

Sample Capstone — The Lifetime Portfolio Arc

A complete, worked portfolio capstone: one continuous arc tying the undergraduate, graduate, and doctoral tiers into a single 20+ year learning path — and turning a career in the pursuit discipline into a portfolio that can be defended, stewarded, and passed on.

What this is. The tier capstones (`undergraduate-pursuit-capstone.md`, `graduate-capture-capstone.md`, `doctoral-research-capstone.md`) each prove one rung of the ladder: *do a pursuit*, *lead a pursuit*, *study the pursuit*. This sample proves the **whole ladder** — that the same person can hold the discipline as one continuous arc across a career. It is a model answer for a learner assembling a lifetime portfolio and for an advisor or fellowship director running a portfolio defense. It is stack-agnostic like every capstone in this folder: the portfolio is a body of thinking, produced with whatever tooling the learner's organizations happened to use over the years.

The arc, in one line. The discipline is a pursuit — and a career in the discipline is itself a pursuit: a **Dream** (the hunch that this is the work) that becomes an **ORBITAL** (a structured, resourced commitment) that becomes a **World** (a contribution that outlasts the person). The portfolio is the record of that cosmology loop, applied to a life.

Tier: all tiers / lifetime · **Audience:** learners, alumni, and the advisors and fellowship directors who run portfolio defenses · **Format:** an ongoing portfolio, assembled and defended at tier transitions and at a final portfolio review · **Committee:** a practitioner mentor and a faculty/research reader · **Tools:** none required.

The philosophy: the three tiers as one arc

The curriculum is a ladder — each tier has a distinct relationship to knowledge (`course/doctoral-program-overview.md`):

Tier	Relationship to knowledge	The tier's capstone proves	The portfolio holds
Undergraduate (B.S.)	<i>Consume</i>	Read, score, build the ORBITAL, submit — do a pursuit	The first solicitations read, the first ORBITALS built, the first honest post-mortems

Tier	Relationship to knowledge	The tier's capstone proves	The portfolio holds
Graduate (M.S.)	<i>Apply</i>	Lead the pursuit as a business — team, price, govern, win	The capture plans, the price-to-win positions, the color-team logs, the FPR calls
Doctoral (Ph.D.)	<i>Generate</i>	Study the pursuit as a science — test the doctrine	The research designs, the dissertation, the publications, the agenda contributions
Stewardship (post-doctoral & executive)	<i>Steward</i>	Teach, govern, pass on the discipline	The mentees, the institutional gate charters, the doctrine improvements

The portfolio capstone is the argument that these four are **one thing**. The undergraduate who reads a NOFO and the doctoral candidate who tests the calibration engine are both, in their way, asking the same question the industry canon has always asked ([literacy/industry-standard-canon.md](#)): *what does it take to win work honestly, and how do we know?* The portfolio shows the learner's own answer to that question deepening across a career.

The cosmology applied to a career

The lifecycle the doctrine teaches for pursuits ([doctrine/07](#)) is the arc the portfolio tracks, applied to the person:

- **A Dream.** The learner's entry into the discipline — the first class, the first RFP read, the first realization that the federal market is a pipeline and not a lottery. The portfolio's earliest artifacts are the learner's first, unpolished attempts: the compliance matrix with gaps, the pWin argued on vibes, the bid/no-bid call that was wrong and taught the most.
- **An ORBITAL.** The learner's structured commitment to the work — the degree, the first capture role, the first pursuit owned end to end. The portfolio's middle artifacts are the professional ones: the capture plan that won, the price-to-win that held, the color-team log that caught a disqualifying miss.
- **A World.** The learner's durable contribution — the discipline taught, the gate charter an organization still uses, the published study that the field cites, the mentee who became a better capture manager than the mentor.

The portfolio's late artifacts are the ones the learner is *handing on*.

The cosmology loop — every win becomes past performance, and past performance raises the next probability of win (**doctrine/07**) — is the mechanism the portfolio makes visible. A career in this discipline is a flywheel, and the portfolio is the flywheel's record.

The portfolio components, tier by tier

The portfolio is a **curated** collection, not a dump. Every artifact earns its place by being a defensible example of one of the tier's learning outcomes. The rule of thumb: **thirty artifacts, curated to fifteen, narrated by the learner, defended by the learner**. What follows is the model contents.

Undergraduate tier artifacts (consume)

- **Solicitation reads** — a NOFO and an RFP, each with the six-question fact sheet and the strategy reading: what the evaluator actually cares about, read from the weights and the adjectives in Section M.
- **Two ORBITALS** — one from a real, closed solicitation (the capstone) and one from the learner's own early work; the seven axes filled with sourced content.
- **Scored pursuit sheets** — pWin argued factor by factor, with the honest miss highlighted: the factor the learner over-scored, and the post-mortem that caught it.
- **Post-mortems** — the capstone's graded post-mortem and one "wrong call" post-mortem, with the lesson stated plainly.

Graduate tier artifacts (apply)

- **A capture plan** — customer map, competitive landscape, incumbent analysis, discriminators, ghost themes suppressed, from the learner's graduate capstone or professional work (within ethical walls).
- **A price-to-win position** — cost floor, competitive range, affordability ceiling, recommended price, argued as a position and defensible under audit.
- **A teaming / JV decision** — the partner rubric, scored and weighted, with the declined option documented.
- **A color-team findings log** — Pink/Red/Gold/Black-Hat, showing the package improving and the score pulled back to a defensible estimate.
- **A final-proposal-revision plan** — what was held, what was moved, the walk-away line; and the outcome analysis that followed.

Doctoral tier artifacts (generate)

- **A research design** — the DL 903 seminar design, defended, with the pre-registered decision rule.
- **The dissertation** (or its empirical core) — one question, answered well, with the survivorship caveat named.
- **A publication** — the flagship article, or the submission that is the program’s publication milestone.
- **An agenda contribution** — one open question on the research agenda answered, and (ideally) one new question written onto it.

Stewardship tier artifacts (steward)

- **A gate charter an organization still uses** — the learner’s own governance artifact that outlived them in the role.
- **A doctrine improvement** — a playbook, a formula, or a lesson the learner contributed to the discipline’s corpus.
- **A mentee’s artifact** — the work of a person the learner taught, included *with the mentee’s permission* as evidence of teaching, not of borrowing.
- **A teaching artifact** — the one-hour lesson the learner would give to a room of newcomers, and the reason it is the right lesson.

The portfolio capstone project

At the end of the arc — at a tier transition, or at a final portfolio review — the learner assembles the portfolio into **one defended statement**. The project has four parts, each a milestone:

Milestone 1 — The selection (the curation gate)

Deliverable: the curated portfolio + the selection memo. The learner curates fifteen artifacts from the thirty they have kept, and writes the memo that explains the curation: *what each artifact proves, why it stays, and — as important — what was deliberately left out*. The selection memo is the first test of the arc: a learner who cannot say why an artifact is in the portfolio does not yet own it.

Milestone 2 — The arc narrative (the coherence gate)

Deliverable: the written arc. A 10–15 page narrative that reads the curated artifacts as one story: the Dream (the first, wrong calls and what they taught), the ORBITAL (the structured years and the wins), the World (the contribution and the stewardship). The narrative uses the doctrine’s own vocabulary — pipeline, gates, pWin, past performance, cosmology loop — to describe a *career*, and it is honest about the misses: a portfolio with no failure in it is a portfolio that has not been truthfully curated.

Milestone 3 — The live case (the current-competence gate)

Deliverable: a live defense of current competence. Before the committee, the learner takes a real, published, closed solicitation they have *not* seen before and works it live for 60–90 minutes: the 15-minute scan, the score, the bid/no-bid call, and the one-page ORBITAL. This is the tier capstones’ defense made permanent — it proves the arc is not just a retrospective, but a living skill. (The live case is the same exercise a certified professional faces in a credentialing review; it is the portfolio’s insurance against the portfolio being a museum.)

Milestone 4 — The stewardship commitment (the passing-the-torch gate)

Deliverable: the stewardship statement + the next-generation charter. The learner writes the commitment that closes the arc: *what they will teach, whom they will mentor, and what of the discipline they will improve or hand on*. The next-generation charter names the learner’s own gate charter — the criteria by which their successors will judge their stewardship, written in advance, exactly as the doctrine demands for every gate (**doctrine/04**). The arc does not end at the defense; it hands the doctrine to the next Dream.

Grading rubric for the portfolio capstone

The four-level scale — **Not Ready · Developing · Proficient · Distinguished** — applied to a portfolio and a defense. The dimensions test the *arc*, not any single artifact (the tier capstones grade the rungs; the portfolio grades the ladder).

Dimension	Not Ready	Proficient	Distinguished
Breadth	Artifacts from only one tier; the portfolio is a folder	Artifacts from all three tiers (and stewardship), curated to a defensible set	The curation is <i>argued</i> — the learner says what stays, what goes, and why
Depth	The artifacts are titles, not work	Each artifact shows the learner’s own reasoning, not just the result	The best artifact would survive a tier-capstone panel on its own

Dimension	Not Ready	Proficient	Distinguished
Coherence / arc	The narrative is a chronology, not an argument	The arc reads the artifacts as one story — Dream → ORBITAL → World	The arc is honest about the misses, and the misses are load-bearing (they teach the next artifact)
Doctrine use	Vocabulary used without doing work	The pipeline, gates, pWin, and cosmology loop structure the narrative	The learner applies the doctrine to <i>themselves</i> — a career gated and scored like a pursuit
Live competence	Cannot work a live solicitation under pressure	The 15-minute scan, score, and call are defensible live	The live case survives a hostile panel and the learner names the limits
Ethics	Fabricated or borrowed artifacts; no permissions	Real, lawful artifacts; confidentiality respected; mentee artifacts permitted	The ethical walls are respected across a career that touched live competitions
Stewardship	No passing-it-on; the arc ends at the defense	A stewardship commitment is named	The next-generation charter is written in advance, with criteria a successor can be judged by

The portfolio’s trap being tested: the retrospective that is a museum — a collection of past wins that proves nothing about current competence and contributes nothing to the next generation. The live case (Milestone 3) and the stewardship commitment (Milestone 4) exist precisely to block that trap: the portfolio must prove the arc is *still moving*, and that it will outlast the learner.

How to run a portfolio defense

For advisors, fellowship directors, and program committees:

1. **Start the portfolio early.** The learner begins keeping artifacts in the undergraduate tier, and the portfolio is *revisited* at each tier transition — it is not a final-year scramble. Each tier capstone drops its best artifact into the portfolio as a matter of course.
2. **The committee is mixed.** A practitioner mentor (who can judge the capture plans and the live case) and a faculty/research reader (who can judge the doctoral artifacts and the doctrine use). Where possible, add an **outside reader** from a neighboring field — the portfolio’s insurance against insularity, exactly as the doctoral defense uses one.
3. **The live case is mandatory.** No portfolio defense without the unsolicited live exercise. It is the difference between a portfolio that is a record and one that is a skill.
4. **The ethics check is real.** A career in this discipline touches live competitions; the portfolio must respect the ethical walls that protect them. Fabricated artifacts, borrowed work, or disclosed-source-selection material fails the portfolio outright — the same standard the market enforces on everyone in it.
5. **The defense is a review, not a rubber stamp.** The panel’s job is the doctrine’s job: push until the learner names the limits of their own career, then judge whether the arc is *defensible*, not perfect.

Where this maps to Shipley + Dream DNA

The industry canon. The portfolio arc is the **Shipley business-development lifecycle** applied to a person (literacy/industry-standard-canon.md): *marketing* is the learner finding the market and deciding where to play (the undergraduate sensing years); *capture* is the learner deciding to pursue a career in it and building the position (the graduate capture years); *proposal* is the learner producing the contribution (the doctoral research and the professional wins); *negotiate* is the learner defending it (the portfolio defense); and *award* is the learner delivering, learning, and passing on — the stewardship commitment. The certification ladder of the profession (APMP Foundation → Practitioner → Professional; Shipley’s own certifications) is the industry’s version of the portfolio’s tier markers: each credential is a checkpoint that the arc is real, and the portfolio is the evidence behind the credentials.

The Dream DNA. The portfolio is the human rendering of the machine side’s most distinctive claim: that **past performance raises the next probability of win** (doctrine/07). The machine encodes that claim in the **win-probability composite’s past-performance factor** and tests it in the **golden-thread verification** that walks the whole pipeline on the **canary company** — the same Ravonics

the learner practiced on in the undergraduate capstone. The portfolio is the same loop, run on a human life: every delivered win becomes the past performance that raises the next pursuit's score. And the stewardship commitment is the human version of the **DNA corpus's** own design — the versioned package of rules, playbooks, and formulas that outlives any single practitioner and lets the discipline compound across generations. The learner who completes the portfolio has, in effect, become a version of the doctrine themselves: the durable concepts held in a person, ready to be handed on.

The capstone in one sentence

The discipline is a pursuit, a career in the discipline is a pursuit, and the portfolio capstone is the proof of both: thirty artifacts curated to fifteen, narrated as one arc from first wrong call to stewardship charter, defended live before a mixed panel — a Dream that became an ORBITAL that became a World, and the passing of the doctrine to the next Dream.