

PROPOSAL & RFP SUPPORT

RFP Readiness & Compliance Review

A sample solicitation assessment, requirement matrix, risk register, and response plan.

About this sample

This document is an illustrative portfolio sample created using a fictional business scenario and hypothetical data. It is not a completed client engagement, a real procurement, or independently verified market research.

01 Executive assessment

Scenario: North Valley Unified School District (fictional) seeks a three-year student tutoring and academic intervention services contract. Responses are due November 20, 2026, at 2:00 p.m. local time. The hypothetical solicitation includes a 35-page narrative limit, a required pricing workbook, and three client references.

Preliminary finding: A bidder with documented K-12 implementation capacity and student data safeguards could be competitive. The most consequential risks are an incomplete staffing plan, unsupported outcome claims, and omission of mandatory attachments.

02 Bid/no-bid screening

Decision factor	Finding	Action
Service fit	Potential fit if tutoring coverage includes grades 3–10.	Confirm program capabilities.
Delivery capacity	Unverified across six campuses.	Obtain staffing and ramp plan.
Past performance	Three comparable references required.	Validate reference permissions.
Commercial fit	Price schedule requested by student-hour and campus.	Model unit economics.
Deadline risk	Approximately three weeks in scenario.	Set internal cutoff five days early.

03 Requirements and compliance matrix

ID	Requirement	Owner / evidence	Status
R-01	Signed cover sheet and addenda acknowledgment	Business lead / executed forms	Open
R-02	35-page maximum technical narrative	Proposal lead / page count	Open
R-03	Staff qualifications and background checks	Operations / credential summary	At risk
R-04	Student data privacy and security plan	IT / approved policy	At risk
R-05	Three K–12 references with contacts	Account lead / approved list	Open
R-06	Pricing workbook in required format	Finance / completed template	Open
R-07	Submit one searchable PDF by 2:00 p.m.	Proposal lead / portal receipt	Open

04 Evaluation strategy

Hypothetical scoring: program approach 35 points, staff qualifications 25, implementation 20, price 15, references 5. This structure suggests that a low-price-only strategy is unlikely to be persuasive; the response should prioritize a measurable service model and credible operational readiness.

- Map each evaluation criterion to a specific response section and evidence item.

- Replace unsupported claims such as 'proven results' with documented, attributable outcomes.
- Provide a campus-by-campus staffing ramp with escalation coverage and contingency plans.
- Describe data handling using approved policies; do not promise controls that have not been validated.

05 Recommended response outline

Section	Content and evidence	Target pages
Executive summary	District priorities, delivery proposition, differentiators	2
Program methodology	Instruction model, student identification, progress tracking	11
Staffing and qualifications	Roles, credentials, background-check procedures	8
Implementation plan	Timeline, campus rollout, governance, risk register	7
Data protection and reporting	Access controls, retention, performance reporting	5
Quality assurance	Issue management, continuous improvement	2

06 Risk register and next actions

Priority	Risk	Mitigation / decision
High	Cannot verify staffing coverage	Operations confirms availability before bid decision.
High	Security language not approved	Obtain IT/legal review; do not improvise.
Medium	References may be unavailable	Request consent and alternates immediately.
Medium	Pricing assumptions inconsistent	Reconcile staffing and volume assumptions.
Low	Portal technical failure	Test access; submit ahead of deadline.

07 Internal production schedule

Day 1-2: compliance review and bid decision. Days 3-6: kickoff, outline, evidence requests. Days 7-12: first drafts and pricing. Days 13-15: red-team review and gap closure. Days 16-17: final approvals, PDF checks, and portal submission. This schedule is illustrative and must be adapted to the actual solicitation.

Client-ready handoff checklist

- All mandatory requirements traced to a response location.
- Attachments, signatures, and addenda verified against the solicitation.
- Page limits, file names, and portal instructions checked.
- Open assumptions and unresolved exceptions disclosed to the bid owner.