

Course 1 LESSON 29

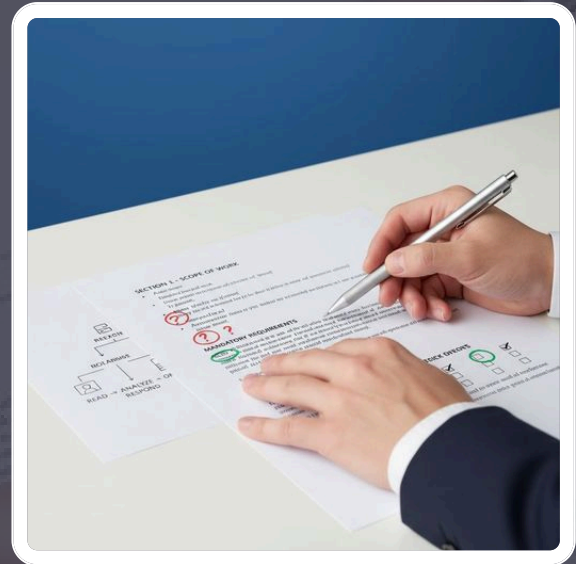
SLED RFP

Walkthrough

A short, visual introduction to analyzing SLED RFPs and RFBs, spotting disqualification risks, and organizing a compliant response. Learn the key terms, first-read checks, mandatory requirements, and bid-structure basics through simple, image-led lessons.



Created by **Collab P Learn**



Course Objectives

- Identify core SLED procurement terms and distinguish RFPs from RFBs in practical bid review.
- Perform a first-read go or no-go check by spotting issuer, submission method, deadlines, and basic feasibility risks.
- Extract mandatory requirements, evaluation criteria, and submission rules to organize a compliant bid structure before drafting.

Skills and Knowledge

SLED procurement

RFP analysis

RFB compliance

bid review

proposal management

submission requirements

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1. Introduction

1.1. Welcome



Designed for beginners and bid, proposal, sales support, and operations teams, this short visual course teaches a fast, practical approach to reading SLED RFPs and RFBs so learners can make a confident go or no go decision on first read. You will learn how to spot issuer and solicitation type, verify submission method and deadline, and capture mandatory forms and evaluation criteria so you can build a compliance checklist and bid structure before drafting any narrative. The Windsor town RFB example highlights common traps such as electronic only single PDF uploads, a hard deadline, and a single procurement contact (Aimee Slusher) for questions, and the lessons explain why vendor and submission requirements often control disqualification risk and why every response must map directly to stated evaluation criteria.

What You Will Learn



Navigate SLED RFPs

Gain the confidence to efficiently navigate and analyze diverse SLED RFPs and RFBs like a pro.



Spot Disqualification Risks

Learn to quickly identify critical disqualification risks to safeguard your bids from automatic elimination.



Build Compliant Responses

Master the art of constructing compliant bid responses that meet all mandatory requirements with ease.



Maximize Evaluation Scores

Discover techniques to align your proposals with evaluation criteria, maximizing your chances for success.



Adapt Across Entities

Become adept at adapting your approach to various SLED entities, ensuring you stay competitive wherever you bid.

2. RFP Walkthrough

2.1. Key Terms at a Glance



Start by learning the words that shape how a SLED solicitation is evaluated and how a bid can be rejected. Recognizing a few key terms helps you prioritize what to read first and what cannot be changed after submission. Use the short definitions below as a mental checklist when you open any SLED procurement document.

Review these key terms related to SLED solicitations, focusing on evaluation and bid rejection criteria.

Key Terms

Familiarize yourself with essential terms that steer SLED solicitations:

- **Evaluation Criteria:** Standards for assessing bids.
- **Non-Responsive:** A bid that fails to meet submission requirements.

Priority Reading

When reading SLED documents, focus first on:

- Requirements that can't be altered post-submission.
- Instructions specific to the evaluation process.

Avoid Rejection

To ensure your bid isn't rejected, remember:

- Use clear, concise language.
- Double-check compliance with all stated requirements.

“

"Success is where preparation and opportunity meet."

~ Zig Ziglar

Swipe through 7 important concepts about SLED RFPs and RFBs.

Core SLED vocabulary

SLED: State, Local, and Education government entities. This label tells you the public sector context and that public-records and procurement rules apply.

Solicitation type, plain meaning

RFP versus **RFB**. An RFP is evaluated on multiple factors including technical merit and approach, while an RFB is price driven and strict about compliance. Expect less flexibility in an RFB.

Contract and technical terms

SOW, scope of work: A clear description of required deliverables and tasks. Every response should trace back to the SOW as the source of truth.

Contract and technical terms

SLA, service level agreement: Performance standards, metrics, and remedies for failing to meet those standards. SLAs define how success will be measured.

Submission and compliance terms

Mandatory forms and required order: Forms, certifications, and a specified file order often control whether a bid is responsive. These items are typically checked before reviewers read narrative answers.

Evaluation and disqualification language

Disqualification triggers: Late submissions, incorrect pricing formats, multiple file uploads when a single PDF is required, and unauthorized contact are common causes for automatic rejection in SLED solicitations.

Quick application example

If a solicitation header says RFB and includes a vendor pricing template plus a single-PDF upload requirement, treat it as price driven and compliance heavy. Prioritize exact pricing formatting, complete mandatory forms, and a single-file assembly before writing narrative responses.

2.2. Identify Type & Issuer

Start by answering three quick questions on the first read: is the solicitation an RFB, who issued it, and what submission rules flow from that issuer. These facts usually decide whether a bid is viable and how to package documents before any detailed writing begins.

Scan the following cards to identify key elements for reading SLED RFPs and RFBs efficiently.

Solicitation Type	Issuer Identification	Submission Rules
Determine if the solicitation is a Request for Bids (RFB). This classification affects the bid approach and preparation.	Identify who issued the solicitation. Knowing the issuer helps understand rules and expectations that guide the submission process.	Review the submission rules associated with the issuer. These details will influence how you package and present your bid documents effectively.

Swipe through 5 slides to learn how to confirm solicitation types and issuers.

Confirm Solicitation Type

Look for the solicitation type label near the top or in the cover sheet. Terms to scan for include **Request for Bid, RFB, Request for Proposal**, and **RFP**. **RFBs** are price driven and rely on strict compliance with required forms and formats, not evaluator discretion, so mark an RFB when the document uses that label or emphasizes exact pricing formats and mandatory forms.

Identify the Issuer

Find the issuing authority and contact details. The issuer is often shown as the department or municipality name and address on the cover or notice page. Note the procurement contact name and the permitted channels for questions, because unauthorized contact can disqualify a vendor.

Extract Submission Rules

Read the **Vendor and Submission Requirements** section for any issuer-specific rules. Key items to capture: Allowed submission method, such as electronic only or mailed hard copies. The Windsor example requires electronic only submissions and rejects late uploads automatically.

File Format and Deadline

Capture file format and packaging rules, such as a single PDF upload, exact pricing template use, or an ordered document list. Note deadline, time zone, and whether the system closes with no grace period. Time zone awareness matters because systems may close at the exact local time stated.

Mandatory Requirements

Flag any mandatory requirement you cannot meet. If a mandatory item cannot be met exactly, treat the opportunity as a **no bid**.

QUESTION 1

What does RFB stand for in procurement solicitations?

- Request for Bid
- Request for Business
- Request for Budget
- Review for Bidders

3. What You Must Capture on First Read

3.1. Confirm Contact & Questions



Start by locating the procurement contact block and any Q&A or questions instructions near the front of the solicitation. Verifying the allowed contact channel and the required place to submit questions prevents disqualification and ensures official answers reach you on time.

Explore these 5 cards on procurement contacts and Q&A instructions, and flip for insights.

Procurement Contact

Locate the procurement contact block early in the solicitation. This is crucial for direct communication regarding the RFP.

Q&A Instructions

Find the section detailing how to submit questions. This ensures you follow the correct protocols and get official answers.

Contact Channels

Verify the allowed channels for contacting procurement. Different solicitations may specify email, phone, or online forms.

Submission Guidelines

Pay attention to where and how to submit your questions. Following these guidelines prevents disqualification.

Timely Responses

Submitting questions properly will ensure you receive timely responses. Engage with the procurement office efficiently.

Review the key points for extracting the required contact method from SLED RFPs and RFBs, including four distinct items.



Find the procurement contact entry

Look for a name, email address, or portal link labeled procurement contact or questions. If an email is listed, treat that as the permitted direct channel unless the solicitation says otherwise. In the Windsor example, the procurement contact is listed as Aimee Slusher, aslusher@windsorgov.com, and the RFB explicitly says questions must follow the RFB instructions, not be submitted online.



Read the questions instructions word for word

Note any required subject line format, required attachments, the required recipient (for example, a single email address or a portal form), and whether questions will be posted publicly as an addendum or Q&A. The solicitation may state a question deadline and a time zone. Treat those details as mandatory.



Confirm permitted contact scope

Some solicitations name a single contact and bar any other contact. Unauthorized contact outside permitted channels can disqualify a vendor, so follow the stated rules exactly.



Capture logistics on your quick checklist

Record the contact name, contact method (email or portal), exact text the solicitation uses for submitting questions, question deadline with time zone, and whether answers will be posted publicly.

3.2. Check Deadline & Method

Capture the hard cutoff time, the issuing authority time zone, and exactly how files must be submitted and formatted. Missing any of these items is the fastest way to be disqualified, because many SLED systems close automatically and evaluators cannot accept late or incorrectly formatted submissions.

This section covers deadline details, submission methods, and time zone considerations; expand for insights.

Deadline Importance

Meeting the submission deadline is crucial. Late submissions are often disqualified automatically. Always double-check the date and time!

Time Zone Awareness

Be aware of the issuing authority's time zone. Confirm your submission time aligns with their deadline, especially if you're in a different zone.

Submission Guidelines

Follow the specific submission method and formatting requirements outlined in the RFP or RFB. Common formats include PDF, Excel, or online forms.

Review these key takeaways on capturing essential details from SLED RFPs and RFBs, totaling 5 items.



Deadline details

Exact deadline date and clock time. Write the full date and the time as given, not a rounded version. Note any separate question deadline if listed.



Submission method

Submission method and name. Record whether the supplier must use a portal, an email address, postal mail, or in-person delivery. If a portal is named, capture the exact portal URL or system name.



Required templates

Required templates and document order. If pricing or other forms must use the buyer template, mark that as mandatory and list the exact template names.



System behavior

System behavior and late policy. Record whether the system closes with no grace period and whether late uploads are rejected automatically.



Size and upload limits

Size, upload limits, and signing requirements. Note any maximum file size, preferred PDF version, or wet/electronic signature rules.

QUESTION 1

What should you do to ensure that you meet the deadline for an SLED submission?

- Convert the deadline to your local time and set alerts before cutoff,
- Round the deadline time to the nearest hour before setting alerts,
- Submit the files 24 hours after the stated deadline,
- Use any file format that is convenient,

4. Extracting Requirements

4.1. Mandatory Functional and Submission Requirements



Start by locating the parts of the solicitation that vendors treat as absolute rules. These items determine whether a submission is responsive or rejected without review. Missing required forms, the wrong pricing format, late files, or unmet security obligations commonly cause automatic disqualification and must be captured before writing any narrative response.

Explore the essential elements of SLED RFPs and RFBs across three sections—expand to learn more.

Key Parts

Familiarize yourself with the critical elements of the solicitation, which include:

- Required documents
- Pricing format
- Submission deadlines Understanding these points is key to compliance.

Responsive Submission

Ensure that your submission aligns with the mandatory rules to avoid disqualification:

- Complete all required forms
- Follow the specified pricing format
- Submit on time and meet all security requirements.

Avoiding Rejection

To prevent your proposal from being dismissed outright, check for:

- Late submissions
- Missing documentation
- Incorrect formatting A careful review can make a significant difference.

Explore the key points about reading SLED RFPs and RFBs with 4 distinct tabs for comparison.

Vendor and Submission Requirements

Vendor and submission requirements, often labeled Vendor Requirements, Submission Requirements, or Instructions to Bidders, are the primary control point for responsiveness. These sections override narrative sections and define documents that evaluators check first. Capture every required form, certification, and the exact order of attachments stated.

Submission and Form Rules

Required files and order: Note each mandatory document and the sequence in which the issuer requires them. Forms and certifications are checked before narrative content, so order errors are a disqualification risk. Single-file rules and upload limits: If the solicitation requires a single PDF or a specific upload method, combine files into the demanded format exactly. Multiple uploads or extra files can equal rejection. Signature and certification: Identify who must sign, whether a wet signature is required, and any notarization or corporate authorization language. Missing signatures commonly cause non-responsiveness. Time zone and hard deadlines: Record the deadline, the stated time zone, and whether the system closes automatically with no grace period. Late submissions are rejected.

Pricing Format Rules

Use provided templates exactly: If a pricing template is supplied, populate it without altering column headings, line items, or calculation cells. Submitting a different pricing format can be grounds for non-response. Required pricing elements: Extract whether pricing must show unit costs, line-item totals, taxes, recurring fees, and a warranty or maintenance cost line. If the solicitation specifies a total-all-in price, do not submit only unit-level pricing. Price submission method: Note whether prices go inside the main PDF, in a separate encrypted attachment, or via a portal field. Follow the exact channel.

Security and Compliance Obligations

Hosting and data location: Record any required data residency or hosting constraints, for example on-premises or in specific jurisdictions. Noncompliant hosting can be disqualifying. Legal and sector rules: Extract sector-specific obligations, such as court data handling rules for justice systems, board approvals for education, or any references to laws and acts (for example public records rules). These often require specific language or forms. Certifications and evidence: Identify required security standards or certifications to include, such as SOC reports or attestations of compliance, and whether proof must be current as of a given date.

4.2. Evaluation Criteria and Bid Structure

Evaluation Criteria and Compliance Matrix

Start by listing what evaluators will score and how much each item matters. Then build a simple matrix that ties every response element back to a scoring criterion, required evidence, and a compliance check so nothing is missed before drafting.

Review the evaluation criteria and compliance matrix to ensure thorough preparation for SLED RFPs and RFBs, focusing on scoring and compliance.

Scoring Criteria

Evaluators score various aspects of your proposal:

- **Technical Merit** (40%): Innovation and feasibility.
- **Cost** (30%): Overall pricing and value.
- **Experience** (20%): Previous success and relevant expertise.
- **Compliance** (10%): Adherence to guidelines.

Compliance Matrix

Use a compliance matrix to track your responses against each criterion:

- **Criterion:** What evaluators look for.
- **Response Element:** Your answer to the criterion.
- **Required Evidence:** Documents or data needed to validate your claims.
- **Compliance Check:** Confirm all elements meet stated requirements.

Action Items

Before submission, ensure:

- Each proposal part aligns with evaluation criteria.
- Necessary evidence is included.
- Compliance checks have been performed to avoid any oversights.



"A goal without a plan is just a wish."

~ **Antoine de Saint-Exupéry**

Swipe through 7 slides that explain the suggested evaluation criteria and sample weights for reading SLED RFPs and RFBs.

Mandatory Responsiveness

Mandatory responsiveness, pass/fail, 0 weight for scoring but blocking for eligibility. Required forms and correct submission format must be verified first, before any scored review, since missing mandatory items causes non-responsiveness and automatic rejection.

Price or Cost

Price or cost, **35**. Use the issuer's pricing template exactly. Incorrect pricing format or failure to use the provided template usually makes a bid non-responsive.

Technical Approach and Fit

Technical approach and fit, **25**. How the proposed solution meets the scope of work and functional requirements.

Experience and References

Experience and references, **15**. Evidence of similar projects, especially in the justice or education sectors when applicable.

Project Plan and Schedule

Project plan and schedule, **10**. Realistic milestones tied to the issuer's required timeline.

Staffing and Key Personnel

Staffing and key personnel, **10**. Resumes, roles, and percent of time committed.

Security and Compliance

Security and compliance, **5**. Proof of required certifications or hosting controls when requested.

QUESTION 1

What is the weight assigned to the 'Price or cost' criterion in the evaluation matrix?

- 25
- 35
- 10
- 15

5. Summary

5.1. Summary

Congratulations on completing the SLED RFP Walkthrough course! This course provided a fast and practical introduction to the critical aspects of analyzing State, Local, and Education (SLED) Requests for Proposals (RFPs) and Requests for Bids (RFBs). Focused on beginners and support teams, particularly those involved in bid, proposal, sales support, and operations staff, this course emphasized the importance of understanding key procurement terms, the distinction between RFPs and RFBs, and the structure of compliant responses.

Course Objectives Recap: By the end of this course, you should now be able to:

- **Identify Core SLED Procurement Terms:** Distinguish between RFPs (evaluated on multiple factors) and RFBs (price-driven with strict compliance) and grasp foundational concepts such as Scope of Work (SOW) and Service Level Agreement (SLA).
- **Perform First-Read Checks:** Conduct rapid assessments for deciding whether to pursue a bid based on issuer information, submission methods, deadlines, and basic feasibility risks.
- **Extract Mandatory Requirements:** Recognize essential evaluation criteria and submission rules to ensure your bid is well-organized and compliant before beginning to draft your proposal.

Key Takeaways from Each Section:

- **Key Terms:** Understand basic procurement vocabulary relevant to SLED.
- **First-Read Checklist:** Develop a systematic approach to evaluate feasibility and avoid disqualification risks.
- **Analyzing RFP Structure:** Learn how to assess what drives risk within the document and where to find critical submission sections.
- **Mandatory Requirements:** Identify requirements that impact responsiveness and eligibility, ensuring compliance with specified regulations.
- **Disqualification Triggers:** Recognize common pitfalls that lead to automatic disqualifications, such as missing documents, incorrect formats, and late submissions.
- **Bid Structure Development:** Translate extracted evaluation criteria into a comprehensive checklist and response framework to enhance your proposal's quality.
- **Variations Across SLED Entities:** Understand the diverse requirements and adaptation strategies needed across different governmental entities.
- **Case Study Application:** Apply learned concepts through a practical example involving real-life documents and responses.

This walkthrough aimed to instill confidence and competence in navigating SLED solicitations, guiding participants to forge compliant, compelling proposals that stand out in the competitive public sector landscape. We hope you found the course informative and empowering, and we encourage you to apply these principles in your future bidding endeavors!

Explore the summaries of all five sections below by expanding each section.

Section 1: Introduction

- Overview of the course objectives and structure.
- Introduction to key concepts and themes to be explored.

Section 2: Core Concepts

- Detailed exploration of the foundational ideas essential for understanding the subject matter.
- Applications of core concepts in real-world scenarios.

Section 3: Practical Applications

- Insights into how the theoretical concepts can be applied in practical settings.
- Strategies for implementing learned skills in everyday situations.

Section 4: Case Studies

- Examination of real-life examples and case studies to solidify learning.
- Analysis of successes and failures to draw key lessons.

Section 5: Summary

- Recap of the main points covered throughout the course.
- Reflection on the learning journey and next steps for continued growth.

Further Readings

If you would like to find out more information about this course, follow the links below:

- [Eight Steps to Winning State, Local and Education Government ...](#)
- [SLED Contracts: Complete Guide to State and Local Government ...](#)
- [How to Find and Win State and Local Government Contracts - iQuasar](#)
- [SLED Procurement 101: How to Win State, Local, and Education ...](#)
- [5 SLED Procurement Strategies for SLED Buying Season 2026](#)