

Keys to Preparing a Top Notch Proposal



May 12, 2015

Discussion Topics

Managing the Process

- Being selective about pursuits
- Planning the process
- Putting together a team

Skills Building

- Writing and editing
- Text, graphics and white space
- Organizing your resources



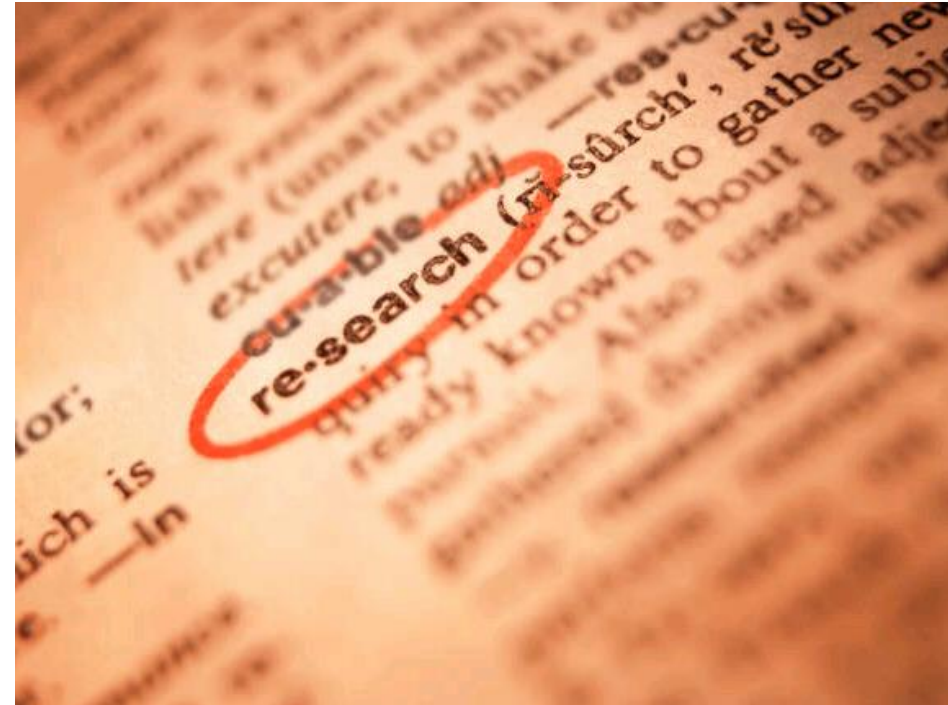
Selecting Pursuits - The Go, No-Go Process



from? **Who will the decision makers be?** What kind of fees are they expecting to pay? What other firms have they worked with and what's gone well or poorly? In other words... what will win the job? What has the client built before? Who designed and built it? What were the results? **Who is the competition?** How do you compare to the competition? Have they worked with the client? Was it positive or negative? Have they worked with others involved in the project? Who wrote the RFQ/RFP? Was it you? Who else has received it? Is someone "wired"? What are key issues in RFQ/RFP? How important is fee? Experience? What are project-specific issues? Do you truly understand them? **Is the project funded?** Where's the money coming from? Who are your references? Do they know the client/project? Have you visited the site? Have you visited abutters? Have you talked with local officials? What is the format of the proposal? What are client's key issues? What prior proposals has the client liked? How much boilerplate? Who will be reading it? **What is the fee structure?** Can you be profitable with this fee? What are competitors' typical fees? How important is fee to client? (They just might tell you it is not important – do not believe this for a moment!) **Who will be attending the interview?** How many people? Who makes the selection? Do you know the decision maker(s)? Who does? What about their background? What are their roles in the project? What does the "scoring sheet" look like? **Do you know the other players/stakeholders?** What about technical challenges? Can you address community concerns? Are there environmental issues? **Have you seen the space?** Can you choose where you sit? Can you choose where client sits? What about A/V? Web access? Do you need a screen? Can you control lighting? Sunlight? When will you present? **Do you have a choice?** When do you want to present? **First?** Just before or after lunch? Last? Is PowerPoint best? Boards? How long is the presentation? **Is the timing strict or relaxed?** Who does the client want to hear from? Who will ask questions of you? To whom will you ask questions? Is Q&A a two-way street? Who should contact whom? When do you follow up? **What can you ask?** Follow up whether or not you win! Who will tell you the results?

Before the Strategy Meeting

- Outline the content, working from the RFP
- Prepare a list of questions
 - Specific questions about the RFP
 - Revisit go/no go questions to assess or confirm your firm's position and messages
- Prepare a list of potential resources for the proposal
 - Team members
 - Relevant project experience
 - Images/graphs/diagrams
 - Unique services or processes



Build Professional Relationships

- Find firms with federal experience
- Use publicly available databases
 - www.fbo.gov
 - www.fdps.gov
- Network, network, network!
- Build a team or subcontract with an experienced firm



IDEA



PLANNING



REALIZATION

SUCCESS



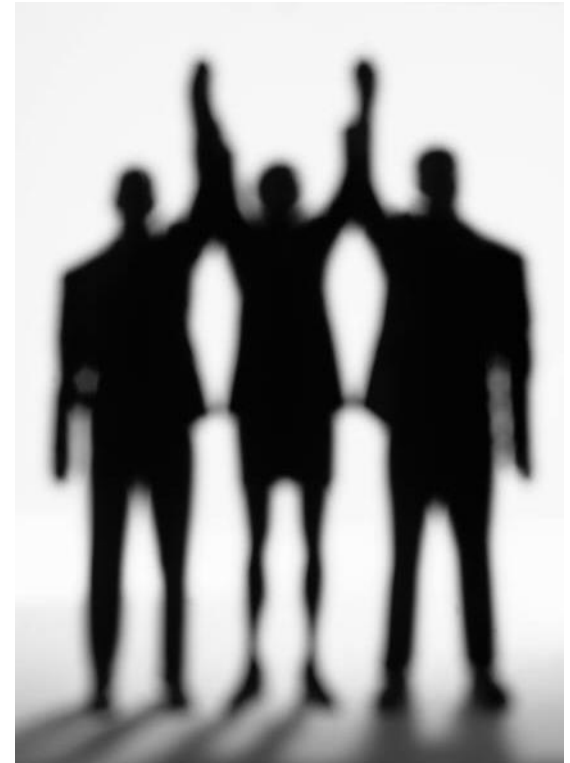
Proposal Strategy Meeting



- Develop a winning strategy and key messages
 - Respond to the evaluation criteria in RFP
 - Focus on information gleaned through your pre-proposal positioning
- Focus message on the client
- Establish work assignments, milestones

Building Internal Relationships

- Strong internal team is the foundation of a good proposal effort
- Respect time and talents of all team members
- Understand the role of each team member - set expectations
- Promote good communication and information sharing
- Clear division of responsibilities
- *Proactive* involvement in the process, rather than *reactive*



Building Your Resources

Production Resources

- Capabilities and limitations for production, information retrieval, archiving and printing
- Templates and styles for proposals, covers, tabs, project sheets, etc.

PAST PERFORMANCE EAPC RELEVANT PROJECTS

SIZE
101,000 SF

BUDGET
\$14 Million

COST
\$13.6 Million

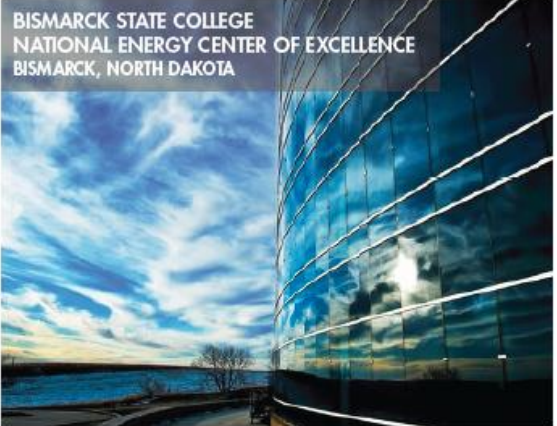
COMPLETED
2008

FIRM'S ROLE
Programming, Code Analysis,
Architecture, Interior Design,
Cost Estimating, Construction
Observation Services

CLIENT CONTACT
Dave Clark
Executive Vice President
701.224.5434

AWARD
Best Design 2009
American School & University

BISMARCK STATE COLLEGE
NATIONAL ENERGY CENTER OF EXCELLENCE
BISMARCK, NORTH DAKOTA



PROJECT DESCRIPTION

The building has a variety of purposes including classrooms, learning labs, and administrative offices.

The building is designed to meet the requirements of Silver-level LEED Certification. Green features include:

- Storm water management;
- Water efficient landscaping;
- 5% recycled content - Fly ash from the coal plants in the region is used in all of the concrete. Parking lots are 65% fly ash, structural elements (foundations and floor slabs) are 30% fly ash, and the flex-crete block is 70% fly ash;
- 20% local/regional materials;
- Low-emitting materials - adhesives & sealants, paints, carpet, and composite wood;
- Daylight & views in 75% of the spaces.

Proposal Writing

- Answer questions directly – the shorter the better and avoid jargon
- Put yourself in the client's shoes
- Follow the format of the Request for Proposal



Proposal Writing

- Substitute text for infographics where possible
- Avoid boilerplate

Battle Creek Co-Generation Energy System. Department of Veterans Affairs



"It is a five star facility that was completed by a five star team"

— SUE FUEHRER VA

Project Details

DeMaria has been hired to complete the Co-Generation Energy System project via the Design/Build delivery method at the Battle Creek VA Medical Center in Battle Creek, MI.

The project includes the design and construction of steam and electricity systems that result in the lowest delivered energy cost for the VA Medical Center utilizing renewable resources (wood chips) as fuel. The energy plant will deliver 2 megawatts of electricity to the campus and will generate substantial lifecycle savings to the Department of Veterans Affairs.

The project scope includes the installation of industrial-grade biomass gasifiers and boilers, material handling (including truck unloading, biomass transfer and ash collection), alternating current (A/C) generator(s) and associated generator and controls; power metering, data acquisition, and computer control equipment; utility interconnection equipment, including transformers, switchgear, and protective relays; computer control software; and associated ancillary materials and equipment.

PROJECT HIGHLIGHTS

Budget: 16,000,000

MARKET

[Government](#)

 Design/Build

LOCATION

[Michigan](#)

 Alternative Energy

OWNER

[Department of Veterans Affairs](#)

 BIM Utilization

ENGINEER / ARCHITECT

[HGA Architects](#)

 Federally Funded

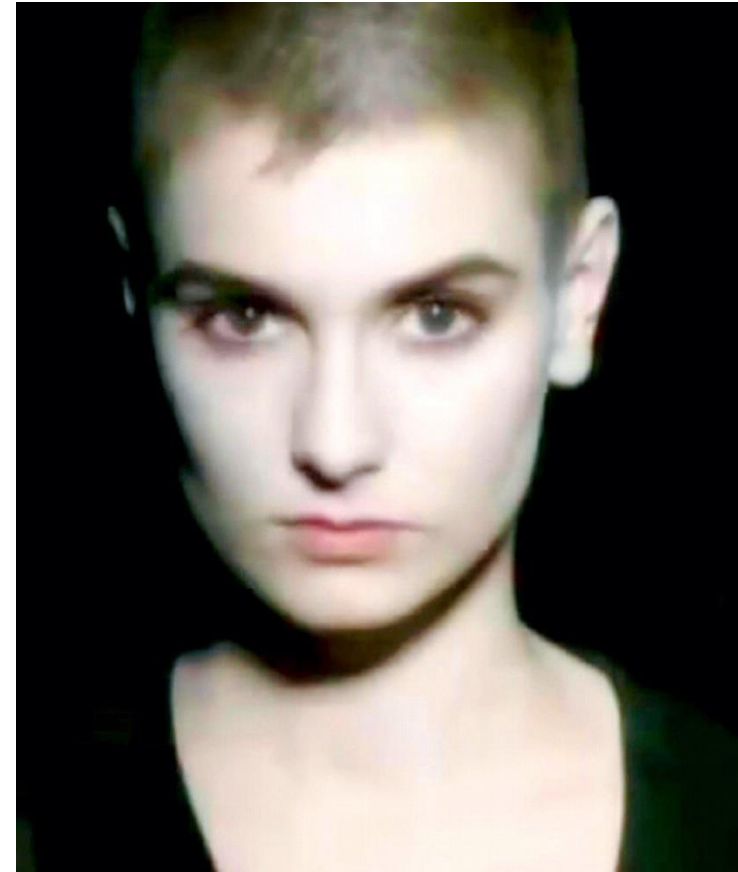
 Lean Construction

 Pre-Construction Service

 Sustainable Construction

Cover Letters

- Write First!
- Identify your key points/differentiators
- Convince the reader that nothing compares to you
- Be succinct

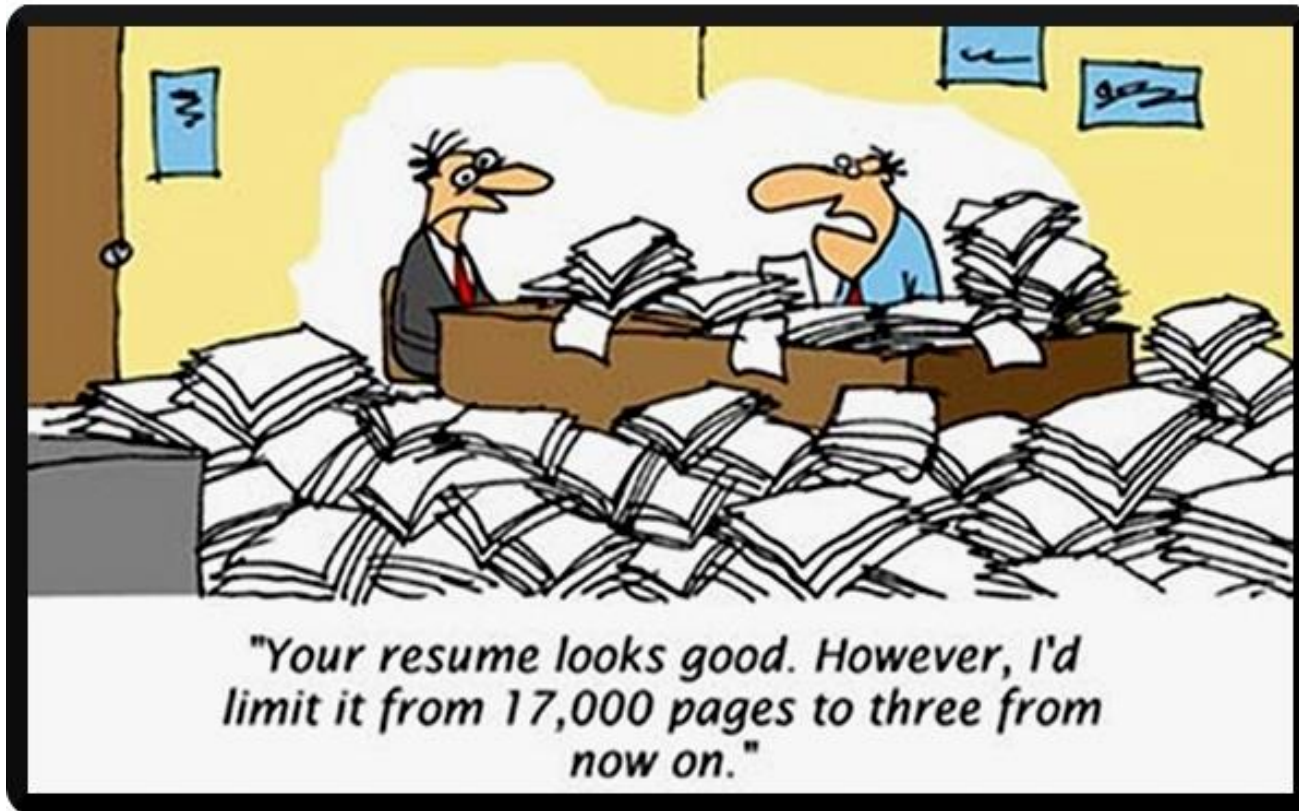


Experience Lists

- Only use relevant projects
- Highlight the similarity between the proposed project and your project

	American River College	Cabrillo College	California State University	Chaffey College	College of Saint Benedict	Florida State University	Hope College	Illinois State University	Napa Valley College	Macalester College	Orway Center for the Performing Arts	Los Angeles City College	Pantages Theatre	Purdue University	St. John's University	Texas A&M University - College Station	Texas A&M University - Commerce	University of California - Davis	University of Minnesota - Ted Mann	University of Minnesota - Northrop	University of Northern Iowa	University of Wisconsin-Stevens Point	University of Wyoming	Valparaiso University	University of Wisconsin - Parkside
Concert Hall	•	•	•																						
Recital Hall	•	•																							
Key Board Studio	•	•												•											
Choral Rehearsal	•	•		•		•																			
Instrumental Rehearsal	•	•	•	•	•																				
Percussion Studio	•	•																							
Voice Studio		•																							
Group Instruction Studio		•												•											
Individual Practice Room	•	•		•	•																				
Ensemble Practice Room	•	•																							
Instrument Storage	•	•		•				•																	
Faculty Offices				•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•	•
Faculty Teaching Studios	•	•			•															•	•	•	•	•	•
Music Classrooms	•	•												•											
Recording Studio	•		•											•											

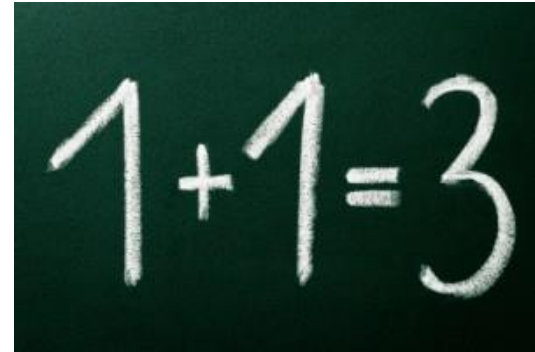
Resumes



- Highlight individual accomplishments on a project
- Keep short and sweet

Fatal Flaws

- Confusing organization
- Inadequate depth/capacity
- Unclear roles and responsibilities
- Not following the RFP outline
- All questions not clearly answered
- PM with little/no experience in Fed work
- Project resume is too old (more than 5 years)

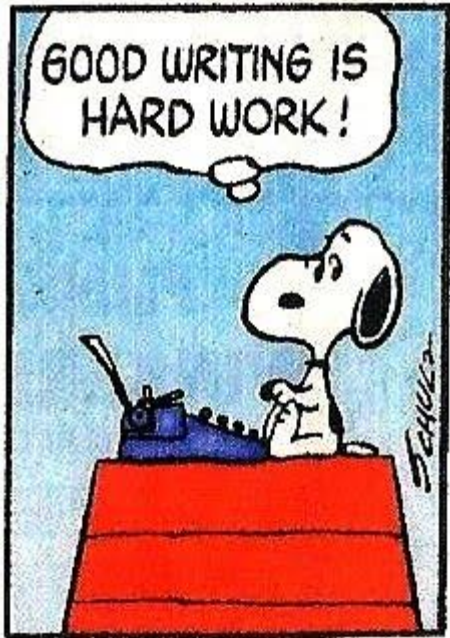


Always Schedule a Debrief

- Do it whether you win or lose
- Face to face is best if possible
- Make sure to do it within the FAR required timeframe (typically 48 hours after notification of not selection)



Writing and Editing



What is good writing?

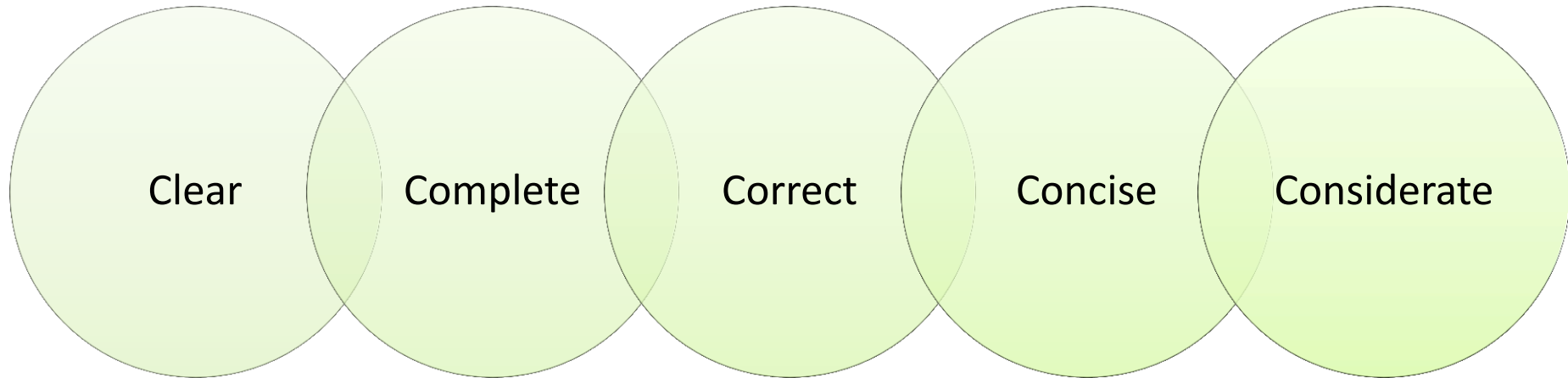
- Simple and direct
- Active, not passive (verbs, not nouns)
- Direct, not indirect
- Specific, not abstract
- Personal
- Shorter over longer

Some myths -

- To write well, write the way you speak
- Good writers turn out perfect copy with little effort
- Good writers are “creative” people
- A very large vocabulary is necessary to write well
- Writing is less important today than it once was



The Five “C’s” of Good Writing



Combating Writer's Block

- Write down questions about your writing assignment and answer them
- Remember – you don't have to start at the beginning; you can start in the middle, or write the last sentence
- Divide a large project into smaller components
- Change writing tools – if you're stuck at your computer, try a pen

Combating Writer's Block

- Collect writing samples – good and bad
- Know when to stop
- Set aside time to write when you're typically most productive
- Write in a place where you won't be disturbed
- Re-read something you recently wrote to get the creative juices flowing again
- Start the day by reviewing and editing what you wrote yesterday

Questions?

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