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…
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
Federal Acquisition Process

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

1. Gov. Dev. Reqmt and Budget
2. Gov. Synopsizes
3. Offeror Decides to Bid & Submits Prop.
4. Gov. Evaluates
5. Comp. Range or Select
7. Selection
8. Negotiation
9. Award
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

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the value to the company?</td>
<td></td>
</tr>
<tr>
<td>What is the risk of not pursuing the opportunity?</td>
<td></td>
</tr>
<tr>
<td>What is the risk level of the project?</td>
<td></td>
</tr>
<tr>
<td>What is the importance of winning?</td>
<td></td>
</tr>
<tr>
<td>What is the impact of losing?</td>
<td></td>
</tr>
</tbody>
</table>
## Bid/No Bid Decision

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Weight</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lowest Price</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teaming</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resources</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Familiarity with customer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Past Performance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Creating Winning Proposals
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
- NDAs, 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

<table>
<thead>
<tr>
<th>Solicitation Requirement – <em>provide training &amp; program materials</em></th>
<th>Proposal Location (page, paragraph)</th>
</tr>
</thead>
</table>

### BACKGROUND  
*info for basis of proposal*

Use of existing TB surveillance infrastructure to:

- **Monitor** TB patients HIV tested/positive/success of referrals
- **Track** use of clinical services by HIV-infected TB patients
- **Monitor** treatment outcomes of HIV-infected TB patients

### PURPOSE  
*what does the government want in a contractor?*

- 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

<table>
<thead>
<tr>
<th>SCOPE OF WORK</th>
<th>Solicitation location</th>
<th>Proposal page &amp; paragraph</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What the contractor is expected to do</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <strong>Modify</strong> existing TB/HIV surveillance materials to comply with int’l stds. and guidelines</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- <strong>Amend</strong> Botswana-specific material to include global info on TB/HIV burdens including WHO TB recording and reporting forms</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## TASKS

**What the offeror needs to build into proposal**

Use int’l 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

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

<table>
<thead>
<tr>
<th>Phases</th>
<th>Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Draft</td>
<td>10 wks after award</td>
</tr>
<tr>
<td>Participation in meetings with CDC</td>
<td>Weekly or Bi-Weekly</td>
</tr>
<tr>
<td>Second Draft</td>
<td>13 wks. After award</td>
</tr>
<tr>
<td>Final Version</td>
<td>20 weeks after award</td>
</tr>
</tbody>
</table>

## 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

► Overview 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.
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?