

# RFP INS AND OUTS –it's not for the faint of heart!



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References: SBA presentation on  
Responding to an RFP

Federal Acquisition Regulation and related  
supplements, Part 15

Anything else that applies...



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# What will we cover?

- FAR Process & Hierarchy
- Background from the Government's side
- Planning to Win and Other Activities
- Creating Winning Proposals – the nitty gritty of it all
- Putting it all together/winning strategies



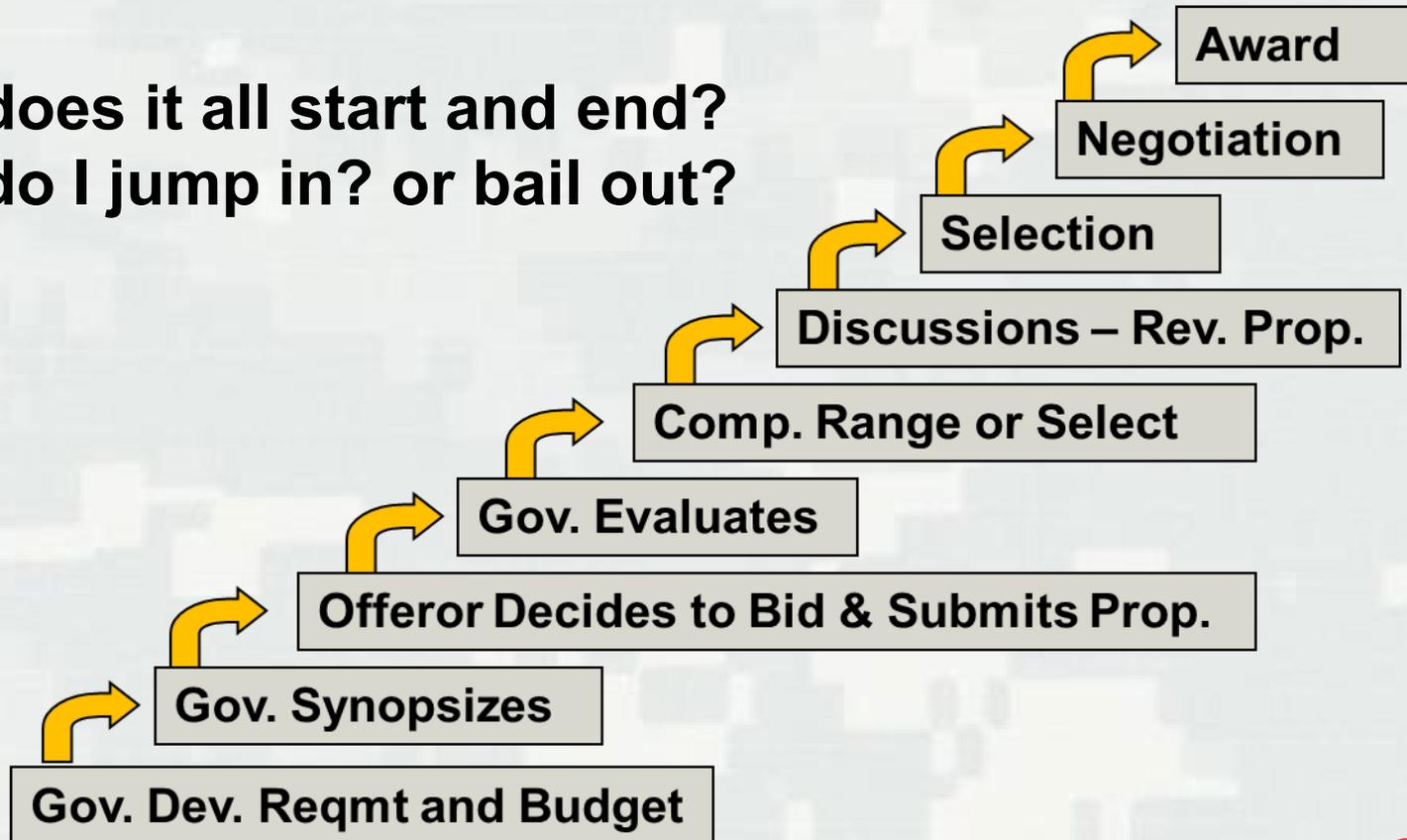
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# FAR Process – Behind the Scenes



## Federal Acquisition Process

Where does it all start and end?  
Where do I jump in? or bail out?





# Publicizing Contract Actions – FAR Part 5

## The Policy (FAR 5.002)

Contracting Officers must publicize contract actions to . . .

- ▶ Increase competition
- ▶ Broaden industry participation
- ▶ Assist small businesses including HZ, SDB, WO & SDVOSB



# Information Dissemination



- **FAR 5.101**
- Over \$25k – thru GPE [Government Point of Entry like FedBizOps] [www.fbo.gov](http://www.fbo.gov)
- Between \$15k and \$25k – displayed in a public place or electronically for a minimum of ten days after solicitation is issued, or until after the quotes are opened, whichever is later.
- Periodic handouts (forecasts), thru trade associations (plan rooms), brief announcements, paid ads, electronic bulletin boards, etc.



# Making Solicitations Available



- **FAR 5.102**
- Thru GPE including specs, tech data, other info
- Unless disclosure would compromise national security, be impracticable to do so, or not in the Government's best interest
- If not on GPE, use other electronic means (CD-ROM), paper copies, direct email. May charge a fee to cover duplication.



# Solicitation Types



- **Requests for Proposals** (FAR Part 15)
  - ▶ Negotiated; Evaluation Factors apply
  - ▶ May award at other than low price if specified in solicitation (Best Value)
  - ▶ Low Price Technically Acceptable
- **Invitation for Bid** (FAR Part 14)
  - ▶ Low Price only; No evaluation factors
- **Request for Quotation** (FAR Parts 12 & 13)
  - ▶ Usually RFQ – non-complex supplies & services under \$250K
  - ▶ Commercial Item (FAR Part 12)



# Requests for Proposals



- **FAR 15.203**
- Used in negotiated acquisition to communicate Government requirements & solicit proposals
  - ▶ Things like: What needs to be in the proposal
  - ▶ Evaluation factors & subfactors and relative importance
  - ▶ Anticipated terms & conditions that will apply to the contract
  - ▶ Oral RFP's authorized under certain conditions
- **Non-Public Opening**
  - ▶ award can be made with or without discussions





# Invitations for Bid

- **FAR 14.101**
- Must clearly describe requirement
- Cannot be unnecessarily restrictive
- Includes all documents needed for prospective bidder to submit a bid for the requirement
- Sealed Bid Opening – Public
  - ▶ No discussions or negotiations
  - ▶ Award made to lowest priced responsible bidder submitting a responsive bid that will be most advantageous to the Govt considering only price & price-related factors



# Request for Quotation



- **FAR 12 & 13**
- Can be written or oral. If oral, provisions must be communicated.
- Simplified Acquisition (FAR 13.1)
  - ▶ >\$10K- <\$250K
  - ▶ <\$10K – micro-purchase (usually P-Card)
- Commercial Item Acquisition (FAR 13.5 & Part 12)
  - ▶ Up to \$7M
  - ▶ COTS – commercial off-the-shelf items, or COTS with modifications to customize



# Know your way around the block



- RFP's and IFB's

- ▶ Specific Format – tells you what section everything is found in (UCF)
- ▶ Construction may follow a different format similar to civilian (CSI)
- ▶ Both have provisions & clauses, description of requirement
- ▶ Tells you exactly what to submit, what you will be evaluated on, what to bid, etc.



# Planning to Win



- Your federal marketing plan should include all your business targets.
- It's important to intimately understand each of these targets and know what each is doing to have its requirements met.
- Your plan should target specific acquisitions, when they are due to release, include due dates and team assignments, track any delays.
- Your plan should address multi-disciplined proposal teams and factor in their availability for proposal work.
- Your plan should include a list of sales messages and discriminators for each agency/acquisition along with winning strategies.



# Bid/No Bid Decision



What is the value to the company?	
What is the risk of not pursuing the opportunity?	
What is the risk level of the project?	
What is the importance of winning?	
What is the impact of losing?	



# Bid/No Bid Decision



Attribute	Weight	Score
Specific Experience		
Lowest Price		
Teaming		
Resources		
Familiarity with customer		
Past Performance		



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# Creating Winning Proposals



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# The Proposal Development Process



1. Solicitation Review
2. Corporate Decision
3. Team Formation
4. Compliance Matrix
5. Outline
6. Team Kick-Off
7. Content Development
8. Cross-Reviews
9. Final Reviews
10. Proposal Production and Release



# Building the Proposal Environment



- **WHO do I need?**
  - ✓ **Skill sets**
  - ✓ **Availability**
  - ✓ **Cost**





# Proposal Leader

- **Casts the vision**
- **Communicates proposal objectives**
- **Understands compliance**
- **Mentors and motivates**
- **Satisfies needs**
- **Rewards excellence**
- **Fosters risk-taking**



# Proposal Development Team



- Upper Management
- Proposal Leader
- Program Manager
- Proposal Specialist
- Key Technical Authors
- Contract Managers
- Comptroller or CPA
- Team members
- Subcontractors
- Word Processors
- Editors
- Producers





# What Else Do I Need?

- ❑ **Places to work – war room, telework**
- ❑ **Ways to share information**
- ❑ **NDA's, Teaming Agreements, Plans of Action**
- ❑ **Production, Printing and Binding, Delivery**



# Other Matters to Decide On



- **Communications**
- **Proposal Schedule**
- **Proposal Outline**
- **Compliance Matrix**
- **Questions for the Government**
- **Winning Strategies**
- **Winning Themes**
- **Writing Assignments**
- **Division of Resources**
- **Deadlines**



# Compliance Matrix



- Analysis of the solicitation**
- Isolate evaluation factors**
- Provides a roadmap to proposal development**
- A Checklist to ensure you capture everything needed**
- Ensures compliance with scope & project requirements**
- Useful for complicated solicitations**



# SAMPLE Compliance Matrix

Solicitation Requirement – <b>provide training &amp; program materials</b>	Proposal Location (page, paragraph)
<b><u>BACKGROUND</u></b> <b>info for basis of proposal</b>	
Use of existing TB surveillance infrastructure to:	
<b>Monitor</b> TB patients HIV tested/positive/success of referrals	
<b>Track</b> use of clinical services by HIV-infected TB patients	
<b>Monitor</b> treatment outcomes of HIV-infected TB patients	
<b><u>PURPOSE</u></b> <b>what does the government want in a contractor?</b>	
- Experience in writing TB training materials for developing world	
- Extensive knowledge of international guidelines for general TB and HIV surveillance among TB patients	
- Strong background in principles and guidelines for TB prevention and control	
- Experience in formatting training materials	

# SAMPLE Compliance Matrix

<u>SCOPE OF WORK</u> What the contractor is expected to do	Solicitation location	Proposal page & paragraph
<b>- Modify</b> existing TB/HIV surveillance materials to - comply with int'l stds. and guidelines		
<b>- Amend</b> Botswana-specific material to include global info on TB/HIV burdens including WHO TB recording and reporting forms		
<u>TASKS</u> What the offeror needs to build into proposal		
Use intl' guidelines and standards to incorporate content curriculum:		
Sample Agenda		
Nine Modules		
Supplemental adult learning materials		
Instructional design that standardizes flow and look of all modules		

# SAMPLE Compliance Matrix

<b>Formatting materials:</b> finished product	
<b>Consistency</b>	
<b>Visual Presentation</b>	
<b>User-friendliness</b>	
<b>Paper format</b>	
<b>Electronic format</b>	
<b>Design cover/spine:</b> what is it going to look like?	
<b>Color</b>	
<b>½ in binder</b>	
<b>Digitally print 200 copies of 250-300 page manual:</b>	
<b>2 color process</b>	
<b>3-hole punched</b>	
<b>Tabs as appropriate – 4 color</b>	

# SAMPLE Compliance Matrix

**DELIVERABLES** - what is your timeline of events? What will you need to deliver to the government if/when you get the contract? Build into costs, teaming, staffing, logistics, anything else applicable.

**First Draft – 10 wks after award**

**Participation in meetings with CDC: Weekly or Bi-Weekly**

**Second Draft – 13 wks. After award**

**Final Version – 20 weeks after award**

## **MINIMUM QUALIFICATIONS**

**History of developing public health materials for TB in developing countries** evaluation factor

**History of working to deadlines and providing interim deliverables** evaluation factor

**Extensive knowledge of international policies and guidelines for HIV testing and surveillance among TB patients** evaluation factor

# Keeping Things Straight Version Control



- **Have one point of collection and distribution.**
  - ▶ Assign a person responsible for accepting everyone's writing and distributing current versions for editing.
  - ▶ Use the same editing process across the board (strike outs, highlights, notes, track changes)
- **Formats for naming electronic files**
  - ▶ Title, volume, version number, DATE AND TIME
- **Daily announcements**
  - ▶ Remind the team daily of what version they should be working on.
  - ▶ Writing assignment checklists and status of submittals



# Compiling the Proposal and Production



- Putting the volumes together
  - ▶ Assign the production person or team
  - ▶ Give them enough time
- Electronic Publishing
  - ▶ Check, check, check and check again the version and titles of every file
  - ▶ PDF whenever allowed and possible
- Hard Copy Production
  - ▶ Make a materials list and buy them early
  - ▶ Have a back-up means to produce; i.e. local printer or secondary office equipment



- Other Electronic Media



# Winning Strategies



- **Propose items/services favored by the agency**
- **Link solutions to customer issues**
- **Apportion performance risk using methods favored by the agency** (QC requirements – internal standards, ISO certs etc)
- **Analyze competitive position to the win** (what are your chances of getting this contract)
- **Ghost competitors' weaknesses** (what's the talk in the "street" about the current contract or who is competing for the same work)



# Executive Summary



- ▶ Overviews the entire project
- ▶ A good idea to do one even if it's not called for. 10 minute review rule.
- ▶ Highlights winning strategies and themes
- ▶ Does not exceed 1-2 pages
- ▶ Is Custom-crafted – **never** off-the-shelf
- ▶ Validates all claims
- ▶ Is directed to evaluators
- ▶ Is written in the active voice



# Active Voice Preferred



**Contrast these two statements:**

- ▶ **“Our experienced and knowledgeable staff will complete the feasibility study in 30 days or less.”**
- ▶ **“The feasibility study will be completed in 30 days or less.”**

***The active voice provides more opportunity to be positive and convincing.***



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# Write to Evaluators



- Target Your Audience. Your audience is very likely to be government personnel who are knowledgeable of the topic and likely were involved in developing the requirement.
- Use Solicitation Terms. If they call it a “Program Management Review,” you call it that.
- Use graphics judiciously. To clarify technical points, condense data and save valuable space, supplement or highlight unique information.





# A Few Basic Rules

- Understand the importance of the 10 second - 10 minute review.
- Place most unique and innovative ideas up front.
- Decide how to refer to the customer and be consistent; i.e. EPA vs. the agency vs. the government.
- Determine what the government wants and propose it.
- Identify acronyms and include a glossary.
- Use verbs of action.
- Avoid flowery statements and descriptions.
- Win or lose – ask for a debriefing.





# Questions?



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