page or letter format? If yes, use it and skip the template.
- [ ] Who must sign (owner, officer, anyone authorized), and must the signature be original ink, digital or notarized?
- [ ] Does the cover letter count toward the page limit, and is a cover letter allowed at all?
- [ ] Which addenda have been issued, and how must each be acknowledged?
- [ ] How long must your offer remain valid (the acceptance period)?
- [ ] Who is the designated contact, and is there a restricted communication period?
- [ ] Which exact legal name, address and identifiers must appear (legal name and DBA, EIN, state vendor ID, Unique Entity ID for federal work)?
- [ ] Is submission electronic, paper or both, and what file names or envelope labels are required?

SECTION 1.3

RFP cover letter template: how to write one evaluators actually read

Think of the proposal cover letter as a handshake, not a summary. In under a minute it should prove three things: you read the solicitation, you comply with it, and you have a clear reason to be chosen. The detail belongs in the executive summary and the body of the proposal; the next chapters, **Executive Summary Templates** and **Writing a Winning Executive Summary**, cover that document.

Keep it to one page if you can and two at most, unless the buyer prescribes a format. Address it to the person or committee the RFP names, never "To Whom It May Concern." Have it signed by an owner or officer who can bind the company, even if someone else drafted it, and make sure its promises match the rest of the proposal word for word.

The five-paragraph cover letter

01 **Name the opportunity**
Exact solicitation title and number, and one sentence of thanks.

↓

02 **Show you understand the goal**
Restate the buyer's outcome in their own words: what must be true when the contract succeeds.

↓

03 **Confirm compliance**
Say the proposal answers every requirement, acknowledge all addenda and confirm the offer validity period.

↓

04 **Give three reasons**
Three short, provable differentiators tied to the evaluation criteria.

↓

05 **Close with authority**
Name the contact authorized to negotiate and sign as someone who can bind the company.

What separates a strong cover letter from a weak one

Strong

- Addressed to the named contracting officer or committee, using the exact solicitation title and number
- One sentence of thanks, then straight to the buyer's goal
- Three differentiators backed by numbers, names or credentials
- An explicit compliance statement and addenda acknowledgment
- Signed by an officer, with a direct phone and a monitored email for the contact person

Weak

- "To Whom It May Concern" and a wrong or missing solicitation number
- A paragraph of company history that evaluators can find elsewhere in the proposal
- Adjectives with no proof: world-class, committed to excellence, best in class
- Exceptions to the terms tucked into the letter instead of where the RFP asks for them
- Signed by someone who cannot legally commit the company

TEMPLATE

Standard proposal cover letter

Copy-ready online

A one-page cover letter for negotiated RFPs from public agencies, nonprofits and private buyers. It follows the five-paragraph structure above and includes the statements federal and most state instructions expect on a proposal's first page.

WHEN TO USE Use it when the solicitation asks for a cover letter or letter of transmittal but does not supply a form. If a form is supplied, use the form instead.

[COMPANY_LETTERHEAD]

[DATE]

[CONTACT_NAME], [CONTACT_TITLE]
[AGENCY_OR_ORGANIZATION_NAME]
[DEPARTMENT_OR_OFFICE]
[STREET_ADDRESS]
[CITY], [STATE] [ZIP]

Re: Proposal for [SOLICITATION_TITLE], [SOLICITATION_NUMBER]

Dear [SALUTATION] [CONTACT_LAST_NAME]:

Thank you for the opportunity to respond to [AGENCY_OR_ORGANIZATION_NAME]'s request for proposals for [SOLICITATION_TITLE]. [COMPANY_LEGAL_NAME] is pleased to submit the enclosed proposal.

We understand that [AGENCY_SHORT_NAME] needs [BUYER_OBJECTIVE_IN_ONE_SENTENCE]. As we read the solicitation, success means [MEASURABLE_OUTCOME_1] and [MEASURABLE_OUTCOME_2], delivered [KEY_CONSTRAINT]. Our proposal is built around those outcomes.

Our proposal responds to every requirement in the solicitation, including Addenda [ADDENDA_NUMBERS], which we acknowledge. We accept the terms and conditions of the solicitation without exception. [IF_EXCEPTIONS: replace the previous sentence with "Our exceptions to the terms and conditions appear in [EXCEPTIONS_LOCATION], as the solicitation directs."] Our offer remains valid for [VALIDITY_PERIOD] calendar days from the proposal due date.

Three reasons [AGENCY_SHORT_NAME] can choose [COMPANY_SHORT_NAME] with confidence:

1. [DIFFERENTIATOR_1]. [PROOF_1]
2. [DIFFERENTIATOR_2]. [PROOF_2]
3. [DIFFERENTIATOR_3]. [PROOF_3]

[OPTIONAL_TEAM_OR_CERTIFICATION_SENTENCE]

[NEGOTIATOR_NAME], [NEGOTIATOR_TITLE], is authorized to negotiate on our behalf and will be your point of contact for questions and clarifications. [NEGOTIATOR_FIRST_NAME] can be reached at [PHONE] or [EMAIL].

We would welcome the opportunity to [NEXT_STEP]. Thank you for your consideration.

Sincerely,

[SIGNATURE]

[SIGNER_NAME]
[SIGNER_TITLE]
[COMPANY_LEGAL_NAME]
[COMPANY_ADDRESS]
[IDENTIFIER_LABEL]: [IDENTIFIER]

FIELDS TO FILL IN · 16

[COMPANY_LETTERHEAD]	Your logo, legal name, address, phone and website. Use the legal name exactly as registered with the buyer.
[CONTACT_NAME], [CONTACT_TITLE]	The designated contact or evaluation committee chair named in the RFP. If none is named, address the procurement office by title.
[SOLICITATION_TITLE], [SOLICITATION_NUMBER]	Copy both exactly from the solicitation cover page, including punctuation and prefixes.

[BUYER_OBJECTIVE_IN_ONE_SENTENCE]	The outcome the buyer wants, in its words, e.g. "a reliable custodial program that keeps five elementary schools inspection-ready."
[MEASURABLE_OUTCOME_1], [MEASURABLE_OUTCOME_2]	Results tied to the scope or evaluation criteria, e.g. "100% of work orders closed within 48 hours."
[KEY_CONSTRAINT]	The condition that matters most to the buyer, e.g. "without disrupting classes" or "within the grant period ending June 30."
[ADDENDA_NUMBERS]	Every addendum issued, by number (e.g. "1 through 3"). If none were issued, say so.
[EXCEPTIONS_LOCATION]	Only if you take exceptions: the section or form where the RFP tells you to list them.
[VALIDITY_PERIOD]	The acceptance period the solicitation requires, or longer. Never shorter.
[DIFFERENTIATOR_1] to [DIFFERENTIATOR_3]	Your three win themes, each one short phrase, e.g. "Two-hour emergency response."
[PROOF_1] to [PROOF_3]	One sentence of evidence each: a metric, a named client, a credential or a commitment the proposal backs up.
[OPTIONAL_TEAM_OR_CERTIFICATION_SENTENCE]	Certifications you currently hold or key teaming partners, e.g. "[COMPANY] is a New York State certified WBE, and our team includes [PARTNER], a certified SDVOB, for [SCOPE]." Delete if not relevant.
[NEGOTIATOR_NAME], [NEGOTIATOR_TITLE]	The person authorized to negotiate and answer clarifications. Give a direct line and an inbox someone checks daily during evaluation.
[NEXT_STEP]	A modest, relevant offer, e.g. "present our approach at an oral presentation" or "walk the sites with your facilities team."
[SIGNER_NAME], [SIGNER_TITLE]	An owner or officer authorized to bind the company.
[IDENTIFIER_LABEL]: [IDENTIFIER]	The identifier the buyer uses, e.g. "UEI" for federal work, a state vendor ID, or a city vendor number.

WORKED EXAMPLE

Filled-in excerpt: a custodial services bid to a Long Island school district

✓ STRONG

> **Re:** Proposal for Custodial Services, Five Elementary Schools, RFP 2026-14
>
> "We understand that the District needs a custodial program that keeps five elementary buildings clean, safe and inspection-ready without disrupting the school day. As we read the RFP, success means every classroom cleaned to the specification nightly and every urgent work order answered within two hours.
>
> Three reasons the District can choose Brightwater with confidence: 1. **Two-hour emergency response.** Our supervisor is based eight miles from the farthest school, and we averaged 74 minutes on urgent calls for two neighboring districts last year. 2. **Green cleaning that passes inspection.** Every product we propose meets the state's green cleaning requirements for schools, and our staff are trained on them annually. 3. **Stable crews.** Our current school crews have worked together for an average of six years, so your buildings get people who know them."
>
> *Why it works:* exact solicitation reference, the buyer's goal in the buyer's terms, and three claims a reader can verify. (Brightwater is a fictional company; the figures are illustrative.)

WORKED EXAMPLE

The same opening, written the way most firms write it

✕ WEAK

> "Founded in 1998, Brightwater is a full-service, family-owned facilities company committed to excellence and customer satisfaction. We are proud to have served hundreds of satisfied clients across the region and believe our world-class team is uniquely qualified to exceed your expectations."
>
> *Why it loses:* no solicitation reference, nothing about the District's need, and every claim is an adjective. An evaluator learns nothing they could score.

☆ PRO TIP **Pro tip: reuse your win themes**

The three reasons in your cover letter should be the same win themes that run through your executive summary and technical approach. If the letter promises two-hour emergency response, the staffing plan must show how you deliver it. **Capture Planning and Win Themes** explains how to choose them.

SECTION 1.4

Transmittal letters for sealed bids: the formal version

Sealed bidding, through an **invitation for bids (IFB)**, is formal by design. Bids are opened publicly at a set time, prices are read aloud or posted, and award usually goes to the lowest responsive, responsible bidder. There is little room to fix mistakes after opening, so the transmittal letter works as a signed checklist: it tells the bid clerk what is in the envelope and confirms the statements the invitation requires.

Timing is unforgiving. Under the federal sealed-bidding rules (FAR Part 14), a bid received after the exact time set for opening is late and is considered only in narrow cases, such as evidence that it was already under government control before the deadline. State and local rules are similar and often stricter. Deliver a day early, and if you hand-deliver, get a time-stamped receipt. **Submission logistics** covers the rest of delivery day.

How to assemble a sealed bid package

1. **Use the buyer's bid form**
   Complete every blank on the official bid or price form exactly as the invitation directs. If a line does not apply, write what the instructions allow (for example "No Bid" or "N/A") rather than leaving it empty.

2. **Acknowledge every addendum**
   List each addendum by number and date on the bid form and in your transmittal letter, and sign any acknowledgment forms the buyer issued. An addendum that changes quantities or drawings and goes unacknowledged is a classic reason for rejection.

3. **Add bid security if required**
   Include the bid bond, certified check or other security in the exact form and amount the invitation requires. A missing or defective bid security is a common reason a low bid is thrown out.

   > **Tip:** Ask your surety for the bid bond at least a week before the due date. **Bonding, Insurance and Compliance Requirements** explains how bonding works.

4. **Sign as an authorized officer**
   Many invitations require the bid and its affidavits (for example a non-collusive bidding certification or a vendor responsibility form) to be signed by an officer, and some require notarization. Match the signer to your corporate authority.

5 **Label the envelope exactly**

Mark the outer envelope with what the invitation requires, typically your company name and address, the bid number, the bid title, and the opening date and time. Several New York agencies warn that a mislabeled envelope may be refused or opened early, which can compromise confidentiality.

6 **Deliver early and keep proof**

Use a delivery method that produces a time-stamped receipt. For electronic submissions, upload well before the deadline, download the confirmation and save it with your bid file.

TEMPLATE

Transmittal letter for a sealed bid

Copy-ready online

A formal one-page transmittal for invitations for bids and other sealed, publicly opened bids. Numbered paragraphs make it easy for a bid clerk to confirm each required item.

WHEN TO USE

Use it for sealed bids from cities, counties, school districts, authorities, state agencies and federal IFBs when the buyer asks for a transmittal or cover letter but provides no form. Place it on top of the bid form inside the sealed envelope, or upload it first.

[COMPANY_LETTERHEAD]

[DATE]

[PURCHASING_OFFICER_NAME], [PURCHASING_OFFICER_TITLE]
[AGENCY_NAME], [PURCHASING_OFFICE]
[BID_DELIVERY_ADDRESS]
[CITY], [STATE] [ZIP]

Re: Sealed Bid for [BID_TITLE], Bid No. [BID_NUMBER], Opening [OPENING_DATE] at [OPENING_TIME]

Dear [SALUTATION] [LAST_NAME]:

[COMPANY_LEGAL_NAME] ("Bidder") submits the enclosed sealed bid in response to Invitation for Bids No. [BID_NUMBER] for [BID_TITLE].

1. Contents. This package contains:
a. Bid Form and Price Schedule, signed ([NUMBER_OF_PAGES] pages)
b. Bid security: [BID_SECURITY_TYPE] in the amount of [BID_SECURITY_AMOUNT], issued by [SURETY_OR_BANK]
c. Required forms and certifications: [LIST_OF_REQUIRED_FORMS]
d. Other required documents: [LIST_OF_OTHER_DOCUMENTS]
e. [NUMBER_OF_COPIES] copies and [ELECTRONIC_COPY_FORMAT]

2. Addenda. Bidder acknowledges receipt of the following addenda and has included their requirements in this bid: Addendum No. [ADDENDUM_NUMBER] dated [ADDENDUM_DATE]; Addendum No. [ADDENDUM_NUMBER] dated [ADDENDUM_DATE].

3. Terms. Bidder has read the Invitation for Bids, including its specifications, terms and conditions, and agrees to furnish the [GOODS_OR_SERVICES] at the prices stated on the Bid Form.

4. Bid validity. This bid remains firm for [VALIDITY_DAYS] calendar days after the bid opening date, or for any longer period the Invitation for Bids requires.

5. Identification. Federal employer identification number: [EIN]. [STATE_OR_CITY_VENDOR_ID_LABEL]: [VENDOR_ID]. Unique Entity ID (federal and federally funded bids only): [UEI]. Certification status: [CERTIFICATION_AND_NUMBER_OR_NONE].

6. Authority. The undersigned is the [SIGNER_TITLE] of Bidder and is authorized to sign this bid and bind Bidder to its terms.

7. Contact. Questions about this bid may be directed to [CONTACT_NAME], [CONTACT_TITLE], at [PHONE] or [EMAIL].

Respectfully submitted,

[COMPANY_LEGAL_NAME]

By: _____
[SIGNER_NAME], [SIGNER_TITLE]
Date: [SIGNATURE_DATE]

[NOTARY_BLOCK_IF_REQUIRED]

FIELDS TO FILL IN · 12

[PURCHASING_OFFICER_NAME], [PURCHASING_OFFICE]	The office and person named in the invitation for receipt of bids. Use the delivery address for bids, which is often different from the agency's main address.
[OPENING_DATE], [OPENING_TIME]	Copy from the invitation or the latest addendum; addenda often move the opening date.
[BID_SECURITY_TYPE], [BID_SECURITY_AMOUNT]	For example "bid bond" and "5% of the base bid," exactly as required. Delete item 1b if no security is required.
[LIST_OF_REQUIRED_FORMS]	Every form the invitation lists, in its order, e.g. non-collusive bidding certification, vendor responsibility questionnaire, M/WBE utilization plan, insurance certificate.
[NUMBER_OF_COPIES], [ELECTRONIC_COPY_FORMAT]	The original plus copies required, and any USB or PDF copy the invitation asks for. Delete item 1e if not required.
[ADDENDUM_NUMBER], [ADDENDUM_DATE]	Repeat the pair for each addendum. If none were issued, write "Bidder confirms that no addenda were issued as of [DATE]."

[GOODS_OR_SERVICES]	The short description used on the bid form, e.g. "road salt" or "HVAC maintenance services."
[VALIDITY_DAYS]	The bid validity period stated in the invitation, or longer.
[EIN], [VENDOR_ID], [UEI]	Your federal tax ID, the buyer's vendor number (e.g. NYC PASSPort vendor number, New York State vendor ID, NJSTART vendor ID) and your Unique Entity ID if the work is federal or federally funded. Delete lines that do not apply.
[CERTIFICATION_AND_NUMBER_OR_NONE]	Only certifications you currently hold, with certifying agency and number, e.g. "NYS-certified MBE, Empire State Development, No. [NUMBER]."
[SIGNER_NAME], [SIGNER_TITLE]	An officer with authority to bind the company. Sign in the ink color or digital format the invitation requires.
[NOTARY_BLOCK_IF_REQUIRED]	Only if the invitation requires a notarized bid or affidavit. Use the notary acknowledgment form for your state.

⚠ **WARNING** **Keep prices and conditions out of the transmittal letter**

In sealed bidding your price belongs on the official bid form. A price in a letter that conflicts with the bid form creates an ambiguity that can get the bid rejected. The same goes for conditions: a line such as "subject to our standard terms" or "pricing assumes a June start" can turn an otherwise low bid into a non-responsive one.

TEMPLATE

Electronic submission email

Copy-ready online

A short covering email for proposals the buyer allows you to submit by email. It creates a clean record of what you sent, when, and in how many files.

WHEN TO USE Use it only when the solicitation permits email delivery. Attach your signed cover letter and proposal volumes; this email does not replace the cover letter. For portal submissions, follow the portal's own steps instead.

Subject: [SOLICITATION_NUMBER] Proposal Submission: [SOLICITATION_TITLE] from [COMPANY_SHORT_NAME]

Dear [CONTACT_NAME]:

On behalf of [COMPANY_LEGAL_NAME], I am submitting our proposal in response to [SOLICITATION_TITLE], [SOLICITATION_NUMBER], due [DUE_DATE] at [DUE_TIME] [TIME_ZONE].

As required by [INSTRUCTIONS_SECTION], the following files are attached:
1. [FILE_NAME_1] ([VOLUME_1_DESCRIPTION], [PAGE_COUNT_1] pages)
2. [FILE_NAME_2] ([VOLUME_2_DESCRIPTION])
3. [FILE_NAME_3] ([VOLUME_3_DESCRIPTION])

The attachments total [TOTAL_SIZE_MB] MB. [IF_SPLIT: This is email [X] of [Y]; the remaining files follow in separate messages sent within the next few minutes.]

We acknowledge Addenda [ADDENDA_NUMBERS]. Please confirm receipt by reply. If any file does not open or arrives incomplete, please contact me directly at [PHONE], and we will resend it immediately and before the deadline where possible.

Thank you,

[SENDER_NAME]
[SENDER_TITLE], [COMPANY_LEGAL_NAME]
[PHONE] | [EMAIL]

FIELDS TO FILL IN · 7

[SOLICITATION_NUMBER], [SOLICITATION_TITLE]	Put the number first in the subject line so it sorts correctly in a crowded procurement inbox.
[DUE_DATE], [DUE_TIME], [TIME_ZONE]	Copy from the solicitation or latest addendum, e.g. "December 4, 2026 at 2:00 PM ET."
[INSTRUCTIONS_SECTION]	The section that sets submission rules, e.g. "Section 4.2, Proposal Submission."
[FILE_NAME_1] to [FILE_NAME_3]	Use the file names the RFP requires. If none are required, use CompanyName_SolicitationNumber_Volume.pdf.
[TOTAL_SIZE_MB]	Check the buyer's attachment limit before you send. Many mail systems reject large messages without telling you.
[IF_SPLIT]	Only if the files must go in more than one email. Number every message.
[ADDENDA_NUMBERS]	All addenda issued, by number.

NOTE **Submitting through a portal**

When the buyer uses an e-procurement portal, such as NYC PASSPort or NJSTART, the cover letter may be a required upload or may be replaced by on-screen forms and attestations. Follow the portal's instructions and the solicitation, upload early, and save the submission confirmation. Portal registration is covered in the **registration handbook**.

SECTION 1.5

Letter of intent to bid: when it matters and what to include

A letter of intent to bid (sometimes called a notice of intent to propose) tells the buyer you plan to submit. Buyers use these letters to gauge competition, plan the pre-bid conference and site visits, and know who should receive addenda. In most solicitations the letter is non-binding: you can still decide not to bid.

Read the wording carefully, though. Some solicitations make a notice of intent mandatory, either to receive addenda and answers to questions or to be eligible to submit at all, and a missed intent deadline can end your bid before it starts. Add the intent deadline to your bid calendar the day you decide to pursue.

Send it after a real decision (the **bid/no-bid framework** gives you a scoring method), and keep it short. Questions about the scope do not belong in the letter; submit them through the official question process so the answers are shared with every bidder.

TEMPLATE

Letter of intent to bid

Copy-ready online

A short, formal notice that you plan to respond, with a named contact for addenda and optional lines for mandatory pre-bid meetings and identifiers.

WHEN TO USE Use it when the solicitation requests or requires a notice of intent, or as a courtesy on large, multi-phase or long-timeline opportunities where you want to be sure you receive every addendum.

[COMPANY_LETTERHEAD]

[DATE]

[CONTACT_NAME], [CONTACT_TITLE]
[AGENCY_OR_ORGANIZATION_NAME]
[ADDRESS]

Sent by [DELIVERY_METHOD]

Re: Notice of Intent to Bid, [SOLICITATION_TITLE], [SOLICITATION_NUMBER]

Dear [SALUTATION] [LAST_NAME]:

[COMPANY_LEGAL_NAME] intends to submit a [BID_OR_PROPOSAL] in response to [SOLICITATION_TITLE], [SOLICITATION_NUMBER], due [DUE_DATE].

[OPTIONAL_ONE_SENTENCE_FIT]

Please direct all addenda, clarifications, schedule changes and pre-bid meeting information to:

[NOTICES_CONTACT_NAME], [NOTICES_CONTACT_TITLE]
[EMAIL]
[PHONE]

[IF_APPLICABLE: We plan to attend the pre-bid conference and site visit on [MEETING_DATE] with [NUMBER] representatives: [ATTENDEE_NAMES].]

[IF_REQUIRED: Company identification: EIN [EIN]; [VENDOR_ID_LABEL] [VENDOR_ID]; Unique Entity ID [UEI].]

[NON_BINDING_OR_ELIGIBILITY_SENTENCE]

We look forward to submitting a complete and compliant response.

Sincerely,

[SIGNATURE]
[SIGNER_NAME]
[SIGNER_TITLE]
[COMPANY_LEGAL_NAME]

FIELDS TO FILL IN · 7

[DELIVERY_METHOD]	The method the solicitation requires, e.g. "email to the designated contact" or "upload to the bid portal." Delete the line if no method is specified.
[BID_OR_PROPOSAL]	"bid" for an invitation for bids, "proposal" for an RFP, "quote" for an RFQ.
[OPTIONAL_ONE_SENTENCE_FIT]	One sentence at most, e.g. "We have provided HVAC maintenance to 14 public facilities in Westchester County since 2015 and meet the minimum qualifications in Section 3." Delete if the buyer supplied a form.
[NOTICES_CONTACT_NAME]	Whoever will watch for addenda daily until the due date, usually your proposal manager.
[MEETING_DATE], [ATTENDEE_NAMES]	Only if there is a pre-bid conference or site visit. Some buyers cap attendees or require advance registration.
[EIN], [VENDOR_ID], [UEI]	Only the identifiers the solicitation asks for.
[NON_BINDING_OR_ELIGIBILITY_SENTENCE]	Usually "We understand this notice does not obligate either party." If the notice is mandatory, write "We submit this notice as required by Section [SECTION] of the solicitation."

✕ COMMON MISTAKE **Common mistake: announcing intent you never follow through on**

Intent letters are easy to send, which tempts some firms to send one for every solicitation they see. Buyers notice when a company repeatedly signals interest and never bids. If you change your mind, send the no-bid letter below so the buyer knows not to expect you.

SECTION 1.6

How to decline an RFP without burning the bridge

Deciding not to bid is a sound business decision when the fit, timing or terms are wrong. Saying nothing is not. Many purchasing offices remove vendors from their bidders lists after a run of unanswered invitations (three consecutive non-responses is a common rule, though policies vary), while a returned no-bid response usually keeps you active. Check the buyer's policy if you depend on its invitations.

A no-bid letter also gives the buyer useful feedback. If several qualified vendors decline for the same reason, such as an unrealistic start date or an insurance requirement out of proportion to the work, the buyer may change the next solicitation. Keep the reason short, true and free of criticism.

TABLE **Turning your real reason into a professional sentence**

Your real reason	How to say it
The schedule is impossible	"Our crews are committed through [MONTH], and we could not meet the required start date without compromising quality."
The scope is outside what we do	"The scope extends beyond our core services in [AREA], and we bid only where we can perform the full requirement ourselves."
The terms carry too much risk	"Certain contract terms, including [TERM], fall outside our company's risk policy."
Bonding or insurance limits exceed ours	"The required [BOND_OR_COVERAGE] exceeds our current capacity. We expect that to change by [TIMEFRAME] and would welcome future opportunities."
We are at capacity	"We are fully committed on current contracts and could not give this project the attention it deserves."
We think the incumbent is locked in	Usually better left unsaid. Give a capacity or fit reason instead, or decline without a reason.

TEMPLATE

No-bid letter that keeps the relationship

Copy-ready online

A courteous statement of no bid that thanks the buyer, gives one honest reason, offers optional constructive feedback and asks to stay on the bidders list.

WHEN TO USE Use it as soon as you decide not to respond to a solicitation you were invited to, sent a notice of intent for, or want to keep receiving. If the buyer supplied a no-bid response form, complete that form and attach this letter as a courtesy.

[COMPANY_LETTERHEAD]

[DATE]

[CONTACT_NAME], [CONTACT_TITLE]
[AGENCY_OR_ORGANIZATION_NAME]
[ADDRESS]

Re: Statement of No Bid, [SOLICITATION_TITLE], [SOLICITATION_NUMBER]

Dear [SALUTATION] [LAST_NAME]:

Thank you for including **[COMPANY_SHORT_NAME]** in **[SOLICITATION_TITLE]**. After reviewing the solicitation carefully, we have decided not to submit a **[BID_OR_PROPOSAL]** for this procurement.

[ONE_OR_TWO_SENTENCE_REASON]

[OPTIONAL_CONSTRUCTIVE_FEEDBACK]

We remain very interested in working with **[AGENCY_SHORT_NAME]**. Please keep **[COMPANY_SHORT_NAME]** on your bidders list for **[CATEGORIES_OR_CODES]**, and do not hesitate to contact us for future quotes, bids and proposals. **[IF_FORM_SUPPLIED: We have also completed the no-bid response form included with the solicitation.]**

Our current capability statement is attached for your files.

Thank you again for the opportunity.

Sincerely,

[SIGNATURE]
[SIGNER_NAME]
[SIGNER_TITLE]
[COMPANY_LEGAL_NAME]
[PHONE] | **[EMAIL]**

FIELDS TO FILL IN · 5

[-ONE_OR_TWO_SENTENCE_REASON]	Pick one line from the table above and make it specific. Never criticize the buyer, the specification or a competitor.
[-OPTIONAL_CONSTRUCTIVE_FEEDBACK]	Only if it is genuinely useful, e.g. "If this work is reissued, a 60-day mobilization period or a separate lot for the two outlying sites would allow more small firms, including ours, to compete." Delete otherwise.
[CATEGORIES_OR_CODES]	The buyer's own category names or commodity codes for your work, so the list entry is accurate.
[IF_FORM_SUPPLIED]	Keep this sentence only if the solicitation included a no-bid form.
[SIGNER_NAME], [SIGNER_TITLE]	Ideally the same person who would have signed the bid, which signals the decision was made at the right level.

TIP **Record the decision**

Move the opportunity to the **No bid** column of your **RFP Detector pipeline board** and add a note with the reason. After a year, those notes show which kinds of work you keep declining, which tells you where to build capacity, find a teaming partner or narrow your searches.

SECTION 1.7

How do you get on a bidders list? The request letter

Many local governments, school districts, public authorities and housing agencies keep vendor lists by commodity or service category. When they buy below their formal bidding limits, purchasing staff often request quotes from vendors on those lists. Prime contractors keep supplier and subcontractor databases too, especially to meet M/WBE, DBE or SDVOB participation goals on public work. A clear request letter, with your capability statement attached, gets you onto those lists.

Federal agencies generally publicize their solicitations openly rather than relying on mailing lists, so this letter matters most at the state, local and prime-contractor level. Ask first whether the buyer has an online vendor registration. Many do, and some no longer accept letters; in that case, register online and send the letter as a short introduction to the buyer who handles your category.

- **City, town, village and county purchasing departments**, which often buy small-dollar goods and services by informal quote.
- **School districts and BOCES** (in New York, Boards of Cooperative Educational Services run cooperative bids for their member districts).
- **Public housing authorities and public authorities** for transit, ports, water and economic development.
- **Public colleges and hospitals** that buy under public procurement rules.
- **Prime contractors' supplier diversity and subcontracting programs**, especially on projects with participation goals. See **Subcontracting and Teaming** and, for corporate and institutional buyers, **how to get on private bidder lists**.

TEMPLATE

Request to be added to a bidders list

Copy-ready online

A one-page request that gives a purchasing office everything it needs to classify you correctly: categories and codes, service area, certifications, insurance, bonding and recent experience.

WHEN TO USE

Use it for purchasing offices that maintain vendor or bidders lists, for prime contractors' subcontractor databases, and as a cover note when you complete a buyer's online vendor registration. Attach your capability statement.

[COMPANY_LETTERHEAD]

[DATE]

[PURCHASING_DIRECTOR_NAME], [PURCHASING_DIRECTOR_TITLE]
[AGENCY_OR_COMPANY_NAME], [PURCHASING_DEPARTMENT]
[ADDRESS]

Re: Request to Be Added to Bidders List for [CATEGORY_NAMES]

Dear [SALUTATION] [LAST_NAME]:

[COMPANY_LEGAL_NAME] respectfully requests to be added to [AGENCY_OR_COMPANY_NAME]'s bidders list for the categories below, so that we may receive invitations for quotes, bids and proposals.

Company: [COMPANY_LEGAL_NAME] [DBA_IF_ANY]
Address: [STREET], [CITY], [STATE] [ZIP]
Contact for solicitations: [CONTACT_NAME], [CONTACT_TITLE], [EMAIL], [PHONE]
Federal EIN: [EIN] Year established: [YEAR] Employees: [EMPLOYEE_COUNT]
Categories and codes: [CATEGORY_NAMES]; NAICS [NAICS_CODES]; [BUYER_COMMODITY_CODES]
Service area: [COUNTIES_OR_REGION]
Certifications: [CERTIFICATIONS_WITH_AGENCY_AND_NUMBER]
Insurance: General liability [GL_LIMIT] per occurrence; [OTHER_COVERAGES]
Bonding capacity (construction only): [SINGLE_LIMIT] single project / [AGGREGATE_LIMIT] aggregate, through [SURETY_NAME]
Registrations: [VENDOR_REGISTRATIONS]

Recent relevant experience:
- [CLIENT_1]: [SCOPE_1], [YEAR_1], [VALUE_1]
- [CLIENT_2]: [SCOPE_2], [YEAR_2], [VALUE_2]
- [CLIENT_3]: [SCOPE_3], [YEAR_3], [VALUE_3]

Our capability statement is enclosed. We accept [PAYMENT_METHODS] and can provide a W-9, certificates of insurance and references on request.

If [AGENCY_OR_COMPANY_NAME] uses an online vendor registration or an application form, please let us know and we will complete it promptly. Thank you for considering [COMPANY_SHORT_NAME] for future opportunities.

Sincerely,

[SIGNATURE]
[SIGNER_NAME], [SIGNER_TITLE]
[COMPANY_LEGAL_NAME]

Enclosure: Capability statement

FIELDS TO FILL IN · 11

[PURCHASING_DIRECTOR_NAME]	The purchasing agent, director of purchasing or, for a prime contractor, the supplier diversity or subcontracts manager. Call the main number and ask who maintains the list.
[CATEGORY_NAMES]	Plain-English categories, e.g. "janitorial supplies; floor care services."
[NAICS_CODES]	Two to five six-digit NAICS codes that match your federal and state registrations.
[BUYER_COMMODITY_CODES]	The buyer's own codes if it uses them, often NIGP commodity codes in state and local government. Ask the purchasing office for its code list. Delete if not used.
[COUNTIES_OR_REGION]	Where you can actually perform, e.g. "Nassau, Suffolk and Queens counties."
[CERTIFICATIONS_WITH_AGENCY_AND_NUMBER]	Only current certifications, e.g. "NYC M/WBE (Department of Small Business Services, No. [NUMBER]." Write "None" if you hold none.
[GL_LIMIT], [OTHER_COVERAGES]	Your current limits, e.g. "$1,000,000 per occurrence; auto, workers' compensation, umbrella $5,000,000."
[SINGLE_LIMIT], [AGGREGATE_LIMIT], [SURETY_NAME]	Construction and trades only, confirmed with your surety. Delete the line otherwise.
[VENDOR_REGISTRATIONS]	Registrations the buyer will recognize, e.g. NYC PASSPort account, New York State vendor ID, NJ Public Works Contractor Registration number, CTsource registration.
[CLIENT_1] to [VALUE_3]	Three recent, relevant jobs, public clients first. Use real values or ranges you can document.
[PAYMENT_METHODS]	e.g. "purchase orders, procurement cards and ACH payment." Accepting purchasing cards makes small buys easier for the buyer.

> ☆ PRO TIP **Pro tip: a list is not a search strategy**
>
> Being on a list does not guarantee an invitation. Buyers rotate vendors, lists get purged, and formal bids above the bidding limits are advertised publicly anyway. Pair every list request with saved **searches** and **alerts in RFP Detector** for the same categories and counties, so you see public solicitations whether or not anyone emails you.

SECTION 1.8

Adapting bid letters for construction, IT, professional services and nonprofits

The templates work across sectors, but each sector has its own must-mention items and its own traps. Use the table to decide what to add to the optional sentences and the identification block.

TABLE **What to add, and what to watch, by sector**

Sector	Add or emphasize	Watch out for
Construction and trades	Bid security, bonding capacity, license and registration numbers (for example New Jersey's public works contractor registration, which must be in place when you submit a public works bid), prevailing wage experience, safety record, subcontractor and M/WBE utilization plans	Unacknowledged addenda that change drawings or quantities; unsigned or unnotarized affidavits; listing an unregistered subcontractor where registration is required
IT and technology	Security credentials you actually hold (a SOC 2 report, ISO/IEC 27001 certification, a CMMC level for defense work), named key personnel, hosting and data-location commitments, contract vehicles	Restating your standard license or cloud terms as conditions in the letter, which can read as an exception to the buyer's terms
Professional services (consulting, engineering, architecture, accounting, legal)	Licensed professionals and license numbers, key staff availability, conflict-of-interest statement, relevant agency experience	Qualifications-based selections for architecture and engineering, where many public buyers rank firms on qualifications first and negotiate fees later, so mentioning price can be out of place

Sector	Add or emphasize	Watch out for
Nonprofit and human services	Mission alignment, populations and neighborhoods served, outcomes, prequalification status (New York State requires nonprofits to prequalify in the Statewide Financial System before competing for state grants; New York City human services RFPs require an approved **HHS Accelerator prequalification** in PASSPort), board authorization where required	A letter signed by program staff when the solicitation requires the executive director or board chair; a missing board resolution; an expired prequalification

EXAMPLE **Sector sentence you can drop into the cover letter**

Construction: "Our bid includes the required bid bond of [AMOUNT] from [SURETY], and our current bonding capacity of [SINGLE] single / [AGGREGATE] aggregate comfortably covers this project."

IT: "Our hosting environment is covered by a current SOC 2 Type II report, available to the evaluation committee on request under a confidentiality agreement."

Nonprofit: "[ORGANIZATION] is prequalified in the Statewide Financial System through [DATE] and has delivered [SERVICE] to [NUMBER] families in [NEIGHBORHOOD] since [YEAR]."

SECTION 1.9

Common bid letter mistakes and a final check before you send

Most problems with bid letters come from rushing them at the end. Write the cover letter early, when your win themes are fresh, then revise it last against the final proposal. Use the checklist below on every letter in this chapter.

Habits that help and habits that hurt

Do

- ✓ Draft the cover letter when the outline is approved, then update it after the final review
- ✓ Copy titles, numbers, names and dates from the solicitation, not from memory
- ✓ Keep a signed PDF and the native file in the bid folder
- ✓ Ask someone who did not write it to read it aloud before it goes out

Don't

- ✗ Reuse last month's letter and forget to change the agency name
- ✗ Promise something the proposal does not deliver
- ✗ Add exceptions, prices or conditions the instructions put elsewhere
- ✗ Contact anyone other than the designated contact about the solicitation

Final check for any bid letter

CHECKLIST · 10 ITEMS

- [ ] Solicitation title and number match the solicitation cover page exactly
- [ ] Addressed to the designated contact, with the name and title spelled correctly
- [ ] Every addendum acknowledged by number (and date, if required)
- [ ] Offer validity matches or exceeds the required acceptance period
- [ ] No prices, conditions or exceptions that the instructions put elsewhere
- [ ] Signed and dated by an authorized signatory, on letterhead
- [ ] Legal company name matches your federal, state and city registrations
- [ ] Contact person's phone and email will be monitored throughout evaluation
- [ ] Proofread by someone who did not write it
- [ ] Saved as a PDF with the file name the buyer requires, and a copy filed with your bid records

NOTE **General information, not legal advice**

Submission, signature, bid security and communication rules vary by agency and change over time. Always follow the solicitation, and confirm anything unclear with the designated contact or a qualified advisor.

Frequently asked questions

What should an RFP cover letter include?

An RFP cover letter should include the exact solicitation title and number, a one-sentence thank-you, a short statement of the buyer's goal in its own words, a statement that your proposal meets every requirement and acknowledges all addenda, the period your offer stays valid, three provable reasons to choose you, the name and contact details of the person authorized to negotiate, and the signature of someone authorized to bind your company. If the solicitation lists required statements or supplies a form, those come first.

How long should a proposal cover letter be?

One page is ideal and two pages is the practical maximum, unless the buyer prescribes a format. Check whether the cover letter counts toward the proposal's page limit; some solicitations exclude it and some do not. Details belong in the executive summary, not the letter.

What is the difference between a cover letter and a transmittal letter?

A cover letter introduces the proposal and makes a brief case for your company. A transmittal letter is more formal: it lists what is enclosed, acknowledges addenda, confirms the offer validity period and identifies who can bind the company. In sealed bidding the transmittal function matters most. Many buyers use the terms interchangeably, so follow whatever the solicitation describes.

Is a letter of intent to bid binding?

Usually not. A letter of intent to bid tells the buyer you plan to respond, and you can still decide not to submit. Some solicitations, however, make a notice of intent mandatory to receive addenda or to be eligible to submit, so read the instructions and meet the intent deadline. If you change your mind after sending one, send a short no-bid letter.

Should I send a letter if I decide not to bid?

Yes, in most cases. A short no-bid letter thanks the buyer, gives one honest reason and asks to stay on the bidders list. Many purchasing offices remove vendors who leave several invitations unanswered, while a returned no-bid response usually keeps you active. It also gives the buyer feedback that can improve the next solicitation.

How do I get on a government bidders list?

Start with the buyer's online vendor registration, if it has one. Then send a one-page request to the purchasing office naming your categories and codes (NAICS and any commodity codes the buyer uses), service area, certifications, insurance, bonding and recent experience, with your capability statement attached. Because lists are not complete or guaranteed, also run saved searches and alerts for the same categories so you see publicly advertised bids.

Q Who should sign a bid or proposal cover letter?

An owner or officer with legal authority to commit the company to a contract. Many solicitations require the cover letter, bid form or affidavits to be signed by an authorized signatory, and some require evidence of authority when an agent signs. A proposal manager can draft the letter, but the signature should come from someone who can bind the company.

→ KEEP GOING

Capability Statement Templates
Attach one to bidders list requests and no-bid letters.
rfpdetector.com/guides/proposal-templates/capability-statement-templates

Executive Summary Templates
Where the cover letter's three reasons become a full argument.
rfpdetector.com/guides/proposal-templates/executive-summary-templates

Proposal Structure, Formatting and Compliance
How the cover letter fits the whole package.
rfpdetector.com/guides/how-to-write-a-winning-proposal/proposal-structure-and-compliance

Reviews, Submission and Debriefs
Submitting on time and learning from the result.
rfpdetector.com/guides/how-to-write-a-winning-proposal/reviews-submission-and-debriefs

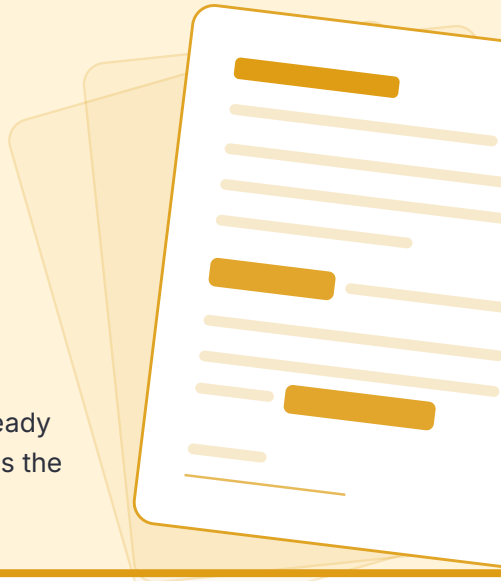
The Bid/No-Bid Decision
Decide before you send an intent or no-bid letter.
rfpdetector.com/guides/how-to-find-government-contracts/bid-no-bid-decision-framework

Bid Management Templates and Checklists
Calendars, question logs and submission checklists.
rfpdetector.com/guides/proposal-templates/bid-management-templates-and-checklists

RFPs closing soon
Open solicitations with deadlines coming up.
rfpdetector.com/rfps/closing-soon

END OF CHAPTER 1

Next: 02 Capability Statement Templates



02

CHAPTER 2

Capability Statement Templates

What a capability statement is, the six parts buyers look for, and five copy-ready templates (general, construction, IT, professional services and nonprofit) plus the short email that gets yours read.

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

Read this chapter online

KEY TAKEAWAYS

- A capability statement is a one-page summary of what your company does, why it is different, what it has delivered and how to buy from it: core competencies, differentiators, past performance, company data and codes, and a named contact.
- Contracting officers and prime contractors use it for market research and set-aside decisions, so every code, certification and identifier must match your registrations exactly.
- Differentiators must be provable: a response time, a credential, a location, a safety rating, a result. Adjectives such as reliable or committed to excellence score nothing.
- Keep one master version and tailor short variants for each agency, prime or market by reordering competencies and swapping past performance, not by rewriting from scratch.
- No government past performance yet? Use commercial, nonprofit and subcontract work and the experience of key staff, described with the same discipline.
- Review it at least quarterly and whenever you win work, add a certification or change contacts, and keep your RFP Detector vendor profile in sync with it.

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A **capability statement** is the one-page document that tells a buyer, in about a minute, what your company does, why it is different, what it has delivered and how to reach you. Contracting officers use it when they research the market, small business specialists use it to match firms with upcoming buys, and prime contractors use it to pick subcontractors and teaming partners. This chapter explains the anatomy of a strong capability statement and gives you five copy-ready capability statement templates: a one-page general version and variants for construction and trades, IT and technology, professional services, and nonprofit and human services, plus the short email that gets it read.

Each template is plain text with [SQUARE_BRACKET] placeholders, laid out section by section so you can paste it into any design tool or word processor. A field guide under each template explains what to put in every placeholder and gives a realistic example.

SECTION 2.1

What is a capability statement, and who reads it?

Think of it as your company's resume for public and institutional buyers. It is not a brochure and not a proposal. A brochure sells to anyone; a proposal answers one solicitation in depth. A capability statement sits in between: short enough to scan in a minute, specific enough for a buyer to decide whether to call you, invite you to quote or keep you on a list of capable firms.

It matters most before a solicitation exists. Federal contracting officers research the market before they buy, and that research often decides whether a purchase is set aside for small businesses. As of 2026, most federal purchases above the micro-purchase threshold ($15,000) and up to the simplified acquisition threshold ($350,000) are generally reserved for small businesses when the contracting officer expects offers from at least two capable small firms. The capability statements in hand are part of that evidence. Thresholds are adjusted periodically and have exceptions, so confirm the current figures with the agency.

1 page
The standard length
A two-page version is acceptable for complex firms; one page is the safe default.

12
Characters in a Unique Entity ID (UEI)
Assigned through your federal entity registration.

5
Characters in a CAGE code
Federal buyers look for it next to your UEI.

6
Digits in a NAICS code
List the codes you are registered under, primary first.

TABLE **Where your capability statement goes, and what the reader decides**

Situation	Who reads it	What they decide
Responding to a sources sought notice or request for information (RFI)	Contracting officer and program staff	Whether enough capable small businesses exist, which can lead to a set-aside
Introductory email or meeting with a small business specialist	An agency's small business office (at federal agencies, often the Office of Small and Disadvantaged Business Utilization, or OSDBU)	Whether to introduce you to buyers and point you to upcoming purchases
Matchmaking events, industry days and outreach fairs	Buyers and prime contractors, often in five- to ten-minute meetings	Whether to follow up after the event
Teaming and subcontracting outreach	A prime contractor's capture team or supplier diversity office	Whether you fill a capability gap or a participation goal on their bid
Bidders list requests and vendor registrations	Purchasing office staff	Which categories to list you under and whether to invite you to quote
Inside a proposal	Evaluators	Usually nothing: most RFPs score only what they ask for, so attach it only when the solicitation invites it

TIP **Before you start**

Have your registrations finished, or at least underway, before you design anything. Your capability statement repeats identifiers and codes from your federal entity registration and your state and city vendor registrations, and buyers will check them. **Getting Bid-Ready** lists what to have in place, and **Federal Vendor Registration and Your UEI** covers the federal side.

SECTION 2.2

Capability statement anatomy: the six parts buyers look for

Procurement counselors at APEX Accelerators and small business development centers describe the same core sections in slightly different words: core competencies, differentiators, past performance, company data and contact information, under a short company overview. Here is what belongs in each and how much room it deserves on a one-page layout.

TABLE The six parts of a capability statement

Section	What goes in it	Space on the page	Tip
Company overview (header)	Logo, legal name, a one-line positioning statement and one or two sentences describing the company	Top 10%	Lead with what you do for buyers like this one, not your founding story
Core competencies	A one-sentence introduction, then four to six specific services or products tied to what the buyer purchases	About 25%	Use the buyer's vocabulary from its solicitations and mission statement
Differentiators	Three to five provable reasons you are better, faster, safer or lower-risk	About 15%	Every claim should survive the question "how do you know?"
Past performance	Three to five relevant contracts: client, scope, period, value and one result, plus a reference contact if you have permission	About 25%	Public clients first; commercial, nonprofit and subcontract work all count
Company data and codes	UEI and CAGE code, NAICS and PSC codes, size status, certifications, contract vehicles, bonding, insurance, purchase-card acceptance, year founded, employees	About 15%	Copy each value from your registrations; a mismatch looks careless
Contact and call to action	A named person, direct phone, monitored email, website and address	Bottom 10%	Never a generic info@ inbox; repeat the contact block on page two if you use one

Glossary

Unique Entity ID (UEI) — The 12-character alphanumeric identifier for your company across federal awards, issued through your federal entity registration.

CAGE code — A five-character Commercial and Government Entity code assigned to registered federal contractors and used in contracting and logistics records. See **UEI vs CAGE code**.

NAICS code — The six-digit North American Industry Classification System code for a line of business. Federal small business size standards are set by NAICS code, so your codes affect whether you count as small. **Building Your Contract Search Strategy** explains how to choose them.

PSC (product and service code)	A four-character code federal buyers use to classify what they buy. Two or three accurate PSCs help a buyer find you.
Set-aside	A purchase reserved for small businesses or for a program such as 8(a), HUBZone, women-owned or service-disabled veteran-owned small businesses.
Contract vehicle	An existing contract that lets agencies order from you without a full new competition, such as a GSA Multiple Award Schedule, a blanket purchase agreement (BPA) or a state or city requirements contract.
Government purchase card	A government credit card used for small purchases. Saying you accept it tells buyers you are easy to buy from below the micro-purchase threshold.
Sources sought notice	A market research notice asking capable firms to identify themselves, usually with a capability statement or short response. It is not a solicitation, but it shapes one. See **RFIs and sources sought notices** and **Procurement Forecasts and Early Intelligence**.

SECTION 2.3

How to write a capability statement in seven steps

From blank page to a capability statement you can send

1

Gather your official data first

Pull your legal name, UEI, CAGE code, NAICS and PSC codes, certification numbers and expiration dates, insurance limits and bonding capacity from the source documents, not from memory. Your capability statement must match your registrations exactly.

> **Tip:** Put the expiration date of every certification and registration on your calendar. **Keeping Registrations Active** lists the ones that lapse.

2

Pick the reader

Choose the agency, prime contractor or market you are writing for. Read two or three of its recent solicitations, its mission statement and any published forecast, and note the words it uses for the work you do.

3

Write four to six core competencies

Open with one sentence that links your services to the buyer's mission, then list specific services in the buyer's vocabulary. "Preventive maintenance for rooftop HVAC units in occupied schools" beats "HVAC services."

4 **Prove three to five differentiators**

Ask two or three good clients why they hired you and why they stayed; owners are often poor judges of their own strengths. Turn the answers into facts: a response time, a credential, a location, a retention rate, a safety record, a method.

5 **Choose past performance that resembles the target work**

List three to five entries, most relevant first. For each, give the client, what you did, when, the value and one result. Get permission before listing a reference contact, and tell the reference to expect a call.

6 **Build the company data block**

Put identifiers, codes, size status, certifications, contract vehicles, bonding, insurance and payment options in a compact grid. Lead with your primary NAICS code and list only a handful of relevant codes, not every code you might ever use.

7 **Design it, save it as a PDF and test it**

Lay it out on one page, export a text-searchable PDF and hand it to someone outside the company for 60 seconds. If they cannot say what you do and why you are different, revise.

> **Tip:** APEX Accelerators (formerly Procurement Technical Assistance Centers) and small business development centers review capability statements free of charge for most clients. Ask one for a critique before a big event.

Differentiators: empty claims vs provable facts

Provable	Empty
✓ “Average 74-minute arrival on urgent calls across three school districts in 2025”	✗ “Fast, responsive service”
✓ “OSHA 30-trained foreman on every crew; experience modification rate below 1.0 for three straight years”	✗ “Safety is our top priority”
✓ “Bilingual English and Spanish case managers at all four of our Bronx sites”	✗ “Culturally competent staff”
✓ “ISO/IEC 27001-certified hosting environment, audited annually”	✗ “State-of-the-art security”

EXAMPLE **No government past performance yet?**

You still have past performance. Use commercial clients, nonprofit work, subcontracts under a prime, and projects your key staff delivered at previous employers (labeled as such). Describe each one exactly as you would a government contract: client type, scope, size, period and result. A property manager's 400-unit turnover program proves the same capability a housing authority is buying.

When you are ready to turn those jobs into full write-ups, use the **project profile template** and the advice in **Past Performance, Case Studies and References**.

SECTION 2.4

One-page capability statement template (general)

Most strong one-page layouts use a header across the top and two columns below it: a narrow column for company data and contact details, and a wide column for competencies, differentiators and past performance. The template below follows that reading order, so you can paste each section into its box. It works for most service and product businesses; the industry versions that follow add what construction, IT, professional services and nonprofit buyers look for.

TEMPLATE

One-page capability statement (general)

Copy-ready online

The all-purpose capability statement: overview, core competencies, differentiators, past performance, company data and contact, in the order buyers read them.

WHEN TO USE Use it as your master capability statement and as the starting point for agency-specific versions, sources sought responses, matchmaking events and bidders list requests.

[COMPANY_LOGO] [COMPANY_LEGAL_NAME]
[ONE_LINE_POSITIONING_STATEMENT]
CAPABILITY STATEMENT | Prepared for **[TARGET_AGENCY_OR_MARKET]** | **[MONTH_YEAR]**

COMPANY OVERVIEW
[COMPANY_SHORT_NAME] provides **[CORE_SERVICE]** for **[TYPE_OF_BUYER]** in **[GEOGRAPHY]**. Since **[YEAR_FOUNDED]**, our **[EMPLOYEE_COUNT]**-person team has **[SCALE_OR_RESULT_STATEMENT]**.

CORE COMPETENCIES
[ONE_SENTENCE_LINKING_SERVICES_TO_BUYER_MISSION]
- [COMPETENCY_1]
- [COMPETENCY_2]
- [COMPETENCY_3]
- [COMPETENCY_4]
- [COMPETENCY_5]

DIFFERENTIATORS
- [DIFFERENTIATOR_1]: [PROOF_1]
- [DIFFERENTIATOR_2]: [PROOF_2]
- [DIFFERENTIATOR_3]: [PROOF_3]

PAST PERFORMANCE
[CLIENT_1] | [CONTRACT_TYPE_OR_NUMBER_1] | [PERIOD_1] | [VALUE_1]
[SCOPE_1]. Result: [RESULT_1].

[CLIENT_2] | [CONTRACT_TYPE_OR_NUMBER_2] | [PERIOD_2] | [VALUE_2]
[SCOPE_2]. Result: [RESULT_2].

[CLIENT_3] | [CONTRACT_TYPE_OR_NUMBER_3] | [PERIOD_3] | [VALUE_3]
[SCOPE_3]. Result: [RESULT_3].

COMPANY DATA
UEI: [UEI] CAGE: [CAGE_CODE]
Primary NAICS: [PRIMARY_NAICS] ([PRIMARY_NAICS_TITLE])
Other NAICS: [OTHER_NAICS_CODES]
PSC: [PSC_CODES]
Business size: [SIZE_STATUS]
Certifications: [CERTIFICATIONS_WITH_CERTIFYING_AGENCY]
Contract vehicles: [CONTRACT_VEHICLES_OR_NONE]
State and local registrations: [STATE_AND_CITY_VENDOR_IDS]
Insurance: [INSURANCE_SUMMARY]
Payment: [PAYMENT_METHODS]
Founded: [YEAR_FOUNDED] Employees: [EMPLOYEE_COUNT]

CONTACT
[CONTACT_NAME], [CONTACT_TITLE]
[DIRECT_PHONE] | [EMAIL]
[WEBSITE]
[STREET_ADDRESS], [CITY], [STATE] [ZIP]

FIELDS TO FILL IN · 16

[ONE_LINE_POSITIONING_STATEMENT]	What you do, for whom, where, in under 15 words, e.g. "Janitorial and building maintenance for occupied public buildings in New York City."

[TARGET_AGENCY_OR_MARKET]	The reader of this version, e.g. "NYC Housing Authority vendors and prime contractors" or "Federal civilian agencies in Region 2." Use "General" on the master version.
[SCALE_OR_RESULT_STATEMENT]	One concrete fact about scale or results, e.g. "maintained more than 2 million square feet of school and housing space."
[ONE_SENTENCE_LINKING_SERVICES_TO_BUYER_MISSION]	e.g. "We keep occupied public buildings clean, safe and inspection-ready without disrupting the people who use them."
[COMPETENCY_1] to [COMPETENCY_5]	Specific services in the buyer's words. Four to six items; cut anything you could not deliver next month.
[DIFFERENTIATOR_1] to [PROOF_3]	A short label and a checkable fact, e.g. "Two-hour emergency response: supervisor on call 24/7, average arrival 74 minutes in 2025."
[CLIENT_1] to [RESULT_3]	Most relevant first. Name public clients; for private clients, a description ("640-unit nonprofit housing operator") is fine if you lack permission to name them. Results should be measurable.
[UEI], [CAGE_CODE]	From your federal entity registration. Delete the line if you are not registered yet, and register before you target federal buyers.
[PRIMARY_NAICS], [OTHER_NAICS_CODES]	Your primary code first, then two to four others, matching your registrations exactly, e.g. "561720 (Janitorial Services); 561790, 238220."
[PSC_CODES]	Two or three product and service codes that describe your work, e.g. "S201" for custodial services.
[SIZE_STATUS]	e.g. "Small business under NAICS 561720." Check the SBA size standard for each code you list.
[CERTIFICATIONS_WITH_CERTIFYING_AGENCY]	Only current certifications, with the certifier, e.g. "NYC M/WBE (NYC Department of Small Business Services); NYS WBE (Empire State Development)." Write "None" rather than leaving it blank.
[CONTRACT_VEHICLES_OR_NONE]	GSA schedules, BPAs, state or city requirements contracts you hold, with contract numbers. Delete the line if you hold none.
[STATE_AND_CITY_VENDOR_IDS]	e.g. New York State vendor ID, NYC PASSPort vendor number, NJSTART vendor ID, CTsource registration.
[PAYMENT_METHODS]	e.g. "Government purchase card accepted; ACH; net 30."
[CONTACT_NAME], [DIRECT_PHONE], [EMAIL]	A real person who answers, with a direct line and an inbox checked daily.

WORKED EXAMPLE

Filled-in example: a Bronx facilities firm with no prime public contract yet

✓ STRONG

Crestline Building Services · Janitorial and building maintenance for occupied public buildings in New York City

Core competencies: nightly and day-porter custodial service for schools and housing developments · floor care and refinishing in occupied buildings · preventive maintenance for boilers and rooftop HVAC units · turnover cleaning for vacant apartments.

Differentiators: two-hour emergency response anywhere in the Bronx and Upper Manhattan, with a supervisor on call around the clock · crews average six years with the company · bilingual English and Spanish supervisors on every site.

Past performance: 640-unit nonprofit housing operator, custodial and turnover cleaning, 2022 to present, $410,000 a year · three-building charter school network, nightly custodial and floor care, 2021 to present, $265,000 a year · subcontract to a general contractor, turnover cleaning on a public housing renovation, 2024, $180,000.

Company data: NAICS 561720 (primary), 238220 · PSC S201 · NYC M/WBE certified · purchase cards accepted.

Why it works: every competency is something a housing or school buyer purchases, every differentiator can be checked, and the past performance mixes nonprofit, private and subcontract work for a firm that has not yet won a prime public contract. (Crestline is fictional; the figures are illustrative.)

SECTION 2.5

Construction and trades capability statement template

Construction buyers and prime contractors screen for risk first. Can you be bonded at this size? Are you licensed and registered where the work is? Is your safety record clean? Have you finished jobs like this on time? Put those answers where a reader finds them in five seconds, then show the projects.

- **Bonding capacity**, single project and aggregate, with the surety's name, confirmed with your surety before you print.
- **Licenses and registrations** where the work is, for example a New York City Department of Buildings license or registration if your trade requires one, New Jersey public works contractor registration (which must be in place when you bid public works there), or Connecticut DAS contractor prequalification for state projects that require it.

- **Safety record:** your experience modification rate (EMR), an insurance rating that compares your workers' compensation claims with others in your trade (1.0 is average; lower is better), and the safety training your crews hold.
- **Labor and payroll:** prevailing wage and certified payroll experience, and union or open-shop status where it matters to the owner.
- **Self-performed trades**, equipment you own, and the project size range you handle comfortably.
- **Certifications** that count toward participation goals: M/WBE, DBE for transportation work, SDVOB.

TEMPLATE

Capability statement for construction and trades

Copy-ready online

A one-page capability statement for general contractors, specialty trades and construction service firms, with a dedicated bonding, licensing and safety block and a project list built for public owners and primes.

WHEN TO USE

Use it for public owners (cities, school districts, housing and transit authorities, state agencies), for prime contractors looking for subcontractors to meet M/WBE, DBE or SDVOB goals, and with bidders list requests for construction categories.

[COMPANY_LOGO] [COMPANY_LEGAL_NAME]
[TRADE_AND_POSITIONING_LINE]
CAPABILITY STATEMENT | Prepared for [TARGET_OWNER_OR_PRIME] | [MONTH_YEAR]

WHO WE ARE
[COMPANY_SHORT_NAME] is a [GENERAL_OR_SPECIALTY] contractor serving [PUBLIC_OWNER_TYPES] in [COUNTIES_OR_REGION]. We self-perform [SELF_PERFORMED_TRADES] and have completed [NUMBER_OF_PROJECTS] public and institutional projects from [SMALLEST_VALUE] to [LARGEST_VALUE] since [YEAR_FOUNDED].

CORE COMPETENCIES
- [COMPETENCY_1]
- [COMPETENCY_2]
- [COMPETENCY_3]
- [COMPETENCY_4]
- [COMPETENCY_5]

BONDING, LICENSING AND SAFETY
Bonding capacity: [SINGLE_PROJECT_LIMIT] single project / [AGGREGATE_LIMIT] aggregate, through [SURETY_NAME]
Licenses and registrations: [LICENSES_AND_REGISTRATIONS_WITH_NUMBERS]
Experience modification rate (EMR): [EMR_BY_YEAR]
Safety training: [SAFETY_TRAINING_SUMMARY]
Labor: [UNION_OR_OPEN_SHOP_STATUS]; prevailing wage and certified payroll on [NUMBER] public projects

DIFFERENTIATORS
- [DIFFERENTIATOR_1]: [PROOF_1]
- [DIFFERENTIATOR_2]: [PROOF_2]
- [DIFFERENTIATOR_3]: [PROOF_3]

SELECTED PROJECTS
[PROJECT_NAME_1] | [OWNER_1] | [CONTRACT_VALUE_1] | Completed [COMPLETION_DATE_1] [SCOPE_1]. [SCHEDULE_OR_BUDGET_RESULT_1]. Reference: [REFERENCE_1]

[PROJECT_NAME_2] | [OWNER_2] | [CONTRACT_VALUE_2] | Completed [COMPLETION_DATE_2] [SCOPE_2]. [SCHEDULE_OR_BUDGET_RESULT_2]. Reference: [REFERENCE_2]

[PROJECT_NAME_3] | [OWNER_3] | [CONTRACT_VALUE_3] | Completed [COMPLETION_DATE_3] [SCOPE_3]. [SCHEDULE_OR_BUDGET_RESULT_3]. Reference: [REFERENCE_3]

COMPANY DATA
UEI: [UEI] CAGE: [CAGE_CODE]
NAICS: [NAICS_CODES]
Certifications: [CERTIFICATIONS_WITH_AGENCY_AND_NUMBER]
Major equipment: [KEY_EQUIPMENT]
Insurance: [INSURANCE_SUMMARY]
Founded: [YEAR_FOUNDED] Field staff: [FIELD_STAFF_COUNT] Office staff: [OFFICE_STAFF_COUNT]

CONTACT
[ESTIMATING_CONTACT_NAME], [CONTACT_TITLE] | [DIRECT_PHONE] | [EMAIL]
[WEBSITE] | [STREET_ADDRESS], [CITY], [STATE] [ZIP]

FIELDS TO FILL IN · 13

[TRADE_AND_POSITIONING_LINE]	e.g. "Electrical contractor for occupied schools, housing and municipal buildings in Westchester and the Bronx."
[PUBLIC_OWNER_TYPES]	e.g. "school districts, housing authorities and municipal facilities departments."
[SELF_PERFORMED_TRADES]	The work your own forces perform, e.g. "electrical, low-voltage and fire alarm work." Owners and primes care about what you do not subcontract.

[SMALLEST_VALUE], [LARGEST_VALUE]	Your realistic range, e.g. "$50,000 to $3.2 million." Keep the top figure honest; primes check.
[COMPETENCY_1] to [COMPETENCY_5]	e.g. "LED lighting retrofits in occupied classrooms"; "Fire alarm upgrades with phased cutovers"; "Emergency generator installation and testing."
[SINGLE_PROJECT_LIMIT], [AGGREGATE_LIMIT], [SURETY_NAME]	Confirm current figures with your surety or broker before every print run. The bonding chapter of the registration handbook explains capacity.
[LICENSES_AND_REGISTRATIONS_WITH_NUMBERS]	Every license and contractor registration relevant to the target owner, with numbers, e.g. a city master electrician license, NJ Public Works Contractor Registration, CT DAS prequalification.
[EMR_BY_YEAR]	Your last three years from your workers' compensation carrier, e.g. "0.82 / 0.79 / 0.85." If yours is above 1.0, explain the improvement plan in a cover letter rather than hiding it.
[SAFETY_TRAINING_SUMMARY]	e.g. "OSHA 30 for all foremen, OSHA 10 for all field staff; site safety training cards for NYC sites."
[SCHEDULE_OR_BUDGET_RESULT_1]	e.g. "Finished two weeks early with no change orders over 2%." Owners remember schedule and budget.
[REFERENCE_1]	Owner's project manager name, title and phone, only with permission.
[KEY_EQUIPMENT]	Owned equipment that signals capacity, e.g. "two bucket trucks, trencher, 60-foot lift."
[ESTIMATING_CONTACT_NAME]	The person who receives bid invitations and plans, usually your estimator or owner.

SECTION 2.6

IT and technology capability statement template

IT buyers want to know what you build or support, on which platforms, how securely, and through which contract vehicles they can buy it. Precision beats breadth. "Cloud email and identity migrations for agencies with 200 to 2,000 users" is more credible than a list of twenty technologies, and a named security credential is worth more than any adjective.

- **Company credentials you actually hold:** for example ISO/IEC 27001 or ISO 9001 certification, a CMMI appraisal, or a current SOC 2 Type II report (a report, not a certification, so describe it accurately).
- **Security posture for the market:** the CMMC level you hold for defense contracts that require one, your approach to NIST SP 800-171 for controlled unclassified information, and FedRAMP authorization only if your cloud service has it.
- **People:** cleared staff and facility clearance if you have them, and staff certifications summarized by count, not as a wall of logos.

- **Accessibility:** experience delivering Section 508-conformant software and documents, which federal buyers and many state and city buyers require.
- **Contract vehicles:** GSA Multiple Award Schedule, agency BPAs, and state or city IT contracts you hold, with contract numbers.

WORKED EXAMPLE
IT overview line that says nothing

✕ WEAK

> "We leverage cutting-edge technologies and agile best practices to deliver innovative, end-to-end digital transformation solutions that empower our clients to achieve mission success."
>
> *Why it loses:* no service, no platform, no client type, no size, no proof. Compare: "We modernize case-management systems for state and city human services agencies, moving legacy applications to the cloud with zero unplanned downtime on our last six cutovers."

TEMPLATE
Capability statement for IT and technology firms

Copy-ready online

A one-page capability statement for software, cloud, cybersecurity, managed services and IT staffing firms, with sections for platforms, security credentials, accessibility and contract vehicles.

WHEN TO USE Use it for federal, state and city IT buyers, for chief information officer and program offices, and for prime contractors building teams for IT bids.

[COMPANY_LOGO] [COMPANY_LEGAL_NAME]
[ONE_LINE_POSITIONING_STATEMENT]
CAPABILITY STATEMENT | Prepared for [TARGET_AGENCY_OR_PRIME] | [MONTH_YEAR]

OVERVIEW
[COMPANY_SHORT_NAME] [WHAT_YOU_DELIVER] for [TYPE_OF_BUYER]. Our [STAFF_COUNT] engineers, analysts and project managers currently support [CURRENT_SCALE_STATEMENT].

CORE COMPETENCIES
- [COMPETENCY_1]
- [COMPETENCY_2]
- [COMPETENCY_3]
- [COMPETENCY_4]
- [COMPETENCY_5]

PLATFORMS AND TOOLS
[PLATFORMS_AND_TOOLS]

SECURITY, QUALITY AND ACCESSIBILITY
- Company credentials: [COMPANY_CREDENTIALS]
- Security frameworks: [SECURITY_FRAMEWORK_STATUS]
- Clearances: [CLEARANCE_STATUS_OR_NONE]
- Accessibility: [ACCESSIBILITY_STATEMENT]
- Staff certifications: [STAFF_CERTIFICATIONS_SUMMARY]

DIFFERENTIATORS
- [DIFFERENTIATOR_1]: [PROOF_1]
- [DIFFERENTIATOR_2]: [PROOF_2]
- [DIFFERENTIATOR_3]: [PROOF_3]

PAST PERFORMANCE
[CLIENT_1] | [CONTRACT_NUMBER_OR_TYPE_1] | [PERIOD_1] | [VALUE_1]
[SCOPE_1]. Result: [RESULT_1].

[CLIENT_2] | [CONTRACT_NUMBER_OR_TYPE_2] | [PERIOD_2] | [VALUE_2]
[SCOPE_2]. Result: [RESULT_2].

[CLIENT_3] | [CONTRACT_NUMBER_OR_TYPE_3] | [PERIOD_3] | [VALUE_3]
[SCOPE_3]. Result: [RESULT_3].

CONTRACT VEHICLES AND CODES
Contract vehicles: [CONTRACT_VEHICLES_OR_NONE]
UEI: [UEI] CAGE: [CAGE_CODE]
NAICS: [NAICS_CODES] PSC: [PSC_CODES]
Size and certifications: [SIZE_AND_CERTIFICATIONS]
State and local: [STATE_AND_CITY_REGISTRATIONS_AND_CONTRACTS]

CONTACT
[CONTACT_NAME], [CONTACT_TITLE] | [DIRECT_PHONE] | [EMAIL]
[WEBSITE] | [STREET_ADDRESS], [CITY], [STATE] [ZIP]

FIELDS TO FILL IN · 12

[WHAT_YOU_DELIVER]	A verb phrase, e.g. "builds and supports case-management and permitting systems" or "provides 24/7 managed security services."
[CURRENT_SCALE_STATEMENT]	e.g. "14 public-sector clients and more than 9,000 end users."
[COMPETENCY_1] to [COMPETENCY_5]	e.g. "Legacy application modernization and cloud migration"; "Identity and access management"; "Tier 1 to 3 service desk for distributed offices."
[PLATFORMS_AND_TOOLS]	The platforms you are genuinely strong in, grouped (cloud, data, low-code, security). Name partner levels only if they are current and stated exactly as the vendor grants them.
[COMPANY_CREDENTIALS]	Certifications and audit reports the company holds, e.g. "ISO/IEC 27001:2022 certified; SOC 2 Type II report (current period)."

[-SECURITY_FRAMEWORK_STATUS]	e.g. "CMMC Level 2 (third-party assessed); NIST SP 800-171 assessment score on file." State only what you can document.
[CLEARANCE_STATUS_OR_NONE]	Facility clearance level and number of cleared staff, or delete the line.
[ACCESSIBILITY_STATEMENT]	e.g. "All deliverables tested for Section 508 and WCAG 2.1 AA conformance."
[-STAFF_CERTIFICATIONS_SUMMARY]	Counts, not logos, e.g. "11 cloud architect certifications, 6 CISSP, 4 PMP."
[CONTRACT_VEHICLES_OR_NONE]	e.g. "GSA Multiple Award Schedule, contract no. [NUMBER]"; agency BPAs; state or city IT contracts. Delete if none.
[NAICS_CODES], [PSC_CODES]	Common IT NAICS codes include 541511, 541512 and 541519; choose the ones you are registered under and check the matching size standard.
[-STATE_AND_CITY_REGISTRATIONS_AND_CONTRACTS]	Vendor IDs and any statewide or citywide IT contracts you hold, with numbers.

SECTION 2.7

Professional services capability statement template

For consultants, engineers, architects, accountants, evaluators, trainers and attorneys, the buyer is really buying people. Your capability statement should put key personnel and their credentials front and center, show the methods you use, and prove results with client outcomes rather than activities.

- **Key people:** two to four principals or project leads with licenses and credentials (for example PE, RA, CPA, PMP) and years of relevant experience.
- **Methods:** a one-line description of how you work, so a buyer can picture the engagement.
- **Client outcomes:** challenge, what you did, and the measurable result.
- **Firm data:** firm licenses, professional liability insurance, and contract vehicles with labor categories.
- **Independence:** a short conflict-of-interest statement if you advise public agencies, audit, evaluate or oversee other contractors.
- **Architecture and engineering firms:** keep the capability statement consistent with your federal SF 330 qualifications form and your state and city prequalification files, since many public owners select these firms on qualifications first and negotiate fees later.

TEMPLATE

Capability statement for professional services firms

Copy-ready online

A one-page capability statement for consulting, engineering, architecture, accounting, evaluation, training and legal services firms that leads with people, methods and client outcomes.

WHEN TO USE Use it for agency program offices, qualifications-based selections, on-call or prequalified consultant pools, and teaming outreach to larger firms that need specialist depth.

[FIRM_LOGO] [FIRM_LEGAL_NAME]
[ONE_LINE_POSITIONING_STATEMENT]
CAPABILITY STATEMENT | Prepared for [TARGET_AGENCY_OR_PRIME] | [MONTH_YEAR]

WHAT WE DO
[FIRM_SHORT_NAME] helps [TYPE_OF_BUYER] [ACHIEVE_OUTCOME] through [SERVICE_LINES]. We have completed [NUMBER_OF_ENGAGEMENTS] engagements for [CLIENT_TYPES] since [YEAR_FOUNDED].

SERVICES
- [SERVICE_1]
- [SERVICE_2]
- [SERVICE_3]
- [SERVICE_4]
- [SERVICE_5]

HOW WE WORK
[METHODOLOGY_STATEMENT]

KEY PEOPLE
[PRINCIPAL_1_NAME], [CREDENTIALS_1] | [ROLE_1] | [YEARS_1] years | [SPECIALTY_1]
[PRINCIPAL_2_NAME], [CREDENTIALS_2] | [ROLE_2] | [YEARS_2] years | [SPECIALTY_2]
[PRINCIPAL_3_NAME], [CREDENTIALS_3] | [ROLE_3] | [YEARS_3] years | [SPECIALTY_3]

DIFFERENTIATORS
- [DIFFERENTIATOR_1]: [PROOF_1]
- [DIFFERENTIATOR_2]: [PROOF_2]
- [DIFFERENTIATOR_3]: [PROOF_3]

CLIENT RESULTS
[CLIENT_1] | [ENGAGEMENT_TYPE_1] | [PERIOD_1] | [VALUE_1]
Challenge: [CHALLENGE_1] Outcome: [OUTCOME_1]

[CLIENT_2] | [ENGAGEMENT_TYPE_2] | [PERIOD_2] | [VALUE_2]
Challenge: [CHALLENGE_2] Outcome: [OUTCOME_2]

[CLIENT_3] | [ENGAGEMENT_TYPE_3] | [PERIOD_3] | [VALUE_3]
Challenge: [CHALLENGE_3] Outcome: [OUTCOME_3]

FIRM DATA
UEI: [UEI] CAGE: [CAGE_CODE]
NAICS: [NAICS_CODES] PSC: [PSC_CODES]
Firm licenses: [FIRM_LICENSES]
Professional liability insurance: [PROFESSIONAL_LIABILITY_LIMIT]
Contract vehicles and prequalified pools: [VEHICLES_AND_POOLS_OR_NONE]
Size and certifications: [SIZE_AND_CERTIFICATIONS]
Independence: [CONFLICT_OF_INTEREST_STATEMENT]

CONTACT
[CONTACT_NAME], [CONTACT_TITLE] | [DIRECT_PHONE] | [EMAIL]
[WEBSITE] | [STREET_ADDRESS], [CITY], [STATE] [ZIP]

FIELDS TO FILL IN · 11

[ACHIEVE_OUTCOME]	The result clients buy, e.g. "pass federal grant audits without findings" or "deliver capital projects on budget."
[SERVICE_LINES]	Two or three umbrella services, e.g. "grant compliance, single audit preparation and internal-control reviews."
[SERVICE_1] to [SERVICE_5]	Specific engagements a buyer could order, e.g. "Subrecipient monitoring programs for federal pass-through funds."
[METHODOLOGY_STATEMENT]	One or two sentences, e.g. "Every engagement starts with a two-week diagnostic, ends with a written roadmap, and includes 90 days of follow-up at no added cost."
[PRINCIPAL_1_NAME] to [SPECIALTY_3]	People who will actually work on the buyer's projects. Use credential abbreviations the buyer will recognize.
[CHALLENGE_1], [OUTCOME_1]	e.g. Challenge: "Three repeat audit findings on federal grants." Outcome: "Zero findings in the next two single audits."
[FIRM_LICENSES]	e.g. firm CPA permit, engineering certificate of authorization, law firm registration, with state and number.
[PROFESSIONAL_LIABILITY_LIMIT]	Your errors and omissions coverage, e.g. "$2,000,000 per claim." Many public contracts set a minimum.
[VEHICLES_AND_POOLS_OR_NONE]	Schedules, BPAs, on-call contracts and prequalified consultant lists you are on, with numbers.
[NAICS_CODES], [PSC_CODES]	e.g. 541611 for management consulting or 541330 for engineering services; match your registrations.
[CONFLICT_OF_INTEREST_STATEMENT]	e.g. "We do not perform construction or sell software, so our recommendations are vendor-neutral." Delete if not relevant.

SECTION 2.8

Nonprofit and human services capability statement template

Nonprofits use capability statements for government contracts and grants, for corporate and foundation partnerships, and as leave-behinds for agency program staff and elected officials. Government human services buyers look for the same core facts as any buyer, plus who you serve, where, with what outcomes, under which licenses, and whether you are cleared to contract.

- **Mission and reach:** populations, neighborhoods or counties, sites and languages.
- **Outcomes:** two to four measured results with the period and source (program records, an external evaluation).
- **Licenses and accreditation:** state program licenses (in New York, for example, from OASAS, OMH or OCFS) and national accreditation such as CARF or COA, if you hold them.
- **Prequalification:** New York State requires nonprofits to prequalify in the Statewide Financial System before competing for state grants, and some core documents in that file (the IRS Form 990, financial statements and Charities Bureau filing) must be refreshed every year. New York City human services RFPs require an approved HHS Accelerator prequalification in PASSPort, renewed annually.
- **Organization data:** EIN, tax-exempt status, annual budget, staff count, and a UEI if you receive federal funds.

TEMPLATE

Capability statement for nonprofits and human services providers

Copy-ready online

A one-page capability statement for community-based organizations, human services providers and other nonprofits seeking government contracts, grants and partnerships.

WHEN TO USE Use it for city, state and federal program offices, elected officials' discretionary funding conversations, prime contractors and lead agencies building service networks, and corporate or foundation partners.

[ORGANIZATION_LOGO] [ORGANIZATION_LEGAL_NAME]
[MISSION_IN_ONE_LINE]
CAPABILITY STATEMENT | Prepared for [TARGET_AGENCY_OR_FUNDER] | [MONTH_YEAR]

WHO WE ARE
[ORGANIZATION_SHORT_NAME] is a [TAX_STATUS] nonprofit founded in [YEAR_FOUNDED] that [CORE_MISSION_ACTIVITY] for [POPULATION_SERVED] in [NEIGHBORHOODS_OR_COUNTIES]. Each year we serve [NUMBER_SERVED] [UNIT_SERVED] at [NUMBER_OF_SITES] sites.

PROGRAMS AND SERVICES
- [PROGRAM_1]: [PROGRAM_1_DESCRIPTION]
- [PROGRAM_2]: [PROGRAM_2_DESCRIPTION]
- [PROGRAM_3]: [PROGRAM_3_DESCRIPTION]
- [PROGRAM_4]: [PROGRAM_4_DESCRIPTION]

OUTCOMES
- [OUTCOME_1] ([PERIOD_AND_SOURCE_1])
- [OUTCOME_2] ([PERIOD_AND_SOURCE_2])
- [OUTCOME_3] ([PERIOD_AND_SOURCE_3])

WHAT SETS US APART
- [DIFFERENTIATOR_1]: [PROOF_1]
- [DIFFERENTIATOR_2]: [PROOF_2]
- [DIFFERENTIATOR_3]: [PROOF_3]

GOVERNMENT CONTRACTS AND PARTNERSHIPS
[FUNDER_1] | [PROGRAM_OR_CONTRACT_1] | [PERIOD_1] | [ANNUAL_VALUE_1]
[SCOPE_AND_RESULT_1]

[FUNDER_2] | [PROGRAM_OR_CONTRACT_2] | [PERIOD_2] | [ANNUAL_VALUE_2]
[SCOPE_AND_RESULT_2]

[FUNDER_3] | [PROGRAM_OR_CONTRACT_3] | [PERIOD_3] | [ANNUAL_VALUE_3]
[SCOPE_AND_RESULT_3]

ORGANIZATION DATA
EIN: [EIN] Tax status: [TAX_STATUS]
Annual operating budget: [ANNUAL_BUDGET] Staff: [STAFF_COUNT] Volunteers: [VOLUNTEER_COUNT]
Languages: [LANGUAGES]
Licenses and accreditation: [LICENSES_AND_ACCREDITATIONS]
Prequalification and registrations: [PREQUALIFICATION_STATUS]
UEI: [UEI_IF_FEDERALLY_FUNDED]
NAICS: [NAICS_CODES]
Insurance: [INSURANCE_SUMMARY]

CONTACT
[CONTACT_NAME], [CONTACT_TITLE] | [DIRECT_PHONE] | [EMAIL]
[WEBSITE] | [ADMINISTRATIVE_ADDRESS]

FIELDS TO FILL IN · 12

[MISSION_IN_ONE_LINE]	Plain words, not a mission-statement paragraph, e.g. "Stable housing and job training for young adults leaving foster care in Brooklyn."
[TAX_STATUS]	e.g. "501(c)(3) tax-exempt."
[NUMBER_SERVED], [UNIT_SERVED]	A real, current figure with its unit, e.g. "1,150 young adults" or "3,400 households."
[PROGRAM_1] to [PROGRAM_4_DESCRIPTION]	Programs a government buyer would recognize, e.g. "Supportive Housing: 120 scattered-site units with on-site case management."
[OUTCOME_1] to [PERIOD_AND_SOURCE_3]	e.g. "86% of participants housed 12 months after placement (FY2025, program records)." Never round up or borrow a figure you cannot document.
[DIFFERENTIATOR_1] to [PROOF_3]	e.g. "Deep neighborhood roots: 70% of staff live in the communities we serve."
[FUNDER_1] to [SCOPE_AND_RESULT_3]	Government contracts first (agency, program, years, annual value), then major foundation or corporate partners.
[ANNUAL_BUDGET]	From your most recent audited financial statements or Form 990.
[-LICENSES_AND_ACCREDITATIONS]	Program licenses and accreditation with the issuing body and expiration date. Delete if none.
[PREQUALIFICATION_STATUS]	e.g. "Prequalified in the NYS Statewide Financial System through [DATE]; NYC HHS Accelerator prequalification approved through [DATE]; NYC PASSPort vendor number [NUMBER]."
[UEI_IF_FEDERALLY_FUNDED]	Required if you receive federal grants or contracts, directly or as a subrecipient in many cases. Delete if not applicable.
[NAICS_CODES]	e.g. 624190 (Other Individual and Family Services) or 624110 (Child and Youth Services). Some government buyers still ask for them.

SECTION 2.9

How do you tailor, send and maintain a capability statement?

Keep one master version with everything that is true about your company, then make short variants for each important agency, prime contractor or market. Tailoring rarely means rewriting. Usually you change the target line, reorder the competencies, swap in the most relevant past performance and adjust the differentiators to what that buyer values.

A simple maintenance rhythm

Every send

Tailor

Change the target line, reorder competencies and choose the past performance closest to the buyer's work.

After every win

Add it while it is fresh

Record the contract, value and period, and ask the client for permission to list a reference.

Every quarter

Refresh

Check contacts, certification expiration dates, insurance limits and bonding capacity, and retire past performance that is getting old.

When registrations change

Update everywhere the same day

Codes, certifications and identifiers must match across your capability statement, your vendor registrations and your RFP Detector vendor profile.

Once a year

Get an outside review

Ask an APEX Accelerator, a small business development center or a trusted client to critique it, and refresh the design if it looks dated.

TEMPLATE

Email to send with your capability statement

Copy-ready online

A short, specific introduction to a small business specialist, contracting officer or prime contractor, with your key identifiers in the body so the reader does not have to open the attachment to classify you.

WHEN TO USE Use it after a matchmaking event, when an agency forecast lists work you do, when you respond to an invitation to share capabilities, or when you approach a prime contractor about teaming. Do not use it to contact anyone during a solicitation's restricted communication period.

Subject: [COMPANY_SHORT_NAME]: [CORE_SERVICE] for [AGENCY_OR_PRIME_SHORT_NAME] ([SIZE_OR_CERTIFICATION], NAICS [PRIMARY_NAICS])

Dear [RECIPIENT_NAME]:

I am [SENDER_NAME], [SENDER_TITLE] of [COMPANY_LEGAL_NAME], a [SIZE_AND_CERTIFICATION_STATUS] firm in [CITY_AND_STATE] that provides [CORE_SERVICE] to [TYPE_OF_BUYER].

I am writing because [SPECIFIC_REASON]. Over the last [NUMBER_OF_YEARS] years we have [RELEVANT_RESULT_1], and [RELEVANT_RESULT_2].

Our one-page capability statement is attached. Key details:
- NAICS: [NAICS_CODES] PSC: [PSC_CODES]
- UEI: [UEI] CAGE: [CAGE_CODE]
- Certifications: [CERTIFICATIONS]
- Contract vehicles: [CONTRACT_VEHICLES_OR_NONE]

Would you have 15 minutes in the coming weeks to tell me how your office buys [CATEGORY] and who I should speak with about [UPCOMING_NEED]? We would also be glad to respond to any sources sought notice or request for information in this area.

Thank you for your time.

[SENDER_NAME]
[SENDER_TITLE], [COMPANY_LEGAL_NAME]
[DIRECT_PHONE] | [EMAIL] | [WEBSITE]

Attachment: [FILE_NAME]

FIELDS TO FILL IN · 6

[RECIPIENT_NAME]	A named person: the agency's small business specialist, the contracting officer listed on a forecast or notice, or a prime's supplier diversity or subcontracts manager.
[SIZE_OR_CERTIFICATION]	The single most relevant status for the subject line, e.g. "SDVOSB" or "NYS MWBE."
[SPECIFIC_REASON]	Why this person, now, e.g. "your agency's forecast lists a facilities maintenance contract for the Brooklyn campus in the third quarter" or "we met at the outreach event on October 14."
[RELEVANT_RESULT_1], [RELEVANT_RESULT_2]	Two short proof points tied to the reason, e.g. "maintained 1.2 million square feet of occupied school space with no failed inspections."
[CATEGORY], [UPCOMING_NEED]	Keep the ask small and specific. A 15-minute call is easier to grant than a meeting.
[FILE_NAME]	e.g. Crestline_Capability_Statement_HousingAuthority_Nov2026.pdf

PRO TIP **Pro tip: keep your vendor profile in sync**

Your free RFP Detector vendor profile uses the same building blocks as a capability statement: a tagline and About section, NAICS codes, certifications, UEI and CAGE code, past performance entries and work samples. Buyers who find you in the **vendor directory** see the profile first, and the matching settings in the same editor (codes, keywords, service area, contract size) drive the Fit score you see on every RFP. **Building a Vendor Profile Buyers Can Find** walks through each field, and **For vendors** explains the free listing.

SECTION 2.10

Capability statement design and format rules

Design is not decoration here; it is how fast a busy reader finds your codes and your phone number. A plain, well-organized page beats a beautiful one that hides the facts.

Design and format checklist CHECKLIST · 10 ITEMS

- [ ] One page (two at most), letter size, with the contact block repeated on page two if you use one
- [ ] Body text no smaller than 10 point and clear section headings that stand out in a two-second scan
- [ ] Header across the top, then a narrow column for company data and contact and a wide column for competencies, differentiators and past performance

- [ ] Two or three brand colors with strong contrast; no light gray text and no text over photos
- [ ] Certification logos only for certifications you hold and only where the certifying program permits their use
- [ ] No generic stock photos; one sharp photo of your own work is fine
- [ ] Exported as a text-searchable PDF, not a scanned image, and small enough to email comfortably
- [ ] File named CompanyName_Capability_Statement_Target_MonthYear.pdf
- [ ] Printed once in black and white to confirm it still reads well at a crowded event table
- [ ] Proofread by someone outside the company, with every phone number and email tested

SECTION 2.11

Capability statement mistakes to avoid

COMMON MISTAKE **Common mistake: data that does not match your registrations**

A NAICS code, certification or company name that differs from your federal or state registration makes a contracting officer wonder what else is wrong. Copy every identifier from the source, and update the capability statement the same day you change a registration.

Fix these before you print

Instead, do this

- ✓ List a handful of codes that match your registrations, primary NAICS first
- ✓ Lead with recent work; many solicitations count only the last three to five years
- ✓ Name one person with a direct line and a monitored inbox
- ✓ Tailor the target line, competencies and projects for each important buyer
- ✓ Show certifications you currently hold, with the certifying agency

Avoid

- ✗ Twenty NAICS codes, which signals you have no focus
- ✗ Projects from a decade ago at the top of the list
- ✗ A generic info@ address or a phone tree
- ✗ One statement sent unchanged to every agency and prime
- ✗ Expired certifications, or a status you have applied for but not received

> ⚠ **WARNING** **Size and certification claims are legal representations**
>
> Describing your company as small, women-owned, service-disabled veteran-owned, 8(a), HUBZone, M/WBE or DBE when it is not, or after a certification lapses, can lead to serious consequences in public contracting, including loss of awards and penalties. List only what you hold today. **Small-Business and Diversity Certifications** explains the programs. This is general information, not legal advice; requirements change, so confirm with the certifying agency or a qualified advisor.

Frequently asked questions

Q What is a capability statement?

A capability statement is a one-page summary of what your company does, why it is different, what it has delivered and how to contact you. Government buyers, small business specialists and prime contractors use it to research the market, decide whether to set aside a purchase for small businesses, and choose subcontractors and teaming partners. It is shorter than a proposal and more specific than a brochure.

Q What should be included in a capability statement?

Six parts: a short company overview, four to six core competencies, three to five provable differentiators, three to five relevant past performance entries, a company data block (UEI and CAGE code, NAICS and PSC codes, size status, certifications, contract vehicles, insurance, bonding and payment options) and a named contact with a direct phone and email.

Q How long should a capability statement be?

One page is the standard and the safest choice. A two-page version is acceptable for firms with complex offerings or extensive past performance, as long as the first page stands on its own and the contact information appears on both pages.

Q How do I write a capability statement with no government experience?

Use the experience you have: commercial clients, nonprofit work, subcontracts under a prime contractor, and projects your key staff delivered at previous employers, clearly labeled. Describe each one with the client type, scope, size, period and a measurable result. Strong differentiators and a focused list of competencies matter even more when your past performance is new.

Q Should I make a different capability statement for each agency?

Yes, for the buyers that matter most. Keep one master version, then tailor a short variant for each important agency, prime contractor or market by changing the target line, reordering competencies, swapping in the most relevant past performance and adjusting differentiators to what that buyer values.

How often should I update my capability statement?

Review it at least quarterly, and update it immediately when you win a contract, gain or renew a certification, change contacts or change a registration. Make sure the same facts match your vendor registrations and your online vendor profile.

Where should I send my capability statement?

Send it in response to sources sought notices and requests for information, to agency small business specialists and program offices, to prime contractors' supplier diversity and subcontracting teams, to purchasing offices with bidders list requests, and to buyers you meet at matchmaking events. Attach it to a proposal only when the solicitation invites it.

→ KEEP GOING

Cover Letter, Transmittal and Intent-to-Bid Templates
Includes the bidders list request that travels with your capability statement.
rfpdetector.com/guides/proposal-templates/cover-letter-and-transmittal-templates

Past Performance, Case Study and Resume Templates
Turn the projects on your capability statement into full write-ups.
rfpdetector.com/guides/proposal-templates/past-performance-and-resume-templates

Capture Planning and Win Themes
Where strong differentiators come from.
rfpdetector.com/guides/how-to-write-a-winning-proposal/capture-planning-and-win-themes

Past Performance, Case Studies and References
Choosing and presenting your most relevant work.
rfpdetector.com/guides/how-to-write-a-winning-proposal/past-performance-and-references

Small-Business and Diversity Certifications
Which certifications you can list, and how to get them.
rfpdetector.com/guides/how-to-register-for-government-contracts/small-business-and-diversity-certifications

Subcontracting and Teaming
Using your capability statement to win work through primes.
rfpdetector.com/guides/how-to-find-government-contracts/subcontracting-and-teaming-opportunities

Building a Vendor Profile Buyers Can Find
Put the same facts in your free RFP Detector listing.
rfpdetector.com/guides/how-to-use-rfp-detector/building-your-vendor-profile

List your company free
Create a vendor profile buyers can search.
rfpdetector.com/for-vendors

END OF CHAPTER 2

Next: 03 Executive Summary Templates for RFP Proposals



03

CHAPTER 3

Executive Summary Templates for RFP Proposals

Five fill-in executive summary templates, one for each kind of bid you are most likely to write, plus a planning worksheet and the rules for choosing, tailoring and cutting them so evaluators see your value on the first page.

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

Read this chapter online

KEY TAKEAWAYS

- Pick the template by **how the award is decided** (best-value tradeoff, lowest price, or a funder's program review), not by your industry alone.
- Every template follows the same five moves: the buyer's outcome, your understanding, your solution, your proof and your commitment.
- Open with the buyer's goal in their own words. Company history belongs in the capability statement, not the first paragraph.
- Never introduce a new promise in the summary. Every claim should point to the section of the proposal where it is proven.
- In a sealed low-bid process, keep any summary letter short and unconditional. Qualifying your price or terms can make the bid nonresponsive.

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3.9 How to adapt an executive summary for your industry 83
3.10 Filled-in example: a weak and a strong executive summary 84
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An **executive summary template** gives you a head start on the one section nearly every evaluator reads. It is where a contracting officer, a city selection committee or a foundation program officer decides whether you understand their problem and whether the rest of your proposal deserves a careful read. This chapter gives you five complete, copy-ready executive summary templates, each built for a different kind of bid, plus a planning worksheet, and shows you how to fill them in, adapt them and cut them to the page limit.

If you want the reasoning behind each move (win themes, discriminators, how evaluators score), read **Writing a Winning Executive Summary** first. This chapter is the hands-on companion: choose a template, replace the bracketed fields, and edit until every sentence is about the buyer.

SECTION 3.1

How to use these executive summary templates

Each template below is a full first draft with [PLACEHOLDER] fields in square brackets. The fields list under each template explains what goes in every bracket and where to find it. Replace every bracket, delete any sentence that does not apply to this bid, and read the result aloud. If a sentence could appear in any company's proposal, rewrite it with a fact or cut it.

> TIP **Before you start**
>
> Have four things open before you touch a template: the solicitation's instructions and evaluation criteria, your compliance matrix or outline, your win themes from capture planning, and two or three proof points with real numbers.
>
> If you have not built a compliance matrix yet, start with **How to Read and Shred an RFP**. If you found the opportunity on RFP Detector, download the RFP report (PDF) from the RFP page so the due date, question deadline, requirements and contacts sit beside you while you write.

The five moves every template follows

01 **Outcome**
Open with what the buyer will get, stated in their words.

02 **Understanding**
Show you grasp the need, the constraints and the priorities behind the request.

03 **Solution**
Summarize your approach at a high level, tied to each priority.

04 **Proof**
Back every claim with a number, a reference project or a credential.

05 **Commitment**
Close with a clear commitment, a start date and a named contact.

From blank page to final summary in six steps

1 **Confirm the rules**

Check whether the solicitation asks for an executive summary at all, its page limit, where it goes and whether it is scored. Some RFPs want it as a separate tab. Sealed bids often leave no room for one beyond a short transmittal letter.

> **Tip:** If the summary is not required and pages are tight, a three-sentence overview at the top of the technical volume can do the same job.

2 **Pick the template**

Use the decision table in the next section. A construction firm answering a best-value design-build RFP should start from the construction template but borrow the factor-by-factor headings of the best-value template.

3 **Plan before you draft**

Fill in the planning worksheet: the buyer's goal, top three priorities, win themes, proof points and the words the buyer uses. Ten minutes here saves hours of rewriting.

4 **Draft from the body**

Outline (or better, draft) the technical, management and past performance sections first, then lift your strongest points into the summary. Every claim in the summary should point to the section where it is proven.

5 **Mirror the evaluation criteria**

Order your headings the way the solicitation orders its evaluation factors, and use the buyer's terms. An evaluator holding a score sheet should be able to find each factor in seconds.

6 **Cut to fit, then test it**

Trim to the page limit, then hand it to a colleague who has not read the RFP. Within a minute they should be able to say what the buyer needs, what you will do and why you are the safer choice.

SECTION 3.2

Which executive summary template fits your bid?

The biggest decision is not wording. It is matching the summary to how the buyer will choose. In a best-value tradeoff, the buyer may pay more for a stronger offer, so your summary sells strengths. In a sealed low-bid process, award goes to the lowest-priced bid that meets every requirement from a bidder judged responsible, so being complete and unconditional matters far more than persuasion. Program proposals to funders and human-services agencies are judged on need, design, outcomes and capacity.

TABLE **Choose a template by solicitation type**

Solicitation type	How award is usually decided	Start from	Typical length	Lead with
Best-value RFP for services (consulting, facilities, staffing, training, professional services)	Tradeoff among technical, management, past performance and price	Best-value services RFP summary	1 to 2 pages unless a limit is set	The buyer's outcome and your top three strengths
Invitation for bid (IFB) or low-bid quote	Lowest responsive bid from a responsible bidder	Low-bid / IFB summary letter	One page, only if a letter is allowed	Confirmation that you meet every requirement, with no conditions
Construction (design-bid-build, design-build, construction manager, job order)	Low bid for traditional work; best value or qualifications for alternative delivery	Construction project summary	1 to 2 pages	Site understanding, schedule, safety and the field team

Solicitation type	How award is usually decided	Start from	Typical length	Lead with
IT system, software or integration project	Usually best value, with demos and technical scores weighted heavily	Technology implementation summary	1 to 3 pages	Business outcomes, the implementation plan and risk control
Nonprofit program RFP or funder proposal	Need, program design, outcomes, capacity and budget	Nonprofit program proposal summary	Often one page; follow the funder	The community need and the measurable change you will deliver

> **NOTE** **Not sure how the award will be decided?**
>
> Look for the basis-of-award language, usually next to the evaluation criteria. Phrases like *best value*, *tradeoff* or *most advantageous* signal a scored proposal. *Lowest responsive and responsible bidder* signals a sealed low bid. *Lowest price technically acceptable* (LPTA) means your technical offer is judged pass or fail and price decides among acceptable offers, so keep the summary lean and compliance-focused. **Types of Solicitations: RFP, RFQ, IFB and RFI** explains each format.

SECTION 3.3

Plan your executive summary before you draft it

Strong summaries are planned, not improvised. The worksheet below collects everything the five moves need on one page. Fill it in with your capture lead or subject matter experts at the outline stage, then keep it beside you while you write. It also makes reviews faster: a reviewer can check the draft against the worksheet instead of guessing what you meant to say.

TEMPLATE

Executive summary planning worksheet

Copy-ready online

A one-page worksheet that captures the buyer's goal, priorities, win themes, proof and exclusions before drafting.

WHEN TO USE At the outline stage of any proposal, before you open one of the five summary templates. Reuse it at the review stage as the checklist reviewers score the draft against.

EXECUTIVE SUMMARY PLANNING WORKSHEET

Opportunity: [SOLICITATION_TITLE], [SOLICITATION_NUMBER]
Buyer: [AGENCY_OR_FUNDER_NAME]
Basis of award: [BASIS_OF_AWARD]
Summary page limit: [PAGE_LIMIT] Scored: [SCORED_YES_NO]
Summary owner: [WRITER_NAME] Draft due: [DRAFT_DATE]

1. The buyer's goal in one sentence, in their words:
[BUYER_GOAL]

2. The buyer's top three priorities and where each is stated:
a. [PRIORITY_1] Source: [WHERE_STATED_1]
b. [PRIORITY_2] Source: [WHERE_STATED_2]
c. [PRIORITY_3] Source: [WHERE_STATED_3]

3. Our solution in two sentences:
[SOLUTION_SUMMARY]

4. Win themes (benefit to the buyer, the feature that delivers it, the proof):
Theme 1: [BUYER_BENEFIT_1] because [OUR_FEATURE_1]. Proof: [EVIDENCE_1]. Proven in section: [SECTION_REF_1]
Theme 2: [BUYER_BENEFIT_2] because [OUR_FEATURE_2]. Proof: [EVIDENCE_2]. Proven in section: [SECTION_REF_2]
Theme 3: [BUYER_BENEFIT_3] because [OUR_FEATURE_3]. Proof: [EVIDENCE_3]. Proven in section: [SECTION_REF_3]

5. Discriminators (what we offer that likely competitors cannot match):
- [DISCRIMINATOR_1]
- [DISCRIMINATOR_2]

6. Risks the buyer worries about, and how we reduce each one:
- [BUYER_RISK_1] → [MITIGATION_1]
- [BUYER_RISK_2] → [MITIGATION_2]

7. Proof points with numbers (results, ratings, credentials, awards):
- [PROOF_POINT_1]
- [PROOF_POINT_2]
- [PROOF_POINT_3]

8. Terms the buyer uses that we must mirror:
[BUYER_TERMS]

9. What the summary must NOT contain:
[EXCLUSIONS]

10. Approved by: [REVIEWER_NAME], [REVIEW_DATE]

FIELDS TO FILL IN · 9

[BASIS_OF_AWARD]	Best-value tradeoff, LPTA, lowest responsive and responsible bid, or program review. Copy the exact phrase from the solicitation.
[PAGE_LIMIT] / [SCORED_YES_NO]	From the submission instructions. Note whether the summary counts toward the technical page limit.
[BUYER_GOAL]	The mission result behind the purchase, for example 'keep 14 park facilities open and inspection-ready through peak season'. Use the buyer's words from the scope or background section.
[PRIORITY_1] to [PRIORITY_3] and [WHERE_STATED_1] to [WHERE_STATED_3]	The three things the buyer cares about most, from evaluation factors, the statement of work, pre-proposal conference notes or answers to questions. Record the page or section for each.
[BUYER_BENEFIT_n] / [OUR_FEATURE_n] / [EVIDENCE_n]	Lead with the benefit to the buyer, then the feature, then a fact that proves it: a result, a rating, a certification or a named reference.
[SECTION_REF_n]	The proposal section where the theme is fully proven. If there is no such section yet, the theme is not ready for the summary.
[DISCRIMINATOR_n]	Something that matters to the buyer and that competitors are unlikely to offer, such as a crew already based in the county or a team that has run this exact system.
[BUYER_RISK_n] → [MITIGATION_n]	Risks the buyer fears (late start, turnover, data loss, safety incidents) and the specific step you take to reduce each one.
[EXCLUSIONS]	Price figures if the solicitation bans them outside the price volume, claims you cannot prove, competitor names, and anything confidential.

SECTION 3.4

Best-value services RFP executive summary template

Use this template for scored RFPs where technical quality, management and past performance count alongside price: consulting, facilities maintenance, janitorial, security, staffing, training, engineering and other professional services. Federal best-value tradeoffs work this way, and many state, city and public authority RFPs use similar weighted scoring.

The structure mirrors the evaluation factors. After a short opening that names the buyer's goal, each heading repeats one factor in the buyer's words, with your strength, the benefit and the proof underneath. That layout lets an evaluator jump from a line on the score sheet straight to your answer.

TEMPLATE

Best-value services RFP executive summary

Copy-ready online

A one-to-two-page summary organized by evaluation factor, with an outcome-first opening and proof under every claim.

WHEN TO USE Scored RFPs for services where non-price factors matter: consulting, facilities, security, staffing, IT services, training and other professional services.

EXECUTIVE SUMMARY
[COMPANY_NAME] Response to [SOLICITATION_NUMBER]: [SOLICITATION_TITLE]

[AGENCY_NAME] needs [OUTCOME_IN_BUYERS_WORDS] so that [MISSION_RESULT]. Our proposal delivers that outcome by [ONE_SENTENCE_SOLUTION], led by a team that has done this work for [COMPARABLE_CLIENT_TYPE] for [YEARS_OF_EXPERIENCE] years.

Our Understanding of Your Needs
We understand that [AGENCY_NAME] must [CORE_REQUIREMENT] while [KEY_CONSTRAINT]. Your solicitation emphasizes three priorities: [PRIORITY_1], [PRIORITY_2] and [PRIORITY_3]. Our approach is built around each of them.

[EVALUATION_FACTOR_1_NAME]
We will [WHAT_YOU_WILL_DO] using [METHOD_OR_TOOL]. For [AGENCY_NAME], this means [BENEFIT_1]. On [REFERENCE_PROJECT], the same approach [MEASURABLE_RESULT]. See Section [SECTION_REF_1].

[EVALUATION_FACTOR_2_NAME]
[PROGRAM_MANAGER_NAME], our proposed program manager, brings [PM_YEARS] years of [PM_RELEVANT_EXPERIENCE] and will be your single point of contact with authority to [PM_DECISION_AUTHORITY]. Our staffing plan fills all [NUMBER_OF_POSITIONS] positions by [STAFFING_DATE], with [BACKUP_OR_SURGE_PLAN]. See Section [SECTION_REF_2].

[EVALUATION_FACTOR_3_NAME]
We have delivered comparable services to [CLIENT_1], [CLIENT_2] and [CLIENT_3], including [MOST_RELEVANT_RESULT]. [REFERENCE_QUOTE_OR_RATING]. See Section [SECTION_REF_3].

Why [COMPANY_NAME]
- [DISCRIMINATOR_1]: [PROOF_1]
- [DISCRIMINATOR_2]: [PROOF_2]
- [DISCRIMINATOR_3]: [PROOF_3]

Value and Risk Reduction
Our offer reflects [VALUE_BASIS], and our approach reduces your risk by [RISK_REDUCTION]. [OPTIONAL_CERTIFICATION_STATEMENT]

Our Commitment
We are ready to begin on [START_DATE] and commit to [TOP_COMMITMENT]. [SIGNATORY_NAME], [SIGNATORY_TITLE], is authorized to bind [COMPANY_NAME] and can be reached at [PHONE] or [EMAIL].

FIELDS TO FILL IN · 13

[OUTCOME_IN_BUYERS_WORDS] / [MISSION_RESULT]	What the buyer is trying to achieve and why it matters to their mission, paraphrased from the background or scope section. Example: 'reliable, code-compliant HVAC service across 22 buildings so that schools stay open on schedule'.
[ONE_SENTENCE_SOLUTION]	Your approach in one plain sentence, without jargon or product names the evaluator would need to look up.
[CORE_REQUIREMENT] / [KEY_CONSTRAINT]	The heart of the scope, and the limit that makes it hard: a fixed budget, a hard start date, occupied buildings, a small in-house team.
[PRIORITY_1] to [PRIORITY_3]	From your planning worksheet. Use the same words the evaluation criteria use.
[EVALUATION_FACTOR_1_NAME] to [EVALUATION_FACTOR_3_NAME]	The solicitation's factor names, in its order (for example Technical Approach, Management and Staffing, Past Performance). Add or remove blocks so there is one per non-price factor.
[BENEFIT_1] / [MEASURABLE_RESULT]	Quantify where you honestly can: response times, completion rates, cost avoided, ratings. Use only results you can document.
[PROGRAM_MANAGER_NAME] / [PM_YEARS] / [PM_RELEVANT_EXPERIENCE] / [PM_DECISION_AUTHORITY]	Name the person, not a role. State what they can approve without escalation (staffing changes, emergency spend up to a set amount).

[SECTION_REF_1] to [SECTION_REF_3]	The proposal section number that proves each claim. Never cite a section that does not exist.
[REFERENCE_QUOTE_OR_RATING]	A short client quote you have permission to use, or a formal performance rating. Delete the sentence if you have neither.
[DISCRIMINATOR_n] / [PROOF_n]	Three reasons to choose you, each with a fact. Avoid superlatives such as world-class or best-in-class.
[VALUE_BASIS] / [RISK_REDUCTION]	Describe value without dollar figures, for example 'a fully staffed team with surge support included'. Many solicitations ban price information outside the price volume; check before adding any number.
[OPTIONAL_CERTIFICATION_STATEMENT]	Small business, M/WBE, SDVOB or other certifications, with the certifying agency, only if relevant to the evaluation or goals. Delete otherwise.
[SIGNATORY_NAME] / [SIGNATORY_TITLE]	An officer authorized to commit the company to the offer.

WORKED EXAMPLE

Filled-in opening for a facilities maintenance RFP (fictional agency, company and figures) ✓ STRONG

> The Riverbend Parks Authority needs its 14 park facilities open, safe and inspection-ready through peak season without adding in-house staff. Our proposal delivers that with a dedicated two-crew preventive maintenance program, a four-hour emergency response commitment and a weekly condition report your facility managers can act on. On a comparable 11-site contract for a Westchester school district, the same program reduced open work orders by about a third in its first year (Section 4.2).
>
> **Why it works:** the buyer and its goal come first, the solution is concrete, the commitment is measurable, and the proof points to a section the evaluator can check.

WORKED EXAMPLE

The same opening, written the usual way ✗ WEAK

> ABC Facility Services, founded in 1998, is a leading, world-class provider of comprehensive facility solutions. We are pleased to submit this proposal and are confident that our experienced team and commitment to excellence make us the best choice for your organization.
>
> **Why it fails:** it is about the seller, names no buyer goal, makes claims nobody can verify, and could be pasted into any proposal ever written.

SECTION 3.5

Low-bid and IFB summary letter template

In sealed bidding (an invitation for bid, or IFB), price decides the award once a bid is *responsive* and the bidder is *responsible*. Responsive means the bid meets every material requirement of the invitation. Responsible means you have the capacity, integrity, finances and resources to perform. A persuasive executive summary rarely changes the outcome, and the wrong words in a letter can hurt you.

> ⚠ **WARNING** **Do not condition your bid**
>
> Federal sealed-bidding rules, and many state and local rules that follow the same principle, reject bids that change the invitation's terms, limit the bidder's liability or qualify the price. A cover or summary letter is acceptable only if the bid still accepts every term exactly as written.
>
> Avoid words like *subject to*, *assuming*, *excluding* or *contingent on* unless the invitation expressly allows alternates or exceptions. This is general information, not legal advice. Rules vary by agency; when in doubt, ask the contracting officer in writing before the question deadline.

Use the letter below only when the invitation allows or asks for a transmittal or summary letter. It confirms completeness, acknowledges addenda, states your capacity briefly and stops. If the invitation calls for nothing more than a bare cover sheet, use the **sealed-bid transmittal letter** instead; use this version when a short statement of your capacity is allowed or requested.

TEMPLATE

Low-bid / IFB summary letter

Copy-ready online

A one-page, unconditional summary letter that confirms the bid is complete and shows you are responsible, without restating or qualifying the price.

WHEN TO USE Invitations for bid, sealed bids and low-bid quotes where a transmittal or summary letter is permitted. Skip it entirely if the invitation says to submit only the bid forms.

[COMPANY_LETTERHEAD]

[DATE]

[CONTRACTING_OFFICER_NAME]
[CONTRACTING_OFFICER_TITLE]
[AGENCY_NAME]
[AGENCY_ADDRESS]

Re: Bid for [IFB_NUMBER], [IFB_TITLE]
Bid opening: [BID_OPENING_DATE_AND_TIME]

Dear [CONTRACTING_OFFICER_NAME]:

[COMPANY_NAME] submits the enclosed bid for [IFB_TITLE] in full accordance with the terms, conditions, specifications and delivery requirements of [IFB_NUMBER]. Our bid takes no exceptions and offers no alternates.

Summary of Our Bid
- Pricing: as entered on the enclosed bid form, [BID_FORM_REFERENCE], for all [NUMBER_OF_LINE_ITEMS] line items on the bid schedule.
- Addenda acknowledged: Addendum [FIRST_ADDENDUM_NUMBER] through Addendum [LAST_ADDENDUM_NUMBER], each also acknowledged on the bid form.
- Bid security: [BID_SECURITY_TYPE] in the amount the invitation requires is enclosed.
- Acceptance period: our bid remains open for acceptance for the period stated in the invitation.
- Required forms enclosed: [LIST_OF_REQUIRED_FORMS].

Our Capacity to Perform
[COMPANY_NAME] has provided [GOODS_OR_SERVICES] to [CLIENT_TYPES] for [YEARS_IN_BUSINESS] years, including [RECENT_COMPARABLE_CONTRACT]. We have the [CREWS_EQUIPMENT_OR_PRODUCTION_CAPACITY], [LICENSES_AND_CERTIFICATIONS] and financial resources to meet the required schedule of [DELIVERY_OR_COMPLETION_REQUIREMENT]. [BONDING_CAPACITY_STATEMENT]

Registrations
Vendor registration or ID: [VENDOR_REGISTRATION_NUMBER]. [CERTIFICATION_STATEMENT]

Point of Contact
[CONTACT_NAME], [CONTACT_TITLE], will answer any question about this bid at [PHONE] or [EMAIL].

Thank you for the opportunity to bid. We look forward to serving [AGENCY_NAME].

Sincerely,

[SIGNATURE]
[AUTHORIZED_SIGNATORY_NAME]
[AUTHORIZED_SIGNATORY_TITLE]
[COMPANY_NAME]

Enclosures: [LIST_OF_ENCLOSURES]

FIELDS TO FILL IN · 9

[IFB_NUMBER] / [IFB_TITLE] / [BID_OPENING_DATE_AND_TIME]	Copy exactly from the invitation cover page, including the time zone if one is stated.
[BID_FORM_REFERENCE]	The name or number of the bid form or schedule, for example 'Bid Form B, Schedule of Prices'. Do not retype your prices in the letter: if the letter and the form disagree, you have created an ambiguity.

[FIRST_ADDENDUM_NUMBER] / [LAST_ADDENDUM_NUMBER]	Check the buyer's posting for late addenda on the morning of submission. Missing an addendum acknowledgment is a common reason bids are rejected.
[BID_SECURITY_TYPE]	Bid bond, certified check or other form the invitation allows. Delete the line if no bid security is required.
[LIST_OF_REQUIRED_FORMS]	Every form the invitation lists (bid form, non-collusion affidavit, questionnaires, certifications). Use the invitation's own names.
[-RECENT_COMPARABLE_CONTRACT]	One recent contract of similar size and scope, with the client name and year, to support responsibility.
[-BONDING_CAPACITY_STATEMENT]	For construction or bonded services: your surety and confirmed single and aggregate capacity. Delete if not relevant.
[-VENDOR_REGISTRATION_NUMBER] / [CERTIFICATION_STATEMENT]	Your vendor ID in the buyer's system and any certification (M/WBE, DBE, SDVOB, small business) with the certifying agency. Delete what does not apply.
[-AUTHORIZED_SIGNATORY_NAME]	Someone with authority to bind the company. Some invitations require proof of authority, such as a corporate resolution.

Safe and risky wording in a bid letter

Safe: confirms, never qualifies

- ✓ We take no exceptions to the terms, conditions or specifications.
- ✓ Addenda 1 through 3 are acknowledged here and on the bid form.
- ✓ Bid security in the required amount is enclosed.
- ✓ Our pricing is as entered on Bid Form B.

Risky: can make a bid nonresponsive

- ✗ Prices are subject to change if material costs rise.
- ✗ Delivery within 60 days, assuming timely approval of submittals (when the invitation requires 45).
- ✗ Our standard terms and conditions apply.
- ✗ We propose a substitute product of equal quality (unless the invitation allows 'or equal' items).

SECTION 3.6

Construction project executive summary template

Public construction is bought in several ways. Traditional design-bid-build work is usually awarded to the lowest responsible bidder, so the bid letter above is often all you need. Design-build, construction manager at-risk and other alternative delivery methods, where state or local law allows them, are often awarded on best value or qualifications, and that is where a strong construction executive summary earns points.

Construction evaluators look for the same few things: do you understand the site and its constraints, can you hold the schedule, will you keep people safe, who is actually running the job, and can you be bonded for it. The template gives each one its own heading so a selection committee can score them quickly.

TEMPLATE

Construction project executive summary

Copy-ready online

A best-value construction summary covering site understanding, phasing, schedule, safety, quality, the field team, experience, participation goals and bonding.

WHEN TO USE

Design-build, construction manager, job order contracting and other construction RFPs scored on more than price, and any construction bid that asks for a project approach narrative.

EXECUTIVE SUMMARY
[PROJECT_NAME], [CONTRACT_NUMBER]
Submitted to [OWNER_AGENCY] by [COMPANY_NAME]

Project Understanding
[OWNER_AGENCY] is [PROJECT_DESCRIPTION] at [SITE_LOCATION]. The work must be completed [SCHEDULE_REQUIREMENT] while [SITE_CONSTRAINT_1] and [SITE_CONSTRAINT_2]. We walked the site on [SITE_VISIT_DATE] and reviewed [DOCUMENTS_REVIEWED]. The three issues that will decide this project's success are [CRITICAL_ISSUE_1], [CRITICAL_ISSUE_2] and [CRITICAL_ISSUE_3].

Our Approach
We will build [PROJECT_NAME] in [NUMBER_OF_PHASES] phases: [PHASE_SUMMARY]. To protect [OCCUPANTS_PUBLIC_OR_OPERATIONS], we will [LOGISTICS_MEASURES]. Long-lead items, including [LONG_LEAD_ITEMS], will be submitted for approval within [SUBMITTAL_DAYS] days of notice to proceed so procurement does not drive the schedule.

Schedule
Our baseline schedule reaches substantial completion on [SUBSTANTIAL_COMPLETION_DATE], [SCHEDULE_POSITION] the required date, with [SCHEDULE_CONTINGENCY]. The critical path runs through [CRITICAL_PATH_SUMMARY]. The full schedule is in Section [SECTION_REF_SCHEDULE].

Safety
[SAFETY_LEAD_NAME], [SAFETY_LEAD_CREDENTIALS], leads our safety program. Our experience modification rate (EMR) for [EMR_YEAR] is [EMR_VALUE], and our site-specific safety plan addresses [SITE_SPECIFIC_HAZARDS]. Every worker on site will hold [REQUIRED_SAFETY_TRAINING].

Quality Control
Our quality control manager, [QC_MANAGER_NAME], will run [QC_METHOD] and document every inspection and test. Details are in Section [SECTION_REF_QC].

Project Team
- Project Executive: [EXECUTIVE_NAME], [EXECUTIVE_YEARS] years, most recently [EXECUTIVE_COMPARABLE_PROJECT]
- Project Manager: [PM_NAME], [PM_YEARS] years, most recently [PM_COMPARABLE_PROJECT]
- Superintendent: [SUPER_NAME], [SUPER_YEARS] years, most recently [SUPER_COMPARABLE_PROJECT]
Our superintendent will be on site full time from mobilization through substantial completion.

Relevant Experience
- [COMPARABLE_PROJECT_1]: [OWNER_1], [VALUE_1], completed [YEAR_1], [RESULT_1]
- [COMPARABLE_PROJECT_2]: [OWNER_2], [VALUE_2], completed [YEAR_2], [RESULT_2]
- [COMPARABLE_PROJECT_3]: [OWNER_3], [VALUE_3], completed [YEAR_3], [RESULT_3]

Participation, Bonding and Insurance
We will meet the [PARTICIPATION_GOAL] through [SUBCONTRACTING_PLAN]. [SURETY_NAME] has confirmed bonding capacity of [SINGLE_PROJECT_LIMIT] for a single project and [AGGREGATE_LIMIT] in aggregate, and our insurance meets the limits in the contract.

[COMPANY_NAME] commits to delivering [PROJECT_NAME] safely, on schedule and within the contract price. Contact: [SIGNATORY_NAME], [SIGNATORY_TITLE], [PHONE], [EMAIL].

FIELDS TO FILL IN · 10

[SITE_CONSTRAINT_1] / [SITE_CONSTRAINT_2]	Real constraints you found in the documents or on the site walk: an occupied school, a single access road, utility shutdown windows, noise limits, a historic facade.
[DOCUMENTS_REVIEWED]	Drawings, specifications, geotechnical report, existing conditions survey, hazardous materials report. Naming them shows you did the homework.
[CRITICAL_ISSUE_1] to [CRITICAL_ISSUE_3]	The few things most likely to cause delay, cost growth or claims on this job, each answered later in your approach.

[LOGISTICS_MEASURES]	Phasing around occupants, after-hours work, temporary partitions, pedestrian protection, delivery staging, dust and noise control.
[SCHEDULE_POSITION] / [SCHEDULE_CONTINGENCY]	'on' or 'ahead of' the required date, and the float or contingency you carry. Never promise a date your schedule does not support.
[EMR_VALUE] / [EMR_YEAR]	Your experience modification rate from your workers' compensation insurer. 1.0 is the industry baseline for your trade and size; lower means a better claims record. Many owners ask for three years.
[REQUIRED_SAFETY_TRAINING]	The training the contract or local law requires, for example OSHA 10 or OSHA 30 cards, or New York City Site Safety Training cards on sites where they apply. Confirm the current requirement for your jurisdiction.
[QC_METHOD]	Your inspection approach, for example 'a three-phase inspection (preparatory, initial, follow-up) for each definable feature of work'. The template in the next chapter has the full plan.
[PARTICIPATION_GOAL] / [SUBCONTRACTING_PLAN]	The M/WBE, DBE, SDVOB or local hiring goal stated in the solicitation, and how you will meet it (named subcontractors, scopes, percentages). Delete if no goal applies.
[SURETY_NAME] / [SINGLE_PROJECT_LIMIT] / [AGGREGATE_LIMIT]	From a current letter from your surety. Attach the letter if the solicitation asks for it.

PRO TIP **Pro tip: put a number on safety and schedule**

An EMR, a recordable incident rate, a list of comparable projects finished on time, or a named superintendent who has built this building type is worth more than a paragraph about your commitment to safety. If you need help with bonding and insurance basics, see **Bonding, Insurance and Compliance Requirements**; for participation goals and certifications, see **Small Business and Diversity Certifications**.

SECTION 3.7

Technology implementation executive summary template

Software, systems integration and IT modernization projects tend to go wrong in familiar ways: unclear requirements, messy data, poor user adoption and late security surprises. Evaluators on these RFPs have often lived through a troubled implementation, so they read your summary looking for evidence that you will control those risks. Lead with business outcomes, then show a phased plan and how you handle data, security, training and support.

TEMPLATE

Technology implementation executive summary

Copy-ready online

An outcome-first summary for software, cloud and systems integration RFPs, with a phased implementation plan, security and accessibility, risk control and post-go-live support.

WHEN TO USE RFPs for case management, permitting, ERP, CRM, websites and portals, data platforms, cloud migration and other system implementations.

EXECUTIVE SUMMARY
[SYSTEM_OR_PROJECT_NAME] Implementation for [AGENCY_NAME]
Response to [SOLICITATION_NUMBER]

The Outcome You Need
[AGENCY_NAME] needs to replace [CURRENT_SYSTEM_OR_PROCESS] with [TARGET_CAPABILITY] so that [USER_GROUPS] can [BUSINESS_OUTCOME]. Success, as your solicitation defines it, means [SUCCESS_MEASURE_1], [SUCCESS_MEASURE_2] and go-live by [GO_LIVE_DATE].

Our Solution
We propose [SOLUTION_DESCRIPTION], delivered as [DEPLOYMENT_MODEL] and configured to your requirements rather than custom-built. It meets [REQUIREMENTS_MET_STANDARD] of your [TOTAL_REQUIREMENTS] requirements as delivered, with the remaining [REQUIREMENTS_CONFIGURED] met through [CONFIGURATION_OR_INTEGRATION_METHOD]. Our requirement-by-requirement response is in Section [SECTION_REF_REQUIREMENTS].

Implementation Plan
Phase 1, Discovery and Design, [PHASE_1_DURATION]: confirm requirements, map current and future processes, and finalize the data migration plan.
Phase 2, Configuration and Integration, [PHASE_2_DURATION]: configure the system, build interfaces with [SYSTEMS_TO_INTEGRATE], and demonstrate progress to your team every [DEMO_FREQUENCY].
Phase 3, Data Migration and Testing, [PHASE_3_DURATION]: [NUMBER_OF_TRIAL_MIGRATIONS] trial migrations, system, performance and security testing, and user acceptance testing led by your staff.
Phase 4, Training and Go-Live, [PHASE_4_DURATION]: role-based training for [NUMBER_OF_USERS] users, a cutover plan with a tested rollback, and [HYPERCARE_PERIOD] of intensive post-launch support.

Security, Privacy and Accessibility
The solution [SECURITY_STATUS] and supports [PRIVACY_REQUIREMENTS]. User interfaces conform to [ACCESSIBILITY_STANDARD]. [DATA_OWNERSHIP_AND_LOCATION_STATEMENT]

Risk Control
The risks most likely to affect this project are [TOP_RISK_1] and [TOP_RISK_2]. We control them through [MITIGATION_SUMMARY]. Our full risk register is in Section [SECTION_REF_RISK].

Team and Experience
[PROJECT_MANAGER_NAME], [PM_CREDENTIAL], will lead the project day to day. Our team has implemented [SOLUTION_TYPE] for [NUMBER_OF_PUBLIC_CLIENTS] public-sector clients, including [REFERENCE_CLIENT], which [REFERENCE_RESULT].

Support After Go-Live
[SUPPORT_MODEL] with [SERVICE_LEVELS], plus [KNOWLEDGE_TRANSFER_COMMITMENT] so your team can run and improve the system on its own.

[COMPANY_NAME] can begin within [MOBILIZATION_DAYS] days of contract execution. Contact: [SIGNATORY_NAME], [SIGNATORY_TITLE], [PHONE], [EMAIL].

FIELDS TO FILL IN · 10

[BUSINESS_OUTCOME] / [SUCCESS_MEASURE_1] / [SUCCESS_MEASURE_2]	Results the buyer named, such as 'issue permits online in days instead of weeks' or 'retire the legacy mainframe before the support contract ends'.
[DEPLOYMENT_MODEL]	Software as a service, government cloud, hosted, or on premises. Match what the solicitation allows.
[REQUIREMENTS_MET_STANDARD] / [TOTAL_REQUIREMENTS] / [REQUIREMENTS_CONFIGURED]	Counts taken from your completed requirements matrix. They must match it exactly; evaluators check.
[SYSTEMS_TO_INTEGRATE]	The buyer's financial system, identity provider, GIS, payment processor or other systems named in the scope.
[HYPERCARE_PERIOD]	The period after go-live with extra support staff, for example 30 or 60 days. State whether it is on site or remote.
[SECURITY_STATUS]	State only what is true today: for example a FedRAMP authorization for federal cloud work, a GovRAMP (formerly StateRAMP) status for state and local work, a current SOC 2 Type II report, or alignment with NIST SP 800-53 controls. If an authorization is in progress, say so plainly.
[ACCESSIBILITY_STANDARD]	Section 508 for federal work; WCAG 2.1 Level AA is a common requirement in state and local RFPs. Use the standard the solicitation names.
[DATA_OWNERSHIP_AND_LOCATION_STATEMENT]	For example, 'All data remains the property of the agency, is stored in data centers in the United States, and is returned in a standard format at contract end.' Confirm with your hosting provider.
[TOP_RISK_1] / [TOP_RISK_2] / [MITIGATION_SUMMARY]	Usually data quality, integration delays, staff availability for testing, or adoption. Pull them from your risk register.
[REFERENCE_CLIENT] / [REFERENCE_RESULT]	A comparable public client and a verifiable result, for example 'went live on the planned date and closed its legacy system three months later'.

COMMON MISTAKE **Common mistake: a feature list instead of outcomes**

Technology summaries often read like a product brochure: dashboards, workflows, mobile apps, AI. Evaluators score how you meet their requirements and how safely you will get them live. Translate every feature into what changes for the buyer's staff or residents, and move product detail into the technical volume. The **Technical Approach and Management Plan Templates** chapter shows where that detail belongs.

SECTION 3.8

Nonprofit program proposal summary template

Nonprofits answer two kinds of requests that look alike: government RFPs for human services and foundation or corporate requests for proposals. Both ask the same questions: what is the need, who will you serve, what will you do, what will change, why are you the right organization and what will it cost. Funders often read the summary first to decide whether to keep reading, so write it last and make it stand on its own.

TEMPLATE

Nonprofit program proposal summary

Copy-ready online

A one-page program summary covering need, program model, measurable outcomes, organizational capacity, budget request and sustainability.

WHEN TO USE Government human-services RFPs (youth, workforce, health, housing, senior services) and foundation or corporate funding requests that ask for a summary or abstract.

PROGRAM SUMMARY
[ORGANIZATION_NAME]: [PROGRAM_NAME]
Submitted to [FUNDER_OR_AGENCY_NAME] in response to [RFP_NAME_OR_NUMBER]

The Need
In [SERVICE_AREA], [TARGET_POPULATION] face [PROBLEM]. [DATA_POINT_WITH_SOURCE].
Without [TYPE_OF_SERVICE], [CONSEQUENCE_FOR_COMMUNITY].

Our Program
[PROGRAM_NAME] will serve [NUMBER_SERVED] [PARTICIPANT_TYPE] over [PROGRAM_PERIOD] through [CORE_SERVICES]. The model is based on [EVIDENCE_BASE], adapted for [LOCAL_CONTEXT]. Participants will be reached through [OUTREACH_AND_REFERRAL_PARTNERS].

Outcomes We Will Deliver
By [END_DATE], we will:
1. [SMART_OBJECTIVE_1]
2. [SMART_OBJECTIVE_2]
3. [SMART_OBJECTIVE_3]
We will track progress with [DATA_SYSTEM] and report to [FUNDER_OR_AGENCY_NAME] [REPORTING_FREQUENCY].

Why [ORGANIZATION_NAME]
Since [YEAR_FOUNDED], [ORGANIZATION_NAME] has [TRACK_RECORD_SUMMARY]. Last year we served [LAST_YEAR_NUMBER_SERVED] [PARTICIPANT_TYPE] and [KEY_RESULT]. Our team includes [KEY_STAFF_QUALIFICATIONS], and we work in partnership with [PARTNER_ORGANIZATIONS]. [CONTRACT_READINESS_STATEMENT]

Budget and Sustainability
We request [AMOUNT_REQUESTED] for [FUNDING_PERIOD] toward a total program budget of [TOTAL_PROGRAM_BUDGET]. Other support comes from [OTHER_FUNDING_SOURCES]. After this funding period, the program will be sustained through [SUSTAINABILITY_PLAN].

[ORGANIZATION_NAME] is ready to begin services on [START_DATE]. Contact: [CONTACT_NAME], [CONTACT_TITLE], [PHONE], [EMAIL].

FIELDS TO FILL IN · 7

[TARGET_POPULATION] / [PROBLEM] / [DATA_POINT_WITH_SOURCE]	Who is affected and how, with one or two credible local figures and their source (census data, a city or county report, your own intake data). Never round up or borrow national numbers as local ones.
[EVIDENCE_BASE]	A named evidence-based or promising model, or your own outcome data from earlier cycles. If the funder lists approved models, use their name for it.
[SMART_OBJECTIVE_1] to [SMART_OBJECTIVE_3]	Specific, measurable, achievable, relevant and time-bound. Example: '75 percent of the 120 enrolled youth will complete a paid summer internship by August 31'.
[DATA_SYSTEM] / [REPORTING_FREQUENCY]	The case management or data tool you already use, and how often you will report (monthly, quarterly). Match any reporting system the agency requires.
[CONTRACT_READINESS_STATEMENT]	For government RFPs: your registration in the agency's vendor or prequalification system, insurance, audit history and experience with contract reporting. Delete for most foundation requests.

[AMOUNT_REQUESTED] / [TOTAL_PROGRAM_BUDGET]	Must match your budget form exactly. Government RFPs sometimes set a maximum award or a cost per participant; stay within it.
[SUSTAINABILITY_PLAN]	Other committed or likely funding, earned revenue, public contracts or partner absorption. Be realistic; reviewers notice hopeful plans.

TIP **Government RFP or foundation request?**

For a government human-services RFP, the summary is often followed by detailed program, staffing and budget forms, so keep it tight and add a line on compliance readiness. For a foundation, emphasize fit with the funder's stated priorities and use their vocabulary. Either way, use outcome numbers you can defend on the first site visit. For where these requests come from, see **Finding Private-Sector and Nonprofit RFPs**.

SECTION 3.9

How to adapt an executive summary for your industry

The five moves stay the same in every industry; the proof changes. Use this table to decide what to emphasize and what to leave out when you tailor a template.

TABLE **What evaluators look for, by industry**

Industry	What evaluators look for	Best proof points	Watch out for
Construction	Site understanding, a realistic schedule, safety, the superintendent, bonding	EMR and safety record, comparable projects finished on time, named field team, surety letter	Generic safety boilerplate; a completion date your schedule cannot support
IT and software	Fit to requirements, implementation risk, data migration, security, training	Go-lives with similar agencies, requirement coverage counts, security reports and authorizations	Feature lists without outcomes; claiming certifications still in progress
Professional services and consulting	Understanding of the problem, method, the actual people, responsiveness	Named experts with relevant results, client quotes, sample deliverables	Selling the firm instead of the team; resumes that do not match the proposed roles
Facilities, janitorial and security services	Coverage, supervision, response times, quality checks, smooth start-up	Coverage plans, response-time history, inspection scores, staff retention	Understaffing to hit a price; vague escalation paths

Industry	What evaluators look for	Best proof points	Watch out for
Nonprofit programs	Need, program model, measurable outcomes, capacity, budget fit	Service numbers, outcome data, partnerships, audit and reporting history	Moving stories with no outcome data; outcomes you cannot measure

If you bid in New York, New Jersey or Connecticut, mention local presence only when it matters to the work: response times, crews based nearby, familiarity with local permitting or inspection practice. *Local business* on its own is not a strength unless the evaluation criteria reward it. To see who has won similar work before (and which incumbent you may be displacing), look up their public profile and **Contractor Score** in the **contractor directory**.

SECTION 3.10

Filled-in example: a weak and a strong executive summary

Here is the same fictional bid written two ways. A small software firm is responding to a county RFP to replace a paper-based building permit process. The facts are identical; only the writing changes. Agency, company and figures are invented for illustration.

WORKED EXAMPLE

Weak: company-first and unprovable

✕ WEAK

> XYZ Software is an innovative, cutting-edge provider of next-generation government software. Founded by industry veterans, we have a passion for digital transformation and a proven track record of success. Our robust, scalable platform offers dashboards, workflows, mobile access and AI-powered analytics. We are confident that XYZ Software is the ideal partner for Lakeside County and look forward to a long and successful relationship.

WORKED EXAMPLE

Strong: buyer-first, specific and checkable

✓ STRONG

> Lakeside County needs to issue residential building permits online, cut the current six-week review backlog, and retire its paper files before the 2027 records-room lease ends. We will deliver an online permitting system configured, not custom-built, to your requirements, live for residential permits within seven months of contract start.
>
> **Faster reviews.** Applicants submit complete applications online with automatic checks for missing documents, the main cause of rework your RFP describes. A comparable county reduced average review time from 31 to 12 days in its first year (Section 3.4).
>
> **Low-risk transition.** We migrate your permit records in three trial runs before cutover and keep the paper process available until your staff signs off (Section 5.2).
>
> **A team that has done this.** Our project manager led two county permitting go-lives in the past three years, both on the planned date (Section 6.1).

What changed between the two versions

The strong version

- ✓ Opens with the county's goals and its deadline
- ✓ Turns each feature into a benefit the RFP asked for
- ✓ Gives numbers and points to the section that proves them
- ✓ Names the riskiest part of the project and how it is handled

The weak version

- ✗ Opens with the seller and its adjectives
- ✗ Lists features with no link to the requirements
- ✗ Makes claims no evaluator can verify
- ✗ Ends with a hope instead of a commitment

SECTION 3.11

Executive summary mistakes to avoid

- **Opening with company history.** Your founding year and mission statement belong in the **capability statement**, not the first line of the summary.
- **Restating the RFP back to the buyer.** Show insight into the need instead: the constraint, the risk, the outcome that matters most.
- **Adding claims the body does not support.** Evaluators score the proposal, not the summary. A promise with no matching section looks like puffery or, worse, an unpriced commitment.

- **Including price where it is not allowed.** Many solicitations forbid price information outside the price volume. In a sealed bid, never retype prices in a letter.
- **Ignoring the page limit.** Pages beyond a limit may be removed or left unread, and the overage can count against compliance.
- **Leaving template residue.** Search the final file for square brackets, other agencies' names and last year's dates before you submit.

> ✕ COMMON MISTAKE **Common mistake: writing it first and never revisiting it**
>
> Many teams draft the summary at kickoff to align the writers, which is fine, then forget to rewrite it after the solution changes. By submission it promises things the technical volume no longer says. Outline the summary early, write the final version last, and check every sentence against the finished body.

Executive summary final check

CHECKLIST · 10 ITEMS

- [ ] The first sentence names the buyer and the outcome they want.
- [ ] Headings follow the order of the evaluation factors and use the buyer's terms.
- [ ] Every claim has a number, a name or a credential behind it.
- [ ] Every claim points to a section of the proposal that proves it.
- [ ] No price figures appear unless the solicitation allows them.
- [ ] In a sealed bid letter: no exceptions, conditions or alternates; all addenda acknowledged.
- [ ] The summary fits the page limit and formatting rules (font, margins, file type).
- [ ] No leftover [PLACEHOLDER] brackets, other buyers' names or old dates.
- [ ] An authorized signatory and a reachable contact are named.
- [ ] A colleague who has not read the RFP can explain your offer in one minute.

Before the summary goes out, run the whole proposal through a structured review. **Reviews, Submission and Debriefs** covers color-team reviews, and **Bid Management Templates and Checklists** has the schedules and checklists to run them.

Frequently asked questions

Which executive summary template should I use?

Pick the template that matches how the buyer will choose. For a best-value services RFP, use the best-value template and organize the middle by evaluation factor. For a low-bid IFB or RFQ, use the one-page summary letter, which confirms compliance and points to the bid form instead of selling. Construction bids, technology rollouts and grant-style nonprofit proposals each have their own template. The **template comparison table** matches each one to bid types.

How do I fill in an executive summary template?

Start with the win-theme planner: write down the buyer's goal, their top priorities in their own words, your solution and one proof point for each theme. Then replace every [PLACEHOLDER] with facts specific to this buyer, use the solicitation's evaluation-factor names as headings and delete any paragraph the bid doesn't need. Finish by checking every claim against the body of the proposal, cutting to the page limit and searching the file for leftover square brackets. For the reasoning behind each part, see **Writing a Winning Executive Summary**.

Should a bid summary letter for an IFB restate my prices?

No. In a sealed bid the bid form controls, and retyping prices in a letter risks a mismatch that makes the bid ambiguous. Point to the form instead (for example, "Our pricing is as entered on Bid Form B"), confirm that you acknowledge every addendum and meet the specifications, and keep the letter to one page. Best-value proposals usually keep price out of the summary too, because many solicitations allow price only in the price volume. Grant-style proposals are the exception: funders expect the amount requested.

What is the difference between an executive summary and a cover letter?

A cover or transmittal letter formally submits the proposal: it identifies the solicitation, confirms key commitments, acknowledges addenda and is signed by an authorized officer. The executive summary is the persuasive overview of the offer itself. Some buyers ask for both, some for only one. See **Cover Letter and Transmittal Templates** for letter formats.

Can I use these templates for a grant or nonprofit program proposal?

Yes. The nonprofit program template follows the order most funders and human services agencies expect: the need, backed by a sourced data point; the program and who it serves; three measurable outcomes and how you will track them; why your organization; and the budget, including the amount requested, other funding and how the program will be sustained. If the funder supplies its own summary form or word limit, use it and move your content into their structure.

Q Can I reuse an executive summary from a previous proposal?

Reuse the structure, proven theme language and proof points, but rewrite every buyer-specific sentence: the goal, the priorities, the constraints and the evaluation-factor headings. Then search the file for the old buyer's name, solicitation number and dates. A summary that obviously belongs to another bid tells evaluators you did not read their RFP closely.

→ KEEP GOING

Writing a Winning Executive Summary
The how-to behind these templates: themes, discriminators and scoring.
rfpdetector.com/guides/how-to-write-a-winning-proposal/writing-a-winning-executive-summary

Capture Planning and Win Themes
Where the themes in your summary come from.
rfpdetector.com/guides/how-to-write-a-winning-proposal/capture-planning-and-win-themes

Cover Letter and Transmittal Templates
The letter that travels with your summary.
rfpdetector.com/guides/proposal-templates/cover-letter-and-transmittal-templates

Technical Approach and Management Plan Templates
The sections your summary points to.
rfpdetector.com/guides/proposal-templates/technical-and-management-plan-templates

Past Performance and Resume Templates
Proof points for every theme.
rfpdetector.com/guides/proposal-templates/past-performance-and-resume-templates

Search open RFPs
Find your next bid and save it to your pipeline.
rfpdetector.com/search

END OF CHAPTER 3

Next: 04 Technical Approach and Management Plan Templates



04

CHAPTER 4

Technical Approach and Management Plan Templates

Six copy-ready templates for the heart of a technical volume (technical approach, management plan, staffing plan and org narrative, quality control plan, transition-in plan and risk register), with guidance for construction, IT, professional services and nonprofit bids.

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

Read this chapter online

KEY TAKEAWAYS

- Number and order the technical approach exactly like the solicitation's instructions and statement of work, so evaluators can find every requirement.
- For each task, show **understanding, approach and proof**: what the buyer needs, exactly how you will do it, and where you have done it before.
- Name real people with signed commitments. A management plan full of 'to be determined' reads as risk.
- A quality control plan explains how you catch problems before the buyer does: standards, inspections, corrective action and records.
- A specific transition-in plan and an honest risk register lower the buyer's perceived risk, which is often what separates close scores.

IN THIS CHAPTER

4.1 How do the technical and management templates fit together? 90

4.2 Technical approach template: section skeleton 92

4.3 Management plan template 96

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4.5 Quality control plan template 101

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4.7 Risk register template 107

4.8 How to adapt these templates for construction, IT, professional services and nonprofits 111

4.9 Technical and management volume mistakes to avoid 112

A **technical approach template** and a matching management plan template cover the part of a proposal that often carries the most weight in a best-value evaluation: how you will do the work and how you will run it. This chapter gives you six copy-ready templates for the core of a technical or management volume (technical approach, management plan, staffing plan and org narrative, quality control plan, transition-in plan and risk register) and shows how to tailor each one for construction, IT, professional services and nonprofit bids.

The strategy behind these sections, including how evaluators assign strengths and weaknesses, is in **Technical and Management Approach**. Here you get the documents themselves, ready to fill in.

SECTION 4.1

How do the technical and management templates fit together?

Evaluators read these sections to answer one question: if we pick this team, will the work get done well and without surprises? Each template answers part of that question. Together they form a chain: the approach determines the people you need, the people determine how you manage them, and everything you plan feeds the risks you must control.

TABLE **What each template proves to the evaluator**

Section	The evaluator's question	What it must show
Technical approach	Do they understand the work, and will their method meet every requirement?	Task-by-task methods, tools, deliverables, measures and proof, in the order of the statement of work
Management plan	Who is in charge, and how will they control schedule, cost and communication?	Organization, lines of authority, reporting, meetings, escalation and change control
Staffing plan and org narrative	Do they have enough of the right people, on time, with backups?	A staffing matrix, named key personnel, recruiting, retention and surge capacity
Quality control plan	How will they catch defects before we do?	Standards, independent inspection, deliverable review, corrective action and records
Transition-in plan	Will service continue on day one without disruption?	A dated schedule, staffing, knowledge transfer, access and readiness criteria
Risk register	Have they thought about what could go wrong?	Specific risks, likelihood and consequence, owners, triggers and mitigation

Build order that saves rework

01 **Compliance matrix**
Map every instruction and requirement to a section.

02 **Technical approach**
Write the method task by task.

03 **Staffing plan**
Size the team the approach actually needs.

04 **Management plan**
Organize and control that team.

05 **Quality and transition**
Show how you start well and stay compliant.

06 **Risk register**
Collect the risks surfaced by every section.

07 **Price check**
Confirm the price volume funds every person and promise.

TIP Before you start

Gather the submission instructions (what to submit, in what order and how long), the evaluation criteria, the statement of work or performance work statement, any quality assurance surveillance plan or performance standards the buyer published, and the page limits.

If you do not yet have a compliance matrix, build one with the **compliance matrix template** and the method in **Proposal Structure and Compliance**. If you track the bid in RFP Detector, keep it on your pipeline board so the due date and question deadline stay in front of the whole team.

Glossary

Statement of work (SOW)	The part of a solicitation that describes the work, often including how it must be done.
Performance work statement (PWS)	A scope written as required results and measurable standards rather than methods, leaving the how to you.
Quality assurance surveillance plan (QASP)	The buyer's plan for checking your performance. Some solicitations ask offerors to propose one.
Quality control plan (QCP)	Your plan for making sure the work meets requirements before the buyer inspects it.
Key personnel	Named people the solicitation treats as essential. Many contracts require the buyer's approval before you replace them.
Full-time equivalent (FTE)	A unit of staffing equal to one person working full time; two half-time people equal one FTE.
Transition-in (phase-in)	The period after award when a new contractor takes over work from an incumbent or from the agency itself.
Definable feature of work	In construction quality control, a distinct task with its own controls, such as concrete placement or roofing, inspected in stages.
Risk register	A table of identified risks with their likelihood, consequence, owner, triggers and planned response.

SECTION 4.2

Technical approach template: section skeleton

The technical approach is where you prove you understand the work and have a credible way to do it. The single most important rule: follow the solicitation's structure. If the instructions list topics in a set order, or the statement of work numbers tasks 3.1 through 3.9, your headings should match them one for one. Evaluators score with a checklist, and anything they cannot find may be scored as missing.

Inside each task, use the same pattern: the requirement, your specific approach (who, what, how, when), the deliverable and how it is measured, the benefit to the buyer and proof that you have done it before. Write in the active voice and commit: *we will*, not *we plan to* or *we may consider*. The **requirement-by-requirement method** explains how evaluators trace each answer.

PRO TIP **Pro tip: answer the buyer's instruction verbs**

Read each instruction for its verb. *Describe* asks for a narrative of how. *Demonstrate* asks for evidence, such as results, examples or data. *Provide* or *submit* asks for a specific artifact, such as an org chart, schedule or plan. *Address* asks you to cover every listed element. Answering *demonstrate* with a description is one of the easiest ways to lose a strength.

TEMPLATE

Technical approach section skeleton

Copy-ready online

A complete technical approach outline with an overview, understanding of the requirement, a repeatable task-by-task block, tools, schedule, value-added features and assumptions.

WHEN TO USE Any proposal that asks for a technical approach, work plan, methodology or statement of how the work will be performed. Repeat the task block once per task, in the order of the statement of work.

[VOLUME_NAME], SECTION [SECTION_NUMBER]: TECHNICAL APPROACH
Response to [SOLICITATION_NUMBER], [SOLICITATION_TITLE]

[SECTION_NUMBER].1 Overview of Our Approach
[AGENCY_NAME] requires [SCOPE_SUMMARY]. Our approach rests on three principles that respond directly to your priorities:
- [PRINCIPLE_1]: [HOW_IT_MEETS_PRIORITY_1]
- [PRINCIPLE_2]: [HOW_IT_MEETS_PRIORITY_2]
- [PRINCIPLE_3]: [HOW_IT_MEETS_PRIORITY_3]
Figure [FIGURE_NUMBER]: [FIGURE_TITLE]. [ACTION_CAPTION]

[SECTION_NUMBER].2 Understanding of the Requirement
Today, [AGENCY_NAME]'s [PROGRAM_OR_FACILITY] [CURRENT_STATE]. The key challenges are [CHALLENGE_1], [CHALLENGE_2] and [CHALLENGE_3]. Success means [SUCCESS_DEFINITION], measured by [PERFORMANCE_STANDARDS].

[SECTION_NUMBER].3 Approach by Task
Repeat the block below for each task, in the order of the statement of work.

Task [TASK_NUMBER]: [TASK_NAME], SOW paragraph [SOW_PARAGRAPH]
Requirement: [REQUIREMENT_SUMMARY]
Our approach: We will [ACTION_1], [ACTION_2] and [ACTION_3]. [WHO_PERFORMS] will perform this work using [TOOLS_METHODS_OR_STANDARDS].
Schedule and frequency: [WHEN_AND_HOW_OFTEN]
Deliverables: [DELIVERABLE_NAME], delivered [DELIVERY_TIMING] in [DELIVERABLE_FORMAT].
Performance measure: [METRIC], against a standard of [STANDARD].
Benefit to [AGENCY_NAME]: [BENEFIT]
Proof: We use this approach on [REFERENCE_CONTRACT], where [RESULT].

[SECTION_NUMBER].4 Tools, Facilities and Equipment
- [TOOL_OR_EQUIPMENT_1]: [HOW_IT_SUPPORTS_THE_WORK_1]
- [TOOL_OR_EQUIPMENT_2]: [HOW_IT_SUPPORTS_THE_WORK_2]
- [TOOL_OR_EQUIPMENT_3]: [HOW_IT_SUPPORTS_THE_WORK_3]

[SECTION_NUMBER].5 Schedule and Milestones
- [MILESTONE_1]: [MILESTONE_1_DATE]
- [MILESTONE_2]: [MILESTONE_2_DATE]
- [MILESTONE_3]: [MILESTONE_3_DATE]
The detailed schedule is provided in [SCHEDULE_LOCATION].

[SECTION_NUMBER].6 Value Added at No Additional Cost
- [VALUE_ADD_1]: [BENEFIT_AND_PROOF_1]
- [VALUE_ADD_2]: [BENEFIT_AND_PROOF_2]

[SECTION_NUMBER].7 Assumptions
[ASSUMPTIONS]

FIELDS TO FILL IN · 12

[VOLUME_NAME] / [SECTION_NUMBER]	Use the volume and section numbering the instructions prescribe, for example 'Volume I, Technical' and '2'. If none is prescribed, mirror the evaluation criteria.
[PRINCIPLE_1] to [PRINCIPLE_3]	Short labels for how you work, each tied to a buyer priority, for example 'Prevent, don't react: scheduled preventive maintenance cuts emergency calls'.
[FIGURE_TITLE] / [ACTION_CAPTION]	One overview graphic, such as a process flow or service model, with a caption that states the benefit ('Our two-crew model keeps every site inspected weekly'), not just a label. Make it readable in black and white.
[CURRENT_STATE] / [CHALLENGE_1] to [CHALLENGE_3]	Show insight, not a restatement of the scope: the backlog, the aging equipment, the audit finding, the budget pressure you learned about in capture or from the solicitation background.
[PERFORMANCE_STANDARDS]	Copy the measurable standards from the performance work statement or service levels, such as response times, accuracy rates or completion deadlines.

[SOW_PARAGRAPH]	The buyer's paragraph number for the task, so the evaluator can trace your answer to the requirement.
[WHO_PERFORMS]	The labor category or named person. It must match the staffing plan and the price volume.
[-TOOLS_METHODS_OR_STANDARDS]	Named methods, industry standards, software, equipment or checklists. Specific beats generic: name the standard, not just best practices.
[METRIC] / [STANDARD]	How the result is measured and the target, ideally the same standard the buyer will use to inspect you.
[REFERENCE_CONTRACT] / [RESULT]	A contract where you used the same method, and a verifiable result. Detailed past performance belongs in its own volume; one sentence here is enough.
[VALUE_ADD_1] / [VALUE_ADD_2]	Extras that matter to the buyer and are already funded in your price. Never offer something free that you have not priced or cannot deliver.
[ASSUMPTIONS]	Include only if the solicitation allows assumptions. In many procurements an assumption that conflicts with a requirement is treated as an exception and can make the proposal unacceptable. Delete the section if you have none.

WORKED EXAMPLE

Filled-in task block: help desk support (fictional agency and figures)

✓ STRONG

Task 3: Tier 1 Help Desk, PWS 3.2. Requirement: support 1,200 users from 7 a.m. to 7 p.m. on weekdays, answering 90 percent of calls within 60 seconds.

Our approach: we staff four analysts on two overlapping shifts so coverage peaks from 8 to 10 a.m., when your ticket history shows 40 percent of calls arrive. Analysts resolve common requests with a knowledge base we build from your last 12 months of tickets during transition, and escalate to Tier 2 through the agency's ticketing system within 15 minutes when unresolved. Deliverable: a monthly service report by the fifth business day. Measure: speed to answer and first-contact resolution, reported weekly. Proof: on a 900-user county contract, this staffing pattern met the same 60-second standard in 11 of 12 months.

WORKED EXAMPLE

The same task, written the usual way

✕ WEAK

We will provide high-quality help desk services using industry best practices and a team of experienced, dedicated professionals. Our proven processes ensure customer satisfaction and timely resolution of all issues.

Why it fails: no staffing numbers, no hours, no link to the 60-second standard, no deliverable and no proof. An evaluator cannot award a strength for any of it.

SECTION 4.3

Management plan template

The management plan shows how you will run the contract once you win: who is in charge, what they can decide, how you communicate with the buyer, how you keep schedule and cost on track, and what happens when something goes wrong. Evaluators want one accountable leader, short escalation paths and evidence that the corporate office will back the team.

TEMPLATE
Management plan

Copy-ready online

A complete management plan covering organization and authority, buyer communication, schedule and cost control, subcontractor management, escalation, change management and corporate support.

WHEN TO USE Proposals with a management approach, program management or project management factor, and any services or construction bid that asks how the contract will be run.

SECTION [SECTION_NUMBER]: MANAGEMENT PLAN

[SECTION_NUMBER].1 Management Approach Overview
[COMPANY_NAME] will manage [CONTRACT_NAME] using [MANAGEMENT_FRAMEWORK], tailored to a contract of this size and type. Our approach gives [AGENCY_NAME] one accountable leader, clear lines of authority and early warning of any issue that could affect schedule, cost or quality.

[SECTION_NUMBER].2 Organization and Lines of Authority
Figure [ORG_CHART_FIGURE_NUMBER] shows our project organization. [PROGRAM_MANAGER_NAME], Program Manager, reports to [EXECUTIVE_SPONSOR_NAME], [EXECUTIVE_SPONSOR_TITLE], and has authority to [PM_AUTHORITY_LIST] without further corporate approval. [TEAMING_PARTNER_NAME] performs [SUBCONTRACTED_SCOPE] under our direct management.

[SECTION_NUMBER].3 Communication with [AGENCY_NAME]
Primary point of contact: [PROGRAM_MANAGER_NAME], [PHONE], [EMAIL], available [AVAILABILITY].
- Kickoff meeting within [KICKOFF_DAYS] days of award to confirm priorities, contacts, reporting formats and the first 90-day plan.
- [MEETING_TYPE_1]: [FREQUENCY_1], attended by [ATTENDEES_1], producing [OUTPUT_1].
- [MEETING_TYPE_2]: [FREQUENCY_2], attended by [ATTENDEES_2], producing [OUTPUT_2].
- Status report: [REPORT_FREQUENCY], covering work completed, work planned, performance against standards, risks, issues and action items.

[SECTION_NUMBER].4 Schedule and Cost Control
We maintain [SCHEDULE_METHOD], updated [SCHEDULE_UPDATE_FREQUENCY]. [COST_TRACKING_METHOD] compares actual hours and costs with plan every [COST_REVIEW_FREQUENCY]. A variance above [VARIANCE_THRESHOLD] triggers a corrective action plan, reported to [AGENCY_CONTACT_ROLE] in the next status report.

[SECTION_NUMBER].5 Subcontractor Management
[SUBCONTRACTOR_SELECTION_AND_DIRECTION]. We review subcontractor performance [SUB_REVIEW_FREQUENCY] against the same standards we apply to our own staff, and every subcontract flows down the applicable contract requirements.

[SECTION_NUMBER].6 Issue Escalation
- Level 1: [LEVEL_1_ROLE] resolves within [LEVEL_1_TIME].
- Level 2: [LEVEL_2_ROLE] resolves within [LEVEL_2_TIME].
- Level 3: [EXECUTIVE_SPONSOR_NAME] engages within [LEVEL_3_TIME].
[AGENCY_NAME] may contact any level directly at any time.

[SECTION_NUMBER].7 Change Management
Requests that may affect scope, schedule or price are logged in [CHANGE_LOG], assessed for impact within [IMPACT_ASSESSMENT_DAYS] business days, and carried out only after written direction from the contracting officer.

[SECTION_NUMBER].8 Corporate Support
[COMPANY_NAME]'s [CORPORATE_FUNCTIONS] support the program team so the Program Manager can focus on performance. [CORPORATE_SUPPORT_EXAMPLE]

FIELDS TO FILL IN · 8

[MANAGEMENT_FRAMEWORK]	The method you actually use, for example 'our documented project management process aligned with PMI practices', 'agile delivery with two-week sprints', or 'our field operations manual'. Do not name a framework your team does not follow.
[PM_AUTHORITY_LIST]	Concrete authority, for example 'reassign staff across sites, approve overtime, and spend up to an agreed amount on emergency repairs'. Evaluators look for decision-making power close to the work.

[TEAMING_PARTNER_NAME] / [SUBCONTRACTED_SCOPE]	Each subcontractor or teaming partner and exactly what they do. Delete the sentence if you self-perform everything.
[MEETING_TYPE_n] / [FREQUENCY_n] / [ATTENDEES_n] / [OUTPUT_n]	For example 'Weekly progress meeting, Program Manager and COR, action item log'. Match any meetings the statement of work requires.
[SCHEDULE_METHOD] / [COST_TRACKING_METHOD]	For example a resource-loaded schedule, a work order system, or a timekeeping and job-costing system. Name what you use.
[VARIANCE_THRESHOLD]	The point at which you act, for example 10 percent over planned hours on any task, or any milestone forecast to slip by more than five days.
[LEVEL_n_ROLE] / [LEVEL_n_TIME]	Roles and response times you can really meet, for example site supervisor within 4 hours, Program Manager within 1 business day.
[CORPORATE_FUNCTIONS] / [CORPORATE_SUPPORT_EXAMPLE]	Recruiting, HR, payroll, finance, IT, safety, legal. Add one real example of reachback, such as 'our recruiting team filled 12 positions in three weeks on a 2025 start-up'.

SECTION 4.4

Staffing plan and organizational narrative template

The staffing plan proves you have enough of the right people at the right time. Evaluators check three things: whether the numbers match the workload, whether the key people meet the stated qualifications and are truly committed, and what happens when someone leaves. The organizational narrative explains the org chart in words, so no reporting line is left to guesswork.

> ⚠ WARNING **Propose only people you can deliver**
>
> Naming people who have not agreed to work on the contract, or who you do not intend to assign, is a serious problem: many contracts include a key personnel clause that requires the buyer's approval before any substitution, and misrepresenting availability can have consequences well beyond a lost bid. Get a signed letter of commitment from each named person, and confirm availability again just before submission. Resume formats are in the **key personnel resume template**.

TEMPLATE

Staffing plan and organizational narrative

Copy-ready online

A staffing section with a staffing approach, org chart narrative, plain-text staffing matrix, key personnel summaries, recruiting, retention, backups and surge capacity.

WHEN TO USE

Any proposal with a staffing, key personnel or organization requirement, especially labor-heavy services such as facilities, security, IT support, staffing and program delivery.

SECTION [SECTION_NUMBER]: STAFFING PLAN AND ORGANIZATION

[SECTION_NUMBER].1 Staffing Approach
Our plan provides [TOTAL_FTES] full-time equivalent (FTE) staff across [NUMBER_OF_LABOR_CATEGORIES] labor categories, sized to the workload described in [WORKLOAD_BASIS]. [CURRENT_EMPLOYEE_SHARE] of the proposed staff are current [COMPANY_NAME] employees; the remaining positions will be filled from [NEW_STAFF_SOURCE].

[SECTION_NUMBER].2 Organizational Narrative
Figure [ORG_CHART_FIGURE_NUMBER] shows our organization. [PROGRAM_MANAGER_NAME] leads the program and is the single point of accountability to [AGENCY_NAME]. Three leads report to the Program Manager: [LEAD_1_NAME] for [FUNCTION_1], [LEAD_2_NAME] for [FUNCTION_2] and [LEAD_3_NAME] for [FUNCTION_3]. [QUALITY_LEAD_NAME] manages quality control and reports to [QUALITY_REPORTING_LINE] so inspections stay independent of production. [PARTNER_NAME] staff work within the [PARTNER_FUNCTION] team under our day-to-day supervision.

[SECTION_NUMBER].3 Staffing Matrix
Labor category | FTEs | Location or shift | SOW tasks supported | On board by
[LABOR_CATEGORY_1] | [FTE_1] | [LOCATION_OR_SHIFT_1] | [TASKS_1] | [START_1]
[LABOR_CATEGORY_2] | [FTE_2] | [LOCATION_OR_SHIFT_2] | [TASKS_2] | [START_2]
[LABOR_CATEGORY_3] | [FTE_3] | [LOCATION_OR_SHIFT_3] | [TASKS_3] | [START_3]
[LABOR_CATEGORY_4] | [FTE_4] | [LOCATION_OR_SHIFT_4] | [TASKS_4] | [START_4]
Total | [TOTAL_FTES] | | |

[SECTION_NUMBER].4 Key Personnel
[KEY_PERSON_1_NAME], [KEY_ROLE_1]: [YEARS_1] years of [EXPERIENCE_1]; [CREDENTIALS_1]. Meets the solicitation requirement for [REQUIREMENT_MET_1]. Commitment: [COMMITMENT_STATUS_1].
[KEY_PERSON_2_NAME], [KEY_ROLE_2]: [YEARS_2] years of [EXPERIENCE_2]; [CREDENTIALS_2]. Meets the solicitation requirement for [REQUIREMENT_MET_2]. Commitment: [COMMITMENT_STATUS_2].
[KEY_PERSON_3_NAME], [KEY_ROLE_3]: [YEARS_3] years of [EXPERIENCE_3]; [CREDENTIALS_3]. Meets the solicitation requirement for [REQUIREMENT_MET_3]. Commitment: [COMMITMENT_STATUS_3].
Resumes are in [RESUME_LOCATION]. Signed letters of commitment are in [COMMITMENT_LETTER_LOCATION].

[SECTION_NUMBER].5 Recruiting and Onboarding
For positions not yet filled, we will [RECRUITING_METHOD]. Our typical time to fill comparable positions is [TIME_TO_FILL]. New staff complete [ONBOARDING_AND_TRAINING], including [CONTRACT_SPECIFIC_TRAINING], before working independently.

[SECTION_NUMBER].6 Retention and Continuity
We retain staff through [RETENTION_MEASURES]. Every key role has a trained backup: [BACKUP_APPROACH]. If a key person must be replaced, we will propose a substitute with equal or better qualifications for [AGENCY_NAME]'s approval within [SUBSTITUTION_DAYS] days, or sooner if the contract requires.

[SECTION_NUMBER].7 Surge and Flexibility
For workload peaks or emergencies, we can add [SURGE_CAPACITY] within [SURGE_RESPONSE_TIME], drawing on [SURGE_SOURCE].

FIELDS TO FILL IN · 10

[WORKLOAD_BASIS]	Where your numbers come from, for example 'the 1,450 annual work orders in Attachment 4' or 'the 22 buildings and 610,000 square feet in Section C'. Showing the math earns credibility.
[CURRENT_EMPLOYEE_SHARE] / [NEW_STAFF_SOURCE]	For example 'Nine of 14'. New staff may come from incumbent hires, your recruiting pipeline or a named partner.
[QUALITY_REPORTING_LINE]	Ideally someone outside the production chain, such as a corporate quality director, so inspectors do not grade their own supervisor.
[LABOR_CATEGORY_n] / [FTE_n] / [TASKS_n]	Use the solicitation's labor category names if it lists them. The FTEs must match your price volume exactly.
[REQUIREMENT_MET_n]	Quote the minimum qualification from the solicitation, for example 'a licensed professional engineer with 10 years of transit experience', and show how the person meets or exceeds it.
[COMMITMENT_STATUS_n]	For example 'current employee, assigned full time' or 'signed letter of commitment dated [date]'. Never imply a commitment you do not have.

[TIME_TO_FILL]	From your own hiring records. Leave it out rather than guess.
[RETENTION_MEASURES]	Pay at or above the required wage rates, training, career paths, recognition, scheduling flexibility. Add your actual retention or turnover figure if it is good.
[SUBSTITUTION_DAYS]	Check the key personnel clause; some contracts set notice periods. Do not promise a shorter period than you can meet.
[SURGE_CAPACITY] / [SURGE_RESPONSE_TIME] / [SURGE_SOURCE]	For example 'six additional cleaners within 48 hours from our 120-person regional workforce'.

SECTION 4.5

Quality control plan template

Quality control is what you do to make sure the work meets the contract before the buyer checks it. Quality assurance is what the buyer does to verify your performance. Government inspection clauses commonly require contractors to maintain an inspection system the buyer finds acceptable and to keep records of inspections, so many solicitations ask for a quality control plan with the proposal or soon after award.

TABLE **Quality control and quality assurance compared**

	Quality control (yours)	Quality assurance (the buyer's)
Purpose	Prevent and catch defects before delivery	Verify that delivered work meets the standards
Document	Quality control plan (QCP)	Quality assurance surveillance plan (QASP) or inspection plan
Who does it	Your quality manager and inspectors	The contracting officer's representative or inspectors
How it connects	Measures itself against the same standards the buyer uses	May rely partly on your QC records and reports

Tailor the inspection method to the work. Many federal construction contracts, including those of the Army Corps of Engineers and the Navy, use a unified guide specification for contractor quality control that requires three phases of control (preparatory, initial and follow-up) for each definable feature of work, and many state and local owners borrow the same idea. Services contracts measure against the performance standards in the performance work statement. IT contracts rely on testing, code review and acceptance criteria. Nonprofit programs check fidelity to the program model and the quality of client data. For what evaluators reward here, see the **quality control guidance**.

TEMPLATE

Quality control plan

Copy-ready online

A ten-part quality control plan covering scope, an independent quality organization, standards, inspections, deliverable review, corrective action, feedback, training, records and updates.

WHEN TO USE When a solicitation asks for a quality control plan, quality management approach or inspection system, and as the starting point for the plan many contracts require shortly after award.

QUALITY CONTROL PLAN
[COMPANY_NAME] for [CONTRACT_NAME], [CONTRACT_OR_SOLICITATION_NUMBER]
Revision [REVISION_NUMBER], [DATE]

1. Purpose and Scope
This plan describes how [COMPANY_NAME] will make sure all work under [CONTRACT_NAME] meets the contract's requirements and performance standards before [AGENCY_NAME] inspects it. It covers work performed by our staff and by our subcontractors, [SUBCONTRACTOR_NAMES], at [WORK_LOCATIONS].

2. Quality Organization
Quality Control Manager: [QC_MANAGER_NAME], [QC_CREDENTIALS]. The QC Manager reports to [QC_REPORTING_LINE], not to the supervisors whose work is inspected, and has authority to stop work that does not meet requirements.
Inspectors and reviewers: [QC_STAFF_AND_ROLES].

3. Performance Standards
We control quality against the standards in [STANDARDS_SOURCE]:
- [PERFORMANCE_OBJECTIVE_1]: standard [STANDARD_1], checked by [CHECK_METHOD_1], [CHECK_FREQUENCY_1]
- [PERFORMANCE_OBJECTIVE_2]: standard [STANDARD_2], checked by [CHECK_METHOD_2], [CHECK_FREQUENCY_2]
- [PERFORMANCE_OBJECTIVE_3]: standard [STANDARD_3], checked by [CHECK_METHOD_3], [CHECK_FREQUENCY_3]

4. Inspection and Testing
[INSPECTION_APPROACH]
Inspectors use written checklists for each [WORK_AREA_OR_DELIVERABLE_TYPE] and record results in [QC_RECORD_SYSTEM] on the day of inspection.

5. Deliverable Review
Every written deliverable passes [NUMBER_OF_REVIEW_LEVELS] levels of review before submission: [REVIEW_LEVELS]. A deliverable is released only when [RELEASE_CRITERIA].

6. Deficiencies and Corrective Action
When an inspection or a customer report identifies a deficiency, we:
a. Record it in the deficiency log with the date, location, description and responsible person.
b. Correct it within **[CORRECTION_TIMEFRAME]**, or immediately if it affects safety or service continuity.
c. Determine the root cause of any repeat or significant deficiency.
d. Put a preventive action in place and verify that it works.
e. Close the item only after re-inspection by **[VERIFIER_ROLE]**.

7. Customer Feedback
[AGENCY_NAME] staff can report issues through **[FEEDBACK_CHANNELS]**. We acknowledge each report within **[ACKNOWLEDGE_TIME]**, resolve it within **[RESOLVE_TIME]**, and review trends with **[AGENCY_CONTACT_ROLE]** **[TREND_REVIEW_FREQUENCY]**.

8. Training
QC staff and supervisors complete **[QC_TRAINING]**. Every new worker is trained on the applicable checklists and standards before working unsupervised.

9. Records and Reporting
We keep inspection records, test results, deficiency logs and corrective actions for **[RECORD_RETENTION_PERIOD]** and provide them to **[AGENCY_NAME]** on request. A quality report summarizing **[QUALITY_METRICS]** is delivered **[QUALITY_REPORT_FREQUENCY]**.

10. Plan Updates
The QC Manager reviews this plan **[PLAN_REVIEW_FREQUENCY]** and after any significant deficiency, and submits revisions to **[AGENCY_NAME]** for acceptance.

FIELDS TO FILL IN · 8

[QC_REPORTING_LINE]	A corporate quality director or executive outside the project chain. Independence is one of the first things evaluators look for.
[STANDARDS_SOURCE]	The performance requirements summary, the specifications, service level table or the buyer's QASP. Use the buyer's numbering so each standard can be traced.
[CHECK_METHOD_n] / [CHECK_FREQUENCY_n]	Scheduled inspection, random sampling, 100 percent inspection, testing, customer survey or system report, and how often.
[INSPECTION_APPROACH]	Services: scheduled and random inspections with sampling rates. Construction: three phases of control (preparatory, initial, follow-up) for each definable feature of work, plus required testing and special inspections. IT: peer code review, automated tests, security scans and user acceptance testing. Nonprofit programs: case file reviews, fidelity checks and data audits.
[REVIEW_LEVELS] / [RELEASE_CRITERIA]	For example 'author self-check, technical peer review, Program Manager approval', released only when every comment is resolved and the deliverable matches the required format.

[CORRECTION_TIMEFRAME]	Use the timeframe in the contract if one is stated; otherwise one you can always meet, such as the next business day for routine items.
[RECORD_RETENTION_PERIOD]	The contract's records clause sets this, and public contracts often require records to be kept for several years after final payment. Use the contract's figure.
[QUALITY_METRICS]	For example inspection pass rate, deficiencies found by us versus by the buyer, time to correct, repeat deficiencies and customer complaints.

PRO TIP **Pro tip: track who finds the problems**

One of the most persuasive quality metrics is the share of deficiencies your own inspectors find before the buyer does. If you already track it on current contracts, quote it. It shows the quality system works, not just that it exists.

SECTION 4.6

Transition-in plan template

A transition-in plan (also called a phase-in plan) explains how you take over work from an incumbent contractor or from the agency's own staff without interrupting service. It matters most on recompetes, where evaluators weigh the risk of switching providers. A detailed, dated plan can neutralize much of the incumbent's advantage; a generic one confirms the evaluator's fear that change means disruption.

Read the solicitation for the transition period, any phase-in requirements and the clauses that govern the outgoing contractor. Federal service contracts often include a continuity of services clause that obliges the incumbent to cooperate with a successor, including phase-in training, for up to 90 days when the contracting officer directs it. State and local contracts vary, so check yours. For how evaluators judge transition risk, see **Technical and Management Approach**.

NOTE **Hiring the incumbent workforce**

Some service contracts and some state and local laws require a successor contractor to offer jobs to the incumbent's workers; others leave it to you. Federal requirements in this area changed in 2025, so read the clauses in your solicitation and confirm with the contracting officer. This is general information, not legal advice. Before writing the plan, look up the incumbent's public profile and **Contractor Score** in the **contractor directory** to understand the contract you are taking over.

TEMPLATE

Transition-in plan

Copy-ready online

A dated transition-in plan with objectives, team, schedule, workforce, knowledge transfer, access and property, communication, transition risks and readiness criteria.

WHEN TO USE Recompetes, contracts that replace in-house staff, and any solicitation that asks for a transition, phase-in or mobilization plan.

SECTION [SECTION_NUMBER]: TRANSITION-IN PLAN

[SECTION_NUMBER].1 Transition Objectives
Our plan moves [CONTRACT_NAME] from [OUTGOING_PROVIDER_DESCRIPTION] to [COMPANY_NAME] within [TRANSITION_PERIOD] with no interruption of service, no loss of data or knowledge, and full performance against every standard by [FULL_PERFORMANCE_DATE].

[SECTION_NUMBER].2 Transition Team
- Transition Manager: [TRANSITION_MANAGER_NAME], who has led [NUMBER_OF_TRANSITIONS] transitions, including [COMPARABLE_TRANSITION].
- Program Manager: [PROGRAM_MANAGER_NAME], on site from [PM_START_DATE].
- HR and Recruiting Lead: [HR_LEAD_NAME].
- Operations or Technical Lead: [OPS_LEAD_NAME].
The transition team stays dedicated to the transition until [TEAM_RELEASE_CRITERIA].

[SECTION_NUMBER].3 Transition Schedule
- Before award: [PRE_AWARD_ACTIONS]
- Day 0, award or notice to proceed: [DAY_0_ACTIONS]
- Days 1 to [PHASE_1_END_DAY]: [PHASE_1_ACTIONS]
- Days [PHASE_2_START_DAY] to [PHASE_2_END_DAY]: [PHASE_2_ACTIONS]
- Days [PHASE_3_START_DAY] to [PHASE_3_END_DAY]: [PHASE_3_ACTIONS]
- Day [FULL_PERFORMANCE_DAY]: full performance begins; transition report delivered to [AGENCY_CONTACT_ROLE].

[SECTION_NUMBER].4 Staffing the Contract
[INCUMBENT_WORKFORCE_APPROACH]. We will hold interviews at [INTERVIEW_LOCATION] during [INTERVIEW_WINDOW], issue offers by Day [OFFER_DAY], and complete [BACKGROUND_CHECKS_BADGING_OR_CLEARANCES] by Day [ACCESS_DAY]. Positions not filled from the incumbent workforce will be filled from [OTHER_STAFF_SOURCES].

[SECTION_NUMBER].5 Knowledge Transfer
We will request [DOCUMENTS_AND_DATA_REQUESTED] from [OUTGOING_PROVIDER_OR_AGENCY]. Knowledge transfer sessions will cover [KNOWLEDGE_TOPICS], supported by [SHADOWING_APPROACH]. Every session is documented in [KNOWLEDGE_LOG].

[SECTION_NUMBER].6 Systems, Equipment and Property
[SYSTEMS_ACCESS_AND_EQUIPMENT_ACTIONS]. Government-furnished property and equipment will be inventoried jointly with [AGENCY_CONTACT_ROLE] on Day [INVENTORY_DAY].

[SECTION_NUMBER].7 Communication During Transition
[AGENCY_NAME] receives a [TRANSITION_REPORT_FREQUENCY] transition status report and a standing [TRANSITION_MEETING_FREQUENCY] transition meeting. End users are told what will change, and what will not, through [END_USER_COMMUNICATION].

[SECTION_NUMBER].8 Transition Risks and Mitigation
- [TRANSITION_RISK_1]: [TRANSITION_MITIGATION_1]
- [TRANSITION_RISK_2]: [TRANSITION_MITIGATION_2]
- [TRANSITION_RISK_3]: [TRANSITION_MITIGATION_3]

[SECTION_NUMBER].9 Readiness Criteria
We will recommend assuming full responsibility only when [READINESS_CRITERION_1], [READINESS_CRITERION_2] and [READINESS_CRITERION_3]. [AGENCY_NAME] confirms readiness at a joint review on Day [READINESS_REVIEW_DAY].

FIELDS TO FILL IN · 9

[TRANSITION_PERIOD]	Use the period the solicitation sets. Transition periods of 30 to 90 days are common, but some contracts expect full performance on day one.
[PRE_AWARD_ACTIONS]	Work you do at your own risk before award: identifying candidates, preparing onboarding packages, drafting the knowledge transfer request. Be honest about what is already done.
[PHASE_1_ACTIONS] to [PHASE_3_ACTIONS]	Dated tasks with owners. A typical sequence: kickoff and document requests; hiring, background checks and training; shadowing and parallel operation; then readiness review.
[INCUMBENT_WORKFORCE_APPROACH]	Your approach to incumbent staff, for example 'We will offer interviews to all incumbent employees in good standing'. Follow any worker-retention requirement in the solicitation or local law.
[BACKGROUND_CHECKS_BADGING_OR_CLEARANCES]	Whatever the buyer requires before staff can work: fingerprinting, background investigations, facility badges or security clearances. Find out typical processing times and plan for them.
[DOCUMENTS_AND_DATA_REQUESTED]	Standard operating procedures, open work orders, equipment inventories, maintenance histories, reports, system documentation, contact lists.
[SYSTEMS_ACCESS_AND_EQUIPMENT_ACTIONS]	Accounts, network and system access, keys and access cards, vehicles, tools, phones, and any equipment you must buy or lease before day one.

[TRANSITION_RISK_n] / [TRANSITION_MITIGATION_n]	Pull these from your risk register. Typical ones: low incumbent staff acceptance, slow background checks, incomplete records, an uncooperative incumbent, late system access.
[READINESS_CRITERION_n]	Measurable conditions, for example 'all positions filled and trained', 'all accounts active and tested', 'open work order backlog reviewed with the agency'.

Sample 60-day transition for a facilities services contract (fictional)

Before award — Prepare
Identify supervisors and a candidate pool, draft the document request and onboarding packets, and line up equipment suppliers.

Day 0 — Kickoff
Meet the agency, confirm contacts and priorities, submit the document request and schedule incumbent staff interviews.

Days 1 to 15 — Hire and access
Interview and make offers, submit background checks, request badges and system accounts, and walk every site with the agency.

Days 16 to 45 — Train and shadow
Train new and retained staff on site procedures, shadow incumbent crews, rebuild preventive maintenance schedules and test reporting.

Days 46 to 59 — Parallel run
Run crews and reporting in parallel, close gaps found in readiness checks and agree on the cutover plan.

Day 60 — Full performance
Joint readiness review, full responsibility assumed and transition report delivered.

SECTION 4.7

Risk register template

A risk register shows the buyer you have thought about what could go wrong and already have a plan. It is a table: one row per risk, with how likely it is, how bad it would be, who owns it, the early warning sign and the planned response. In a proposal, include the five to ten risks that matter most to the buyer. Claiming there are no risks signals inexperience, not confidence. For how risk management is scored, see **Technical and Management Approach**.

The Defense Department's risk management guide for acquisition programs offers a practical model that works for any contract. A good risk statement names the possible event and its consequence, and

the cause when known, often in an *if … then …* form, without mixing in the solution. Likelihood and consequence are each rated on a 1-to-5 scale, using whole numbers. Each risk is then handled in one of four ways: **accept** it, **avoid** it by changing the plan, **transfer** it to a party better able to manage it, or **control** it by taking action to reduce its likelihood or consequence.

TABLE **One common 1-to-5 likelihood scale (adapted from the Defense Department risk management guide)**

Level	Likelihood	Probability of occurrence
5	Near certainty	More than 80% up to 99%
4	Highly likely	More than 60% up to 80%
3	Likely	More than 40% up to 60%
2	Low likelihood	More than 20% up to 40%
1	Not likely	More than 1% up to 20%

Define consequence levels in terms the buyer cares about, for example 1 for minimal impact up to 5 for a missed critical deadline, a safety incident or a failed service standard. A simple way to rank risks is to multiply likelihood by consequence for a score from 1 to 25 and set your own thresholds for low, moderate and high, or plot each risk on a five-by-five color matrix. Whatever you choose, state the scales at the top of the register so evaluators can read it.

TEMPLATE

Risk register (plain-text table)

Copy-ready online

A structured, pipe-separated risk register with scales, if-then risk statements, ratings, handling options, triggers, owners and residual risk. Paste it into a table in your proposal or spreadsheet.

WHEN TO USE Any proposal that asks for a risk management approach or risk mitigation, and as an attachment to technical, management and transition plans. Keep updating it after award.

RISK REGISTER
Contract: [CONTRACT_NAME] Prepared by: [COMPANY_NAME] Date: [DATE] Revision: [REVISION_NUMBER]
Likelihood (L): 1 Not likely, 2 Low likelihood, 3 Likely, 4 Highly likely, 5 Near certainty
Consequence (C): 1 Minimal, 2 Minor, 3 Moderate, 4 Significant, 5 Severe. Defined as: [CONSEQUENCE_DEFINITIONS]
Score = L x C. Ratings: [RATING_THRESHOLDS]
Handling options: Accept, Avoid, Transfer, Control

ID | Risk statement | Category | L | C | Score | Handling | Mitigation actions | Trigger or early warning | Owner | Due | Status | Residual L x C
R-01 | If [CAUSE_OR_EVENT_1], then [CONSEQUENCE_1]. | [CATEGORY_1] | [L_1] | [C_1] | [SCORE_1] | [HANDLING_1] | [MITIGATION_1] | [TRIGGER_1] | [OWNER_1] | [DUE_1] | [STATUS_1] | [RESIDUAL_1]
R-02 | If [CAUSE_OR_EVENT_2], then [CONSEQUENCE_2]. | [CATEGORY_2] | [L_2] | [C_2] | [SCORE_2] | [HANDLING_2] | [MITIGATION_2] | [TRIGGER_2] | [OWNER_2] | [DUE_2] | [STATUS_2] | [RESIDUAL_2]
R-03 | If [CAUSE_OR_EVENT_3], then [CONSEQUENCE_3]. | [CATEGORY_3] | [L_3] | [C_3] | [SCORE_3] | [HANDLING_3] | [MITIGATION_3] | [TRIGGER_3] | [OWNER_3] | [DUE_3] | [STATUS_3] | [RESIDUAL_3]
R-04 | If [CAUSE_OR_EVENT_4], then [CONSEQUENCE_4]. | [CATEGORY_4] | [L_4] | [C_4] | [SCORE_4] | [HANDLING_4] | [MITIGATION_4] | [TRIGGER_4] | [OWNER_4] | [DUE_4] | [STATUS_4] | [RESIDUAL_4]
R-05 | If [CAUSE_OR_EVENT_5], then [CONSEQUENCE_5]. | [CATEGORY_5] | [L_5] | [C_5] | [SCORE_5] | [HANDLING_5] | [MITIGATION_5] | [TRIGGER_5] | [OWNER_5] | [DUE_5] | [STATUS_5] | [RESIDUAL_5]

Review cadence: [REVIEW_FREQUENCY], by [REVIEWER_ROLE]. New high risks are reported to [AGENCY_CONTACT_ROLE] within [HIGH_RISK_NOTICE_TIME].

FIELDS TO FILL IN · 9

[CONSEQUENCE_DEFINITIONS]	What each level means for this contract, for example '5 = a missed critical deadline, safety incident or failed service standard; 3 = a recoverable delay of up to a week; 1 = no noticeable impact'.
[RATING_THRESHOLDS]	Your bands for the 1 to 25 score, for example 'Low 1 to 4, Moderate 5 to 12, High 15 to 25'. Any consistent scheme works if you state it.
[CAUSE_OR_EVENT_n] / [CONSEQUENCE_n]	Write the event and its effect, not the fix: 'If background checks take longer than 10 days, then new hires cannot start on Day 1.'
[CATEGORY_n]	Technical, schedule, staffing, cost, safety, security, external or transition.
[HANDLING_n]	Accept, Avoid, Transfer or Control. Control is common, but consider all four.
[MITIGATION_n]	Specific actions with dates. Each action should lower the likelihood, the consequence or both.
[TRIGGER_n]	The early warning that tells you the risk is materializing, for example 'fewer than 70 percent of offers accepted by Day 15'.
[OWNER_n]	One named role per risk. A risk owned by everyone is owned by no one.
[RESIDUAL_n]	The expected likelihood and consequence after mitigation, for example 1 x 4.

TABLE Sample risk register entries for a facilities services transition (fictional)

ID	Risk statement	L x C	Handling	Mitigation and trigger	Owner
R-01	If fewer than 80 percent of incumbent staff accept offers by Day 20, then coverage gaps could open at full performance.	3 x 4	Control	Pre-award candidate pool of 15; trigger: acceptance below 70 percent on Day 15 activates a staffing partner.	Transition Manager
R-02	If background checks take longer than 10 days, then new hires cannot badge in on schedule.	3 x 3	Control	Submit checks on Day 1 and overlap with already-cleared staff; trigger: any check pending on Day 7.	HR Lead
R-03	If the incumbent's maintenance records are incomplete, then preventive maintenance may miss due items.	4 x 3	Control	Joint equipment walk-down in Days 1 to 15 and rebuild schedules from nameplate data.	Operations Lead
R-04	If the elevator subcontractor misses response times, then elevators stay out of service beyond the 24-hour standard.	2 x 4	Transfer	Subcontract with performance terms and a backup vendor; trigger: two missed responses in a month.	Program Manager
R-05	If winter storms exceed planned snow-removal hours, then labor costs exceed plan.	3 x 2	Accept	Track hours weekly and raise early with the contracting officer if the contract provides an adjustment mechanism.	Program Manager

SECTION 4.8

How to adapt these templates for construction, IT, professional services and nonprofits

The structure of each template holds across industries; the content inside changes. Use this table to decide what to emphasize when you tailor a template to your field.

TABLE What to emphasize in each template, by industry

Template	Construction	IT and software	Professional services	Nonprofit programs
Technical approach	Means and methods, phasing, sequencing, site logistics, submittals	Architecture, configuration versus custom code, integration, testing, data migration	Methodology, work plan, deliverables, stakeholder engagement	Program model, service flow, intake and eligibility, evidence base
Management plan	Superintendent authority, coordination meetings, requests for information, change orders	Delivery governance, sprint or phase reviews, release management	Engagement leadership, client communication, deliverable review	Program director, supervision ratios, case conferencing, board oversight
Staffing plan	Superintendent, foremen, crew sizes by phase, prevailing wage obligations	Roles by phase, certifications, location or citizenship requirements if any	Named experts, hours by task, specialist subconsultants	Caseloads, required licenses and credentials, staff versus volunteers
Quality control plan	Three-phase inspections, testing labs, special inspections, punch lists	Code review, automated testing, security scans, user acceptance	Peer review of deliverables, editorial standards, client sign-off	Case file audits, fidelity checks, data quality reviews, participant surveys
Transition-in plan	Mobilization, site setup, permits, utility coordination	Environments, access, data handover, parallel run	Knowledge transfer from the prior consultant, document handover	Participant handoffs, records transfer with privacy safeguards, referral partner notices

Template	Construction	IT and software	Professional services	Nonprofit programs
Risk register	Weather, unforeseen conditions, long-lead materials, inspections	Data quality, integration, security, user adoption	Key person loss, scope creep, stakeholder availability	Enrollment shortfalls, staff turnover, funding delays, data privacy

Whatever your industry, the summary of these sections belongs at the front of the proposal. The **Executive Summary Templates** chapter shows how to lift your strongest technical and management points into one or two pages, and the **technology implementation summary** pairs naturally with the technical approach skeleton above.

SECTION 4.9

Technical and management volume mistakes to avoid

What scores and what loses points

Earns strengths

- ✓ Headings that match the solicitation's numbering one for one
- ✓ Specific methods, quantities, frequencies and standards for every task
- ✓ Named, committed key personnel who meet or exceed the stated qualifications
- ✓ A staffing matrix whose FTEs match the price volume exactly
- ✓ An independent quality organization with metrics and corrective action
- ✓ A dated transition plan with readiness criteria
- ✓ Honest risks with owners, triggers and specific mitigation

Costs points or creates weaknesses

- ✗ Restating the statement of work back to the buyer as your approach
- ✗ Hedged language: 'we plan to', 'we may', 'as needed'
- ✗ Key personnel listed as 'to be determined', or people who never agreed to the role
- ✗ Staffing that cannot possibly cover the workload or shifts described
- ✗ A quality manager who reports to the supervisors being inspected
- ✗ A transition plan with no dates, owners or incumbent staffing approach
- ✗ Claiming there are no risks, or listing risks with 'we will monitor' as the only response

COMMON MISTAKE **Common mistake: the technical volume and the price volume disagree**

The technical team writes four analysts, the pricing team prices three. The approach promises a monthly report nobody costed. Evaluators compare volumes, and mismatches create weaknesses or doubts about realism. Before final review, walk the staffing matrix and every promised deliverable against the price build. The **basis of estimate** section explains how to keep them aligned.

Technical and management volume final check

CHECKLIST · 11 ITEMS

- [ ] Every instruction and requirement in the compliance matrix maps to a heading, and the heading numbers match the solicitation.
- [ ] Every task block has an approach, a deliverable, a measure and proof.
- [ ] All instruction verbs are answered as asked (describe, demonstrate, provide, address).
- [ ] Key personnel meet the stated minimum qualifications, and signed commitment letters are on file.
- [ ] FTEs, labor categories and hours match the price volume.
- [ ] The org chart, narrative and staffing matrix show the same names and reporting lines.
- [ ] The quality control plan answers the buyer's standards or QASP line by line.
- [ ] The transition plan has dates, owners, staffing steps and readiness criteria.
- [ ] The risk register states its scales, and every risk has an owner, a trigger and a response.
- [ ] Assumptions appear only if allowed and do not contradict any requirement.
- [ ] Page limits, fonts, margins and file naming follow the instructions.

Run these sections through a scored review before submission. **Reviews, Submission and Debriefs** explains color-team reviews, and once you win, the **Post-Award Contract Templates** help you turn these plans into a running contract.

Frequently asked questions

What is a technical approach template?

A technical approach template is a reusable section skeleton for explaining how you will do the work: an overview, a short statement of your understanding, then one block per task with the requirement, your method, the deliverable, the performance measure, the benefit to the buyer and proof from past work, followed by the schedule. You copy it, renumber the headings to match the solicitation and replace each placeholder with specifics. For the strategy behind each block, see **Technical and Management Approach**.

How do I adapt these templates to a specific RFP?

Let the solicitation drive. Rename and renumber every heading to match the instructions and the statement of work, delete sections the RFP doesn't ask for, and combine the technical and management sections if the instructions combine them. Keep staffing numbers, schedules and assumptions identical to your price volume, stay inside the page limit and check the final draft against your compliance matrix. If the RFP supplies a required form or outline, it overrides these templates.

Do I need a separate management plan if the RFP doesn't ask for one?

Usually not. If the instructions don't call for a management volume or section, adding one can break the required structure or use up pages you need. Fold the essentials into the sections that are scored instead: who leads the work and how the buyer reaches them, key personnel, how you control schedule and quality, and how you report. When the evaluation criteria mention management, staffing or quality control, answer them exactly where the instructions say.

What should a staffing plan include?

A staffing plan should include the total staffing level and how you sized it, a staffing matrix by labor category with FTEs, locations or shifts and start dates, named key personnel and how each meets the stated qualifications, signed commitments, your recruiting and onboarding approach for open positions, retention measures, backups for key roles and surge capacity. The numbers must match your price volume.

What is the difference between a quality control plan and a QASP?

A quality control plan is the contractor's document: how you inspect and correct your own work before the buyer sees it. A quality assurance surveillance plan (QASP) is the buyer's document: how they will check your performance against the contract standards. Under federal rules the agency may write the QASP itself or ask offerors to propose one. Your quality control plan should measure the same standards the QASP uses.

Q What is a transition-in plan, and how long should the transition be?

A transition-in plan (or phase-in plan) explains how you will take over work from an incumbent contractor or the agency's own staff without interrupting service: the team, a dated schedule, staffing, knowledge transfer, access and property, communication, risks and readiness criteria. The length is usually set by the solicitation; 30 to 90 days is common, and some contracts expect full performance on day one. Always follow the solicitation's period.

Q What should a risk register include in a proposal?

Include the five to ten risks that matter most to the buyer, each with a clear if-then risk statement, a category, likelihood and consequence ratings on a stated scale, the handling choice (accept, avoid, transfer or control), specific mitigation actions, an early-warning trigger, a named owner and the expected residual risk. State your scales at the top so evaluators can read the ratings.

→ KEEP GOING

Technical and Management Approach
The how-to behind these templates: strengths, weaknesses and scoring.
rfpdetector.com/guides/how-to-write-a-winning-proposal/technical-and-management-approach

How to Read and Shred an RFP
Turn the solicitation into the outline these templates fill.
rfpdetector.com/guides/how-to-write-a-winning-proposal/how-to-read-and-shred-an-rfp

Executive Summary Templates
Summarize these sections in one or two pages.
rfpdetector.com/guides/proposal-templates/executive-summary-templates

Past Performance and Resume Templates
Resumes for key personnel and proof for every task.
rfpdetector.com/guides/proposal-templates/past-performance-and-resume-templates

Pricing and Compliance Templates
Compliance matrix and price build that must match your staffing.
rfpdetector.com/guides/proposal-templates/pricing-and-compliance-templates

Post-Award Contract Templates
Put these plans to work after you win.
rfpdetector.com/guides/proposal-templates/post-award-contract-templates

Contractor directory
Research incumbents and competitors before you write a transition plan.
rfpdetector.com/contractors

END OF CHAPTER 4

Next: 05 Past Performance, Case Study and Resume Templates



05

CHAPTER 5

Past Performance, Case Study and Resume Templates

Six copy-ready templates for proving you have done this work before: a past performance project profile, a reference permission email, a one-page case study, a key personnel resume, a questionnaire cover email and a letter of commitment, with guidance on adapting each one.

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

Read this chapter online

KEY TAKEAWAYS

- Evaluators judge past performance on **recency, relevance and quality**. Write every profile so relevance in size, scope and complexity is obvious without the evaluator having to infer it.
- Build a **past performance library** as each project closes, so every bid starts from verified facts instead of memory.
- Never list a reference you have not called first. Confirm their willingness, their current contact details and the project facts.
- Case studies follow **challenge, solution, results**, and the results need numbers your client would confirm if asked.
- Key personnel resumes must use the RFP's own position titles and requirements, and must agree with your project profiles line for line.

IN THIS CHAPTER

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5.2 Build a past performance library before you need it 119

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5.5 Case study template: challenge, solution, results 130

5.6 Key personnel resume template and letter of commitment 132

5.7 How to adapt these templates for construction, IT, professional services and nonprofits 137

5.8 What if you have little or no past performance? 138

5.9 Past performance mistakes that cost points 138

Past performance is the part of a proposal where you stop promising and start proving. Evaluators read it to answer one question: has this team done work like ours, recently, and done it well? This chapter gives you copy-ready **past performance templates** for the documents that answer that question: a project profile, a reference permission email, a one-page case study, a key personnel resume, a past performance questionnaire (PPQ) cover email and a letter of commitment. Each comes with a fields list, a filled-in example where it helps, and notes on adapting it for construction, IT, professional services and nonprofit bids.

> **TIP** **Before you start**
>
> Open the solicitation and find three things first: the **instructions** for the past performance section (often called Section L or 'proposal format'), the **evaluation criteria** (Section M or 'basis of award'), and any **required forms**. If the RFP supplies its own past performance form or resume format, use it exactly and treat these templates as the source of your content, not your layout.
>
> For the strategy behind choosing projects and references, read **Past Performance, Case Studies and References** in the proposal-writing handbook. This chapter is the toolkit that goes with it.

SECTION 5.1

What do evaluators look for in past performance?

Almost every past performance evaluation, public or private, comes down to three factors. **Recency** asks whether the work happened within the window the buyer cares about. **Relevance** asks whether it resembles the new job in scope, size and complexity. **Quality** asks how well you performed, judged by references, questionnaires and any formal evaluations on record.

Federal evaluation rules tell agencies to weigh how current and relevant the information is, where it came from and the context around it, as well as overall performance trends. Many solicitations spell out the recency window (three or five years is common, but the RFP decides) and say how they will judge relevance. State agencies, cities, school districts and authorities in New York, New Jersey and Connecticut usually score past performance inside an 'experience and qualifications' criterion and check references by phone or with a reference form. Private companies and foundations tend to ask for case studies and client references instead. The full evaluator's view is in **what evaluators look for** in the proposal-writing handbook.

TABLE How evaluators read a past performance entry, and how to show each factor

Factor	What the evaluator asks	How to show it in your profile
Recency	Was the work performed inside the window the RFP sets?	Give exact start and end dates, and say 'ongoing' when it is. Lead with your most recent projects.
Relevance: scope	Did you do the same kind of work?	Name the tasks you performed and cite the matching statement of work (SOW) paragraphs of the new RFP.
Relevance: size	Was the job comparable in dollars, staff, sites or volume?	State the contract value, annual value, team size and volumes (users, tickets, square feet, clients served).
Relevance: complexity	Did you face the same constraints?	Call out occupied buildings, regulated data, multiple locations, tight schedules, union labor or difficult stakeholders.
Quality	Did you perform well?	Give measurable results, formal ratings or awards, and an honest account of any problem and how you fixed it.
Your role	Was this your work, or a partner's?	Say whether you were prime, subcontractor or joint venture partner, and what share of the work you performed.

NOTE **New firms are not automatically penalized**

Federal rules have long said that an offeror with no relevant past performance record should be rated neutrally, neither favorably nor unfavorably. The 2025 to 2026 overhaul of the federal acquisition rules rewrote parts of the evaluation sections, so always read how the specific solicitation says it will treat a firm without a record. State and local rules vary more; some RFPs simply require a minimum number of similar projects. See **What if you have little or no past performance?** below. This is general information, not legal advice.

SECTION 5.2

Build a past performance library before you need it

The firms that write strong past performance sections in a few hours are not better writers. They capture the facts while a project is fresh and keep them in one place. When an RFP arrives, they pick the closest matches from the library and tailor the relevance section, instead of chasing old contract numbers and former client contacts under deadline.

The past performance library cycle

01 **Project closes**
Or reaches a milestone on a multi-year job.

↓

02 **Capture the facts**
Contract data, scope, results, problems and photos while the team remembers.

↓

03 **Confirm the reference**
Ask the client contact now, while the relationship is warm.

↓

04 **Write the profile and case study**
Use the templates below; store both versions.

↓

05 **Update resumes**
Add the project to every key person who worked on it.

↓

06 **Review twice a year**
Recheck contacts, retire stale projects and add new results.

Facts to capture when every project closes

CHECKLIST · 11 ITEMS

- [ ] Contract or purchase order number, contract type, and the client's legal name and department
- [ ] Technical contact and contracting contact, with title, direct phone and email
- [ ] Period of performance: start date, end date, and any option years exercised
- [ ] Original value, final value and the number of modifications (and why the value changed)
- [ ] Your role (prime, subcontractor or joint venture partner) and your share of the work
- [ ] Scope summary with volumes: sites, users, square feet, tickets, participants or deliverables
- [ ] Three to five measurable results, each with a baseline and a timeframe
- [ ] Problems encountered and the corrective actions you took
- [ ] Names and roles of your staff who worked on it
- [ ] Formal evaluations, awards, letters of commendation, safety records or audit findings
- [ ] Photos, before-and-after data and approved client quotes (with written permission to use them)

PRO TIP **Pro tip: put your library to work on RFP Detector**

Your free **vendor profile** has a **Past performance** section that holds up to 20 projects, each with a project name, client or issuer, year, value and a description of up to 600 characters (shown to buyers as self-reported), plus a work samples gallery for photos. The one-sentence summary and results from your project profiles fit it well. See **Building Your Vendor Profile**.

If your organization holds New York State contracts, it may already have a public **contractor profile** with a **Contractor Score** built from the public record. That score measures contracting activity, not quality, but buyers can see it, so make sure the contracts and values in your proposals agree with it. You can claim the profile to add your own description and contacts.

SECTION 5.3

Past performance project profile template

The project profile (also called a past performance write-up, reference sheet or contract summary) is the core document. Write one profile per contract. If the RFP limits you to three or five projects, choose the closest matches in scope first, then size, then recency, and fill every field the solicitation asks for, even when the answer is 'none'.

The template below follows the structure that federal past performance information forms and most state reference forms share: identification, contacts, a one-sentence summary, scope, an explicit relevance argument, results, and an honest account of problems. That last section matters. Federal forms often ask you to discuss difficulties and corrective actions directly, and evaluators in every sector trust a profile more when it admits a problem and shows how you solved it.

TEMPLATE

Past performance project profile

Copy-ready online

A complete one-to-two page profile for a single contract, with an explicit relevance section that maps your old work to the new requirement.

WHEN TO USE Any RFP that asks for similar projects, past performance, relevant experience or contract references. Use one profile per contract and tailor sections 5 and 8 for each bid.

PAST PERFORMANCE PROJECT PROFILE
Profile **[NUMBER]** of **[TOTAL]** | Solicitation: **[SOLICITATION_NUMBER]**, **[SOLICITATION_TITLE]**
Offeror: **[COMPANY_NAME]** | UEI or vendor ID (if requested): **[VENDOR_ID]**

1. CONTRACT IDENTIFICATION
Project or contract title: **[PROJECT_TITLE]**
Contract or purchase order number: **[CONTRACT_NUMBER]**
Client: **[CLIENT_LEGAL_NAME]**, **[CLIENT_DEPARTMENT]**
Prime contractor (if we were a subcontractor): **[PRIME_CONTRACTOR_OR_NA]**
Our role: **[PRIME / SUBCONTRACTOR / JOINT VENTURE PARTNER]** | Share of work we performed: **[PERCENT_OF_WORK]**%
Contract type: **[CONTRACT_TYPE]**
Place of performance: **[CITY_STATE]**
Period of performance: **[START_DATE]** to **[END_DATE]** (**[COMPLETED / ONGOING]**)
Contract value: original **[ORIGINAL_VALUE]**; current or final **[FINAL_VALUE]**, including **[NUMBER_OF_MODIFICATIONS]** modifications
Average annual value: **[ANNUAL_VALUE]**

2. CLIENT POINTS OF CONTACT (confirmed on **[DATE_CONFIRMED]**)
Technical or program contact: **[TECH_CONTACT_NAME]**, **[TECH_CONTACT_TITLE]**, **[TECH_CONTACT_PHONE]**, **[TECH_CONTACT_EMAIL]**
Contracting contact: **[CONTRACTING_CONTACT_NAME]**, **[CONTRACTING_CONTACT_TITLE]**, **[CONTRACTING_CONTACT_PHONE]**, **[CONTRACTING_CONTACT_EMAIL]**

3. SUMMARY OF WORK
Under contract **[CONTRACT_NUMBER]**, **[COMPANY_NAME]** provided **[SERVICES_OR_PRODUCTS]** to **[CLIENT_LEGAL_NAME]** at **[NUMBER_OF_SITES_OR_LOCATION]** under a **[CONTRACT_TYPE]** contract.

4. SCOPE OF WORK
[SCOPE_DESCRIPTION: three to five sentences on what we delivered, for whom and at what scale. Name the deliverables and the volumes: sites, users, square feet, tickets, participants or units.]

5. RELEVANCE TO THIS SOLICITATION
Scope: **[HOW_THE_TASKS_MATCH, citing the SOW or specification paragraphs of this RFP, for example "SOW 3.1 to 3.4"]**
Size: **[COMPARISON_OF_VALUE_STAFF_OR_VOLUME, for example "about 80% of the estimated annual value of this contract"]**
Complexity: **[COMPARABLE_CONSTRAINTS, for example occupied buildings, regulated data, multiple sites, compressed schedule, union labor]**

6. RESULTS
- **[RESULT_1: a measurable outcome with a baseline and a timeframe]**
- **[RESULT_2]**
- **[RESULT_3]**

Formal evaluations, ratings or awards: **[RATINGS_OR_RECOGNITION_OR_NONE]**

7. CHALLENGES AND CORRECTIVE ACTIONS
Challenge: **[WHAT_WAS_DIFFICULT_OR_WENT_WRONG, stated plainly]**
Action taken: **[WHAT_WE_DID]**
Outcome: **[RESULT_OF_THE_CORRECTIVE_ACTION]**

8. PROPOSED KEY PERSONNEL WHO WORKED ON THIS PROJECT
[NAME_1]: **[ROLE_ON_THIS_PROJECT]**; proposed as **[PROPOSED_ROLE]**
[NAME_2]: **[ROLE_ON_THIS_PROJECT]**; proposed as **[PROPOSED_ROLE]**

FIELDS TO FILL IN · 13

[SOLICITATION_NUMBER], [SOLICITATION_TITLE]	Copy exactly from the RFP cover page so the profile is traceable if pages get separated.
[VENDOR_ID]	Only if the RFP asks: your Unique Entity ID (UEI) for federal bids, or the state or city vendor ID it names.
[CLIENT_LEGAL_NAME], [CLIENT_DEPARTMENT]	The contracting entity's official name plus the office you served, for example a county's Department of Public Works.
[PRIME_CONTRACTOR_OR_NA]	If you were a subcontractor, name the prime and the end client. Never present subcontract work as prime work.
[PERCENT_OF_WORK]	Your share of the contract's work or value. Evaluators use it to judge how much of the experience is really yours.
[CONTRACT_TYPE]	Firm fixed price, time and materials, unit price, cost reimbursement, grant-funded service contract, and so on.
[ORIGINAL_VALUE], [FINAL_VALUE]	Show both when they differ and be ready to explain why (added scope, options exercised, quantity changes).
[DATE_CONFIRMED]	The date you last spoke with each contact. Recheck any contact older than six months before submitting.
[SCOPE_DESCRIPTION]	Facts and volumes, not adjectives. Three to five sentences.

[Relevance lines (scope, size, complexity)]	The most important section. Cite the new RFP's paragraph numbers and compare like with like.
[RESULT_1] to [RESULT_3]	Each result should be a number the client would confirm: on-time rate, cost saved, backlog cleared, safety record.
[Challenge, action, outcome]	One real problem handled well builds more trust than a perfect record. Keep it factual and short.
[NAME_1], [NAME_2]	Link the project to people you are proposing now. Their resumes must list this project with the same dates and role.

WORKED EXAMPLE

Filled-in example: sections 3, 5, 6 and 7 for a facilities contract (illustrative; names and numbers are fictional) ✓ STRONG

3. Summary of work. Under contract PW-2023-118, Harborline Facility Services provided custodial, day porter and minor maintenance services to the fictional Bayview County Department of Public Works at 14 occupied county buildings under a three-year firm fixed price contract.

5. Relevance. *Scope:* the same custodial, porter and work-order tasks as SOW 3.1 to 3.5 of this RFP, including the green-cleaning products required by SOW 3.6. *Size:* 610,000 cleanable square feet and 42 staff, about 85 percent of the 720,000 square feet in this solicitation. *Complexity:* all buildings stayed open to the public during service, two operated 24 hours a day, and staff worked under a collective bargaining agreement, as this contract requires.

6. Results. Inspection scores rose from an average of 82 to 96 out of 100 within six months; 98 percent of work orders were closed within the 48-hour standard over the contract term; zero lost-time injuries in three years.

7. Challenge and corrective action. In month two, night-shift turnover left two buildings understaffed. We added a floating crew of four, moved a supervisor to nights and brought staffing back to the contract level within three weeks; no further staffing deficiencies were recorded.

Relevance statements: strong versus weak

Strong

- Cites the new RFP's SOW paragraphs and maps each to work you actually did
- Compares size in the buyer's terms: square feet, users, sites, annual value
- Names the constraints the two jobs share, such as occupied buildings or regulated data
- Admits a size gap and explains why the experience still transfers

Weak

- 'This project is highly relevant to the requirement' with no evidence
- Lists every service your company offers instead of what this contract required
- Claims a large delivery capacity based on a much smaller job
- Uses different values or dates than the reference will remember

SECTION 5.4

Reference request and PPQ cover email templates

References are a two-step process. First you ask permission and confirm the facts, ideally by phone with an email to follow. Second, if the RFP requires a past performance questionnaire, you send the agency's form with a cover email that tells the reference exactly what to do, where to send it and by when. Skipping the first step is the most common reason a PPQ never arrives.

A **past performance questionnaire (PPQ)** is a standard form, usually attached to the RFP, that your former client fills out and sends to the buying agency. Federal and many state solicitations require the reference to return it directly to the contracting officer or designated contact, not to you. Federal PPQ cover letters often reassure references that the agency will not tell the offeror who said what. Some agencies say they may disregard questionnaires that arrive after the proposal due date, so build in time.

A typical PPQ schedule for a 30-day response window

Days 1 to 3 — **Choose and call references**
Pick the closest-match projects, call each contact, and confirm willingness, availability and facts.

Days 3 to 5 — **Send the permission email, then the PPQ**
Use the two templates below. Send the PPQ as soon as the reference agrees.

Day 12 — **First reminder**
A short, friendly note with the deadline and the return address repeated.

Day 20 — **Confirm it was sent**
Ask the reference for a one-line confirmation. If someone cannot do it, switch to a backup reference now.

Days 25 to 30 — **Proposal due**
Check whether the RFP lets you confirm receipt with the designated contact. Late questionnaires may not count.

TEMPLATE

Reference permission and fact-check email

Copy-ready online

Asks a former client for permission to list them, confirms their contact details and the project facts, and tells them what evaluators are likely to ask.

WHEN TO USE

Send after a short phone call, or as the first contact if you cannot reach the person by phone, as soon as you decide to bid. Send one per reference; never blind-copy several references on one email.

Subject: Permission to list you as a reference: [SOLICITATION_TITLE]

Dear [REFERENCE_NAME],

I hope all is well at [REFERENCE_ORGANIZATION]. [COMPANY_NAME] is preparing a proposal for [SOLICITATION_TITLE] ([SOLICITATION_NUMBER]), issued by [ISSUING_AGENCY]. The work is closely related to what we delivered for you on [PROJECT_TITLE], and we would be grateful to list you as a reference.

Before we do, could you confirm three things?

1. You are willing to serve as a reference and expect to be reachable between [EVALUATION_START_DATE] and [EVALUATION_END_DATE].
2. Your contact details are current: [REFERENCE_TITLE], [REFERENCE_PHONE], [REFERENCE_EMAIL].
3. The project facts below match your records.

Project: [PROJECT_TITLE]
Contract number: [CONTRACT_NUMBER]
Period of performance: [START_DATE] to [END_DATE]
Contract value: [CONTRACT_VALUE]
Our role: [ROLE]
Key results: [RESULT_1]; [RESULT_2]

The evaluators may call you, email you or send a short questionnaire. If they do, they will most likely ask about [TOPIC_1], [TOPIC_2] and [TOPIC_3], since those carry the most weight in this solicitation. You do not need to prepare anything; we simply want you to know what to expect.

If a questionnaire is required, we will send it separately with the agency's instructions on where and when to return it.

If you would prefer that we ask a colleague of yours instead, just say so. Either way, thank you for the opportunity to work with you on [PROJECT_TITLE]. I am happy to talk by phone if that is easier: [YOUR_PHONE].

Best regards,

[YOUR_NAME]
[YOUR_TITLE], [COMPANY_NAME]
[YOUR_EMAIL] | [YOUR_PHONE]

FIELDS TO FILL IN · 6

[REFERENCE_NAME], [REFERENCE_ORGANIZATION]	The person who directly oversaw your work, such as the project manager or contract administrator, not a senior official who only knows your name.
[ISSUING_AGENCY]	The buyer for the new bid. Some references need to know who will contact them before they agree.
[EVALUATION_START_DATE], [EVALUATION_END_DATE]	Your best estimate of when evaluators will call: usually from the due date to a few weeks after. Use the RFP's schedule if it gives one.
[CONTRACT_VALUE], [START_DATE], [END_DATE]	Must match your project profile exactly. Asking the reference to confirm them catches mismatches before evaluators do.
[TOPIC_1] to [TOPIC_3]	Take these from the evaluation criteria: for example schedule control, responsiveness to issues, quality of staff.
[YOUR_PHONE]	A direct line. References who have questions should reach a person, not a general inbox.

TEMPLATE

Past performance questionnaire (PPQ) cover email

Copy-ready online

Sends the agency's questionnaire to a reference who has already agreed, with clear instructions, a deadline, a project summary and a return path that goes straight to the agency.

WHEN TO USE Whenever the RFP requires references to complete a questionnaire or reference form. Send it as soon as the reference agrees, and attach the agency's form in the exact file format the RFP provides.

Subject: Action requested by [PPQ_DUE_DATE]: past performance questionnaire for [SOLICITATION_NUMBER]

Dear [REFERENCE_NAME],

Thank you again for agreeing to serve as a reference for [COMPANY_NAME]. As we discussed on [CALL_DATE], [ISSUING_AGENCY] asks each reference to complete a past performance questionnaire as part of its evaluation of proposals for [SOLICITATION_TITLE] ([SOLICITATION_NUMBER]).

The questionnaire is attached. Here is what the agency asks you to do:

What to do: Complete the attached form based on your own assessment of our work on [PROJECT_TITLE] (contract [CONTRACT_NUMBER], [START_DATE] to [END_DATE]).

Where to send it: Return it directly to [AGENCY_CONTACT_NAME], [AGENCY_CONTACT_TITLE], at [AGENCY_RETURN_ADDRESS_OR_PORTAL]. Please do not send the completed form to us; the agency requires it to come straight from you.

Deadline: [PPQ_DUE_DATE] at [DUE_TIME] [TIME_ZONE]. The agency may not consider questionnaires received after this date.

Subject line or file name the agency requested: [REQUIRED_SUBJECT_OR_FILE_NAME]

To save you time, here is a short summary of the project you will be rating:
- Scope: [ONE_SENTENCE_SCOPE]
- Value and our role: [CONTRACT_VALUE]; [ROLE]
- Key outcomes: [OUTCOME_1]; [OUTCOME_2]
- Our staff you worked with: [STAFF_NAMES]

The new contract involves [ONE_SENTENCE_DESCRIPTION_OF_NEW_WORK], which is why your perspective on [RELEVANT_ASPECT] will be especially useful to the evaluators.

The form usually takes about [ESTIMATED_MINUTES] minutes. If you have any trouble with it or with the deadline, please call me at [YOUR_PHONE].

I will send a brief reminder on [REMINDER_DATE]. Once you have sent the form, a one-word reply to this email ("Sent") would help us keep track.

With thanks,

[YOUR_NAME]
[YOUR_TITLE], [COMPANY_NAME]
[YOUR_EMAIL] | [YOUR_PHONE]

Attachment: [PPQ_FILE_NAME]

FIELDS TO FILL IN · 8

[CALL_DATE]	The date of your permission call. Mentioning it reminds a busy reference that they already said yes.
[AGENCY_CONTACT_NAME], [AGENCY_RETURN_ADDRESS_OR_PORTAL]	Copy exactly from the RFP's past performance instructions. A wrong address is the same as no questionnaire.
[PPQ_DUE_DATE], [DUE_TIME], [TIME_ZONE]	Use the deadline the RFP sets for questionnaires, which may be earlier than the proposal due date.
[REQUIRED_SUBJECT_OR_FILE_NAME]	Many agencies ask for the solicitation number and your company name in the subject line so they can match forms to offerors. Delete the line if the RFP is silent.
[ONE_SENTENCE_SCOPE], [OUTCOME_1], [OUTCOME_2]	Facts the reference can verify. Do not suggest ratings or wording for their answers.
[RELEVANT_ASPECT]	The part of their experience with you that matters most for the new job, for example managing work in occupied schools.
[ESTIMATED_MINUTES]	Look at the form and estimate honestly; most take 15 to 30 minutes.
[REMINDER_DATE]	About a week after sending, and at least a week before the deadline.

⚠ WARNING **Never fill in the ratings yourself**

Do not complete the questionnaire for your reference, send a pre-filled form for signature, or ask to see their answers when the RFP requires them to go straight to the agency. Evaluators recognize offeror-written questionnaires, and the practice can undermine your whole proposal. You may give the reference factual reminders about the project, as the template does.

SECTION 5.5

Case study template: challenge, solution, results

A case study tells the story of one project in a form a non-specialist can follow in two minutes. Private companies, foundations, hospitals and universities often ask for case studies instead of formal past performance forms. Public RFPs use them too, usually under headings like 'describe similar projects' or 'demonstrated experience', and they double as capability statement and website content.

The structure is simple: the **challenge** (what the client needed, in numbers), the **solution** (what you did and how), and the **results** (what changed, in numbers). Add a short paragraph that connects the story to the new buyer's requirement, and a client quote only if you have written permission to use it.

TEMPLATE

One-page project case study

Copy-ready online

A challenge, solution, results case study with a headline result, project facts and a 'why it matters' paragraph tailored to the new buyer.

WHEN TO USE Private sector and nonprofit RFPs, 'similar projects' sections, capability statements, and the work samples on your vendor profile. Keep it to one page.

CASE STUDY: **[HEADLINE_RESULT, for example "Cut permit review time by 38% for a mid-size city"]**

Client: **[CLIENT_NAME]** ([CLIENT_TYPE, for example county agency, school district, hospital, nonprofit])
Location: **[CITY_STATE]**
Period: **[START_MONTH_YEAR]** to **[END_MONTH_YEAR]**
Contract value: **[VALUE_OR_RANGE]**
Our role: **[PRIME / SUBCONTRACTOR / PARTNER]**
Services: **[SERVICE_1]**, **[SERVICE_2]**, **[SERVICE_3]**

THE CHALLENGE
[CLIENT_NAME] needed to **[GOAL]**. **[THE_PROBLEM_IN_NUMBERS: baseline metric, backlog, cost, risk or deadline]**. The work had to happen **[CONSTRAINTS: within a fixed budget, without closing the building, on legacy systems, with limited client staff]**. **[WHY_IT_MATTERED: the effect on residents, students, patients, clients or operations]**.

OUR SOLUTION
We **[APPROACH_IN_ONE_SENTENCE]**.
- **[ACTION_1: what we did first, and the method or tool we used]**
- **[ACTION_2]**
- **[ACTION_3]**

Team: **[TEAM_SIZE_AND_KEY_ROLES]**. **[DIFFERENTIATOR: the one thing we did that another firm likely would not have]**.

THE RESULTS
- **[RESULT_1: metric, before and after, and timeframe]**
- **[RESULT_2]**
- **[RESULT_3]**
- Completed **[ON_SCHEDULE_DETAIL]** and **[BUDGET_DETAIL]**.

WHY THIS MATTERS FOR **[PROSPECTIVE_CLIENT_NAME]**
[ONE_OR_TWO_SENTENCES connecting this project to a specific requirement in the new RFP, citing its section number].

"**[CLIENT_QUOTE, approved in writing]**"
[QUOTE_NAME], **[QUOTE_TITLE]**, **[CLIENT_NAME]**

Reference: **[AVAILABLE_ON_REQUEST / CONTACT_DETAILS_IF_THE_RFP_ASKS]**

FIELDS TO FILL IN · 8

[HEADLINE_RESULT]	Lead with the outcome, not the client's name. A number in the headline gets read.
[CLIENT_NAME]	Use the real name only with permission. Otherwise describe the client ('a 2,000-student Westchester school district').
[THE_PROBLEM_IN_NUMBERS]	The baseline makes the result meaningful: 'a 1,400-application backlog' or '21-day average turnaround'.
[ACTION_1] to [ACTION_3]	Specific actions in order. Name the method, tool or standard you used.
[DIFFERENTIATOR]	Ties the case study to your win themes; see the executive summary chapter for how to choose them.
[RESULT_1] to [RESULT_3]	Before and after, with timeframe. Only numbers the client would confirm.
[PROSPECTIVE_CLIENT_NAME] paragraph	Rewrite for every bid. This is what turns a marketing piece into proposal evidence.
[CLIENT_QUOTE]	Optional. Get written approval of the exact wording and keep it in your library.

WORKED EXAMPLE

Weak results section

✕ WEAK

> *We delivered an outstanding solution that exceeded the client's expectations. The new system was a big improvement and staff love it. The project was a great success and showcases our commitment to excellence.*
>
> Nothing here can be verified or scored. 'Outstanding', 'big improvement' and 'great success' are claims, not evidence.

WORKED EXAMPLE

Strong results section

✓ STRONG

> *Average permit review time fell from 21 business days to 13 within four months of go-live (38 percent faster). The pending backlog dropped from 1,400 applications to under 200. Online submissions rose from 35 to 82 percent of all applications in the first year. We went live on the scheduled date and finished 4 percent under the approved budget.*
>
> Every sentence has a baseline, a result and a timeframe the client could confirm.

Where do the numbers come from? Look at your close-out report, monthly status reports, the client's own dashboards, inspection or audit results, invoices against budget, schedule baselines, and satisfaction surveys. If you never measured anything, start now: add two or three measurable outcomes to every new project plan so your next case study writes itself.

SECTION 5.6

Key personnel resume template and letter of commitment

Key personnel are the people the RFP names as essential, such as the project manager, superintendent, lead engineer or program director. The buyer evaluates their resumes and often makes them contractually required: you generally cannot swap them out after award without the buyer's approval. Many RFPs set a page limit per resume, require a specific format, ask for references, or require a signed letter of commitment from each person.

Write each resume against the requirement, not as a career history. Open with a short qualifications summary that uses the RFP's own position title and words, add a crosswalk from each stated requirement to the evidence, and list relevant projects with dates, values and results. Architect-engineer firms answering federal and many state and local solicitations use the SF 330 form instead, where the key

personnel resumes (Section E), example projects (Section F) and the participation matrix (Section G) must all agree with each other.

TABLE **Map each RFP requirement to the line of the resume that proves it (sample for a help desk project manager)**

RFP requirement for the position	Where the resume proves it
Ten years managing IT service desk operations	Experience entries with month-and-year dates that add up to ten or more years, each naming the service desk scope
Project management certification or equivalent	Licenses and certifications line with the issuing body and expiration date
Experience supporting public sector clients	Project lines naming the agency or district, value and number of users supported
Managed teams of 15 or more	A bullet with the team size on at least one recent project
Experience with the ITIL service framework	A bullet describing the processes implemented, plus any certification held

TEMPLATE

Key personnel resume

Copy-ready online

A requirement-driven resume with a crosswalk, relevant projects with numbers, and a signed certification. Fits two to three pages.

WHEN TO USE For each person the RFP designates as key personnel, or any resume the RFP requests, unless the RFP supplies its own resume format (then use that format and move this content into it).

KEY PERSONNEL RESUME
Solicitation: **[SOLICITATION_NUMBER]** | Offeror: **[COMPANY_NAME]**

Name: **[FULL_NAME]**
Proposed position: **[POSITION_TITLE_EXACTLY_AS_IN_RFP]**
Labor category (if applicable): **[LABOR_CATEGORY]**
Relationship to offeror: **[EMPLOYEE_SINCE_YEAR / CONTINGENT_HIRE / EMPLOYEE_OF_SUBCONTRACTOR_NAME]**
Availability: **[PERCENT]**% of working time, available from **[START_DATE]**
Years of relevant experience: **[YEARS]** (RFP minimum: **[REQUIRED_YEARS]**)

QUALIFICATIONS SUMMARY
[TWO_TO_THREE_SENTENCES that restate the RFP's requirements for this position and show how this person meets each one, using the RFP's own wording.]

REQUIREMENT CROSSWALK
RFP requirement: **[REQUIREMENT_1]** → Evidence: **[WHERE_AND_HOW_MET]**
RFP requirement: **[REQUIREMENT_2]** → Evidence: **[WHERE_AND_HOW_MET]**
RFP requirement: **[REQUIREMENT_3]** → Evidence: **[WHERE_AND_HOW_MET]**

EDUCATION
[DEGREE], **[FIELD_OF_STUDY]**, **[INSTITUTION]**, **[YEAR]**

LICENSES AND CERTIFICATIONS
[LICENSE_OR_CERTIFICATION], **[ISSUING_BODY]**, **[NUMBER_IF_REQUIRED]**, valid through **[EXPIRATION_DATE]**

RELEVANT EXPERIENCE (most recent first)
[MONTH_YEAR] to **[MONTH_YEAR_OR_PRESENT]** | **[EMPLOYER]** | **[JOB_TITLE]**
Project: **[PROJECT_NAME]** for **[CLIENT_NAME]** (**[PROJECT_VALUE]**, team of **[TEAM_SIZE]**)
- **[RESPONSIBILITY_THAT_MATCHES_THE_PROPOSED_ROLE]**
- **[ACCOMPLISHMENT_WITH_A_NUMBER]**
- **[ACCOMPLISHMENT_WITH_A_NUMBER]**

[MONTH_YEAR] to **[MONTH_YEAR]** | **[EMPLOYER]** | **[JOB_TITLE]**
Project: **[PROJECT_NAME]** for **[CLIENT_NAME]** (**[PROJECT_VALUE]**)
- **[RESPONSIBILITY]**
- **[ACCOMPLISHMENT_WITH_A_NUMBER]**

EARLIER EXPERIENCE (summary)
[YEAR] to **[YEAR]**: **[ONE_LINE_SUMMARY_OF_EARLIER_ROLES]**

CLEARANCE OR BACKGROUND CHECK (only if the RFP requires it)
[STATUS_OR_NOT_APPLICABLE]

REFERENCES (only if the RFP requires them)
[REFERENCE_NAME], **[REFERENCE_TITLE]**, **[REFERENCE_ORGANIZATION]**, **[REFERENCE_PHONE]**, **[REFERENCE_EMAIL]**

CERTIFICATION
I certify that this resume accurately describes my education, licenses and experience, and that I have agreed to be proposed for the position named above.
Signature: _____ Date: **[DATE]**
[FULL_NAME]

FIELDS TO FILL IN · 8

[-POSITION_TITLE_EXACTLY_AS_IN_RFP]	Use the buyer's title, not your internal one. If the RFP says 'Program Manager', do not write 'Engagement Director'.
[RELATIONSHIP_TO_OFFEROR]	Be truthful. Contingent hires and subcontractor staff are common and acceptable when disclosed.
[PERCENT], [START_DATE]	Must match your staffing plan and price volume. A full-time role priced at half time is a red flag.
[YEARS], [REQUIRED_YEARS]	Show the math. Overlapping jobs do not add up twice.
[Requirement crosswalk]	One line per stated requirement for the position, in the RFP's order. If the page limit is tight, merge it into the summary.
[EXPIRATION_DATE]	Licenses that lapse before the contract starts can make the person unqualified. Check before you submit.
[-ACCOMPLISHMENT_WITH_A_NUMBER]	Same rule as case studies: baseline, result, timeframe.
[Certification and signature]	Include it when the RFP requires a signed resume. Otherwise you can drop the signature line and keep the certification sentence.

TEMPLATE

Key personnel letter of commitment

Copy-ready online

A short signed letter in which a proposed key person confirms the position, start date, time commitment and accuracy of their resume.

WHEN TO USE

When the RFP requires letters of commitment or intent, and as good practice for any contingent hire or subcontractor employee you name as key personnel, unless the RFP forbids extra documents.

LETTER OF COMMITMENT

[DATE]

[ISSUING_AGENCY]
Attn: [CONTRACTING_OFFICER_OR_DESIGNATED_CONTACT]
Re: [SOLICITATION_NUMBER], [SOLICITATION_TITLE]

I, [FULL_NAME], confirm that I have agreed to be proposed by [COMPANY_NAME] as [POSITION_TITLE] for the contract resulting from the solicitation above.

If [COMPANY_NAME] receives the award, I commit to:
- Serve as [POSITION_TITLE] beginning on [START_DATE];
- Devote [PERCENT]% of my working time, about [HOURS_PER_WEEK] hours per week, to this contract; and
- Remain in this position for at least [COMMITMENT_PERIOD], barring circumstances beyond my control.

My current relationship with [COMPANY_NAME] is: [EMPLOYEE_SINCE_YEAR / OFFER_ACCEPTED_CONTINGENT_ON_AWARD / EMPLOYEE_OF_SUBCONTRACTOR_NAME].

I have reviewed the resume submitted with this proposal and confirm that it accurately describes my education, licenses and experience. I authorize [COMPANY_NAME] to include it in its proposal.

[LICENSE_OR_CLEARANCE_SENTENCE_IF_REQUIRED]

Signature: _____
[FULL_NAME]
[CURRENT_TITLE], [CURRENT_EMPLOYER]
[PHONE] | [EMAIL]

FIELDS TO FILL IN · 6

[CONTRACTING_OFFICER_OR_DESIGNATED_CONTACT]	The person the RFP names for all communications. Some RFPs prefer letters addressed to the offeror; follow the instructions.
[START_DATE]	The expected contract start date, or 'the contract start date' if the RFP does not give one.
[PERCENT], [HOURS_PER_WEEK]	Firm numbers. Hedged language such as 'intends to be available' weakens the letter.
[COMMITMENT_PERIOD]	Often the base period of the contract, or a minimum such as 12 months. Use what the RFP asks for.
[OFFER_ACCEPTED_CONTINGENT_ON_AWARD]	For people you will hire if you win. Keep the signed offer letter in your files.
[LICENSE_OR_CLEARANCE_SENTENCE_IF_REQUIRED]	For example: 'I hold New York State Professional Engineer license [NUMBER], current through [DATE].' Delete if not needed.

✕ COMMON MISTAKE **Common mistake: naming people who are not committed**

Proposing a well-known expert who has not agreed to the role, or who you know will be unavailable, is a classic 'bait and switch'. If a proposed key person becomes unavailable before award, tell the buyer through the designated contact rather than hoping no one notices; protest decisions have gone against offerors who stayed silent. After award, substitutions usually need the buyer's written approval and someone with equal or better qualifications. Confirm availability in writing before every submission.

SECTION 5.7

How to adapt these templates for construction, IT, professional services and nonprofits

The structure of each template works in every sector. What changes is the evidence evaluators expect and the vocabulary they use. Use the table to decide what to emphasize, then rewrite the relevance and results sections in the buyer's language.

TABLE What to emphasize by industry

Industry	Project profile and case study	Results that score	Key personnel focus
Construction and facilities	Building type, square footage, contract value, delivery method, occupied or vacant site, prevailing wage and union labor, bonding	On-schedule completion, change order rate, punch list closeout time, safety record (for example the experience modification rate and recordable incidents), inspection scores	Superintendent and project manager licenses, OSHA training, years on similar building types, the same superintendent on the cited projects
IT and software	Users and sites supported, systems and integrations, hosting model, security and privacy requirements, legacy migration	Uptime, ticket resolution times against service levels, defect rates, migration completed without data loss, adoption rates	Certifications tied to the stack, security background checks, experience with the agency's platforms, named architect and lead developer
Professional services and consulting	Client type, engagement scope and deliverables, stakeholder groups, methods used, labor categories	Recommendations adopted, savings identified and realized, deliverables accepted on first submission, reports delivered on schedule	Credentials (CPA, PE, PMP, licensed attorney), subject expertise, prior work for similar agencies, hours committed
Nonprofits and human services	Population served, program model, funding source, geographic area, partners, compliance with funder reporting	Participants served against targets, outcome measures (placements, completions, health indicators), retention, audit results, cost per participant	Program director and clinical leads with licenses, lived experience or community ties, supervision ratios, bilingual staff

Two adaptations deserve a closer look. **Construction** owners often use a contractor qualification statement that asks for completed projects, current backlog, bonding capacity and safety data in one form; your project profiles should feed it directly, and the projects you list should match what your surety and insurance records show (see Bonding, Insurance and Compliance Requirements). **Nonprofits**

answering government human services RFPs should report outcomes, not just outputs: 'served 420 families' is an output, while '71 percent of families remained stably housed after 12 months' is an outcome, and outcomes are what evaluators score.

SECTION 5.8

What if you have little or no past performance?

Every contractor starts with zero. Evaluators know that, and most solicitations allow you to draw on experience beyond your own company's contract history. Federal evaluation rules, for example, tell agencies to take into account relevant experience of key personnel, predecessor companies and subcontractors who will perform major or critical parts of the work. Be transparent about what you are citing and why it is relevant. For the rules on neutral ratings and new contractors, see **little or no past performance**.

Five ways to build a credible past performance section from a thin record

1. **Use your key people's experience**
   Write project profiles for work your principals and key staff performed at previous employers, clearly labeled with the firm they worked for at the time. Pair them with strong resumes.

   > **Tip:** Never imply that your company performed work an employee did elsewhere.

2. **Count commercial and private work**
   Commercial, nonprofit and private projects are past performance too. A property manager's building contract or a hospital's IT project can be highly relevant to a public job of the same kind.

3. **Cite subcontract work**
   Work as a subcontractor counts. Name the prime and the end client, and describe only your share. See **Subcontracting and Teaming Opportunities** for how to get it.

4. **Team with an experienced partner**
   A teaming partner or mentor firm with relevant contracts can strengthen the team's record, if the RFP allows team member past performance. Their projects go in with their name on them.

5. **Start smaller**
   Smaller purchases and quick-turn quotes usually weigh price and responsiveness more than a long track record. Use them to build the record you need for larger bids; in **RFP Detector search**, set a **Value** maximum and pick the RFQ notice type to find them.

SECTION 5.9

Past performance mistakes that cost points

Do and don't

Do

- Provide exactly the number of projects and references the RFP asks for
- Choose the most similar project over the most impressive one
- Call every reference before listing them, and recheck contacts older than six months
- Keep values, dates and roles identical across profiles, resumes, case studies and forms
- Explain a problem and the corrective action before the evaluator hears about it elsewhere
- Comment on every formal performance evaluation you receive, within the window allowed

Don't

- List a contact who has left the organization or never agreed to be a reference
- Pad the section with extra projects the RFP did not ask for
- Present subcontract or employee experience as your company's prime work
- Use round, unverifiable claims such as 'saved millions' or '100% satisfaction'
- Ignore a required reference form and attach your own instead
- Recycle a resume from the last bid without updating the position title and crosswalk

PRO TIP **Pro tip: run a consistency check before submission**

Put every project profile, resume and case study side by side and check four things: the same contract value, the same dates, the same role, and the same people on each project. Evaluators read these volumes together, and a $1.2 million project in one place and $1.5 million in another invites doubt about everything else. Add this check to your final review checklist from **Bid Management Templates and Checklists**.

Glossary

Past performance	Evidence of how well you performed on recent, similar contracts, judged through references, questionnaires and formal evaluations.
Recency	Whether the work falls inside the time window the solicitation sets, often the last three to five years.
Relevance	How closely a past contract resembles the new one in scope (type of work), size (dollars, staff, volume) and complexity (constraints and risk).

PPQ (past performance questionnaire)	A form, usually attached to the RFP, that your former client completes and returns directly to the buying agency.
CPARS	The Contractor Performance Assessment Reporting System, where federal agencies record formal evaluations of contractor performance. Contractors are notified and can comment on each evaluation.
Key personnel	People the solicitation designates as essential to the contract. Their resumes are evaluated, and replacing them after award usually needs the buyer's approval.
Letter of commitment	A signed statement in which a proposed person confirms they will fill the named role if you win.
Neutral rating	The rating federal evaluators generally give an offeror with no relevant past performance record: neither favorable nor unfavorable.
SF 330	The federal Architect-Engineer Qualifications form, also used by some state and local agencies, with sections for key personnel resumes, example projects and a participation matrix.

Frequently asked questions

Q What is a past performance template?

A past performance template is a reusable form for describing one completed or ongoing contract in a proposal: the contract details, client contacts, scope, how the work relates to the new requirement, measurable results and any problems you solved. Using the same template for every project keeps your facts consistent and lets you tailor only the relevance section for each bid. If the RFP supplies its own past performance form, use that form and copy your content into it.

Q How do I ask a client to be a past performance reference?

Ask in writing before you list them. Name the solicitation and the agency, remind them of the project you delivered for them, and ask three things: that they are willing and reachable during the evaluation window, that their title, phone and email are current, and that the project facts (contract number, dates, value, your role and key results) match their records. Tell them which topics evaluators are likely to ask about. The **reference permission email** covers all of this in one message.

Q How do I send a past performance questionnaire to my references?

If the instructions allow it, fill in your company and contract details at the top of the form, then send it to each reference with a short cover email that gives the agency's return address or portal and the exact deadline. The reference sends the completed questionnaire straight to the agency, never back to you. Check in with the reference a few days before the deadline, and never fill in or ask to see the ratings.

Q Can a key employee's or subcontractor's experience count as past performance?

Sometimes. Federal evaluation rules let agencies consider the past performance of predecessor companies, key personnel with relevant experience and subcontractors that will perform major parts of the work, and many state and local RFPs do the same, but only where the solicitation allows it. Say whose experience it is and what share of the new work they will do. Never present an employee's work for a former employer, or a subcontract, as your own company's prime contract.

Q What is a letter of commitment for key personnel?

It is a short letter, signed by the person you propose, confirming that they agree to be named in your proposal, that they will serve in the stated position from a given start date for a stated share of their time if you win, and that their resume is accurate. Solicitations often require one for key personnel, especially people who are not yet your employees, and a missing required letter can make a proposal unacceptable. Collect it early, address it to the agency and use the position title exactly as the RFP names it.

Q What should a key personnel resume include?

The proposed position title exactly as the RFP names it, availability and time commitment, a short qualifications summary in the RFP's words, education, current licenses and certifications with expiration dates, and relevant experience with dates, project values, team sizes and measurable accomplishments. Add references, a clearance statement or a signed certification only when the RFP requires them, and stay within any page limit.

Q What is the difference between a case study and a past performance write-up?

A past performance write-up is a structured record of one contract, built around the facts evaluators need to score recency, relevance and quality: contract number, value, dates, contacts and results. A case study tells the same project as a short story, challenge then solution then results, for readers who want to understand the outcome quickly. Formal public RFPs usually want the write-up; private and nonprofit buyers often prefer case studies. Keep both versions of every major project in your library.

→ KEEP BUILDING YOUR PROPOSAL

Past Performance, Case Studies and References

The how-to chapter: choosing projects, managing references and writing for evaluators.

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

Technical and Management Approach

Where your key personnel and staffing plan fit into the technical volume.

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

Capability Statement Templates

Turn your best project results into a one-page capability statement.

rfpdetector.com/guides/proposal-templates/capability-statement-templates

Compliance Matrix Template

Track every past performance and resume requirement so nothing is missed.

rfpdetector.com/guides/proposal-templates/pricing-and-compliance-templates#compliance-matrix-template

Building Your Vendor Profile

Publish your past performance and work samples where buyers can find you.

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

Subcontracting and Teaming Opportunities

Build a record by working with experienced primes.

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

Browse open RFPs

Find the next bid to put your past performance library to work.

rfpdetector.com/rfps

END OF CHAPTER 5

Next: 06 Pricing Narrative and Compliance Matrix Templates



06

CHAPTER 6

Pricing Narrative and Compliance Matrix Templates

Six copy-ready templates for the parts of a bid that decide whether you are compliant and whether your price makes sense: a compliance matrix, an RFP questions letter, a pricing narrative, a basis of estimate, an assumptions and exceptions list and a clarification response letter.

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

Read this chapter online

KEY TAKEAWAYS

- Start the **compliance matrix** the day the RFP arrives and update it after every amendment and set of answers; it is your outline, your task list and your final check.
- Ask questions in writing, through the channel the RFP names, before the deadline, and assume every competitor will read them.
- A **pricing narrative** explains how you built the price; a **basis of estimate** shows the math for each task. Both must match the technical volume exactly.
- Assumptions describe conditions your price depends on; exceptions reject a requirement. Exceptions can make a bid non-responsive, so use them rarely and precisely.
- Answer clarification requests directly, by the deadline, and change nothing the buyer did not ask or allow you to change.

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6.7 How to adapt these templates for construction, IT, professional services and nonprofits 168

6.8 Pricing and compliance mistakes to avoid 170

A proposal can lose before anyone reads your approach: a missed requirement, an exception buried in the price volume, or a number the evaluator cannot trace. This chapter gives you a **compliance matrix template** in structured plain text, plus copy-ready templates for the documents around it: a letter of questions to the issuer, a pricing narrative, a basis of estimate (BOE), an assumptions and exceptions list, and a clarification response letter. Each template has a fields list, and the guidance shows how to adapt it for construction, IT, professional services and nonprofit bids.

> **TIP** **Before you start**
>
> Download every solicitation document, including attachments, forms, price sheets and any amendments or addenda issued so far. Read the instructions, the evaluation criteria and the price form before you open a template; the RFP always overrides these templates.
>
> For the reasoning behind compliance and pricing decisions, read **Proposal Structure and Compliance** and **Pricing Strategy and Cost Proposals** in the proposal-writing handbook.

SECTION 6.1

Where pricing and compliance documents fit in your bid

These six documents are not written in one sitting. Each one belongs to a stage of the bid, and they feed each other: your questions come out of building the compliance matrix, the answers change the matrix and your assumptions, and the assumptions shape the price. The timeline below shows when each one is drafted on a typical four-to-six-week response.

When each document is drafted

Day 1 to 3 — **Compliance matrix, first version**
Shred the instructions, evaluation criteria, scope and forms into rows. Every unclear requirement becomes a candidate question.

Before the question deadline — **Questions to the issuer**
Send one consolidated, numbered letter through the channel the RFP names, ideally a few days before the deadline.

When answers or amendments arrive — **Matrix update**
Add new requirements, close answered questions and acknowledge each amendment the way the RFP asks.

Middle weeks — **Basis of estimate and pricing narrative**
Build the price from the same staffing plan and schedule as the technical volume.

Final week

Assumptions and exceptions list

Finalize only the assumptions the price truly depends on, and any exceptions you have decided to take.

After submission

Clarification response

If the buyer asks for clarification, answer exactly what was asked by the deadline.

> **PRO TIP** **Pro tip: let your pipeline hold the dates**
>
> Save the RFP to your pipeline in RFP Detector and its due date, questions deadline and any pre-bid meeting appear on your calendar, next to internal due dates you set for your own drafts. The downloadable RFP report (PDF) lists the key dates and rebuilds when an RFP changes, which is a useful prompt to re-run your compliance matrix after an amendment. See **Tracking Bids, Pipeline and Alerts**.

Glossary

Compliance matrix	A table of every requirement in the solicitation, with its source, where your proposal answers it, who owns it and its status.
Cross-reference (response) matrix	A shorter version submitted with the proposal so evaluators can find where each requirement is answered.
Shred	Breaking the RFP into individual requirement statements, usually by finding every 'shall', 'must' and 'will'.
Basis of estimate (BOE)	The documented reasoning behind each cost element: the method, the data and the math that produced the hours, quantities and rates.
Loaded labor rate	A direct wage rate plus fringe benefits, overhead, general and administrative expense and profit.
Other direct costs (ODCs)	Non-labor costs charged directly to the contract, such as travel, materials, software licenses or equipment rental.
Assumption	A condition your approach and price are based on, stated so the buyer knows what happens if it changes.
Exception	A statement that you do not accept a requirement or term of the solicitation as written.
Clarification	A limited exchange after submission in which the buyer asks you to explain or confirm something, usually without letting you revise the proposal.

Discussions and BAFO	Broader negotiations with offerors still in contention, usually ending with a request for final proposal revisions or a best and final offer (BAFO).
Amendment or addendum	A formal change to the solicitation issued by the buyer. You usually must acknowledge each one.

SECTION 6.2

Compliance matrix template (structured plain text)

A compliance matrix turns a 90-page RFP into a checklist you can manage. Internally, it is the backbone of the proposal: it drives the outline, assigns writers, flags questions and becomes the final check before submission. Externally, many RFPs ask you to submit a cross-reference or response matrix so evaluators can find each answer quickly. Others forbid extra pages, so check the instructions before you include one.

How to build a compliance matrix in seven steps

1. **Collect every document**
   The RFP, all attachments and exhibits, the price form, required forms and certifications, specifications or scope of work, the draft contract, and every amendment or addendum. Note the version date of each.

2. **Shred the instructions**
   Read the submission instructions line by line and create one row for each requirement: every 'shall', 'must', 'will', 'is required to', 'include', 'provide' and 'submit', plus page limits, fonts, file formats and delivery rules. Keep the RFP's wording and section reference.

   > **Tip:** Search the PDF for those words, but still read every page. Requirements hide in tables, footnotes and attachments.

3. **Add the evaluation criteria**
   Map each evaluation factor to the instruction rows that answer it. If a criterion has no matching instruction, add a row anyway: evaluators score what the criteria say.

4. **Add scope and specification requirements**
   Each task, deliverable, service level or technical specification gets a row and a compliance position: comply, comply with an assumption, or exception.

5 **Add forms, terms, insurance and bonds**

Signature pages, affidavits, amendment acknowledgments, insurance limits, bid security, diversity utilization plans and any registration or license proof the RFP requires.

6 **Assign owners and locations**

Give every row an owner and a planned location in your outline (volume, section, page). Mark rows that need a question to the issuer.

7 **Update, then verify**

Update the matrix after every amendment and set of answers. Before submission, have someone who did not write the proposal check every row against the final files.

TABLE **Sample compliance matrix rows (illustrative)**

ID	RFP reference	Requirement	Proposal location	Owner	Status
A-02	Sec. 4.1, p. 18	Technical proposal shall not exceed 25 pages, 11-point font, 1-inch margins	Volume I, all	Proposal manager	Complete
B-04	Sec. 4.3(c), p. 20; Criterion 2 (30 points)	Describe the approach to transitioning services within 30 days of award	Vol. I, Sec. 3.2, p. 9	Operations lead	In progress
C-11	SOW 3.6, p. 41	Respond to emergency work orders within 2 hours, 24/7	Vol. I, Sec. 3.4, p. 12; Assumption A-3	Operations lead	Question pending (Q-5)
D-03	Attachment F	Signed non-collusion affidavit, notarized	Volume III, Tab 4	Contracts manager	Not started
E-02	Contract Art. 12	Professional liability insurance of 2 million dollars per claim	Vol. III, Tab 6; Exception E-1	Contracts manager	Complete

TEMPLATE

Compliance matrix (structured plain text)

Copy-ready online

A complete five-part compliance matrix you can paste into a document or spreadsheet: submission rules, content mapped to evaluation criteria, scope requirements, forms, and contract terms, with a status key and a final verification line.

WHEN TO USE Every bid, from a 10-page quote to a multi-volume proposal. Keep it internal, or trim it to the location columns if the RFP asks you to submit a cross-reference matrix. Paste the rows into a spreadsheet if you prefer one column per field.

COMPLIANCE MATRIX
Solicitation: [SOLICITATION_NUMBER], [SOLICITATION_TITLE]
Issuer: [ISSUING_AGENCY]
Proposal due: [DUE_DATE] at [DUE_TIME] [TIME_ZONE] | Questions due: [QUESTIONS_DUE_DATE]
Amendments incorporated: [AMENDMENT_NUMBERS_AND_DATES_OR_NONE]
Matrix owner: [PROPOSAL_MANAGER] | Last updated: [LAST_UPDATED_DATE]

STATUS KEY: C = complete and verified | IP = in progress | NS = not started | Q = question pending with issuer | NA = not applicable (explain in notes)

PART A. SUBMISSION AND FORMAT REQUIREMENTS
ID | RFP reference | Requirement | Proposal location | Owner | Status | Notes
A-01 | [SECTION_PAGE] | Deliver [NUMBER_OF_COPIES_OR_FILES] in [FORMAT] by [DELIVERY_METHOD] no later than [DUE_DATE_TIME] | Transmittal | [OWNER] | [STATUS] | [NOTES]
A-02 | [SECTION_PAGE] | Page limit of [PAGE_LIMIT] for [VOLUME_NAME]; font [FONT_SIZE]; margins [MARGINS] | All volumes | [OWNER] | [STATUS] | [NOTES]
A-03 | [SECTION_PAGE] | File naming and labeling: [NAMING_RULE] | All files | [OWNER] | [STATUS] | [NOTES]
A-04 | [SECTION_PAGE] | Price submitted separately from technical proposal: [YES_NO_AND_RULE] | Volume [X] | [OWNER] | [STATUS] | [NOTES]

PART B. PROPOSAL CONTENT MAPPED TO EVALUATION CRITERIA
ID | RFP reference | Requirement | Evaluation criterion and weight | Proposal location | Owner | Status
B-01 | [SECTION_PAGE] | Describe [TOPIC] | [CRITERION_NAME], [POINTS_OR_WEIGHT] | Vol. [X], Sec. [X.X], p. [PAGE] | [OWNER] | [STATUS]
B-02 | [SECTION_PAGE] | Provide [NUMBER] past performance references on the agency's form | [CRITERION_NAME], [POINTS_OR_WEIGHT] | Vol. [X], Sec. [X.X] | [OWNER] | [STATUS]
B-03 | [SECTION_PAGE] | Provide resumes for [KEY_POSITIONS], maximum [PAGES] pages each | [CRITERION_NAME], [POINTS_OR_WEIGHT] | Vol. [X], App. [X] | [OWNER] | [STATUS]
B-04 | [SECTION_PAGE] | [REQUIREMENT] | [CRITERION_NAME], [POINTS_OR_WEIGHT] | [LOCATION] | [OWNER] | [STATUS]

PART C. SCOPE OF WORK AND SPECIFICATION REQUIREMENTS
ID | SOW or spec reference | Requirement | Compliance position | Proposal location | Status
C-01 | [SOW_PARAGRAPH] | [REQUIREMENT] | Comply | [LOCATION] | [STATUS]
C-02 | [SOW_PARAGRAPH] | [REQUIREMENT] | Comply with assumption [A-NUMBER] | [LOCATION] | [STATUS]
C-03 | [SOW_PARAGRAPH] | [REQUIREMENT] | Exception [E-NUMBER] (approved by [APPROVER]) | [LOCATION] | [STATUS]

PART D. FORMS, CERTIFICATIONS AND ATTACHMENTS
ID | Form or attachment | What it requires | Signer | Notarized | Location | Status
D-01 | [FORM_NAME_OR_NUMBER] | [WHAT_IT_REQUIRES] | [SIGNER] | [YES_NO] | [TAB_OR_APPENDIX] | [STATUS]
D-02 | Amendment acknowledgments | Sign and return each amendment, or list them in the transmittal letter if the RFP allows | [SIGNER] | No | [LOCATION] | [STATUS]
D-03 | [DIVERSITY_OR_UTILIZATION_PLAN_IF_REQUIRED] | [GOAL_AND_FORM] | [SIGNER] | [YES_NO] | [LOCATION] | [STATUS]

PART E. CONTRACT TERMS, INSURANCE AND BONDS
ID | RFP reference | Requirement | Our position | Location | Status
E-01 | [CLAUSE] | Insurance: [COVERAGE_TYPES_AND_LIMITS] | [ACCEPT / ACCEPT WITH ASSUMPTION / EXCEPTION E-NUMBER] | [LOCATION] | [STATUS]
E-02 | [CLAUSE] | Bid security: [AMOUNT_OR_PERCENT_AND_FORM] | [ACCEPT] | [LOCATION] | [STATUS]
E-03 | [CLAUSE] | [OTHER_KEY_TERM, for example liquidated damages, payment terms, indemnification] | [POSITION] | [LOCATION] | [STATUS]

OPEN ITEMS
[ROW_ID]: [ISSUE] | Action: [ACTION_NEEDED] | Owner: [OWNER] | Due: [DATE]

FINAL VERIFICATION
Checked against the final submission files by [REVIEWER_NAME] on [VERIFICATION_DATE].
Every row is marked C, or NA with an explanation: [YES_NO]
Every amendment is acknowledged: [YES_NO]

FIELDS TO FILL IN · 9

[-AMENDMENT_NUMBERS_AND_DATES_OR_NONE]	Update this line every time the buyer issues a change. It tells reviewers which version of the RFP the matrix reflects.
[Row IDs (A-01, B-01 and so on)]	Letter by part, number by order. Use the same IDs in your question letter and assumptions list so everything cross-references.
[SECTION_PAGE]	The exact RFP section and page, for example 'Sec. 4.3(c), p. 20'. Evaluators and reviewers both need it.
[Requirement]	Copy the RFP's wording for anything mandatory. Paraphrase only for long descriptive passages, and never soften a 'shall'.
[CRITERION_NAME], [POINTS_OR_WEIGHT]	From the evaluation section. Weight tells writers where to spend their pages.
[Compliance position]	Comply, comply with assumption (give its number), or exception (give its number and who approved it).
[OWNER]	One named person per row, not a department.
[STATUS]	Use the status key. 'Q' rows must be closed or converted to assumptions before submission.
[Final verification]	Done by someone who did not write the proposal, against the final PDF or printed copies, not the drafts.

TABLE **Internal compliance matrix versus a submitted cross-reference matrix**

	Internal compliance matrix	Submitted cross-reference matrix
Purpose	Plan, assign and verify the whole response	Help evaluators find each answer
Columns	Reference, requirement, location, owner, status, notes, open items	Reference, short requirement, proposal section and page
Who sees it	Your team only	The evaluators
When required	Always (best practice)	When the RFP asks, or when it allows extra pages and the response is long
Watch out for	Letting it go stale after amendments	Page limits: check whether the matrix counts against them

SECTION 6.3

RFP questions letter: how do you write questions to the issuer?

Most RFPs set a question period with a firm deadline and name one person or portal for all communication. Questions are your chance to fix ambiguities, correct errors, and ask for changes to requirements that would limit competition or add needless cost. They are also public: buyers usually publish every question and answer to all prospective bidders, often as an amendment or addendum, so write as if your competitors will read every word.

In federal procurements, once a solicitation is released the contracting officer is the focal point for all exchanges, and information given to one potential offeror that bidders need to prepare proposals must be made available to everyone. State and local buyers follow similar rules, and many go further.

> ⚠ **WARNING** **Contact rules: New York's restricted period and 'no contact' clauses**
>
> New York State's Procurement Lobbying Law (State Finance Law sections 139-j and 139-k) creates a **restricted period** that begins with the earliest posting of a state procurement and lasts until the contract is awarded and approved. During it, you may communicate about the procurement only with the designated contact or contacts named in the solicitation, apart from a short list of exceptions such as submitting your proposal. State entities must record contacts, and an impermissible contact can lead to a finding that you are not a responsible bidder, which you then have to disclose in later state bids. The law covers state agencies, public authorities and certain other public bodies. It does not directly govern most city, town and county purchasing, but many local buyers and school districts have their own 'cone of silence' or no-contact clauses.
>
> The safe habit everywhere: send every question in writing to the designated contact through the stated channel, and do not call program staff or elected officials about an open solicitation. This is general information, not legal advice; read the solicitation's contact rules and ask counsel if you are unsure.

What to ask, and what to keep to yourself

Good questions

- Conflicts between sections, for example a page limit of 20 in one place and 25 in another
- Missing information you need to price, such as workload data, site square footage or the number of users
- Requirements that seem to favor one product or vendor, with a request to accept equivalents
- Unclear evaluation or submission rules, such as whether the price form counts toward the page limit
- A deadline extension, with a short reason, when the RFP is complex or a key attachment was late

Avoid

- Questions that reveal your solution, your pricing approach or your partners
- Questions already answered in the RFP (they signal you did not read it)
- Several questions packed into one paragraph
- Argumentative or sales-pitch questions
- Phone calls or emails to anyone other than the designated contact

WORKED EXAMPLE

Weak question

WEAK

> *Can you tell us more about the help desk requirements and what the county is looking for? We have a lot of experience with help desks and want to make sure our innovative tiered model fits.*
>
> Vague, reveals your approach, and gives the buyer nothing specific to answer.

WORKED EXAMPLE

Strong question

STRONG

> *Reference: SOW 3.2, page 14, and Attachment C. Background: SOW 3.2 requires support for 'all county users', but Attachment C lists ticket volumes for 2,100 users while Section 1.1 states the county has 3,400 employees. Question: For pricing purposes, should offerors assume 2,100 or 3,400 supported users? Suggested resolution: please confirm the number, or provide 12 months of ticket volume for the full user base.*
>
> Cites the exact sections, explains the conflict in one sentence, asks one answerable question and offers a fix.

TEMPLATE

Questions to the issuer letter

Copy-ready online

A consolidated, numbered letter of questions that cites each RFP reference, explains the issue in one sentence and asks one specific question, with an optional suggested resolution.

WHEN TO USE During the question period, sent to the designated contact through the exact email address or portal the RFP names. If the RFP supplies a question form, put the same content into that form.

[COMPANY_NAME]
[COMPANY_ADDRESS]

[DATE]

To: [DESIGNATED_CONTACT_NAME], [DESIGNATED_CONTACT_TITLE]
[ISSUING_AGENCY]
Submitted via: [EMAIL_ADDRESS_OR_PORTAL_EXACTLY_AS_STATED_IN_RFP]

Re: Questions regarding [SOLICITATION_NUMBER], [SOLICITATION_TITLE]

Dear [DESIGNATED_CONTACT_NAME]:

[COMPANY_NAME] respectfully submits the following questions about the solicitation referenced above, in accordance with Section [QUESTIONS_SECTION] of the solicitation and before the question deadline of [QUESTION_DEADLINE]. Where the solicitation provides a question form, the same questions are entered on that form and attached.

Question 1
Reference: Section [SECTION], page [PAGE]
Background: [ONE_SENTENCE_QUOTING_OR_SUMMARIZING_THE_LANGUAGE_AT_ISSUE]
Question: [ONE_SPECIFIC_QUESTION]
Suggested resolution: [WHAT_THE_ISSUER_COULD_DO, for example confirm a figure, provide data, accept an equivalent, extend a date]

Question 2
Reference: Section [SECTION], page [PAGE]
Background: [BACKGROUND]
Question: [ONE_SPECIFIC_QUESTION]

Question 3
Reference: Attachment [ATTACHMENT_ID], [FORM_OR_TABLE_NAME]
Background: [BACKGROUND]
Question: [ONE_SPECIFIC_QUESTION]

Question 4 (schedule)
Reference: Section [SECTION], Schedule of Events
Background: [REASON_AN_EXTENSION_WOULD_HELP_THE_BUYER, for example time to incorporate answers to these questions]
Question: Would [ISSUER_SHORT_NAME] consider extending the proposal due date to [REQUESTED_DATE]?

We understand that questions and answers may be shared with all prospective proposers. Please let us know if you need these questions in a different format.

Thank you for your time and for the opportunity to propose.

Sincerely,

[YOUR_NAME]
[YOUR_TITLE], [COMPANY_NAME]
[YOUR_EMAIL] | [YOUR_PHONE]

FIELDS TO FILL IN · 7

[DESIGNATED_CONTACT_NAME], [EMAIL_ADDRESS_OR_PORTAL_EXACTLY_AS_STATED_IN_RFP]	Copy from the solicitation's communications section. Questions sent anywhere else may be ignored or, in some jurisdictions, recorded as improper contact.
[QUESTIONS_SECTION], [QUESTION_DEADLINE]	Cite the section that invites questions. Send a day or two early; deadlines are firm and late questions often go unanswered.
[Reference line]	Section, page and amendment number if relevant. The buyer should find the issue in seconds.
[Background]	One sentence. Quote the conflicting or unclear language rather than describing it.
[Question]	One question per number, answerable with a fact, a yes or no, or a document.
[Suggested resolution]	Optional, but it makes a 'yes' easy. Frame it around the buyer's benefit, such as more competition or more accurate pricing.
[Question 4 (schedule)]	Delete if you do not need more time. Ask once, with a reason, early in the question period.

SECTION 6.4

Pricing narrative and basis of estimate templates

The price form tells the buyer what you will charge. The **pricing narrative** tells them why the number is right: how you built it, what it includes, what it assumes, and how it ties to your technical approach. The **basis of estimate** goes one level deeper and shows the method, data and math behind each task. Federal negotiated procurements, cost-reimbursement contracts, many state and city service RFPs, and most grant-funded nonprofit budgets ask for some version of both, under names like cost proposal narrative, price volume, budget justification or budget narrative.

Two cautions before you write. First, some solicitations, especially sealed bids and invitations for bid, want the price form and nothing else; extra narrative can be ignored or, worse, read as a qualification of your price. Second, many RFPs require price to be submitted separately from the technical proposal, so keep dollar figures out of the technical volume unless the instructions say otherwise. See **Types of Solicitations: RFP, RFQ, IFB and RFI** for how each type evaluates price.

TABLE **Estimating methods and how to document each one**

Method	How it works	Best when	What to document
Analogous (historical)	Start from actual hours or costs on a similar past job and adjust for differences	You have reliable actuals from comparable work	The reference contract, its actuals, and each adjustment with a reason
Parametric	Multiply a workload driver by a productivity rate (hours per ticket, cost per square foot)	The work is repetitive and you have measured rates	The driver quantity and its source, the rate and its source, any adjustment
Bottom-up (engineering)	Estimate each task or work package and add them up	The scope is new or detailed enough to break down	The task list tied to the scope, hours per task, and who estimated them
Vendor or subcontractor quote	Use a written quote for materials, equipment or subcontracted work	Non-labor items and specialty trades	The quote, its date, its validity period and what it excludes
Expert judgment	An experienced estimator's documented reasoning	Data is scarce and the approach is novel	Who made the judgment, their experience, and the reasoning; never just 'based on experience'

WORKED EXAMPLE

Worked example: a basis of estimate for help desk staffing (illustrative numbers)

STRONG

Driver. The RFP's Attachment C shows an average of 2,400 tickets a month. Our current contract with a 3,100-user agency shows 85 percent of tickets resolved at Tier 1 and 15 percent escalated to Tier 2.

Productivity. Over the last 12 months on that contract, Tier 1 tickets averaged 22 minutes including documentation, and Tier 2 tickets averaged 75 minutes.

Math. Tier 1: 2,040 tickets x 22 minutes / 60 = 748 hours a month. Tier 2: 360 tickets x 75 minutes / 60 = 450 hours a month. Each full-time employee provides about 140 productive hours a month (2,080 paid hours a year, less leave, holidays and training, is about 1,680 hours, divided by 12).

Staffing. Tier 1: 748 / 140 = 5.3, rounded up to 6 FTEs because the county's data shows Monday volume about 30 percent above average. Tier 2: 450 / 140 = 3.2, staffed with 3 FTEs plus the team lead covering overflow.

Every number has a source, the math is visible, and the rounding decisions are explained. An evaluator can disagree with an input, but cannot call the estimate unsupported.

TEMPLATE

Pricing narrative (price volume introduction)

Copy-ready online

A seven-part narrative that summarizes the price, explains how it was built, covers labor and non-labor costs, states inclusions and exclusions, and confirms consistency with the technical proposal.

WHEN TO USE When the RFP asks for a cost or price narrative, budget justification or price volume, or allows supporting explanation with the price form. Skip it when the RFP limits the price submission to the form alone.

PRICE PROPOSAL NARRATIVE
[COMPANY_NAME] | **[SOLICITATION_NUMBER]**, **[SOLICITATION_TITLE]** | **[DATE]**

1. PRICE SUMMARY
[COMPANY_NAME] proposes a total price of **[TOTAL_PRICE]** for the base period and **[OPTION_TOTAL]** for **[NUMBER_OF_OPTIONS]** option periods, as entered on **[PRICE_FORM_NAME]**. Our pricing is **[PRICING_TYPE, for example firm fixed price, fixed unit prices, or fixed hourly rates]** and remains valid for **[VALIDITY_PERIOD]**.

Period | Dates | Price
Base period | **[BASE_DATES]** | **[BASE_PRICE]**
Option period 1 | **[OPTION_1_DATES]** | **[OPTION_1_PRICE]**
Option period 2 | **[OPTION_2_DATES]** | **[OPTION_2_PRICE]**
Total | | **[GRAND_TOTAL]**

2. HOW WE BUILT THIS PRICE
Our price is built from the same staffing plan, schedule and approach described in our technical proposal, Section **[TECHNICAL_SECTION]**. We estimated labor using **[LABOR_ESTIMATING_METHOD, for example actual productivity data from comparable contracts]** and non-labor costs using **[NON_LABOR_METHOD, for example written vendor quotes]**. The basis of estimate for each task is provided in **[BOE_LOCATION]**.

3. LABOR
Labor categories: **[NUMBER]** categories, defined in **[LABOR_CATEGORY_REFERENCE]** and mapped to the positions in our staffing plan.
Direct rates: based on **[RATE_BASIS, for example current payroll, a named salary survey, or the applicable wage determination or prevailing wage schedule]**.
Loaded rates: include fringe benefits, overhead, general and administrative expense and profit, built up as shown in **[RATE_BUILDUP_REFERENCE]**.
Escalation: option period rates increase by **[ESCALATION_PERCENT]**% a year, based on **[ESCALATION_SOURCE]**.
Wage compliance:
[STATEMENT_ON_PREVAILING_WAGE_LIVING_WAGE_OR_LABOR_AGREEMENT_COMPLIANCE_OR_NOT_APPLICABLE]-
.

4. NON-LABOR COSTS
Materials and equipment: **[BASIS_AND_AMOUNT, with quotes attached as [ATTACHMENT_ID]]**
Subcontracts: **[SUBCONTRACTOR_NAME]**, **[SCOPE]**, **[VALUE]**, supported by **[QUOTE_OR_BOE]**
Travel and other direct costs: **[BASIS_AND_AMOUNT]**
Bonds and insurance: **[INCLUDED_IN_RATES_OR_SEPARATE_LINE, with basis]**

5. WHAT THE PRICE INCLUDES AND EXCLUDES
Included: **[KEY_INCLUSIONS, for example transition, all supplies, after-hours emergency response]**
Excluded: **[EXCLUSIONS, each tied to the solicitation language or answer that supports it]**
Assumptions affecting price: see our Assumptions and Exceptions List, items **[ASSUMPTION_NUMBERS]**.

6. VALUE AND COST CONTROL
[TWO_TO_THREE_SENTENCES on why the price is realistic and how the approach controls cost risk for the buyer, for example no mobilization fee, local staff already in place, fixed monthly price tied to service levels.]
Small business or diversity participation (if applicable): **[PARTICIPATION_PERCENT]**% of contract value, detailed in **[UTILIZATION_PLAN_REFERENCE]**.

7. CONSISTENCY STATEMENT
The staffing levels, hours, schedule and assumptions in this price proposal match those in our technical proposal. Where the price form required a different structure, the crosswalk is shown in **[CROSSWALK_REFERENCE]**.

Authorized signature: _____
[SIGNER_NAME], **[SIGNER_TITLE]** | **[DATE]**

FIELDS TO FILL IN · 8

[TOTAL_PRICE], [OPTION_TOTAL], [GRAND_TOTAL]	Must match the price form to the cent. Check them last, after every other change.

[PRICING_TYPE]	Use the solicitation's own term for the contract type so there is no doubt about what you are offering.
[VALIDITY_PERIOD]	The offer validity period the RFP requires, for example 90, 120 or 180 days from the due date.
[RATE_BASIS]	Name the source. If prevailing wage, a service contract wage determination or a labor agreement applies, say so and confirm your rates meet it.
[RATE_BUILDUP_REFERENCE]	Some buyers want each indirect rate shown; others only want loaded rates. Give what the RFP asks for and no more.
[ESCALATION_PERCENT], [ESCALATION_SOURCE]	Tie escalation to a published index or your labor agreement, not a round guess.
[EXCLUSIONS]	Each exclusion should trace to the RFP or an answer. An exclusion that contradicts a requirement is really an exception and belongs in the exceptions list.
[PARTICIPATION_PERCENT]	Only if the RFP sets goals (for example MWBE or SDVOB goals on New York State contracts). Must match the utilization plan exactly.

TEMPLATE

Basis of estimate (one task or work package)

Copy-ready online

A one-page BOE for a single task: identification, description, method, visible calculation, labor mix, non-labor items, assumptions and a cross-check.

WHEN TO USE — For each major task or cost element when the RFP asks for a basis of estimate, cost build-up or budget justification, and as internal backup for every price even when the buyer does not ask to see it.

BASIS OF ESTIMATE
Solicitation: [SOLICITATION_NUMBER] | Offeror: [COMPANY_NAME]
BOE number: [BOE_NUMBER] | Prepared by: [ESTIMATOR_NAME] | Reviewed by: [REVIEWER_NAME] | Date: [DATE]

1. TASK IDENTIFICATION
Task or work package: [TASK_NUMBER_AND_NAME]
Scope reference: [SOW_OR_SPEC_PARAGRAPHS]
Period covered: [PERIODS]
Deliverables or outputs: [DELIVERABLES_AND_QUANTITIES]

2. TASK DESCRIPTION
[TWO_TO_FOUR_SENTENCES describing the work, consistent with technical proposal Section [TECHNICAL_SECTION].]

3. ESTIMATING METHOD
Method: **[ANALOGOUS / PARAMETRIC / BOTTOM-UP / VENDOR QUOTE / EXPERT JUDGMENT, or a combination]**
Data source: **[SOURCE, for example actual hours on contract [REFERENCE_CONTRACT]** for **[DATE_RANGE]**, the solicitation's workload data in **[ATTACHMENT_ID]**, or a quote from **[VENDOR]** dated **[QUOTE_DATE]**]
Why this method fits: **[ONE_SENTENCE_RATIONALE]**

4. CALCULATION
Workload driver: **[DRIVER, for example tickets, square feet, participants, drawings, inspections]**
Quantity: **[QUANTITY]** per **[TIME_UNIT]**
Productivity or unit rate: **[RATE]** per **[UNIT]**, based on **[RATE_SOURCE]**
Adjustment: **[ADJUSTMENT_PERCENT]**% for **[REASON, for example larger site, new system learning curve, peak periods]**
Result: **[QUANTITY]** x **[RATE]** x (1 + **[ADJUSTMENT_PERCENT]**%) = **[TOTAL_HOURS_OR_UNITS]** per **[TIME_UNIT]**

5. LABOR MIX
Labor category | Hours | Share | Why this category
[LABOR_CATEGORY_1] | **[HOURS_1]** | **[SHARE_1]**% | **[REASON_1]**
[LABOR_CATEGORY_2] | **[HOURS_2]** | **[SHARE_2]**% | **[REASON_2]**
Total | **[TOTAL_HOURS]** | 100% |

6. NON-LABOR ITEMS FOR THIS TASK
[ITEM]: **[QUANTITY]** x **[UNIT_COST]** = **[ITEM_TOTAL]**; source: **[QUOTE_CATALOG_OR_HISTORICAL]**

7. ASSUMPTIONS AND RISKS
Assumption: **[ASSUMPTION]**, listed as item **[ASSUMPTION_NUMBER]** in our Assumptions and Exceptions List
Risk: **[RISK]** and how the estimate accounts for it: **[TREATMENT]**

8. CROSS-CHECK
Compared with **[BENCHMARK, for example actual hours on a similar contract or an independent estimate]**: **[RESULT, for example within 6% after adjusting for scope]**

FIELDS TO FILL IN · 7

[BOE_NUMBER]	Match your work breakdown or price form line numbers so evaluators can move between documents.
[SOW_OR_SPEC_PARAGRAPHS]	Every hour should trace to a scope paragraph. Hours with no scope reference look like padding.
[Data source]	Specific and checkable: contract, period, data set or quote. 'Industry standard' is not a source.
[Calculation]	Show the formula with real numbers. Evaluators trust math they can redo.
[ADJUSTMENT_PERCENT], [REASON]	Explain every adjustment. Unexplained round-number padding is a red flag.
[Labor mix]	Categories must match your price form and staffing plan. Do not assign senior rates to routine work without a reason.
[Cross-check]	A second method or benchmark that lands close to your estimate is strong evidence it is realistic.

NOTE **Federal cost and pricing rules in brief**

In federal procurements, adequate price competition usually establishes that a price is reasonable. Cost-reimbursement contracts get a **cost realism** analysis, and a fixed-price solicitation may say it will assess **price realism**, in which case a price that looks too low for the work can count against you. Large negotiated contracts without adequate competition can require certified cost or pricing data above a dollar threshold that is adjusted periodically, so check the current figure in the solicitation and the federal acquisition rules. Prices that are badly overstated or understated on individual line items (unbalanced pricing) can also be rejected. This is general information, not legal or accounting advice.

COMMON MISTAKE **Common mistake: a price that does not match the technical volume**

The technical proposal promises a full-time project manager and a 24-hour emergency crew; the price includes a half-time manager and no overtime. Evaluators compare the two volumes, and a mismatch either fails a realism review or becomes a contract you cannot perform at the price. Build the price from the technical staffing plan, then run a line-by-line check of positions, hours and schedule before submission.

SECTION 6.5

Assumptions and exceptions list template

An **assumption** states a condition your approach and price rely on, such as site access hours, the number of users, or the buyer providing a test environment. A **clarification** states how you read ambiguous language. An **exception** says you do not accept a requirement or term as written. They carry very different risk. Clear assumptions protect you and help the buyer compare offers. Exceptions can make a proposal non-responsive: some state agencies treat any exception to their terms as grounds for rejection, others weigh exceptions in the evaluation, and some require you to list each one on a form by clause and page, or write 'none'.

How to decide what goes on the list

1. **Try a question first**
   Most assumptions start as questions. If the issuer answers during the question period, you may not need the assumption at all, and the answer applies to every bidder.
2. **Keep only price-relevant assumptions**
   List assumptions that would change your scope, schedule or price if they proved wrong. Drop boilerplate; a long list reads as a hedge.
3. **Never assume away a requirement**
   'We assume the 2-hour emergency response does not apply on weekends' is an exception in disguise when the RFP says 24/7. Treat it as an exception or comply.
4. **Take exceptions only to terms you truly cannot accept**
   Typical candidates are unlimited liability, insurance limits you cannot obtain, or intellectual property terms that conflict with licensed software. Get approval from an officer of the company.
5. **Propose specific replacement language**
   Quote the clause, offer exact alternative wording, give a business reason and state the price effect if it is not accepted. Buyers can accept a precise proposal; they cannot accept 'to be negotiated'.

Assumptions that protect you versus wording that creates risk

Clear and safe

- 'Pricing assumes work at the 14 sites listed in Attachment B; added sites would be priced at the unit rates on the price form.'
- 'We assume the county provides a test environment by week 4, as stated in the answer to Question 12.'
- 'Night work, if required, will be performed between 10 p.m. and 6 a.m. as described in SOW 2.4.'

Risky or non-responsive

- 'Our price is subject to change after a site visit.' (qualifies a firm price)
- 'We take exception to the payment terms.' (no clause, no alternative, no reason)
- 'We assume insurance requirements will be negotiated after award.' (an exception disguised as an assumption)

TEMPLATE

Assumptions, clarifications and exceptions list

Copy-ready online

A three-part list that separates assumptions (with basis and effect), clarifications of ambiguous language, and exceptions (with quoted clause, proposed language, reason and price effect).

WHEN TO USE With the price or administrative volume whenever you have assumptions or exceptions, or when the RFP requires an exceptions form. If the RFP supplies its own form, transfer the content into it.

ASSUMPTIONS, CLARIFICATIONS AND EXCEPTIONS
[COMPANY_NAME] | [SOLICITATION_NUMBER], [SOLICITATION_TITLE] | [DATE]

Except as listed below, [COMPANY_NAME] takes no exception to the terms, conditions, specifications and requirements of the solicitation, including amendments [AMENDMENT_NUMBERS]. Nothing below changes our acceptance of the solicitation's mandatory requirements.

PART 1. ASSUMPTIONS
Our technical approach and price are based on the conditions below. If a condition does not hold, we will work with [ISSUER_SHORT_NAME] to agree on any adjustment through the contract's change process.

A-1
Solicitation reference: **[SECTION_OR_SOW_PARAGRAPH]**
Assumption: **[WHAT_WE_ASSUMED, stated as a fact about the work]**
Basis: **[WHY_IT_IS_REASONABLE, for example the solicitation's workload data, the site visit on [DATE]**, or the answer to Question **[NUMBER]**]
Effect if it changes: **[EFFECT_ON_SCOPE_SCHEDULE_OR_PRICE, for example additional sites priced at the unit rates on the price form]**

A-2
Solicitation reference: **[REFERENCE]**
Assumption: **[ASSUMPTION]**
Basis: **[BASIS]**
Effect if it changes: **[EFFECT]**

PART 2. CLARIFICATIONS
These state how we have read language that could be interpreted more than one way. They do not take exception to any requirement.

CL-1
Solicitation reference: **[REFERENCE]**
Our interpretation: **[INTERPRETATION]**

PART 3. EXCEPTIONS
(If there are none, replace this part with: None. **[COMPANY_NAME]** takes no exceptions to the solicitation.)

E-1
Solicitation reference: **[CLAUSE_NUMBER_AND_TITLE]**, page **[PAGE]**
Current language: "**[QUOTED_LANGUAGE]**"
Proposed language: "**[PROPOSED_REPLACEMENT_LANGUAGE]**"
Reason: **[BUSINESS_REASON, for example the required limit is not commercially available to firms of our size at a reasonable cost]**
Effect on price if not accepted: **[PRICE_EFFECT_OR_NONE]**
Alternatives we would accept: **[ALTERNATIVE, for example a lower limit with an umbrella policy]**

Approved by: **[OFFICER_NAME]**, **[OFFICER_TITLE]**
Authorized signature: _____ Date: **[DATE]**

FIELDS TO FILL IN · 8

[AMENDMENT_NUMBERS]	List every amendment you acknowledge, so the buyer knows which version of the terms you accepted.
[Assumption]	State it as a fact about the work, not a condition on your offer. Avoid 'subject to'.

[Basis]	Point to the RFP, an attachment, the site visit or a published answer. An assumption with a basis looks reasonable; one without looks like a hedge.
[Effect if it changes]	Tell the buyer how a change would be handled, ideally by existing unit prices or the change clause.
[Clarifications]	Use sparingly, for genuine ambiguity the question period did not resolve.
[QUOTED_LANGUAGE], [PROPOSED_REPLACEMENT_LANGUAGE]	Quote exactly and propose exact wording. Vague exceptions are the ones most likely to be rejected.
[PRICE_EFFECT_OR_NONE]	Some buyers evaluate the cost of exceptions. Saying 'none' when true makes the exception easier to accept.
[Approved by]	Exceptions are business decisions. Have an officer with authority to bind the company approve each one.

SECTION 6.6

How to respond to a clarification request

After submission, a buyer may send questions about your proposal. In federal negotiated procurements, **clarifications** are limited exchanges used when the agency plans to award without discussions; they can cover things like the relevance of your past performance, adverse past performance information you have not had a chance to address, or minor clerical errors. **Discussions** are broader negotiations with the offerors still in contention and usually end with a request for final proposal revisions. State and local buyers use similar steps under names like requests for clarification, interviews, oral presentations and best and final offers.

The rule for a clarification response is discipline. Answer exactly what was asked, in the order asked, by the deadline, with a pointer to where the answer already sits in your proposal. Do not revise your price, approach or staffing unless the buyer has asked or allowed you to; an unrequested change can turn a clarification into something the buyer cannot accept, or be ignored entirely.

Clarification response workflow

01 Log the request
Note the deadline, the format and who sent it.

02 Classify each item
Explanation, confirmation, clerical correction, or a revision the buyer invited.

03 Draft direct answers
One to three sentences each, with proposal references.

04 Check consistency
Against the price form, technical volume and assumptions list.

05 Sign and send
From an authorized signer, through the channel the buyer named, before the deadline.

TEMPLATE

Clarification response letter

Copy-ready online

A formal reply to a buyer's request for clarification: each request quoted, a direct answer, a proposal reference, and a closing statement that the proposal is otherwise unchanged.

WHEN TO USE — When a buyer sends questions about your submitted proposal. If the buyer instead opens discussions or requests final proposal revisions, follow those instructions; this letter is for clarifications.

[COMPANY_LETTERHEAD]

[DATE]

[DESIGNATED_CONTACT_NAME]
[DESIGNATED_CONTACT_TITLE]
[ISSUING_AGENCY]
Submitted via: [EMAIL_ADDRESS_OR_PORTAL_NAMED_IN_REQUEST]

Re: Response to request for clarification dated [REQUEST_DATE]
Solicitation: [SOLICITATION_NUMBER], [SOLICITATION_TITLE]
Offeror: [COMPANY_NAME] ([VENDOR_ID])

Dear [DESIGNATED_CONTACT_NAME]:

Thank you for your [EMAIL_LETTER_OR_PORTAL_MESSAGE] of [REQUEST_DATE] requesting clarification of the proposal [COMPANY_NAME] submitted on [SUBMISSION_DATE]. Our responses follow in the order of your requests, and are provided by the requested deadline of [RESPONSE_DEADLINE].

Item 1
Your request: "[QUOTED_REQUEST_1]"
Our response: [DIRECT_ANSWER_1, in one to three sentences]
Proposal reference: [VOLUME_SECTION_PAGE]. No change to the proposal.

Item 2
Your request: "[QUOTED_REQUEST_2]"
Our response: [DIRECT_ANSWER_2]
Proposal reference: [VOLUME_SECTION_PAGE]. No change to the proposal.

Item 3 (clerical correction)
Your request: "[QUOTED_REQUEST_3]"
Our response: [EXPLANATION_OF_THE_ERROR_AND_THE_CORRECT_FIGURE_OR_TEXT]. This correction does not change [OUR_TOTAL_PRICE_OR_TECHNICAL_APPROACH].
Proposal reference: [VOLUME_SECTION_PAGE]. Corrected page attached only because you requested it.

Except as stated above, our proposal is unchanged, and our offer remains valid through [OFFER_VALIDITY_DATE].

Our point of contact for this procurement remains [CONTACT_NAME], [CONTACT_TITLE], [CONTACT_PHONE], [CONTACT_EMAIL].

Sincerely,

[SIGNER_NAME]
[SIGNER_TITLE], authorized to bind [COMPANY_NAME]

Attachments: [ATTACHMENT_LIST_OR_NONE]

FIELDS TO FILL IN · 8

[EMAIL_ADDRESS_OR_PORTAL_NAMED_IN_REQUEST]	Reply through the channel the buyer used or named, even if you know other people at the agency.
[VENDOR_ID]	Whatever identifier the buyer uses for you: Unique Entity ID (UEI) on federal bids, or the state or city vendor number.

[QUOTED_REQUEST_1]	Quote each request exactly so there is no dispute about what you answered.
[DIRECT_ANSWER_1]	Lead with the answer ('Yes, the project manager is full time'), then one sentence of support. No marketing.
[No change to the proposal]	Keep this line unless the buyer asked or permitted a revision. It signals discipline.
[Item 3 (clerical correction)]	Use only for obvious errors such as a transposed number or a missing page reference. Show the correct figure and its effect.
[OFFER_VALIDITY_DATE]	Confirm the offer is still open. If the buyer asked you to extend validity, state the new date.
[SIGNER_NAME], [SIGNER_TITLE]	Someone authorized to bind the company, ideally the same person who signed the proposal.

SECTION 6.7

How to adapt these templates for construction, IT, professional services and nonprofits

The structure of each template holds across sectors; what changes is how price is expressed and which compliance items carry the most risk. Use this table to tune each template before you start.

TABLE **Pricing and compliance by industry**

Industry	Pricing narrative and BOE	Compliance items to watch	Typical assumptions and exceptions
Construction and facilities	Lump sum or unit prices, allowances, alternates, schedule of values, bond premiums, escalation on long schedules, prevailing wage rates	Bid form, bid security, addenda acknowledgments, non-collusion affidavit, licenses, insurance certificates, MWBE or SDVOB utilization plans, apprenticeship rules	Site access hours, existing conditions, hazardous materials excluded unless specified, permit fees; exceptions to liquidated damages or indemnity terms
IT and software	One-time implementation versus recurring subscription, support tiers, hosting, licenses, service level credits, option-year escalation	Security and privacy questionnaires, accessibility requirements, data location, cyber insurance, software license terms	Number of integrations, data quality for migration, client-provided environments; exceptions to liability caps, intellectual property and source code terms

Industry	Pricing narrative and BOE	Compliance items to watch	Typical assumptions and exceptions
Professional services and consulting	Labor categories, hourly rates, hours by task, deliverable-based milestones, travel	Key personnel qualifications, labor category definitions, conflict of interest disclosures, rate validity	Number of meetings and review cycles, stakeholder availability, turnaround time on client comments; exceptions to unlimited revisions or payment terms
Nonprofits and human services	Line-item budget with a budget narrative: staff positions and FTEs, fringe, indirect costs, participant costs, cost per participant, any match	Board approval, audited financial statements, insurance, program forms, the funder's budget template	Referral volumes, space or equipment provided by the funder, start date; indirect cost rate rules

Construction bidders should pay special attention to wage and bonding rules. Public works in New York, New Jersey and Connecticut generally carry state prevailing wage requirements (coverage and dollar thresholds vary by state), much federal and federally funded construction follows Davis-Bacon wage rates, and many federal service contracts carry Service Contract Act wage determinations; your rate basis must say which applies. Bonds and certifications are covered in **Bonding, Insurance and Compliance Requirements** and **Small Business and Diversity Certifications**.

Nonprofits should follow the funder's budget template exactly and explain every line in the narrative. If the solicitation is for a federal grant or a subaward of federal funds, the budget generally follows the federal Uniform Guidance, which as of 2026 lets an organization without a negotiated indirect cost rate claim a de minimis rate of up to 15 percent of modified total direct costs. City and state contracts often set their own indirect rate rules, and some federal agencies apply different limits, so follow the RFP and confirm with the program officer or your accountant.

SECTION 6.8

Pricing and compliance mistakes to avoid

Do and don't

Do

- Rebuild the compliance matrix after every amendment and acknowledge each amendment as instructed
- Use the buyer's price form exactly, with every line filled (write 0 or 'included' rather than leaving blanks, if the RFP allows)
- Show your math in the basis of estimate and name every data source
- Keep staffing, hours and schedule identical across the technical and price volumes
- Send questions early, in one numbered letter, to the designated contact only
- Have an officer approve every exception before submission

Don't

- Put dollar figures in the technical volume when the RFP requires a separate price submission
- Qualify a firm price with phrases like 'subject to change' or 'estimate only'
- Bury exceptions in a cover letter, assumptions list or footnote
- Justify hours with 'based on our experience' and no data
- Change prices or approach in a clarification response nobody asked you to revise
- Call agency staff during a restricted or no-contact period

Final pricing and compliance check before you submit

CHECKLIST · 10 ITEMS

- [ ] Every compliance matrix row is marked complete, or not applicable with an explanation
- [ ] Every amendment or addendum is acknowledged in the form the RFP requires
- [ ] Totals on the price form match the pricing narrative and BOE to the cent
- [ ] Option periods, escalation and unit prices are filled in for every line the form requires
- [ ] Labor categories, hours and positions match the technical staffing plan
- [ ] Wage rates meet any prevailing wage, wage determination or labor agreement that applies
- [ ] Assumptions are reasonable, numbered and cross-referenced; none contradicts a requirement
- [ ] Exceptions are listed in the place the RFP specifies, with exact language, and approved by an officer

- [ ] Required forms are signed by an authorized person and notarized where required
- [ ] The price is submitted in the separate volume, envelope or portal section the RFP specifies

For the full submission-day routine, including file naming, delivery and receipts, pair this checklist with the templates in **Bid Management Templates and Checklists** and the review process in **Reviews, Submission and Debriefs**.

Frequently asked questions

What columns should a compliance matrix template include?

At minimum: a requirement ID, the RFP reference (section and page), the requirement in the solicitation's own words, where your proposal answers it, the owner and the status. Add the evaluation criterion and its weight for content requirements, and a notes column for questions and assumptions. Group rows by type, such as submission and format rules, proposal content, forms and contract terms, so nothing gets lost. If the RFP asks for a cross-reference matrix, submit a shorter version with just the requirement and where you answer it.

Do I have to submit the compliance matrix with my proposal?

Only if the solicitation asks for one or clearly allows it. Many RFPs require a cross-reference matrix; others impose strict page limits or forbid extra materials, and a matrix may count against those limits. Read the submission instructions. Either way, keep a full internal compliance matrix for every bid, because it is your best protection against missing a requirement.

What is a basis of estimate?

A basis of estimate (BOE) is the written explanation of how you arrived at each cost in your proposal: the task it covers, the estimating method (historical, parametric, bottom-up, vendor quote or expert judgment), the data source, the calculation and the assumptions. A good BOE lets an evaluator retrace your math and see that the hours and costs match the work described in your technical proposal. Federal cost proposals often require one; for other bids, keep it as internal backup.

What is the difference between an assumption and an exception in a proposal?

An assumption states a condition your price and approach are based on, such as the number of sites or users, without rejecting any requirement. An exception says you do not accept a requirement or term as written. Assumptions are normal and helpful when they are reasonable and tied to the RFP. Exceptions are riskier: depending on the buyer's rules they can lower your score or make your proposal non-responsive, so take them rarely, list them where the RFP says, and propose exact alternative language.

Q Will other bidders see the questions I ask?

Usually, yes. Public buyers typically publish every question and its answer to all prospective bidders, often in an amendment or addendum, and they often (but not always) remove the name of the company that asked. Federal rules require information given to one potential offeror that is needed to prepare proposals to be made available to all. Write questions that do not reveal your solution, pricing or partners.

Q What should I do if I miss the question deadline?

Check the solicitation first: some buyers accept late questions at their discretion, but most are not obliged to answer them. If the issue is a genuine conflict or error, you can still submit the question to the designated contact and explain why it matters, but plan to proceed without an answer. Resolve the issue in your proposal with a clear, reasonable assumption rather than an exception, and do not contact anyone other than the designated contact.

Q What is the difference between clarifications and discussions?

In federal negotiated procurements, clarifications are limited exchanges, used when the agency intends to award without discussions, that let an offeror explain things like past performance relevance or correct minor clerical errors. They generally do not allow you to revise your proposal. Discussions are broader negotiations with every offeror still in contention, in which weaknesses can be raised and proposals revised, usually ending with final proposal revisions. State and local buyers use similar steps, sometimes called best and final offers.

→ KEEP BUILDING YOUR PROPOSAL

Proposal Structure and Compliance

The how-to chapter behind the compliance matrix.

rfpdetector.com/guides/how-to-write-a-winning-proposal/proposal-structure-and-compliance

Pricing Strategy and Cost Proposals

How to set a competitive, defensible price before you write the narrative.

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

How to Read and Shred an RFP

The shredding technique that feeds your matrix and your questions.

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

Key Personnel Resume Template

Resumes and commitment letters that match your staffing and price.

rfpdetector.com/guides/proposal-templates/past-performance-and-resume-templates#key-personnel-resume-template

Bid Management Templates and Checklists

Schedules, kickoff agendas and submission checklists.

rfpdetector.com/guides/proposal-templates/bid-management-templates-and-checklists

Post-Award Contract Templates

What comes next if you win.

rfpdetector.com/guides/proposal-templates/post-award-contract-templates

RFPs closing soon

Open solicitations with deadlines coming up.

rfpdetector.com/rfps/closing-soon

END OF CHAPTER 6

Next: 07 Bid Management Templates and Checklists



07

CHAPTER 7

Bid Management Templates and Checklists

Six copy-ready bid management templates that carry a bid from the go decision to the debrief: a bid/no-bid scorecard, a proposal schedule built backwards from the due date, a kickoff agenda, a red team review form, a final submission checklist and a debrief request letter.

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

Read this chapter online

KEY TAKEAWAYS

- Bid management is project management for a proposal: one owner, one schedule, one folder and a fixed set of forms, so nothing depends on memory.
- Score every opportunity on the same bid/no-bid scorecard, including the cost of bidding, and get the decision signed before anyone starts writing.
- Build the proposal schedule backwards from an internal deadline at least one business day before the real one, and protect time to fix review findings.
- Red team reviewers score the draft the way evaluators will, against the solicitation's own criteria, and write findings a writer can act on.
- Run the final submission checklist after the last edit, and request a debriefing in writing the day the notice arrives: federal requests are due within 3 days.

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Bid management templates turn a proposal from a scramble into a repeatable process. Most lost bids are not lost on the writing. They are lost on a late decision, a schedule with no room for review, a reviewer who did not know what to look for, a missing signature, or a debrief nobody asked for. This chapter gives you six copy-ready templates that cover the whole bid cycle: a bid/no-bid scorecard, a proposal schedule built backwards from the due date, a kickoff meeting agenda, a red team review form, a final submission checklist and a debrief request letter. Each comes with instructions, a filled-in example where it helps, and notes on adapting it for construction, IT, professional services and nonprofit bids.

The templates are plain text with [SQUARE_BRACKET] placeholders, so they paste cleanly into a document, a spreadsheet or the checklist on a tracked RFP. For the reasoning behind each step, pair this chapter with **Proposal Reviews, Submission and Debriefs** in the proposal-writing handbook and the **bid/no-bid decision framework** in the handbook on finding contracts.

SECTION 7.1

Bid management templates at a glance: six documents for one bid

Every bid has the same life cycle. You decide whether to pursue it, plan the response, launch the team, review the draft, submit, and learn from the result. Each template below owns one of those moments and leaves behind one record you keep with the opportunity.

The bid cycle and the template for each stage

01 **Decide**
Bid/no-bid scorecard: bid, bid with conditions, or pass.

02 **Plan**
Proposal schedule: every milestone dated backwards from the due date.

03 **Launch**
Kickoff agenda: strategy, outline, assignments and rules in one meeting.

04 **Review**
Red team review form: evaluator-style findings on a near-final draft.

05 **Submit**
Final submission checklist: forms, files, signatures and proof of delivery.

06 **Learn**
Debrief request letter: the buyer's own explanation of your score.

TABLE **The six bid management templates in this chapter**

Template	Use it when	Owner	What you keep
Bid/no-bid scorecard	Within 2 to 3 business days of finding the RFP, and again after major addenda	Capture lead or owner	Signed decision, score, conditions
Proposal schedule	The day you decide to bid	Proposal manager	Dated milestones, owners, pens-down times
Kickoff meeting agenda	Once the outline and compliance matrix exist	Proposal manager	Assignments, decisions, open questions
Red team review form	When the draft is substantially complete and days remain to fix it	Review lead	Findings by evaluation factor, with fixes

Template	Use it when	Owner	What you keep
Final submission checklist	After the last edit, before upload or delivery	Proposal manager plus one fresh checker	Signed checklist and delivery receipt
Debrief request letter	The day an award or exclusion notice arrives	Owner or contracts lead	Request, debrief notes, lessons learned

Glossary

Bid management — Running a proposal like a project: decision, schedule, assignments, reviews, production, submission and follow-up. On a small team, one person usually does it alongside writing.

Proposal manager — The person who owns the schedule, the outline and the process for one bid. It is often the owner or the strongest writer. It should never be nobody.

Capture — Everything you do to position for a specific opportunity: learning the buyer's needs, choosing partners and setting a price target. See **capture planning and win themes**.

Compliance matrix — A table that lists every instruction and requirement in the solicitation and where your proposal answers it. Build one with the **compliance matrix template**.

Color team review — A staged review named by color: pink for structure, red for an evaluator-style score of the near-final draft, gold for executive sign-off. See **color team reviews**.

Pens down — The time writers stop editing so a review or production step can start on a stable version.

Debriefing — The buyer's explanation of how your proposal was evaluated, given after award or after you are excluded from the competition.

> **NOTE** **Before you start: one folder, one owner**
>
> Set up one bid folder per opportunity before you fill in any template. A simple structure works: 01-Solicitation (the RFP and every addendum), 02-Decision, 03-Schedule-and-Kickoff, 04-Drafts, 05-Reviews, 06-Final-Submitted, 07-Debrief. Name files with the solicitation number and a date, and make the final submitted set read-only.
>
> If you track the bid in RFP Detector, the RFP's panel on your **pipeline board** holds the stage, owner, internal due date, estimated value, win probability, notes and a checklist with an assignee for each step, so the whole team works from one record.

SECTION 7.2

Bid/no-bid scorecard template

A **bid/no-bid scorecard** puts the same questions to every opportunity, so the decision rests on evidence rather than enthusiasm. It has four parts: pass/fail knock-out questions, a weighted score, the cost of bidding, and a signed decision. Score honestly, write down the evidence, and have one named person approve the result.

This long-form scorecard uses the same eight criteria, weights and decision bands as the one-page record in the **weighted bid/no-bid scoring matrix**, so scores stay comparable across your pipeline. It adds score definitions, a bid cost estimate and an approval block, which help when more than one person has a say or when you want to look back at why you bid.

How to use the scorecard

1. ### Run the knock-outs first

   Answer every pass/fail question with Yes, No or Gap before you score anything. One No you cannot fix ends the review. The **knock-out questions** section explains how to judge each one.

2. ### Score each criterion from 1 to 5, with evidence

   Use the definitions in the template. A score without a line of evidence is a guess. Write the fact behind it, such as “met the facilities director at the pre-bid walkthrough” or “no similar project in five years.” The **scoring anchors** show what 1, 3 and 5 look like.

   > **Tip:** Have two people score separately, then compare. A gap of two points or more usually means one of them knows something the other does not.

3. ### Estimate the cost of bidding

   Count the hours to write, price, review and produce the proposal, multiply by a loaded hourly cost, and add hard costs such as printing, travel, plan fees and the bid bond premium. A bid that costs $12,000 to prepare deserves a harder look than one that costs $1,500.

4. ### Decide and set conditions

   Apply the decision bands: 70 to 100 is a bid, 55 to 69 is a bid with conditions, below 55 is a no-bid. Every condition gets one owner and one date. If a condition date passes unmet, the bid comes back for a second decision.

5

File it, and rescore after addenda

Keep the signed scorecard in the bid folder and enter the win probability and estimated value on the tracked RFP. Rescore whenever an addendum changes the scope, evaluation criteria, bonding, insurance or due date.

TEMPLATE

Bid/no-bid scorecard (long form)

Copy-ready online

Knock-outs, weighted score, cost of bidding and a signed decision on one form. Criteria and bands match the one-page decision record in the bid/no-bid framework chapter.

WHEN TO USE

Within two to three business days of finding an opportunity, before anyone starts writing. Rescore after any addendum that changes scope, evaluation, bonding, insurance or the due date.

BID/NO-BID SCORECARD

Opportunity: **[OPPORTUNITY_TITLE]**
Solicitation no.: **[SOLICITATION_NUMBER]**
Buyer: **[BUYER_NAME]**
Buyer type: **[FEDERAL / STATE / CITY OR COUNTY / SCHOOL OR UNIVERSITY / NONPROFIT / PRIVATE]**
Questions due: **[QUESTIONS_DEADLINE]** Proposal due: **[DUE_DATE_AND_TIME]**
Estimated value and term: **[ESTIMATED_VALUE_AND_TERM]**
Award method: **[LOW BID / BEST VALUE / QUALIFICATIONS-BASED / OTHER]**
Set-aside or certification goal: **[SET_ASIDE_OR_GOAL]**
RFP Detector Score and Fit: **[SCORE_AND_FIT]**
Prepared by: **[PREPARER_NAME]** Date: **[DATE]**

PART A. KNOCK-OUT QUESTIONS

Answer Yes, No or Gap. Any No we cannot fix = no-bid.

1. We meet every eligibility rule: size, set-aside, certification, location. **[ANSWER]**
2. Our registrations are active and will stay active through award (federal entity registration, state or city vendor enrollment, buyer portal account). **[ANSWER]**
3. We hold, or can get by the due date, every required license, permit and professional credential. **[ANSWER]**
4. We can provide the required insurance limits and any bid, performance and payment bonds. **[ANSWER]**
5. We meet the minimum experience rules (years in business, number and size of similar projects). **[ANSWER]**
6. We can attend every mandatory pre-bid meeting or site visit. **[ANSWER]**
7. We can accept the contract terms, or the gaps are small enough to raise as questions. **[ANSWER]**
8. We have the time and people to submit a compliant, competitive response. **[ANSWER]**

Gaps and how we would close them (partner, question to buyer, purchase, hire): **[GAP_PLAN]**

PART B. WEIGHTED SCORE

Score each criterion 1 to 5. Points = weight x score / 5.

1 = weak or no evidence. 3 = moderate, one manageable gap. 5 = strong, documented evidence.

Score risk inversely: 5 = low risk.

Criterion	Weight	Score	Points	Evidence
Customer relationship	15	**[S]**	**[P]**	**[EVIDENCE]**
Requirements fit	20	**[S]**	**[P]**	**[EVIDENCE]**
Competition and incumbent	15	**[S]**	**[P]**	**[EVIDENCE]**
Past performance	15	**[S]**	**[P]**	**[EVIDENCE]**
Price and margin	10	**[S]**	**[P]**	**[EVIDENCE]**
Resources and timeline	10	**[S]**	**[P]**	**[EVIDENCE]**
Risk (5 = low risk)	10	**[S]**	**[P]**	**[EVIDENCE]**
Strategic value	5	**[S]**	**[P]**	**[EVIDENCE]**
TOTAL	100		**[TOTAL]**	

PART C. COST AND VALUE OF BIDDING

Internal hours: **[HOURS]** x loaded hourly cost **[RATE]** = **[LABOR_COST]**

Hard costs (printing, travel, plan fees, bid bond premium, consultants): **[HARD_COSTS]**

Total cost to bid: **[TOTAL_BID_COST]**

Honest probability of winning: **[WIN_PROBABILITY]** percent

Expected gross margin if we win: **[EXPECTED_MARGIN]**

Other bids competing for the same people this month: **[COMPETING_BIDS]**

PART D. DECISION

Bands: 70 to 100 = Bid. 55 to 69 = Bid with conditions. Below 55 = No-bid (consider a subcontracting role).

Decision: **[BID / BID WITH CONDITIONS / NO-BID]**

Conditions, each with one owner and one date:

1. **[CONDITION_1]** Owner: **[OWNER]** Due: **[DATE]**
2. **[CONDITION_2]** Owner: **[OWNER]** Due: **[DATE]**
3. **[CONDITION_3]** Owner: **[OWNER]** Due: **[DATE]**

Teaming needs: **[TEAMING_NEEDS]**

Proposal manager assigned: **[PROPOSAL_MANAGER]**

If no-bid: reason **[NO_BID_REASON]**; no-bid letter sent by **[DATE]**; recompete watch date **[CONTRACT_END_DATE]**

APPROVAL

Decided by: **[APPROVER_NAME]**, **[APPROVER_TITLE]**

Signature: _____ Date: **[DATE]**

Rescore if an addendum changes scope, evaluation criteria, bonding, insurance or the due date.

FIELDS TO FILL IN · 10

[Buyer type (pick one)]	Keep one option. It changes which registrations, forms and debriefing rules apply.
[Award method (pick one)]	From the evaluation section. Low bid means price decides among responsive bidders; best value lets a stronger approach win.
[SCORE_AND_FIT]	The RFP Detector Score and grade plus your Fit, for example “74 B / Fit 81”. Treat them as inputs, not the decision.
[ANSWER]	Yes, No or Gap. A Gap needs a line in [GAP_PLAN] explaining how you close it and by when.
[S] / [P] / [EVIDENCE]	Score 1 to 5, points = weight x score / 5, and one line of fact behind the score.
[RATE]	Loaded hourly cost: salary plus benefits and overhead per hour. Use the same figure on every scorecard.
[WIN_PROBABILITY]	Your honest estimate in percent. Record the same number on the tracked RFP so pipeline value reflects it.
[CONDITION_1] to [CONDITION_3]	For a bid with conditions: each gap to close, such as “confirm surety will issue the bid bond.”
[NO_BID_REASON]	Short and specific: “bonding limit,” “found too late,” “incumbent with recent renewals.”
[CONTRACT_END_DATE]	When the resulting contract ends, so you can prepare earlier for the recompete.

TABLE **Filled-in example: HVAC controls upgrade for a Westchester school district, estimated $420,000, low-bid award (fictional)**

Criterion	Weight	Score	Points	Evidence
Customer relationship	15	3	9	Two service calls for the district last year; met the facilities director once
Requirements fit	20	5	20	Same controls platform as three recent school projects
Competition and incumbent	15	3	9	No incumbent; expect four to six local mechanical bidders
Past performance	15	4	12	Three K-12 controls projects in five years, all with references
Price and margin	10	3	6	Low bid with prevailing wage; thin but positive margin
Resources and timeline	10	2	4	Summer install window overlaps two other jobs
Risk (5 = low risk)	10	2	4	Liquidated damages if not finished before school opens
Strategic value	5	4	4	District has three more buildings due for upgrades
Total	**100**		**68**	**Bid with conditions**

WORKED EXAMPLE

Strong decision record for the example above

✓ STRONG

> **Decision:** bid with conditions (68). **Cost to bid:** 46 hours at $85 plus $650 in plan fees and bond premium, about $4,560.
>
> **Conditions:** (1) Confirm a second install crew from our controls subcontractor for July and August (Marco, by Friday). (2) Ask the district in writing whether liquidated damages apply to the controls scope or only to the general contractor (Jen, before the questions deadline). (3) Confirm the surety will issue the bid bond and performance bond at this value (Ruth, within three days). **If any condition fails, we send a no-bid letter and record the reason.**

> ✕ COMMON MISTAKE **Common mistake: scoring after you have already started writing**
>
> Once someone has spent a weekend on the technical section, the scorecard stops being honest. Score first, write second. If the decision is late, write the decision date into the **proposal schedule** as milestone one and hold everyone to it.

SECTION 7.3

Proposal schedule template: how do you work backwards from the due date?

A **proposal schedule** built forwards from today always runs out of time at the end, exactly where reviews, fixes and production live. Build it backwards instead. Start from the real deadline, set an internal deadline before it, and place each milestone in reverse order until you reach today. If the dates collide, you find out on day one, when you can still add a writer, merge two reviews or decide not to bid.

Build the schedule in reverse

1. **Copy the real deadline exactly**

   Take the date, time, time zone and delivery method from the solicitation and the latest addendum. A 2:00 p.m. hard-copy deadline at an agency office is a different schedule from an 11:59 p.m. portal upload.

2. **Set your internal deadline**

   Put your own deadline at least one business day earlier for portal uploads, and earlier still for hard copies that must be printed, bound and delivered. The internal date is the only deadline the team works to.

   > **Tip:** In RFP Detector, enter it as the tracked RFP's internal due date. The calendar then shows it beside the real due date, the questions deadline and any pre-bid meeting.

3. **Back out production and the final check**

   Allow time for formatting, PDF assembly, signatures, notarization and the **final submission checklist**. Proposal-management guides commonly suggest about a day and a half for electronic submissions and two to three days when large hard copies must be printed and shipped.

4 **Back out gold, red and pink reviews with recovery time**

Each review needs pens-down time before it, so reviewers read a stable draft, and recovery time after it, so writers can fix findings. A common rule of thumb places red team about 70 percent of the way through the schedule and leaves several days between reviews on a 30-day bid.

5 **Add the buyer's fixed dates**

Questions deadline, pre-bid meeting or site visit, intent-to-bid deadline, reference questionnaire deadlines, and any separate due date for a price or past performance volume. Your internal milestones move around these; the buyer's dates do not move.

6 **Protect the start**

The proposal manager needs time to read the solicitation, build the **compliance matrix** and outline, and prepare the kickoff. On a 30-day bid that can take three or four days; on a 10-day bid, aim for one.

7 **Give every line an owner, then publish**

A milestone without an owner is a hope. Share the schedule at kickoff, review it at every check-in, and reset it the same day an addendum moves the due date.

TABLE **Rules of thumb for placing milestones (adjust to your team, the bid and the buyer's dates)**

Milestone	Typical position	Ready state
Kickoff	About 15 percent into the response period, a professional-association guideline; sooner on very short bids	Outline, compliance matrix, draft schedule and assignments ready
Questions to the buyer	Before the buyer's questions deadline, usually in the first third	Ambiguities and conflicts found while shredding the RFP
Pink team	Around the midpoint on longer bids	Every requirement has a home; rough or bulleted sections
Red team	About 70 percent through	Substantially complete, near customer-ready draft
Gold team	A few days before the internal deadline	Final price, commitments and exceptions
Production and final check	The last 1 to 3 days before the internal deadline	Frozen text; formatting, signatures and files
Internal submission	At least 1 business day before the real deadline	Uploaded or delivered, receipt saved

Worked example: a 15-business-day schedule for a city agency consulting RFP (portal upload due Friday at 2:00 p.m.)

Day 1 (Mon) — Decide and schedule
Scorecard signed, proposal manager named, this schedule drafted backwards from day 15.

Days 2–3 — Shred and outline
Compliance matrix, annotated outline and a first list of questions for the buyer.

Day 3 (Wed) — Kickoff, 90 minutes
Strategy, assignments and dates agreed; partners briefed separately.

Day 4 (Thu) — Questions submitted
One designated sender, before the buyer's deadline on day 5.

Day 7 (Tue) — Pink team
Bulleted sections checked against the matrix; resumes and references requested.

Day 9 (Thu) — Buyer posts answers
Matrix and schedule updated; scorecard rechecked because one answer added a deliverable.

Day 10 (Fri) — Pens down and red team
Complete draft and draft price scored by two reviewers who did not write it.

Days 11–12 — Fix findings
Highest-impact findings first; every finding logged as fixed, partly fixed or waived.

Day 13 (Wed) — Gold sign-off
Owner approves final price, staffing and any exceptions.

Day 14 (Thu) — Production and upload by noon
Final checklist run after the last edit; portal receipt saved to the bid folder.

Day 15 (Fri) — Real deadline, 2:00 p.m.
Buffer day. Nothing new gets written.

> ☆ PRO TIP **Pro tip: short bids still need one review**
>
> On a quote or proposal due in a week or less, you will not fit every color team. Keep one independent review of the near-final draft and the final submission check, and drop the rest. **How to run reviews with a small team** shows which stages to merge.

TEMPLATE

Proposal schedule (work backwards from the due date)

Copy-ready online

A milestone table you fill from the bottom up, plus the buyer's fixed dates, long-lead items and a slip rule.

WHEN TO USE The day you decide to bid. Publish it at kickoff and update it whenever an addendum changes a date.

PROPOSAL SCHEDULE (built backwards from the due date)

Opportunity: **[OPPORTUNITY_TITLE]** Solicitation no.: **[SOLICITATION_NUMBER]**
Proposal manager: **[PROPOSAL_MANAGER]** Version date: **[VERSION_DATE]**
Real deadline: **[DUE_DATE]** at **[DUE_TIME]** **[TIME_ZONE]**, by **[DELIVERY_METHOD]**
Internal deadline: **[INTERNAL_DUE_DATE]** at **[INTERNAL_DUE_TIME]** (at least 1 business day earlier)
Working days available: **[WORKING_DAYS]**
Holidays and absences: **[HOLIDAYS_AND_ABSENCES]**

BUYER DATES (fixed)
Pre-bid meeting or site visit: **[PREBID_DATE]** Mandatory? **[YES_NO]**
Intent-to-bid or registration deadline: **[INTENT_DEADLINE]**
Questions deadline: **[QUESTIONS_DEADLINE]**
Expected answers or addendum: **[ANSWERS_DATE]**
Other buyer deadlines (references, samples, separate volumes): **[OTHER_BUYER_DATES]**

INTERNAL MILESTONES (fill from the bottom up, starting with line 16)

#	Milestone	Date	Owner	Ready when
1	Bid decision signed	[DATE]	[OWNER]	Scorecard approved
2	Compliance matrix and outline done	[DATE]	[OWNER]	Every requirement mapped
3	Kickoff meeting	[DATE]	[OWNER]	Assignments accepted
4	Questions sent to buyer	[DATE]	[OWNER]	Before buyer deadline
5	Resumes, references, partner input due	[DATE]	[OWNER]	Received and checked
6	Pink team (pens down, review)	[DATE]	[OWNER]	Rough sections in outline
7	Draft price and basis of estimate	[DATE]	[OWNER]	Matches staffing plan
8	Red team pens down	[DATE]	[OWNER]	Substantially complete draft
9	Red team review and debrief	[DATE]	[OWNER]	Findings logged
10	Red team fixes complete	[DATE]	[OWNER]	Every finding closed or waived
11	Gold team sign-off	[DATE]	[OWNER]	Price and commitments approved
12	Final edit and formatting	[DATE]	[OWNER]	Text frozen
13	Forms signed, notarized, bonds in hand	[DATE]	[OWNER]	Originals ready
14	Final submission checklist	[DATE]	[OWNER]	Every line checked
15	Internal submission, receipt saved	[DATE]	[OWNER]	Receipt in bid folder
16	Real deadline (buffer only)	[DUE_DATE]	[OWNER]	No new writing

LONG-LEAD ITEMS (start today)

[LONG_LEAD_ITEMS]

Examples: bid bond from the surety, insurance certificate, notarized affidavits, partner letters of commitment, portal account approval, printing and courier booking.

RISKS TO THE SCHEDULE AND BACKUP PLAN

[SCHEDULE_RISKS]

Status check-ins: [CHECKIN_DAYS_AND_TIME]

Slip rule: if any milestone slips by more than [SLIP_TOLERANCE], the proposal manager resets the schedule the same day and tells every owner.

FIELDS TO FILL IN · 8

[DELIVERY_METHOD]	Portal (name it), email address, or the street address and room for hard copies.
[INTERNAL_DUE_DATE] / [INTERNAL_DUE_TIME]	At least one business day before the real deadline; two or three days for printed copies.
[HOLIDAYS_AND_ABSENCES]	Public holidays, vacations and anyone on another bid. These are why schedules fail.
[OTHER_BUYER_DATES]	Reference questionnaires, product samples, oral presentation windows, separate price volume deadlines.
[DATE] / [OWNER]	Fill line 16 first, then work upwards. One owner per line, by name, not by team.
[LONG_LEAD_ITEMS]	Anything that depends on someone outside the team. Request these on day one.
[SCHEDULE_RISKS]	For example: key reviewer traveling on red team day; backup reviewer named.
[SLIP_TOLERANCE]	Usually half a day on short bids, one day on longer ones.

SECTION 7.4

Proposal kickoff meeting agenda template

The **proposal kickoff meeting** is where the bid stops being an idea and becomes assignments. Hold it once the compliance matrix, outline and draft schedule exist, so people leave knowing what to write, by when, and why the buyer should choose you. A widely used proposal-management guideline puts the kickoff about 15 percent into the response period. On a two-week bid, that means day two or three.

Keep it short and concrete: 60 to 90 minutes for most small-business bids. Send the kickoff package at least a day ahead so people arrive having read the solicitation, and hold a separate session for teaming partners if your price strategy or proprietary content should stay inside your company.

Kickoff package: send it before the meeting

CHECKLIST · 8 ITEMS

- [ ] The solicitation and every addendum, plus the buyer's answers to questions if posted
- [ ] The signed bid/no-bid scorecard and its conditions
- [ ] The proposal schedule with owners and review dates
- [ ] The compliance matrix and annotated outline (see the **compliance matrix template**)
- [ ] Win themes and discriminators from **capture planning**

- [ ] A one-page style sheet: the buyer's name and acronyms, your company name format, words to avoid
- [ ] Reusable content: **project profiles**, resumes, your **capability statement**
- [ ] The bid folder location, file-naming rule and who may edit which files

WARNING **Put communication rules on the agenda**

Many public solicitations restrict who may talk to the buyer while the procurement is open. In New York State, the Procurement Lobbying Law limits contact during the restricted period to the designated contacts named in the solicitation, and many cities, counties and authorities have similar rules. Name one person who sends all questions, and remind everyone, including partners, not to contact evaluators or program staff about the bid.

TEMPLATE

Proposal kickoff meeting agenda (90 minutes)

Copy-ready online

A time-boxed agenda that ends with every section assigned, every date agreed and every open question owned.

WHEN TO USE About 15 percent into the response period, after the compliance matrix and outline are ready. Cut items 2 and 3 to five minutes each on simple quotes.

PROPOSAL KICKOFF MEETING AGENDA

Opportunity: [OPPORTUNITY_TITLE] Solicitation no.: [SOLICITATION_NUMBER]
Date and time: [MEETING_DATE_TIME] Location or video link: [MEETING_LOCATION]
Facilitator: [PROPOSAL_MANAGER] Note-taker: [NOTE_TAKER]
Invited: [ATTENDEES_AND_ROLES]
Pre-read sent on [PREREAD_DATE]: solicitation and addenda, bid decision, schedule, compliance matrix, outline, win themes

1. Purpose and ground rules (5 min) - [PROPOSAL_MANAGER]
- Why we are bidding: [ONE_SENTENCE_REASON]
- We leave with: assignments, dates, and an owner for every open question

2. The opportunity in brief (10 min) - [CAPTURE_LEAD]
- Buyer, scope, value, term and award method: [OPPORTUNITY_SUMMARY]
- How proposals will be evaluated (factors, weights, pass/fail items): [EVALUATION_CRITERIA]
- What we know about the buyer's priorities and concerns: [HOT_BUTTONS]
- Incumbent and likely competitors: [COMPETITORS]

3. Win strategy (15 min) - [CAPTURE_LEAD]
- Our solution in two sentences: [SOLUTION_SUMMARY]
- Win themes and the proof behind each: [WIN_THEMES]
- Weaknesses we must neutralize: [WEAKNESSES]
- Price target and pricing approach: [PRICE_TARGET] (detailed pricing in a separate session)

4. Compliance and outline walk-through (15 min) - [PROPOSAL_MANAGER]
- Volumes, page limits, format, file and submission rules: [FORMAT_RULES]
- Mandatory forms, certifications, insurance and bonds: [MANDATORY_ITEMS]
- Section owners taken from the compliance matrix

5. Assignments (15 min) - [PROPOSAL_MANAGER]

Section or item	Owner	First draft due
[SECTION_1]	[OWNER]	[DATE]
[SECTION_2]	[OWNER]	[DATE]
[SECTION_3]	[OWNER]	[DATE]
Resumes and key personnel	[OWNER]	[DATE]
Past performance and references	[OWNER]	[DATE]
Price and basis of estimate	[OWNER]	[DATE]
Forms, signatures and production	[OWNER]	[DATE]

6. Schedule and reviews (10 min) - [PROPOSAL_MANAGER]
- Internal deadline: [INTERNAL_DUE_DATE]. Real deadline: [DUE_DATE_AND_TIME]
- Pink team [PINK_DATE], red team [RED_DATE], gold team [GOLD_DATE]
- Status check-ins: [CHECKIN_SCHEDULE]

7. Questions for the buyer (5 min) - [QUESTIONS_OWNER]
- Draft questions so far: [DRAFT_QUESTIONS]
- Buyer's questions deadline: [QUESTIONS_DEADLINE]
- Only [DESIGNATED_SENDER] communicates with the buyer about this bid

8. Working rules (5 min) - [PROPOSAL_MANAGER]
- Folder: [FOLDER_LOCATION]. File names: [FILE_NAMING_RULE]
- Style sheet and templates: [STYLE_SHEET]
- Confidentiality: partner material is shared only [CONFIDENTIALITY_RULE]

9. Open issues, risks and next steps (10 min) - all

Issue	Owner	Due
[ISSUE_1]	[OWNER]	[DATE]
[ISSUE_2]	[OWNER]	[DATE]

Notes and action items go to all attendees by [NOTES_DUE].

FIELDS TO FILL IN · 8

[ONE_SENTENCE_REASON]	From the scorecard, for example “strong fit, no incumbent, opens a new district.”
[EVALUATION_CRITERIA]	Copy the factors and weights from the evaluation section word for word.
[HOT_BUTTONS]	The buyer's worries and priorities you learned in capture, questions or past contracts.
[WIN_THEMES]	Two to four themes, each with a feature, benefit and proof.
[PRICE_TARGET]	A range or target only. Keep detailed rates out of a meeting that includes partners.
[SECTION_1] to [SECTION_3]	Use the buyer's section numbers and names so writers mirror the solicitation.
[DESIGNATED_SENDER]	One person who sends questions and receives buyer communications.
[CONFIDENTIALITY_RULE]	For example “under the signed nondisclosure agreement, in the partner folder only.”

✕ COMMON MISTAKE **Common mistake: a kickoff that turns into a reading session**

If the meeting spends 40 minutes reading the RFP aloud, nobody prepared and nobody leaves with work. Send the package early, open with strategy, and spend most of the time on assignments, dates and open questions.

SECTION 7.5

Red team review form template

A **red team review** asks people who did not write the proposal to score it the way the buyer's evaluators will. The form keeps reviewers on the questions that change scores: Is it compliant? Does it answer every requirement where an evaluator will look? Would an evaluator record strengths here, or weaknesses? The **color team reviews** section explains where red team sits among the other reviews.

Use the buyer's language. Federal evaluations use defined terms: a **weakness** is a flaw that increases the risk of unsuccessful performance, a **significant weakness** appreciably increases that risk, and a **deficiency** is a material failure to meet a requirement, or a combination of significant weaknesses that raises the risk to an unacceptable level. State, city and private buyers often score points per criterion instead; copy their scale into the form.

Run a red team in five moves

1. **Pick the right reviewers**
   Two or three people who did not write the draft: someone senior who knows the work, someone who knows how this kind of buyer evaluates, and if possible an outsider such as a teaming partner, an advisor or an APEX Accelerator counselor. Writers never review their own sections.

2. **Brief them with the evaluator's tools**
   Give reviewers the evaluation criteria and rating scale, the statement of work, the compliance matrix and the draft. Leave out your internal strategy slides; evaluators never see those either.

3. **Review alone, then together**
   Each reviewer scores independently for a fixed block of time. Then the group meets for an hour to merge findings into one list, ranked by likely effect on the score.

4. **Write findings a writer can act on**
   Every finding names the location, the requirement, the problem, the likely score effect and a recommended fix. “Weak” and “needs more punch” are not findings.

5. **Close every finding**
   The proposal manager assigns each finding an owner and logs the outcome: fixed, partly fixed, or waived with a reason. Recheck the high-impact fixes before gold team.

TABLE **A practical rating scale for reviewers (replace it with the buyer's scale when the solicitation gives one)**

Rating	What it means	What reviewers usually see
Outstanding	Exceeds requirements in ways that benefit the buyer; several strengths, no weaknesses	A specific, proven approach with measurable results
Good	Meets every requirement with some strengths; any weaknesses are minor	A clear approach backed by relevant proof
Acceptable	Meets requirements; few or no strengths	The requirement restated, a generic method
Marginal	Some requirements not clearly met; significant weaknesses	Missing details, unsupported claims, hard to find answers
Unacceptable	Fails a requirement or is noncompliant	A missing section, wrong format, or a deficiency

Red team findings: strong vs weak

Strong finding

- **Location:** Volume 1, section 2.3, page 14.
- **Requirement:** Scope of work 3.2 asks for a monthly data quality report.
- **Problem:** The section describes the database but never mentions the report or what it contains.
- **Impact:** Factor 1 (technical approach, 40 points) would likely record a weakness.
- **Fix:** Add a short paragraph and a sample report outline, and cite SOW 3.2 in the heading.

Weak finding

- "Section 2 feels thin."
- "Make this pop more."
- Three paragraphs rewritten in tracked changes with no explanation.
- "We should change our whole approach," two days before the deadline.
- Comments on fonts while a required form is still missing.

TEMPLATE

Red team review form

Copy-ready online

A reviewer worksheet organized by the buyer's evaluation factors, with a findings log and a close-out table for the proposal manager.

WHEN TO USE For each reviewer at red team, when the draft is substantially complete and at least two working days remain to fix findings. Also works for a one-person review on short bids.

RED TEAM REVIEW FORM

Opportunity: [OPPORTUNITY_TITLE] Solicitation no.: [SOLICITATION_NUMBER]
Reviewer: [REVIEWER_NAME] Role: [REVIEWER_ROLE] Date: [REVIEW_DATE]
Draft reviewed: [DRAFT_VERSION] Sections assigned: [SECTIONS_ASSIGNED]
Evaluation basis: [EVALUATION_BASIS]
Rating scale used: [RATING_SCALE]

PART 1. COMPLIANCE SNAPSHOT (Yes / No / Unsure)
- Every requirement in my sections is answered and easy to find: [ANSWER]
- Headings follow the buyer's numbering and terms: [ANSWER]
- Page limits, format and required content are met: [ANSWER]
- Claims match the price, staffing plan and other volumes: [ANSWER]
- No exceptions, assumptions or promises the buyer did not invite: [ANSWER]

PART 2. SCORE BY EVALUATION FACTOR
Factor 1: [FACTOR_NAME] Weight or points: [FACTOR_WEIGHT]
Rating: [RATING]
Strengths an evaluator would credit (with page): [STRENGTHS]
Weaknesses that increase risk (with page): [WEAKNESSES]
Deficiencies (missing or failed requirements): [DEFICIENCIES]
Is each win theme proven here, not just claimed? [THEME_CHECK]

Factor 2: [FACTOR_NAME] Weight or points: [FACTOR_WEIGHT]
Rating: [RATING]
Strengths an evaluator would credit (with page): [STRENGTHS]
Weaknesses that increase risk (with page): [WEAKNESSES]
Deficiencies (missing or failed requirements): [DEFICIENCIES]
Is each win theme proven here, not just claimed? [THEME_CHECK]

Repeat for each factor assigned to you, including past performance and price if you review them.

PART 3. FINDINGS LOG (rank by effect on score)

#	Location (vol/section/page)	Requirement ref.	Finding	Impact (H/M/L)	Recommended fix
1	[LOCATION]	[REQ_REF]	[FINDING]	[IMPACT]	[FIX]
2	[LOCATION]	[REQ_REF]	[FINDING]	[IMPACT]	[FIX]
3	[LOCATION]	[REQ_REF]	[FINDING]	[IMPACT]	[FIX]
4	[LOCATION]	[REQ_REF]	[FINDING]	[IMPACT]	[FIX]

PART 4. OVERALL JUDGMENT
If I were the evaluator, my overall rating would be: [OVERALL_RATING]
The one change that would most improve the score: [TOP_FIX]
Would this proposal win as written? [WIN_JUDGMENT] Why: [WIN_REASON]

FOR THE PROPOSAL MANAGER: FINDINGS CLOSE-OUT

Finding #	Assigned to	Outcome (Fixed / Partly / Waived)	Reason if waived	Checked by
[NUM]	[OWNER]	[OUTCOME]	[REASON]	[CHECKER]
[NUM]	[OWNER]	[OUTCOME]	[REASON]	[CHECKER]

FIELDS TO FILL IN · 8

[EVALUATION_BASIS]	From the solicitation, for example “best value; technical factors together more important than price” or “100 points: approach 40, staff 30, experience 20, price 10.”
[RATING_SCALE]	The buyer's scale if given; otherwise the five-level scale in this chapter.
[FACTOR_NAME] / [FACTOR_WEIGHT]	One block per evaluation factor or criterion, in the buyer's order and wording.
[STRENGTHS] / [WEAKNESSES] / [DEFICIENCIES]	Write them the way an evaluator would, with a page reference for each.

[THEME_CHECK]	Yes or No for each win theme, and where the proof is. A theme with no proof is a claim.
[IMPACT]	H if it could cost a rating level or make the bid noncompliant; M if it weakens a factor; L for polish.
[FIX]	What to add, cut or move, specific enough that the writer does not need to ask you.
[OUTCOME] / [REASON]	Every finding ends as Fixed, Partly or Waived. Waivers need a reason the owner accepts.

> ☆ PRO TIP **Pro tip: run a compliance pass the day before red team**
>
> Have one person check the draft against the compliance matrix before reviewers see it. Reviewers can then spend their time on persuasion and scoring instead of hunting for missing sections.

SECTION 7.6

Final proposal submission checklist

The **final submission checklist** is the last defense against the errors that get proposals rejected without being read: a missing addendum acknowledgment, an unsigned form, a file the portal rejected, a hard copy delivered to the wrong room. Run it after the last edit, not before, because late changes break page counts, cross-references and price totals.

The template splits the work into three windows: 72 hours out (assemble), 24 hours out (verify) and submission (deliver and prove). It complements the **final compliance check** and **submission logistics** in the proposal-writing handbook. If the solicitation includes its own submission checklist or transmittal form, complete that too; it usually reflects exactly what the evaluators will check first.

> ⚠ WARNING **Late is late**
>
> Public buyers rarely accept late proposals, and federal rules allow only narrow exceptions. Set your internal deadline at least one business day early, keep the upload receipt or courier proof, and never plan around an exception.

TEMPLATE

Final proposal submission checklist

Copy-ready online

A three-window checklist (72 hours, 24 hours, submission) with a sign-off by two people.

WHEN TO USE Start the 72-hour section three days before your internal deadline. Run the 24-hour section only after the text is frozen. Keep the signed checklist with the submitted files.

FINAL PROPOSAL SUBMISSION CHECKLIST

Opportunity: **[OPPORTUNITY_TITLE]** Solicitation no.: **[SOLICITATION_NUMBER]**
Real deadline: **[DUE_DATE_AND_TIME]** Internal deadline: **[INTERNAL_DUE_DATE_AND_TIME]**
Delivery method: **[PORTAL / EMAIL / COURIER / HAND DELIVERY]**
Portal name, email address or delivery address and room: **[DELIVERY_DETAILS]**
Checklist owner: **[CHECKLIST_OWNER]** Second checker: **[SECOND_CHECKER]**

72 HOURS BEFORE THE INTERNAL DEADLINE: ASSEMBLE

[ ] Latest addendum checked; total addenda issued: **[ADDENDA_COUNT]**; all reflected in the proposal
[ ] Compliance matrix updated to final page numbers
[ ] Every required form identified: **[REQUIRED_FORMS_LIST]**
[ ] Authorized signatory available on **[SIGNING_DATE]**; notary booked if needed
[ ] Bid bond or other bid security obtained (**[BID_SECURITY_AMOUNT]**) or confirmed not required
[ ] Insurance certificate, licenses and certifications current and attached as required
[ ] Partner letters of commitment and subcontractor forms received
[ ] Portal tested: login works, our user role can submit, file size limit is **[FILE_SIZE_LIMIT]**
[ ] Courier or hand delivery booked, with time for building security (hard copy only)

24 HOURS BEFORE: VERIFY (text frozen)

[ ] Final version is **[FINAL_VERSION_NAME]**; no one edits after this point
[ ] Page limits, fonts, margins and file formats follow the instructions
[ ] File names follow the instructions: **[FILE_NAMING_RULE]**
[ ] Price totals recalculated after the last edit; price appears only where allowed
[ ] Names, numbers and commitments match across volumes (staffing, schedule, price)
[ ] Every addendum acknowledged in the required way (form, portal checkbox or letter)
[ ] Forms complete, signed by an authorized person, dated, notarized where required
[ ] PDFs open, are searchable and contain no comments, tracked changes or hidden text
[ ] Buyer's name correct everywhere; no other buyer's name left in reused text
[ ] Hard copies: **[ORIGINALS_COUNT]** originals, **[COPIES_COUNT]** copies, **[MEDIA_COUNT]** drives, sealed and labeled
[ ] Envelope or box label reads exactly: **[REQUIRED_LABEL_TEXT]**

SUBMISSION: DELIVER AND PROVE

[ ] Uploaded or delivered by the internal deadline at: [ACTUAL_SUBMISSION_TIME]
[ ] Confirmation number, receipt or time-stamped delivery proof: [CONFIRMATION_REFERENCE]
[ ] Uploaded files downloaded back from the portal and opened, where the portal allows
[ ] Buyer's receipt email saved (email submissions): [RECEIPT_EMAIL_TIME]
[ ] Final submitted set saved read-only in the bid folder
[ ] Tracked RFP moved to Submitted; award and debrief dates added to the calendar

SIGN-OFF

Checked by: [CHECKLIST_OWNER] Date and time: [DATE_TIME]
Second check by: [SECOND_CHECKER] Date and time: [DATE_TIME]

FIELDS TO FILL IN · 7

[DELIVERY_DETAILS]	Copy from the latest addendum. Delivery addresses and portals sometimes change mid-solicitation.
[REQUIRED_FORMS_LIST]	Every form the solicitation names: bid form, affidavits, disclosure forms, diversity utilization plan, addendum acknowledgments.
[BID_SECURITY_AMOUNT]	The amount or percentage the solicitation requires, or “not required.”
[FILE_SIZE_LIMIT]	Per file and per submission. Split or compress files days before the deadline, not hours.
[REQUIRED_LABEL_TEXT]	Sealed bids usually need the solicitation number, title, due date and your name on the outside.
[CONFIRMATION_REFERENCE]	Portal confirmation number, courier tracking number or the buyer's time stamp. Save a PDF or screenshot.
[SECOND_CHECKER]	Someone who did not produce the final files. Fresh eyes catch what tired ones miss.

WORKED EXAMPLE

Filled-in example: a clean submission record

✓ STRONG

> A Brooklyn nonprofit submitting a youth workforce proposal through a city portal logs: “Uploaded four files (Technical, Budget, Forms, Attachments) Thursday at 10:42 a.m., a day before the Friday 2:00 p.m. deadline. Confirmation number saved as PDF in 06-Final-Submitted. Addenda 1 to 3 acknowledged in the portal and on the acknowledgment form. Budget totals rechecked by a second person after the last edit. Each file downloaded back from the portal and opened.” If the buyer later says a file was missing, this record and the receipt are your evidence.

SECTION 7.7

Debrief request letter template

A **debrief request letter** asks the buyer to explain how your proposal was evaluated. Ask every time, win or lose. A win debrief tells you what to keep doing; a loss debrief is the most specific feedback you will ever get on your proposal. Speed matters, because the right to a debriefing often depends on asking within days of the notice.

TABLE **When to send the request (as of 2026; always check the solicitation and the notice)**

Situation	Deadline to request	What you can expect
Federal negotiated procurement, excluded before award	In writing within 3 days after you receive the exclusion notice; you may ask to delay the debriefing until after award	A pre-award debriefing on the evaluation of significant parts of your proposal and why you were excluded
Federal negotiated procurement, after award	In writing within 3 days after you receive the award notice; the debriefing should occur within 5 days of the request where practicable	Significant weaknesses and deficiencies; your and the awardee's overall evaluated price and technical rating; any ranking; the award rationale
Federal simplified acquisition	Promptly after notice	Usually a brief explanation of the basis for award, if you ask
New York State agency	Within 15 calendar days of the notice that your offer was unsuccessful (State Finance Law §163); bills to lengthen this window have been introduced, so check the solicitation	A debriefing on request, including the reasons your offer was not selected
City, county, authority, school or private buyer	As the solicitation states; if silent, within a week	Varies; many buyers agree to a short call if asked courteously
Sealed-bid IFB	Not applicable	No debriefing; request the bid tabulation instead

The template below is a formal letter with alternate opening paragraphs for each situation, a numbered list of topics, and a short thank-you note to send after the debriefing. For a quick email version, use the **debriefing request** in the proposal-writing handbook.

TEMPLATE

Debrief request letter (formal, with follow-up note)

Copy-ready online

Formal request with alternate openings for federal, New York State and other buyers, a topic list that matches what federal debriefings must cover, and a thank-you note.

WHEN TO USE The day you receive an award, exclusion or unsuccessful-offer notice. Send it by email to the contracting officer or the contact named in the notice, and keep the sent copy as proof of timing.

[COMPANY_LETTERHEAD]

[DATE]

Sent by email to [CONTACT_EMAIL]

[CONTACT_NAME]
[CONTACT_TITLE]
[AGENCY_OR_ORGANIZATION]
[ADDRESS]

Re: Request for debriefing, [SOLICITATION_NUMBER], [SOLICITATION_TITLE]

Dear [CONTACT_SALUTATION]:

[KEEP ONE OPENING PARAGRAPH AND DELETE THE OTHERS]

Federal, after award: [COMPANY_NAME] received notice on [NOTICE_RECEIVED_DATE] that the contract under the solicitation above was awarded to [AWARDEE_NAME]. Under the post-award debriefing rules in FAR Part 15, we request a debriefing. This written request is submitted within 3 days of our receipt of that notice.

Federal, excluded before award: [COMPANY_NAME] received notice on [NOTICE_RECEIVED_DATE] that our proposal was excluded from the competition. Under the pre-award debriefing rules in FAR Part 15, we request a debriefing. [OPTIONAL: We ask that the debriefing be delayed until after award.]

New York State agency: [COMPANY_NAME] received notice dated [NOTICE_DATE] that our offer was not selected. Under State Finance Law section 163, we request a debriefing.

Other buyers: Thank you for your notice dated [NOTICE_DATE] about the solicitation above. We would value the chance to learn how our proposal was evaluated so that we can serve [AGENCY_OR_ORGANIZATION] better in the future, and we respectfully request a debriefing.

We would welcome an oral debriefing by phone or video, or a written debriefing if you prefer. We are available [AVAILABLE_DATES_AND_TIMES]. [DEBRIEF_ATTENDEES] will attend for [COMPANY_NAME].

To make the best use of your time, we would appreciate covering the topics below. We understand that some information, such as other offerors' confidential or proprietary data, cannot be shared.

1. The significant strengths, weaknesses and any deficiencies in our proposal, by evaluation factor.
2. Our overall ratings and evaluated price, and those of the successful offeror, where they may be shared.
3. How our past performance was assessed.
4. The overall ranking of offerors, if one was developed.
5. The main reasons for the award decision.
6. Whether any part of our proposal was unclear, hard to find or considered noncompliant.
7. Suggestions that would make future proposals from [COMPANY_NAME] more useful to your evaluators.

Please direct scheduling to [POC_NAME], [POC_TITLE], at [POC_PHONE] or [POC_EMAIL].

Thank you for considering our proposal and for the time your evaluation team invested in it.

Sincerely,

[SIGNATORY_NAME]
[SIGNATORY_TITLE]
[COMPANY_NAME]
[COMPANY_ADDRESS]

AFTER THE DEBRIEFING: THANK-YOU NOTE (send within 2 business days)

Subject: Thank you for the debriefing on [SOLICITATION_NUMBER]

Dear [CONTACT_NAME],

Thank you for the debriefing on [DEBRIEF_DATE]. Your comments on [ONE_SPECIFIC_POINT_LEARNED] were especially helpful, and we are applying them to our next submissions. We look forward to future opportunities with [AGENCY_OR_ORGANIZATION] and would welcome the chance to compete for upcoming work in [SERVICE_AREA].

Best regards,

[SIGNATORY_NAME]
[SIGNATORY_TITLE], [COMPANY_NAME]

FIELDS TO FILL IN · 6

[NOTICE_RECEIVED_DATE]	The day you received the notice, not the date printed on it. Federal deadlines run from receipt.
[AWARDEE_NAME]	As stated in the notice. Leave the sentence out if the notice does not name the awardee.
[AVAILABLE_DATES_AND_TIMES]	Two or three windows within the next week; federal debriefings should happen within about 5 days of the request.
[DEBRIEF_ATTENDEES]	Two people at most: the proposal manager and the owner or capture lead. Name them.
[ONE_SPECIFIC_POINT_LEARNED]	A real point from the debriefing, for example “how you evaluated the staffing plan.” Specific thanks are remembered.
[SERVICE_AREA]	The kind of work you want to be considered for next, in the buyer's terms.

NOTE **General information, not legal advice**

Debriefing rights and protest deadlines come from statutes, regulations and the solicitation, and they change; federal acquisition rules are being rewritten in 2025 and 2026. A timely request for a required federal debriefing can affect when a protest is due, and a late or delayed request generally does not extend protest deadlines. If you are considering a protest, read **bid protests at a high level** and speak with procurement counsel the same day.

In the debriefing itself

CHECKLIST · 7 ITEMS

- [ ] Bring two people: one asks the questions, one takes notes.
- [ ] Open by thanking the evaluators for their time.
- [ ] Work through the topics in order; listen, and do not argue with the findings.
- [ ] Ask what a stronger proposal would have looked like on the factor where you lost the most.
- [ ] Do not ask for point-by-point comparisons with other proposals or for their cost breakdowns; federal rules do not allow them to be shared.
- [ ] Write up the notes within 24 hours and file them in 07-Debrief.
- [ ] Move the tracked RFP to Won or Lost, record the outcome and add the debrief notes so your reports show patterns over time.

SECTION 7.8

How to adapt these bid management templates for your industry

The forms work for any bid, but each sector puts weight in different places. Adjust the template, not the discipline: add the knock-outs, schedule items and review checks your industry needs, and keep the rest.

TABLE **What to add for construction, IT, professional services and nonprofit bids**

Template	Construction	IT and technology	Professional services	Nonprofit and human services
Bid/no-bid scorecard	Bonding capacity, prevailing wage, liquidated damages, site visit and current backlog as knock-outs or risk	Security and privacy requirements, required certifications, data location and licensing costs	Key personnel availability, conflicts of interest, rate competitiveness	Mission fit, match or cost-sharing rules, reimbursement-only payment and cash flow
Proposal schedule	Pre-bid walkthrough, subcontractor and supplier quote deadlines, bid bond request	Solution architecture review before pink team; an owner for the security questionnaire	Book resume approvals and reference calls early; key people are busy billing	Board approval, budget narrative and partner letters of support
Kickoff agenda	Bid form, unit prices, alternates, takeoff assignments, MWBE or DBE subcontracting goals	Technical solution, licensing, data security, transition from the incumbent	Staffing plan, labor categories and rates, methodology	Outcomes, evaluation plan, budget and staff qualifications
Red team form	On low-bid work, red team becomes a bid-form, math and responsiveness check	Add a technical reviewer to test feasibility and security claims	Check resumes against labor category minimum qualifications	Check outcomes, measurement and budget justification against the funder's priorities
Submission checklist	Bid bond, non-collusion affidavit, subcontractor lists, addenda on the bid form, sealed envelope label	Security and accessibility forms, separate price file	Signed key personnel commitment letters, rate sheets	Board list, audited financials, nonprofit status documents, budget forms

Template	Construction	IT and technology	Professional services	Nonprofit and human services
Debrief letter	Sealed bids have no debriefing; request the bid tabulation and compare unit prices	Ask how the technical solution and transition plan were rated	Ask how key personnel and rates compared	Ask how the evaluation plan and budget scored, and whether another funding round is planned

Construction: on a public works bid decided by price, most of the bid management effort goes into the numbers and the forms: takeoff accuracy, subcontractor coverage, the bid bond and a flawless bid form. Your red team is a second estimator checking quantities, unit prices and extensions, and your submission checklist is the difference between responsive and rejected. The **sealed-bid transmittal letter** covers the package itself.

Nonprofits: human services proposals to New York City agencies usually need the organization to be prequalified before it can compete, so add that to your knock-outs (see **HHS prequalification for nonprofits**). Build board approval and budget review into the schedule, since they depend on people outside the proposal team.

SECTION 7.9

Common bid management mistakes and how to avoid them

- **Deciding late.** Writing starts before anyone has scored the opportunity, so a weak bid gets the best writer. Score first, and date the decision as milestone one.
- **A schedule that ends on the due date.** No buffer means any slip lands on production. Work to an internal deadline at least a business day early.
- **Reviews with no recovery time.** A red team two days before the deadline produces findings nobody can fix. Leave days, not hours, after each review.
- **Reviewers who rewrite.** Rewrites arrive late and bury the real findings. Reviewers find and explain; writers fix.
- **One person who knows where everything is.** If the proposal manager is sick on deadline day, the folder, checklist and portal login must still make sense to someone else.
- **Running the checklist too early.** A checklist completed before the last edit certifies a version you did not submit.
- **Skipping the debrief after a win.** Winners learn which strengths scored, and that tells you what to reuse next time.
- **Never closing the loop.** Hold a 45-minute **lessons-learned review** within two weeks of every outcome and update your templates.

PRO TIP **Pro tip: turn the templates into a standard checklist**

Copy the submission checklist lines you use on every bid into the checklist on each tracked RFP in RFP Detector, and assign each step to a teammate. Progress shows on the RFP, and the calendar keeps due dates, questions deadlines, pre-bid meetings and internal due dates in one view. See **tracking bids, pipeline and alerts**, and use **search** to find the next opportunity worth scoring.

TIP **When the answer is no**

A no-bid decision still deserves a short, courteous letter to the buyer, especially if you want to stay on its bidders list. Use the **no-bid letter template**, and consider whether a subcontracting role is a better fit (see **subcontracting and teaming opportunities**).

Frequently asked questions

What is bid management?

Bid management is running a proposal like a project: deciding whether to bid, planning the schedule, assigning work, reviewing drafts, submitting on time and learning from the result. Small businesses usually do it with one proposal manager and a standard set of templates: a bid/no-bid scorecard, a proposal schedule, a kickoff agenda, a review form, a submission checklist and a debrief request letter.

What should a bid/no-bid scorecard include?

Pass/fail knock-out questions (eligibility, registrations, licenses, insurance and bonding, minimum experience, mandatory meetings, contract terms and time), a weighted score across criteria such as customer relationship, requirements fit, competition, past performance, price, resources, risk and strategic value, an estimate of what it will cost to bid, and a signed decision with conditions, owners and dates.

How do you build a proposal schedule?

Work backwards. Start from the real deadline, set an internal deadline at least one business day earlier, then place production and the final check, gold team, red team and its fixes, pink team, the kickoff and the compliance matrix in reverse order, around the buyer's fixed dates such as the questions deadline. Give every milestone one owner and leave recovery time after each review.

Q Who should be on a proposal red team?

Two or three people who did not write the proposal: someone senior who knows the work, someone who knows how this type of buyer evaluates, and ideally an outsider such as a teaming partner or advisor. They score the draft against the solicitation's evaluation criteria and write specific findings with recommended fixes. Writers should not review their own sections.

Q What goes on a proposal kickoff meeting agenda?

The purpose of the bid, a summary of the opportunity and its evaluation criteria, the win strategy and themes, a walk-through of the compliance matrix and outline, section assignments with due dates, the schedule and review dates, questions for the buyer and who sends them, working rules for files and confidentiality, and open issues with owners. Most small-business kickoffs take 60 to 90 minutes.

Q What should a debrief request letter include?

The solicitation number and title, the date you received the award or exclusion notice, a clear request for a debriefing under the buyer's rules, your preferred format (oral or written), the questions you want answered and a contact who can schedule it. Send it in writing to the contracting officer or designated contact, and send it fast: as of 2026, federal negotiated procurements require the request within 3 days of the notice, and New York State agencies within 15 calendar days.

Q What belongs on a final proposal submission checklist?

Every addendum acknowledged; required forms complete, signed and notarized where needed; bid security, insurance and licenses attached as required; page limits and file rules followed; price math rechecked after the last edit; files that open and are searchable; correct hard-copy counts and labels; and proof of on-time delivery saved in the bid folder.

→ KEEP GOING

Proposal Reviews, Submission and Debriefs
The how-to behind every template in this chapter
rfpdetector.com/guides/how-to-write-a-winning-proposal/reviews-submission-and-debriefs

Bid/No-Bid Decision Framework
Knock-outs, scoring anchors and red flags
rfpdetector.com/guides/how-to-find-government-contracts/bid-no-bid-decision-framework

Pricing and Compliance Templates
Compliance matrix and questions to the issuer
rfpdetector.com/guides/proposal-templates/pricing-and-compliance-templates

Cover Letter, Transmittal and Intent-to-Bid Templates
Transmittal, intent-to-bid and no-bid letters
rfpdetector.com/guides/proposal-templates/cover-letter-and-transmittal-templates

Post-Award Contract Management Templates
Next: run the contract after you win
rfpdetector.com/guides/proposal-templates/post-award-contract-templates

Tracking Bids, Pipeline and Alerts
Owners, internal due dates and checklists
rfpdetector.com/guides/how-to-use-rfp-detector/tracking-bids-pipeline-and-alerts

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

END OF CHAPTER 7

Next: 08 Post-Award Contract Management Templates

08

CHAPTER 8

Post-Award Contract Management Templates



Six copy-ready templates for running a contract after you win: a kickoff agenda, a monthly status report, an invoice cover letter, a change order request, a teaming and subcontract term sheet outline, and a closeout checklist, with guidance for construction, IT, professional services and nonprofit contracts.

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

Read this chapter online

KEY TAKEAWAYS

- Winning starts a new set of obligations: deliverables, reports, invoices and records that decide whether you are paid on time and what your next reference says.
- Hold a kickoff meeting early, confirm who has authority to change the contract, and get every commitment in writing. Meetings do not change contracts.
- A proper invoice starts the payment clock. As of 2026, federal agencies generally pay within 30 days of a proper invoice, New York State agencies within 30 days (15 for qualifying small businesses).
- Never perform changed work on a verbal request. Give written notice promptly, submit a priced change order request and wait for a signed modification unless directed in writing to proceed.
- Use a term sheet to agree the business deal with a teaming partner, then have counsel draft the agreement. Vague workshare promises are often unenforceable.
- Close out deliberately: accepted deliverables, final invoice, retainage, releases, records retention and a lessons-learned review turn a finished contract into past performance.

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Post-award contract management is where you earn the money you bid and the reference you will cite next time. The work is less exciting than writing the proposal: a kickoff meeting, monthly reports, invoices, the occasional change order, partner agreements and a closeout file. Yet this is where small contractors most often lose margin, through unpaid changed work, rejected invoices and missed deliverables. This chapter gives you six copy-ready post-award contract management templates, explains the rules behind each one, and shows how to adapt them for construction, IT, professional services and nonprofit contracts.

Use it with **After award: contract kickoff and the first 90 days** in the proposal-writing handbook. The templates are plain text with [SQUARE_BRACKET] placeholders. When your contract prescribes a form, format or system, the contract wins.

> **NOTE** **General information, not legal advice**
>
> Contract clauses, payment laws and small business rules differ by buyer and change over time, and federal acquisition rules are being rewritten in 2025 and 2026. Figures in this chapter are current as of 2026 and are here for orientation. Read your own contract, confirm requirements with the contracting officer or contract manager, and use a qualified attorney for agreements, claims and disputes.

SECTION 8.1

Post-award contract management templates at a glance

Every contract moves through the same stages after award. The template for each stage gives you a record the buyer recognizes and an audit trail you can rely on if something goes wrong.

From award to closeout

01 **Award and paperwork**
Executed contract, insurance, bonds, payee setup.

02 **Kickoff**
Shared understanding of scope, authority, reports and invoicing.

03 **Perform and report**
Deliverables, monthly status reports, performance measures.

04 **Invoice and get paid**
Proper invoices with support, tracked to payment.

05 **Manage changes**
Notice, priced requests, signed modifications.

06 **Close out**
Final deliverables, final payment, releases, records, references.

TABLE **The six post-award templates in this chapter**

Template	When you use it	Who owns it	Why it matters
Contract kickoff agenda	In the first weeks after award or notice to proceed	Your project manager, with the buyer's contract manager	Settles contacts, authority, reporting and invoicing before problems start
Monthly status report	Every reporting period the contract sets, usually monthly	Project manager	Documents progress and risk, and builds your performance record
Invoice cover letter	With each invoice, where the buyer accepts one	Billing or contracts lead	Helps the invoice count as proper so the payment clock starts
Change order request	Whenever scope, schedule or cost changes	Project manager and contracts lead	Protects your right to be paid for changed work

Template	When you use it	Who owns it	Why it matters
Teaming and subcontract term sheet	Before the proposal, then again before the subcontract is signed	Owner or contracts lead, with counsel	Puts workshare, money and exit terms in writing
Contract closeout checklist	From the last deliverable until the file is closed	Contracts lead	Collects final payment, releases, records and references

Glossary

Contracting officer (CO)
The government official with authority to sign, change and terminate the contract. On federal contracts, only a contracting officer acting within their authority can sign a modification. State, city and private buyers name an equivalent, such as a contract manager or purchasing agent.

Contracting officer's representative (COR)
A technical representative who monitors performance day to day. Under federal rules, a COR has no authority to make commitments or changes that affect price, quality, quantity, delivery or other terms.

Notice to proceed (NTP)
A written instruction to start work. Common in construction and in contracts that must be approved or registered before work begins.

Modification
A written change to the contract signed by the authorized official. Change orders, funding actions and option exercises are all modifications.

Equitable adjustment
A fair change to price, schedule or both that reflects a change in the work.

Proper invoice
An invoice that contains everything the contract and the payment rules require. Payment deadlines usually run from receipt of a proper invoice.

Retainage
A percentage of each payment held back until the work is complete. Common in construction.

Closeout
The steps that finish a contract on paper: final deliverables, final invoice and payment, releases, property, reports and records.

SECTION 8.2

What should you do in the first 30 days after award?

The day you receive the award, open a contract file and build a **deliverables register**: every report, meeting, submittal, certification and invoice the contract requires, with due dates and owners. Your compliance matrix from the proposal is the starting point, because the promises you made in the proposal are now obligations.

Set up the contract in the first 30 days

1. **Confirm the contract is in force**
   Do not start work until you hold a fully executed contract, purchase order or written notice to proceed. Some contracts must be approved or registered first: New York City contracts must be registered before they take effect, and many New York State agency contracts need approval from the state's contract approval authority. See **award and notification**.

2. **Return the paperwork**
   Insurance certificates (often naming the buyer as additional insured), performance and payment bonds, tax forms and any signed key personnel or subcontractor forms. See **bonding, insurance and compliance requirements**.

3. **Set up to get paid**
   Complete payee setup and electronic payment enrollment, find the invoicing system or address named in the contract, and learn who approves invoices. For New York State agencies that starts with your **Statewide Financial System vendor ID**.

4. **Build the deliverables register**
   List every deliverable, report and recurring obligation with its clause reference, due date, owner and recipient. Include certified payroll, diversity utilization reports and insurance renewals where they apply.

   > **Tip:** Put recurring dates in a shared calendar on day one. A missed monthly report is a small thing that evaluators remember.

5. **Brief the delivery team**
   Walk the team through the scope, the key personnel commitments and anything you promised in the proposal, such as response times, staffing levels or a **transition-in plan**.

6. **Request and hold the kickoff**
   Use the agenda below. If the buyer does not schedule a kickoff, ask for one.

✕ COMMON MISTAKE **Common mistake: starting work on a phone call**

"Go ahead and start Monday" is not a contract. Work performed before a contract is executed, approved or registered may never be paid. Ask for the written notice to proceed and keep it in the contract file.

SECTION 8.3

Contract kickoff meeting agenda template

The **contract kickoff meeting** (federal rules call it a post-award orientation or post-award conference) brings the buyer's team and yours to the same understanding of the contract before work is under way. On federal contracts the contracting officer decides whether to hold one and arranges it, and the meeting is expressly not a place to change the contract: any commitment made there must be put in writing and signed by the contracting officer, and changes require a formal modification. State and local buyers follow the same principle.

If the buyer runs the meeting, send your questions ahead and bring this agenda as your checklist. If the buyer leaves it to you, as many smaller agencies, nonprofits and private clients do, run it yourself. Either way, end with written minutes that list decisions, open issues, owners and due dates, and send them to everyone who attended.

TEMPLATE

Contract kickoff meeting agenda (90 minutes)

Copy-ready online

Covers authority, scope, deliverables, reporting, invoicing, compliance and changes, and ends with owned action items.

WHEN TO USE Within the first weeks after award or notice to proceed. Send it to the buyer three to five business days ahead and ask what they want to add.

CONTRACT KICKOFF MEETING AGENDA

Contract: [CONTRACT_TITLE] Contract or PO no.: [CONTRACT_NUMBER]
Buyer: [BUYER_NAME] Contractor: [COMPANY_NAME]
Date and time: [MEETING_DATE_TIME] Location or video link: [MEETING_LOCATION]
Chair: [CHAIR_NAME] Minutes taken by: [MINUTES_TAKER]
Period of performance: [START_DATE] to [END_DATE] Contract value: [CONTRACT_VALUE]
Contract type: [FIXED PRICE / TIME AND MATERIALS / COST REIMBURSEMENT / UNIT PRICE]

Opening statement: The purpose of this meeting is to reach a shared understanding of the contract. It does not change the contract. Any change must be made in writing by the authorized official.

1. Introductions and authority (10 min)
- Buyer: contracting officer or contract manager [BUYER_CONTRACT_AUTHORITY]; technical lead or COR [BUYER_TECHNICAL_LEAD]; finance or accounts payable [BUYER_FINANCE_CONTACT]
- Contractor: signatory [COMPANY_SIGNATORY]; project manager [PROJECT_MANAGER]; key personnel [KEY_PERSONNEL]; billing contact [BILLING_CONTACT]
- Who may give technical direction, who may approve changes, and what each person may not do

2. Scope and deliverables (20 min)
- Scope in plain language: [SCOPE_SUMMARY]
- Deliverables, due dates and acceptance criteria: [DELIVERABLES_LIST]
- How deliverables are submitted and accepted, and how long review takes: [ACCEPTANCE_PROCESS]
- Parts of our proposal incorporated into the contract: [INCORPORATED_COMMITMENTS]

3. Schedule and transition (10 min)
- Start-up and transition milestones: [TRANSITION_MILESTONES]
- Access, badges, systems, site logistics and security: [ACCESS_REQUIREMENTS]
- Constraints (blackout dates, working hours, site rules): [CONSTRAINTS]

4. Reporting and communication (10 min)
- Status reports: format [REPORT_FORMAT], frequency [REPORT_FREQUENCY], due [REPORT_DUE_DAY], recipients [REPORT_RECIPIENTS]
- Meeting cadence: [MEETING_CADENCE]
- Escalation path for issues: [ESCALATION_PATH]

5. Invoicing and payment (10 min)
- Billing frequency and method (portal, email, mail): [BILLING_METHOD]
- Required invoice content and supporting documents: [INVOICE_REQUIREMENTS]
- Invoice approver and expected payment timeline: [INVOICE_APPROVER_AND_TIMELINE]
- Retainage, withholding or milestone payment rules: [RETAINAGE_OR_MILESTONES]

6. Compliance requirements (10 min)
- Insurance and bond status: [INSURANCE_BOND_STATUS]
- Labor requirements (prevailing wage, certified payroll, wage determinations): [LABOR_REQUIREMENTS]
- Subcontractor approvals and diversity utilization reporting: [SUBCONTRACT_AND_DIVERSITY_REPORTING]
- Data security, confidentiality, records and audit rights: [SECURITY_AND_RECORDS]

7. Changes, issues and performance evaluation (10 min)
- How to request a change and who approves it: [CHANGE_PROCESS]
- How potential problems are raised, and how fast: [ISSUE_PROCESS]
- How and when our performance will be evaluated: [EVALUATION_PROCESS]

8. Open questions and action items (10 min)

Item	Owner	Due
[ACTION_ITEM_1]	[OWNER]	[DATE]
[ACTION_ITEM_2]	[OWNER]	[DATE]
[ACTION_ITEM_3]	[OWNER]	[DATE]

Minutes circulated by [MINUTES_DUE_DATE] to all attendees. Please send corrections within [CORRECTION_WINDOW] business days.

FIELDS TO FILL IN · 8

[BUYER_CONTRACT_AUTHORITY]	The one person who can sign changes. Write the name and title; this is the most important line on the page.
[BUYER_TECHNICAL_LEAD]	The COR, program manager or project officer who oversees the work but usually cannot change the contract.
[DELIVERABLES_LIST]	Copy from your deliverables register, with the clause or SOW reference for each.
[-INCORPORATED_COMMITMENTS]	If the contract incorporates your proposal, list the promises the team must keep (response times, staffing, reports).
[INVOICE_REQUIREMENTS]	What must appear on or with each invoice. Ask for a sample of an invoice the buyer considers complete.
[LABOR_REQUIREMENTS]	Prevailing wage schedules, certified payroll frequency and where it goes, or “not applicable.”
[CHANGE_PROCESS]	The clause, the form, who receives requests, and any notice period in days.
[CORRECTION_WINDOW]	Usually two to five business days. Uncorrected minutes become the shared record.

WORKED EXAMPLE

Filled-in example: kickoff minutes that prevent a payment problem

✓ STRONG

> An IT firm starting a one-year help desk contract with a New Jersey county writes in its minutes: “Invoices monthly in arrears to the accounts payable mailbox, with the purchase order number, signed timesheets and that month's status report attached. Approver: county IT director. The purchase order amount is the spending limit; work above it needs a change order approved before performance. Status reports due by the fifth business day of each month.” Four sentences, and the first invoice goes through without a rejection. (Fictional example; your buyer's rules will differ.)

☆ PRO TIP **Pro tip: send a kickoff package first**

Three to five business days before the meeting, send your draft agenda, the deliverables register, your staffing chart and contact list, and any transition or quality plan from the proposal (see the **quality control plan template**). Buyers notice a contractor who arrives organized.

SECTION 8.4

Monthly status report template

A **monthly status report** is the contract's running record. The people who evaluate your performance will form their views partly from these reports, so write them as evidence: what you did against the plan, what is at risk, and what you need from the buyer. If the contract specifies a report format or data item, follow it exactly; otherwise use the template below every month so the buyer always knows where to look.

Federal agencies must evaluate contractor performance at least annually and at completion for contracts above the simplified acquisition threshold ($350,000 for most purchases as of 2026), construction contracts of $900,000 or more, and architect-engineer contracts of $45,000 or more. Clear monthly reports give the evaluator facts to cite and give you a record if you need to respond to a rating. State, city and nonprofit buyers increasingly keep vendor performance records too.

Status report entries: strong vs weak

Strong entry

- ✓ "Closed 312 of 340 help desk tickets within the 4-hour target (91.8 percent; target 90 percent)."
- ✓ "Risk: firmware delay may push site 3 cutover from May 12 to May 19. Mitigation: stage site 4 first. Decision needed from the county by May 2."
- ✓ "Staffing: network engineer position filled April 14; all key personnel in place."
- ✓ "Invoiced $84,200 of $410,000 (20.5 percent) at 25 percent of the period of performance; under plan because site 3 slipped."

Weak entry

- ✗ "Work continues as planned."
- ✗ "Some delays this month."
- ✗ A list of activities with no link to deliverables or targets.
- ✗ A problem left out until it becomes the buyer's emergency.

TEMPLATE

Monthly status report

Copy-ready online

Nine sections: summary, work completed, deliverables, performance measures, next period, risks, staffing, finances and changes.

WHEN TO USE Every reporting period, on the day the contract sets. Use the buyer's format instead when the contract prescribes one, and keep section order the same every month.

MONTHLY STATUS REPORT

Contract: [CONTRACT_TITLE] Contract or PO no.: [CONTRACT_NUMBER]
Reporting period: [PERIOD_START] to [PERIOD_END] Report no.: [REPORT_NUMBER]
Submitted to: [BUYER_RECIPIENTS]
Submitted by: [PROJECT_MANAGER], [COMPANY_NAME] Date: [SUBMISSION_DATE]

1. SUMMARY
Overall status: [GREEN / YELLOW / RED]
Schedule: [ON TRACK / AT RISK / LATE] Budget: [ON TRACK / AT RISK / OVER]
Highlights (two or three sentences): [SUMMARY_HIGHLIGHTS]
Decisions or actions needed from [BUYER_NAME]: [BUYER_ACTIONS_NEEDED], by [DECISION_DATE]

2. WORK COMPLETED THIS PERIOD

Task / SOW ref.	Planned	Actual	Status
[TASK_REF_1]	[PLANNED_1]	[ACTUAL_1]	[STATUS_1]
[TASK_REF_2]	[PLANNED_2]	[ACTUAL_2]	[STATUS_2]
[TASK_REF_3]	[PLANNED_3]	[ACTUAL_3]	[STATUS_3]

3. DELIVERABLES

Deliverable	Due	Submitted	Accepted	Notes
[DELIVERABLE_1]	[DUE_1]	[SUBMITTED_1]	[ACCEPTED_1]	[NOTES_1]
[DELIVERABLE_2]	[DUE_2]	[SUBMITTED_2]	[ACCEPTED_2]	[NOTES_2]

4. PERFORMANCE MEASURES

Measure (from the contract)	Target	This period	Trend
[MEASURE_1]	[TARGET_1]	[RESULT_1]	[TREND_1]
[MEASURE_2]	[TARGET_2]	[RESULT_2]	[TREND_2]

5. WORK PLANNED NEXT PERIOD

[NEXT_PERIOD_PLAN]

6. ISSUES AND RISKS

#	Issue or risk	Impact (cost/schedule/quality)	Mitigation	Owner	Date
1	[RISK_1]	[IMPACT_1]	[MITIGATION_1]	[OWNER_1]	[DATE_1]
2	[RISK_2]	[IMPACT_2]	[MITIGATION_2]	[OWNER_2]	[DATE_2]

7. STAFFING AND SUBCONTRACTORS

Key personnel changes: [KEY_PERSONNEL_CHANGES]
Staffing against plan: [STAFFING_VS_PLAN]
Subcontractor activity and payments: [SUBCONTRACTOR_STATUS]
Diversity or local-hire participation this period (if required): [PARTICIPATION_REPORT]

8. FINANCIAL STATUS

Contract value: [CONTRACT_VALUE] Funded or PO amount: [FUNDED_AMOUNT]
Invoiced this period: [INVOICED_THIS_PERIOD] Invoiced to date: [INVOICED_TO_DATE]
Percent of value invoiced: [PERCENT_INVOICED] Percent of period elapsed: [PERCENT_TIME_ELAPSED]
Invoices outstanding: [OUTSTANDING_INVOICES]
Funding concerns: [FUNDING_CONCERNS]

9. CHANGES

Change requests submitted, pending or approved: [CHANGE_LOG_SUMMARY]
No work outside the current scope is being performed without a signed modification.

Prepared by: [PROJECT_MANAGER] Phone: [PHONE] Email: [EMAIL]

FIELDS TO FILL IN · 7

[GREEN / YELLOW / RED]	Define the colors once (for example, yellow = a milestone at risk but recoverable) and use them consistently.
[BUYER_ACTIONS_NEEDED]	Approvals, data, access or decisions you are waiting for, with a date. This protects you if a delay follows.
[TASK_REF_1] to [TASK_REF_3]	Use the contract's task, line item or SOW numbers so the buyer can trace work to the contract.
[MEASURE_1] / [TARGET_1]	Service levels or performance standards from the contract or your quality plan, with the number achieved.
[PERCENT_INVOICED] / [PERCENT_TIME_ELAPSED]	Side by side, these show whether spending tracks the schedule. Explain any big gap.
[PARTICIPATION_REPORT]	Only if the contract has MWBE, DBE, SDVOB, local-hire or subcontracting goals; give amounts paid this period.
[CHANGE_LOG_SUMMARY]	Each change request by number, amount, days and status. Keep the full log in the contract file.

PRO TIP **Pro tip: write the report from the register**

Keep the deliverables register and risk log current during the month and the report nearly writes itself. Ten minutes on Friday afternoons beats a scramble on the fifth business day. For a ready-made risk log, use the **risk register template**.

SECTION 8.5

Invoice cover letter template

An **invoice cover letter** travels with an invoice and shows the approver, at a glance, what is being billed, under which contract and with what support. It does not replace the buyer's invoice form or portal. Many federal agencies require electronic invoicing through the system named in the contract, where a cover letter becomes an attachment or is not used at all. Where buyers accept emailed or mailed invoices, as many cities, counties, schools, nonprofits and private clients do, a clean cover letter cuts rejections.

The goal is a **proper invoice**, because payment deadlines usually start only when the buyer receives one. The federal definition is a useful checklist for any buyer:

TABLE **What a proper federal invoice contains (federal prompt payment rules in FAR Part 32, as of 2026; your contract may add more)**

Element	What to include
Your name and address	Exactly as they appear in the contract
Invoice date and number	A unique invoice number you never reuse
Contract number and authorization	Including order number and line item numbers
Description and pricing	Description, quantity, unit of measure, unit price and extended price
Shipping and payment terms	Shipment number and date, and any prompt payment discount terms, where they apply
Payee	Name and address of the official to receive payment, matching the contract
Contact for problems	Name, title, phone and mailing address of the person to notify about a defective invoice
Tax ID and banking details	Only if the agency's procedures require them on the invoice
Other required documents	Anything else the contract requires, such as proof of delivery or timesheets

TABLE **How long public buyers have to pay (as of 2026; your contract and current law govern)**

Buyer	General rule	What starts the clock
Federal agencies	Generally 30 days; progress payments on construction 14 days	The later of the billing office's receipt of a proper invoice or acceptance of the work. Interest is owed on late payments.
New York State agencies	30 calendar days; 15 calendar days for qualifying New York small businesses that submit proper electronic invoices (State Finance Law §179-f)	Receipt of a proper invoice. The agency has 15 calendar days (7 for those small businesses) to report defects. Interest accrues on late payments, with limited exceptions.
New York City agencies	Generally 30 days under the city's prompt payment rules	A proper invoice and acceptance of the work. Interest is owed on late payments.
New Jersey, Connecticut, local governments and authorities	Set by state law, local rules and the contract	Check the payment clause and ask the finance contact at kickoff.

Buyer	General rule	What starts the clock
Nonprofits and private clients	Whatever the contract says	Negotiate payment terms before you sign; they are rarely changed afterwards.

TEMPLATE

Invoice cover letter

Copy-ready online

Summarizes the invoice, the contract billing status and the supporting documents, and names who to call about problems.

WHEN TO USE With each emailed or mailed invoice, or as an attachment in an invoicing portal when the buyer allows one. Do not use it to bill changed work that is not yet approved.

[COMPANY_LETTERHEAD]

[DATE]

[BUYER_BILLING_OFFICE_OR_APPROVER]
[BUYER_ORGANIZATION]
[BILLING_ADDRESS_OR_EMAIL]

Re: Invoice [INVOICE_NUMBER] for [CONTRACT_TITLE]
Contract or PO no.: [CONTRACT_NUMBER] Order or line items: [ORDER_AND_LINE_ITEMS]
Billing period: [PERIOD_START] to [PERIOD_END]

Dear [APPROVER_NAME]:

Enclosed is invoice [INVOICE_NUMBER], dated [INVOICE_DATE], for [INVOICE_AMOUNT], covering [BRIEF_DESCRIPTION_OF_WORK] performed under the contract above during the billing period.

INVOICE SUMMARY
Line item / milestone Description Qty or units Unit price Amount
[LINE_1] [DESCRIPTION_1] [QTY_1] [UNIT_PRICE_1] [AMOUNT_1]
[LINE_2] [DESCRIPTION_2] [QTY_2] [UNIT_PRICE_2] [AMOUNT_2]
[LINE_3] [DESCRIPTION_3] [QTY_3] [UNIT_PRICE_3] [AMOUNT_3]
Less retainage at [RETAINAGE_PERCENT] (if applicable): [RETAINAGE_AMOUNT]
Total due this invoice: [INVOICE_AMOUNT]

CONTRACT BILLING STATUS
Contract value or PO amount: [CONTRACT_VALUE]
Previously invoiced: [PREVIOUSLY_INVOICED]
This invoice: [INVOICE_AMOUNT]
Remaining balance: [REMAINING_BALANCE]

SUPPORTING DOCUMENTS ENCLOSED
[SUPPORTING_DOCUMENTS]

CHANGED WORK
[CHANGE_ORDER_STATEMENT]

Please remit payment to [PAYEE_NAME] at [REMITTANCE_ADDRESS_OR_EFT_ON_FILE], as stated in the contract. Our taxpayer identification and banking details are [TAX_AND_BANKING_STATEMENT].

If any part of this invoice is incomplete or cannot be approved, please contact [BILLING_CONTACT_NAME], [BILLING_CONTACT_TITLE], at [BILLING_CONTACT_PHONE] or [BILLING_CONTACT_EMAIL], or by mail at [BILLING_CONTACT_ADDRESS], so we can correct it promptly.

[CERTIFICATION_STATEMENT_IF_REQUIRED]

Thank you for your prompt processing.

Sincerely,

[SIGNATORY_NAME]
[SIGNATORY_TITLE]
[COMPANY_NAME]

Enclosures: Invoice [INVOICE_NUMBER]; [ENCLOSURE_LIST]

FIELDS TO FILL IN · 8

[INVOICE_NUMBER]	Unique and sequential. Never reuse a number, even for a corrected invoice; mark corrections “replaces invoice [number].”
[ORDER_AND_LINE_ITEMS]	Task order, delivery order, line item (CLIN), milestone or schedule-of-values numbers, exactly as in the contract.
[RETAINAGE_PERCENT] / [RETAINAGE_AMOUNT]	Only if the contract withholds retainage. Delete the line otherwise.
[SUPPORTING_DOCUMENTS]	For example: signed timesheets, deliverable acceptance, proof of delivery, certified payroll, lien waivers, receipts for approved reimbursable expenses.
[CHANGE_ORDER_STATEMENT]	“No changed work is billed on this invoice,” or “Line 3 bills Change Order 2, signed [date].”
[TAX_AND_BANKING_STATEMENT]	“on file in your vendor records,” or provide them only if the buyer's procedures require them on the invoice.

[BILLING_CONTACT_NAME] and address	Federal rules list this contact as part of a proper invoice. Use someone who answers the phone.
[-CERTIFICATION_STATEMENT_IF_REQUIRED]	Only the exact certification wording your contract or the buyer requires, if any. Otherwise delete this line.

COMMON MISTAKE **Common mistake: billing for unapproved work**

An invoice line for work outside the contract, or above the purchase order amount, can get the whole invoice rejected and restart the payment clock. Bill changed work only after the modification or change order is signed, on its own line with the change number.

TIP **Pro tip: keep an invoice log**

Record each invoice with the date sent, proof of receipt, approver and expected payment date. If a payment is late, follow up politely with the invoice number and receipt date. Some prompt payment laws require interest to be paid automatically on late payments, but only a well-documented invoice proves when the clock started.

SECTION 8.6

Change order request template

A **change order request** asks the buyer to change the contract formally: to add, remove or alter work, and to adjust price, schedule or both. Changes happen on almost every contract. The contractors who get paid for them do three things: they recognize a change when it happens, give written notice quickly, and wait for a signed modification before doing the extra work, unless the contract or a written direction requires them to proceed.

Under federal rules, only a contracting officer acting within their authority can sign a modification, and a COR cannot change price, quantity, quality or delivery. If you believe the government has changed the contract without a signed writing, for example a technical lead asking for extra reports or a different method, the rules call for prompt written notice. The standard fixed-price changes clause gives you 30 days from receiving a written change order to assert your right to an adjustment, and it also requires you to keep performing the contract as changed. State, city and private contracts set their own notice periods, sometimes only days; find yours at kickoff.

Handle a change in six steps

1. **Recognize it**
   Compare the request with the contract's scope, specifications and schedule. New tasks, more quantity, a different method, a faster schedule, buyer-caused delays and unexpected site conditions are the usual triggers.

2. **Give written notice now**
   Email the authorized official within the contract's notice period: what happened, who asked, when, and that you consider it a change. Send it before you know the cost; you can price it afterwards.

3. **Ask for direction**
   Ask whether to proceed, stop or wait, and get the answer in writing from someone with authority.

4. **Price it**
   Build the cost from labor, materials, equipment, subcontracts, overhead and profit as the contract allows, plus any schedule impact. Use the same **basis of estimate** method you used in the proposal so the buyer can follow it.

5. **Submit the change order request**
   Use the template below or the buyer's form, with backup: quotes, drawings, photos, correspondence and a schedule analysis.

6. **Track it to a signed modification**
   Log every request and its status in the contract file and the monthly report. Bill changed work only once the change is signed.

> **Tip:** If a request sits unanswered, raise it in the status report under decisions needed, with the date you submitted it.

TABLE **Change terms you will see**

Term	What it means
Change order	A written order signed by the buyer's authorized official directing a change. On federal contracts it can be issued without your consent, within the scope of the changes clause.
Change order request (change request, proposed change order)	Your written request and price for a change.
Bilateral modification (supplemental agreement)	A change both parties sign.

Term	What it means
Request for equitable adjustment	A request to adjust price or schedule because of a change or a buyer action.
Claim	A formal written demand under the contract's disputes process. On federal contracts, claims over $100,000 must be certified (as of 2026).
Constructive change	An informal change caused by the buyer's direction or conduct, without a written change order.

TEMPLATE

Change order request

Copy-ready online

Describes the change and its origin, prices it line by line, states the schedule impact and work status, and reserves unknown impacts.

WHEN TO USE After you have given written notice of a change and gathered the backup. Use the buyer's form instead if the contract requires one, and attach this as the narrative.

CHANGE ORDER REQUEST

To: [AUTHORIZED_OFFICIAL_NAME], [AUTHORIZED_OFFICIAL_TITLE], [BUYER_ORGANIZATION]
Copy: [TECHNICAL_LEAD_OR_COR]; [ARCHITECT_OR_OWNER_REPRESENTATIVE]
From: [PROJECT_MANAGER], [COMPANY_NAME]
Date: [DATE]

Contract: [CONTRACT_TITLE] Contract or PO no.: [CONTRACT_NUMBER]
Change order request no.: [COR_NUMBER] Related written notice dated: [NOTICE_DATE]
Contract clause relied on: [CHANGES_CLAUSE_REFERENCE]

1. DESCRIPTION OF THE CHANGE
What is changing: [CHANGE_DESCRIPTION]
Contract requirement affected (section, drawing, specification or SOW paragraph): [AFFECTED_REQUIREMENT]

2. REASON AND ORIGIN
Origin: [BUYER DIRECTION / DIFFERING SITE CONDITION / DESIGN CHANGE / REGULATORY CHANGE / BUYER DELAY / CONTRACTOR-PROPOSED IMPROVEMENT]
What happened, who directed it and when: [EVENT_DESCRIPTION]
Supporting documents attached: [ATTACHMENTS_LIST]

3. COST IMPACT

Category	Hours or qty	Rate	Amount
Labor: [LABOR_CATEGORY_1]	[HOURS_1]	[RATE_1]	[LABOR_AMOUNT_1]
Labor: [LABOR_CATEGORY_2]	[HOURS_2]	[RATE_2]	[LABOR_AMOUNT_2]
Materials and equipment	[QTY]	[UNIT_COST]	[MATERIALS_AMOUNT]
Subcontractors			[SUBCONTRACT_AMOUNT]
Other direct costs			[ODC_AMOUNT]
Subtotal, direct costs			[DIRECT_SUBTOTAL]
Overhead and profit at [MARKUP_RATE], as the contract allows			[MARKUP_AMOUNT]
Less credit for deleted work			[CREDIT_AMOUNT]
TOTAL REQUESTED PRICE ADJUSTMENT			[TOTAL_PRICE_ADJUSTMENT]

Pricing basis: [PRICING_BASIS]

4. SCHEDULE IMPACT

Requested time extension: [DAYS_REQUESTED] [CALENDAR_OR_WORKING] days

Milestones or deliverables affected: [AFFECTED_MILESTONES]

Explanation (critical path or dependency): [SCHEDULE_EXPLANATION]

If there is no schedule impact, state: This change has no schedule impact.

5. OTHER IMPACTS

Staffing, key personnel, quality, warranty, permits, insurance or bonding: [OTHER_IMPACTS]

6. STATUS OF THE WORK (check one)

[ ] We have not started the changed work and will wait for a signed change order.

[ ] We are proceeding as directed in writing by [DIRECTING_OFFICIAL] on [DIRECTION_DATE].

[ ] Affected work is stopped pending direction.

7. RESERVATION

This request covers impacts known as of [DATE]. [COMPANY_NAME] reserves its right to request a further adjustment for impacts not yet known, including [POSSIBLE_FURTHER_IMPACTS], as the contract allows.

8. REQUESTED ACTION

Please issue a contract modification or change order for [TOTAL_PRICE_ADJUSTMENT] and [DAYS_REQUESTED] days by [RESPONSE_REQUESTED_BY], so that [AFFECTED_MILESTONE] is not delayed.

Submitted by: [SIGNATORY_NAME], [SIGNATORY_TITLE]

Signature: _____ Date: [DATE]

FOR BUYER USE

[ ] Approved as submitted [ ] Approved as modified [ ] Rejected [ ] More information needed

Authorized official: _____ Modification no.: [MOD_NUMBER] Date: _____

FIELDS TO FILL IN · 8

[NOTICE_DATE]	The date of your first written notice. The change order request follows the notice; it does not replace it.
[CHANGES_CLAUSE_REFERENCE]	The clause number and title in your contract, such as the changes, differing site conditions or delay clause.
[EVENT_DESCRIPTION]	Facts only: dates, names, what was said or found. Attach the email or photo that proves it.
[MARKUP_RATE]	Use the markup the contract allows for changes, if it sets one. Do not invent a higher rate.
[PRICING_BASIS]	For example: contract unit prices, contract labor rates, supplier quotes attached, or actual cost records.
[CALENDAR_OR_WORKING]	Match how the contract counts time.
[POSSIBLE_FURTHER_IMPACTS]	For example: “delay to later phases if the inspection finds further damage.” Keeps rights you cannot yet price.
[RESPONSE_REQUESTED_BY]	A realistic date tied to the schedule, so the buyer understands the cost of waiting.

WORKED EXAMPLE

Worked example: a construction change, priced and documented

✓ STRONG

A Long Island general contractor renovating a public library opens a wall the drawings showed as sound and finds rotted floor joists. The superintendent photographs the condition, and that afternoon the project manager emails the architect and the owner's representative, citing the differing site conditions clause and asking for direction. The owner directs the work to proceed, in writing.

Within the contract's notice period the contractor submits Change Order Request 4: sistering 14 joists for **$9,890** (labor $5,100, materials $2,300, carpentry subcontractor $1,200, plus overhead and profit at the 15 percent markup the contract allows, $1,290) and **3 working days**, with photos, the subcontractor's quote and a marked-up schedule. The signed change order arrives nine days later and is billed on its own line of the next payment application. (Fictional example.)

SECTION 8.7

Teaming and subcontract agreement term sheet outline

A **teaming agreement** is the deal between companies that pursue a contract together: usually a prime contractor and one or more subcontractors, sometimes partners forming a joint venture. Federal rules recognize these arrangements, require them to be disclosed in the offer, and still hold the prime fully responsible for performance. A **term sheet** is a short summary of the business deal that both sides agree before lawyers draft the full teaming agreement and, after award, the subcontract.

> ⚠ WARNING **Not legal advice**
>
> This outline helps you agree business terms and spot issues early. It is not a contract and not legal advice. Teaming agreements, subcontracts and joint ventures carry real legal consequences, including enforceability, small business size and affiliation rules, and antitrust limits. Courts have refused to enforce vague promises of future workshare, so have a qualified government contracts attorney draft or review the final documents.

Small businesses bidding federal set-asides face one more constraint, the **limitations on subcontracting**: the prime may not pay more than a set share of the amount it receives to subcontractors that are not similarly situated. A small business subcontractor on a small business set-aside is similarly situated, and its work counts on the prime's side only when it performs that work with its own employees.

TABLE **Federal limitations on subcontracting for small business set-asides (13 CFR 125.6, as of 2026)**

Contract type	Most the prime may pay to subcontractors that are not similarly situated	Notes
Services (except construction)	50 percent of the amount paid to the prime	Measured over the base term and each option period on set-asides
Supplies or products	50 percent of the amount paid to the prime	Different rules apply to non-manufacturers
General construction	85 percent of the amount paid to the prime	Cost of materials is excluded
Special trade construction	75 percent of the amount paid to the prime	Cost of materials is excluded

Separately, the small business size rules can treat a prime and a subcontractor as affiliated when the subcontractor performs the primary and vital requirements of the contract or the prime is unusually reliant on it, which can make the prime ineligible. Draft the workshare with both rules in mind. On state

and city contracts, workshare often has to meet diversity goals instead; see **New York State MWBE and SDVOB certification** and the chapter on **subcontracting and teaming opportunities**.

Workshare language: specific vs vague

Specific (useful, and more likely to hold up)

- ✓ "If the prime is awarded the contract, it will issue a subcontract to Partner for Task 3 (data migration), estimated at 30 percent of labor hours in each period, at the rates in Exhibit B, subject only to customer consent and Partner's continued eligibility."
- ✓ Exhibit B lists labor categories, hours and rates.
- ✓ Clear events that end the agreement.

Vague (often unenforceable)

- ✗ "The parties will negotiate in good faith a subcontract for a meaningful share of the work."
- ✗ "Workshare to be determined after award."
- ✗ No exhibit, no rates, no end date.

TEMPLATE

Teaming and subcontract term sheet (non-binding outline)

Copy-ready online

Thirteen headings that cover the business deal: parties, opportunity, proposal duties, workshare, exclusivity, subcontract terms, confidentiality, non-solicitation, termination and next steps.

WHEN TO USE When you agree to pursue an opportunity with a partner, before sharing pricing or writing the proposal. Revisit it before the subcontract is negotiated after award. Have counsel turn it into the actual agreements.

TEAMING AND SUBCONTRACT TERM SHEET (NON-BINDING OUTLINE)

This term sheet summarizes business terms under discussion. Except for paragraph 8 (confidentiality), it is not binding. The parties intend to sign a teaming agreement and, if the prime is awarded the contract, a subcontract. This outline is not legal advice; each party should have its own counsel review the final agreements.

1. PARTIES
Prime: **[PRIME_LEGAL_NAME]**, a **[PRIME_STATE_AND_ENTITY_TYPE]**; UEI or vendor ID **[PRIME_ID]**
Team member: **[PARTNER_LEGAL_NAME]**, a **[PARTNER_STATE_AND_ENTITY_TYPE]**; UEI or vendor ID **[PARTNER_ID]**
Size status and certifications relied on: **[SIZE_AND_CERTIFICATIONS]**

2. OPPORTUNITY
Buyer: [BUYER_NAME]
Solicitation: [SOLICITATION_NUMBER_AND_TITLE]
Expected value and term: [EXPECTED_VALUE_AND_TERM]
Set-aside or diversity goal: [SET_ASIDE_OR_GOAL]

3. RELATIONSHIP
Type: [PRIME AND SUBCONTRACTOR / JOINT VENTURE / MENTOR-PROTEGE JOINT VENTURE]
Each party is an independent contractor. Nothing here creates a partnership unless stated.

4. PROPOSAL RESPONSIBILITIES
Prime: [PRIME_PROPOSAL_DUTIES]
Team member: [PARTNER_PROPOSAL_DUTIES], due [PARTNER_INPUT_DUE_DATES]
Proposal costs: each party bears its own unless stated: [COST_SHARING]

5. WORKSHARE IF AWARDED
Team member scope: [PARTNER_SCOPE]
Share of work: [WORKSHARE_PERCENT] of [LABOR_HOURS_OR_CONTRACT_VALUE] in each period, detailed in Exhibit [WORKSHARE_EXHIBIT]
Labor categories and rates, or pricing method: [RATES_OR_PRICING_METHOD]
Plan for limitations on subcontracting or diversity goals: [LIMITATIONS_COMPLIANCE_PLAN]
Key personnel provided by team member: [PARTNER_KEY_PERSONNEL]

6. EXCLUSIVITY
Exclusive for this opportunity only: [YES_NO]
Scope of exclusivity: [EXCLUSIVITY_SCOPE]
Exceptions (for example, if the buyer restricts exclusive teaming): [EXCLUSIVITY_EXCEPTIONS]

7. SUBCONTRACT TERMS AFTER AWARD
Subcontract type: [FIXED PRICE / TIME AND MATERIALS / COST REIMBURSEMENT]
Prime contract clauses flowed down as required.
Payment terms: [PAYMENT_TERMS]
Invoicing and reporting to the prime: [SUB_INVOICING_AND_REPORTING]
Insurance and bonds the team member must carry: [SUB_INSURANCE_AND_BONDS]

8. CONFIDENTIALITY AND INTELLECTUAL PROPERTY (binding)
Proprietary information is shared only for this pursuit, marked as proprietary, and protected for [CONFIDENTIALITY_PERIOD] after this term sheet or the teaming agreement ends. Each party keeps ownership of its pre-existing intellectual property. [IP_TERMS]

9. NON-SOLICITATION
Neither party will solicit the other's employees who work on this pursuit for [NON_SOLICIT_PERIOD], except through general advertising. [NON_SOLICIT_TERMS]

10. COMMUNICATIONS WITH THE BUYER
The prime is the single point of contact with the buyer unless agreed otherwise: **[COMMUNICATION_RULES]**

11. TERM AND TERMINATION
The teaming agreement ends at the earliest of: award to another offeror; cancellation of the solicitation; the prime's decision not to submit; failure to agree a subcontract within **[NEGOTIATION_PERIOD]** days after award; the buyer's refusal to approve the team member; either party's loss of eligibility; or **[END_DATE]**.

12. DISPUTES AND GOVERNING LAW
Escalation steps: **[ESCALATION_STEPS]**
Governing law: **[GOVERNING_LAW]**

13. NEXT STEPS
Draft teaming agreement by **[DRAFT_DATE]**, prepared by **[DRAFTING_PARTY]**'s counsel. Target signature date: **[SIGNATURE_TARGET_DATE]**.

Acknowledged (non-binding except paragraph 8):
[PRIME_SIGNATORY], **[PRIME_TITLE]** Date: **[DATE]**
[PARTNER_SIGNATORY], **[PARTNER_TITLE]** Date: **[DATE]**

FIELDS TO FILL IN · 8

[SIZE_AND_CERTIFICATIONS]	For example: small business under the solicitation's size standard, 8(a), HUBZone, SDVOSB, New York State MWBE or SDVOB. Only certifications you actually hold.
[PRIME_PROPOSAL_DUTIES] / [PARTNER_PROPOSAL_DUTIES]	Prime: proposal management, final content and price decisions, submission. Partner: named sections, resumes, past performance, pricing input, letters of commitment.
[WORKSHARE_PERCENT] / Exhibit	The more specific, the better: tasks, labor categories, hours and dollars in an exhibit.
[-LIMITATIONS_COMPLIANCE_PLAN]	How the team stays within the limitations on subcontracting or meets the buyer's diversity goals, with rough percentages.
[PAYMENT_TERMS]	For example: a set number of days after a proper invoice, or after the prime is paid. Agree this now; it drives the partner's cash flow.
[CONFIDENTIALITY_PERIOD]	Commonly a few years after the agreement ends. Counsel will advise what fits.
[NEGOTIATION_PERIOD]	How long the parties have after award to sign a subcontract before the teaming agreement ends.
[GOVERNING_LAW]	The state whose law applies, for example New York.

SECTION 8.8

Contract closeout checklist

Contract closeout finishes the contract on paper: final deliverables accepted, final invoice paid, releases signed, property returned, records kept and the file closed. Skipping it leaves money on the table (retainage and final invoices are the usual casualties), exposes you to audits you cannot support, and wastes the best moment to ask for a reference.

Federal rules set time standards for the government's side: contracts under simplified acquisition procedures close once the contracting officer has evidence of receipt and final payment; firm-fixed-price contracts within 6 months after evidence of physical completion; contracts that require settling indirect cost rates within 36 months; and others within 20 months. Before closing, the contract administration office checks items such as the final invoice, settled subcontracts, property clearance, patent and royalty reports and the contractor's closing statement. Your checklist mirrors those steps from your side.

Keep records after final payment. The federal default is 3 years after final payment unless a clause sets a longer period, and New York State's standard contract clauses have long required records for the rest of the calendar year in which they were made plus six more years. Check your contract and keep the longest period that applies.

Closeout timeline for a typical fixed-price services contract

60 days before the end — **Plan the finish**
Confirm final deliverables, transition-out duties, option or extension status, and the recompete date.

Final 30 days — **Deliver and hand over**
Submit final deliverables and the transition-out plan; return badges, equipment and data.

At completion — **Final invoice**
Submit the invoice marked final, with any release, certification or report the contract requires.

After final payment — **Close the books**
Pay subcontractors, resolve open changes, review and sign the release, respond to the performance evaluation.

Within two weeks — **Lessons learned**
Hold a short review and add the project to your past performance library.

TEMPLATE

Contract closeout checklist

Copy-ready online

Five sections: performance complete, money, paperwork and compliance, records, and reputation and next work.

WHEN TO USE Open it 60 days before the end of the period of performance and keep it until the buyer confirms the contract is closed. Delete lines that do not apply.

CONTRACT CLOSEOUT CHECKLIST

Contract: [CONTRACT_TITLE] Contract or PO no.: [CONTRACT_NUMBER]
Buyer: [BUYER_NAME] Contracting officer or contract manager: [BUYER_CONTRACT_AUTHORITY]
Period of performance ended: [END_DATE]
Final contract value with all modifications: [FINAL_CONTRACT_VALUE]
Closeout owner: [CLOSEOUT_OWNER] Target close date: [TARGET_CLOSE_DATE]

1. PERFORMANCE COMPLETE
[ ] All deliverables submitted and accepted in writing: [ACCEPTANCE_REFERENCES]
[ ] Final report or project summary delivered on [FINAL_REPORT_DATE]
[ ] Transition-out complete: knowledge transfer, data and documents handed over as required
[ ] Construction: punch list complete; certificate of substantial or final completion dated [COMPLETION_CERTIFICATE_DATE]; as-built drawings, operation and maintenance manuals, warranties and spare stock delivered
[ ] Buyer property, badges, keys, equipment and system access returned; property records reconciled
[ ] Buyer data returned or destroyed as the contract requires; certificate of destruction sent if required

2. MONEY
[ ] Every change order signed or formally resolved; no changed work left unbilled or unresolved
[ ] Final invoice marked FINAL submitted on [FINAL_INVOICE_DATE] for [FINAL_INVOICE_AMOUNT]
[ ] Retainage release requested: [RETAINAGE_AMOUNT]
[ ] Final payment received on [FINAL_PAYMENT_DATE] and reconciled to the final contract value
[ ] Credits, overpayments or excess funds identified and resolved
[ ] Subcontractors and suppliers paid in full; their final releases or lien waivers collected: [SUB_RELEASES]
[ ] Cost-type contracts: final indirect cost rates and closing statement submitted as required

3. PAPERWORK AND COMPLIANCE

[ ] Release of claims reviewed before signing; pending claims or change requests listed as exceptions: [RELEASE_EXCEPTIONS]

[ ] Final certified payroll and labor compliance reports submitted (prevailing wage work)

[ ] Final diversity utilization, local-hire or subcontracting reports submitted

[ ] Other final reports the contract requires (for example patent, royalty or small business subcontracting reports)

[ ] Insurance and bond obligations after completion confirmed (completed operations or warranty-period coverage)

[ ] Controlled or classified information returned or destroyed as directed (if applicable)

4. RECORDS

[ ] Contract file complete: contract, modifications, correspondence, deliverables, acceptances, invoices and payments

[ ] Retention period recorded: [RETENTION_PERIOD] (the longest of the contract clause, the buyer's rules and your own policy)

[ ] Destroy-after date: [DESTROY_AFTER_DATE]

[ ] Records stored where they can be produced for an audit: [RECORDS_LOCATION]

5. REPUTATION AND NEXT WORK

[ ] Performance evaluation received; response submitted by [EVALUATION_RESPONSE_DEADLINE] if needed

[ ] Reference permission requested from [REFERENCE_NAME], [REFERENCE_TITLE]

[ ] Project added to the past performance library with measurable results: [KEY_RESULTS]

[ ] Lessons-learned meeting held on [LESSONS_LEARNED_DATE]; actions: [LESSONS_ACTIONS]

[ ] Recompete or follow-on date recorded and a search alert set: [RECOMPETE_DATE]

[ ] Buyer confirms the contract is closed: [CLOSEOUT_CONFIRMATION]

Signed off by: [CLOSEOUT_OWNER] Date: [DATE]

Approved by: [EXECUTIVE_NAME], [EXECUTIVE_TITLE] Date: [DATE]

FIELDS TO FILL IN · 7

[ACCEPTANCE_REFERENCES]	Email, signed form or portal record showing each deliverable was accepted. Acceptance, not submission, is what counts.
[RETAINAGE_AMOUNT]	Total held back over the contract. Retainage release often has its own paperwork; ask what the buyer needs.
[SUB_RELEASES]	Construction: final lien waivers from every subcontractor and major supplier. Services: written confirmation of final payment.
[RELEASE_EXCEPTIONS]	Anything you have not been paid for and still intend to pursue. A release signed without exceptions may waive it.
[RETENTION_PERIOD]	For example: federal default of 3 years after final payment unless the contract says longer; New York State standard clauses: rest of the year plus six years.
[KEY_RESULTS]	Numbers you can reuse in proposals: on-time percentage, cost savings, service levels met, people served.
[RECOMPETE_DATE]	When the buyer is likely to buy this work again. Start capture well before it.

⚠ WARNING **Read the release before you sign it**

Many contracts require a release of claims before final payment. A release can waive claims you have not raised yet, so list any pending claims or change requests as exceptions, as the contract allows, and ask counsel if the amounts matter.

☆ PRO TIP **Pro tip: ask for the reference while the work is fresh**

The week you hand over the last deliverable is when the buyer's project lead remembers your work best. Ask whether they will serve as a reference, confirm their contact details, and add the project to your **past performance library**. Federal evaluations give you a chance to comment on ratings; respond factually and on time.

SECTION 8.9

How to adapt the post-award templates for your industry

The six templates cover any contract, but each sector has its own paperwork. Add the items below to the relevant template and delete what does not apply.

TABLE What to add for construction, IT, professional services and nonprofit contracts

Template	Construction	IT and technology	Professional services	Nonprofit and human services
Kickoff agenda	Site logistics, safety plan, submittals, RFIs, schedule of values, payment applications, certified payroll	System access, security and privacy requirements, environments, change control, service levels	Deliverable acceptance, key personnel, travel rules, billing by labor category	Program outcomes, participant data privacy, budget modification rules, reporting templates
Monthly status report	Look-ahead schedule, percent complete by schedule-of-values line, open RFIs and submittals, safety incidents	Service levels, tickets, uptime, releases, security incidents	Hours by labor category against budget, deliverable status	Participants served, outcomes against targets, spending by budget line
Invoice cover letter	Usually a monthly payment application with schedule of values, retainage, lien waivers and certified payroll	Milestone or monthly service billing with acceptance or service-level reports	Timesheets by labor category and approved travel receipts	Often cost reimbursement with expense documentation; watch budget line limits
Change order request	Most changes happen here; follow the changes and differing site conditions clauses and notice deadlines exactly	Change control for new integrations, data volumes, users or environments	Added deliverables, extra meetings and expanded scope presented as clarifications	Budget modification requests; many funders limit shifts between budget lines without approval
Teaming term sheet	Subcontracting goals (MWBE, DBE, SDVOB), subcontractor bonding and insurance	Data rights, software licenses, security requirements for team members	Key personnel and non-solicitation	Whether a partner is a subrecipient or a contractor under the funding rules
Closeout checklist	Punch list, completion certificate, as-builts, warranties, retainage, final lien waivers	Data return or destruction, knowledge transfer, license transfer, access removal	Final report, return of client materials, final timesheet reconciliation	Final program and fiscal reports, equipment disposition, records retention under the funding rules

Construction: payment usually runs through a monthly payment application rather than a simple invoice, with a schedule of values, retainage and lien waivers. On federally funded construction covered by prevailing wage rules, contractors submit certified payrolls weekly; New York's public work law has its own prevailing wage and payroll record requirements. Build both into the deliverables register from day one, and price prevailing wage correctly from the start (see **prevailing wage pricing**).

Nonprofits: human services contracts are often cost reimbursement against a line-item budget, so the invoice is really a claim for documented expenses, and moving money between lines may need approval. Track spending by line every month in the status report, and raise budget modifications early rather than at year end.

SECTION 8.10

Common post-award contract management mistakes

- **Taking direction from the wrong person.** A program manager's request is not a contract change. Confirm authority in writing before you act on it.
- **Doing extra work to keep the client happy.** Free work becomes expected work. Give notice and price it, even if you later decide in writing to waive the cost.
- **Missing notice deadlines.** Some contracts give you days, not weeks, to report a change, delay or differing condition.
- **Sloppy first invoices.** The first invoice sets the pattern. An incomplete one can restart the payment clock.
- **Reports that hide problems.** Buyers forgive problems raised early with a plan; they remember surprises at evaluation time.
- **Handshake teaming.** A partner promised “a share of the work” with nothing in writing is a dispute waiting to happen.
- **Signing the final release without reading it.** A release can waive claims you meant to keep.
- **Throwing out records too soon.** Audits and disputes can arrive years later. Keep records for the full retention period.

> ☆ PRO TIP **Pro tip: keep the next bid in view**
>
> Before the contract ends, record its end date, set a search alert for the buyer and service so you see the recompete, and look at what similar buyers are buying with **RFP Detector search**. The **procurement forecasts chapter** explains why expiring contracts are the best early signal, and **contractor profiles** show who holds similar work.

Frequently asked questions

What is post-award contract management?

Everything a contractor does after winning to perform and administer the contract: the kickoff meeting, deliverables, status reports, invoicing, change management, subcontractor management, compliance reporting and closeout. It decides whether you are paid on time and what your performance evaluations and references say.

What should be on a contract kickoff meeting agenda?

Introductions and who holds authority, scope and deliverables with acceptance criteria, schedule and transition, reporting and communication, invoicing and payment, compliance requirements such as insurance, labor and diversity reporting, the change process, how performance will be evaluated, and action items with owners. Open by stating that the meeting does not change the contract.

What should a monthly status report include?

A summary status, work completed against plan, deliverables and their acceptance, performance measures against targets, next period's plan, issues and risks with mitigation, staffing and subcontractor updates, financial status and change requests. If the contract prescribes a format, use it exactly.

How long does the government have to pay an invoice?

As of 2026, federal agencies generally must pay within 30 days after receiving a proper invoice or accepting the work, whichever is later, with interest on late payments. New York State agencies generally have 30 calendar days, or 15 for qualifying New York small businesses that submit proper electronic invoices. New York City agencies generally pay within 30 days under the city's prompt payment rules. Other buyers follow their own laws and contract terms.

Should I do extra work before a change order is signed?

Generally no. Give written notice, ask the person with authority for written direction, and wait for a signed change order or modification unless the contract requires you to proceed. If you are directed to proceed, get that direction in writing and submit your priced change order request promptly to protect your right to an adjustment.

What is the difference between a teaming agreement and a subcontract?

A teaming agreement governs how companies pursue an opportunity together before award: proposal duties, exclusivity, confidentiality and the intended workshare. A subcontract is the binding contract for performing work after the prime wins, with scope, price, flowed-down clauses and payment terms. A teaming agreement usually commits the parties to negotiate a subcontract if the prime wins. This is general information, not legal advice.

What is included in contract closeout?

Accepted final deliverables, a final invoice and payment, release of retainage, any required release of claims, subcontractor payments and releases, return of property and data, final compliance reports, records retention, a response to the performance evaluation and a lessons-learned review. Federal contracting offices also verify items such as settled subcontracts and the contractor's closing statement before closing the file.

→ KEEP GOING

After Award: Contract Kickoff and the First 90 Days
The how-to behind this chapter
rfpdetector.com/guides/how-to-write-a-winning-proposal/reviews-submission-and-debriefs#contract-kickoff

Bid Management Templates and Checklists
Previous: scorecard, schedule, reviews and debriefs
rfpdetector.com/guides/proposal-templates/bid-management-templates-and-checklists

Technical and Management Plan Templates
Transition-in plan, quality plan and risk register
rfpdetector.com/guides/proposal-templates/technical-and-management-plan-templates

Past Performance and Resume Templates
Turn a finished contract into proposal proof
rfpdetector.com/guides/proposal-templates/past-performance-and-resume-templates

Bonding, Insurance and Compliance Requirements
Certificates, bonds and ongoing compliance
rfpdetector.com/guides/how-to-register-for-government-contracts/bonding-insurance-and-compliance-requirements

Subcontracting and Teaming Opportunities
Find partners and prime contractors
rfpdetector.com/guides/how-to-find-government-contracts/subcontracting-and-teaming-opportunities

Contractor profiles
See who holds similar contracts
rfpdetector.com/contractors

Create an account
Track bids, deadlines and recompetes
rfpdetector.com/sign-up

END OF CHAPTER 8

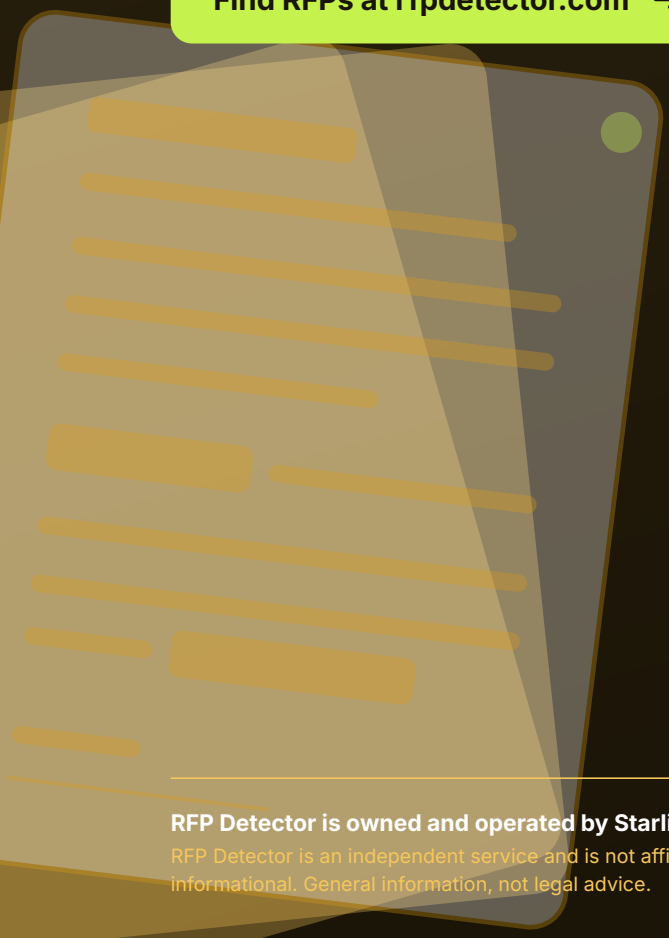
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