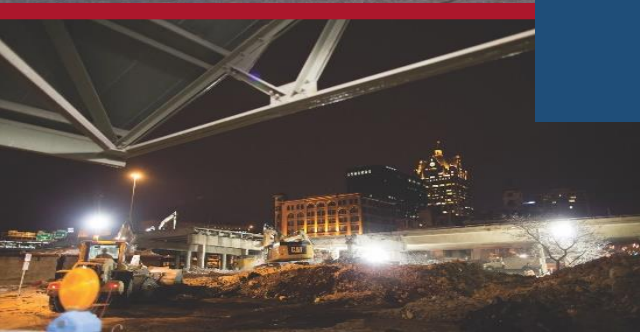




A Procurement Technical Assistance Center (PTAC)

PREPARING A WINNING GOVERNMENT PROPOSAL

May 2, 2018



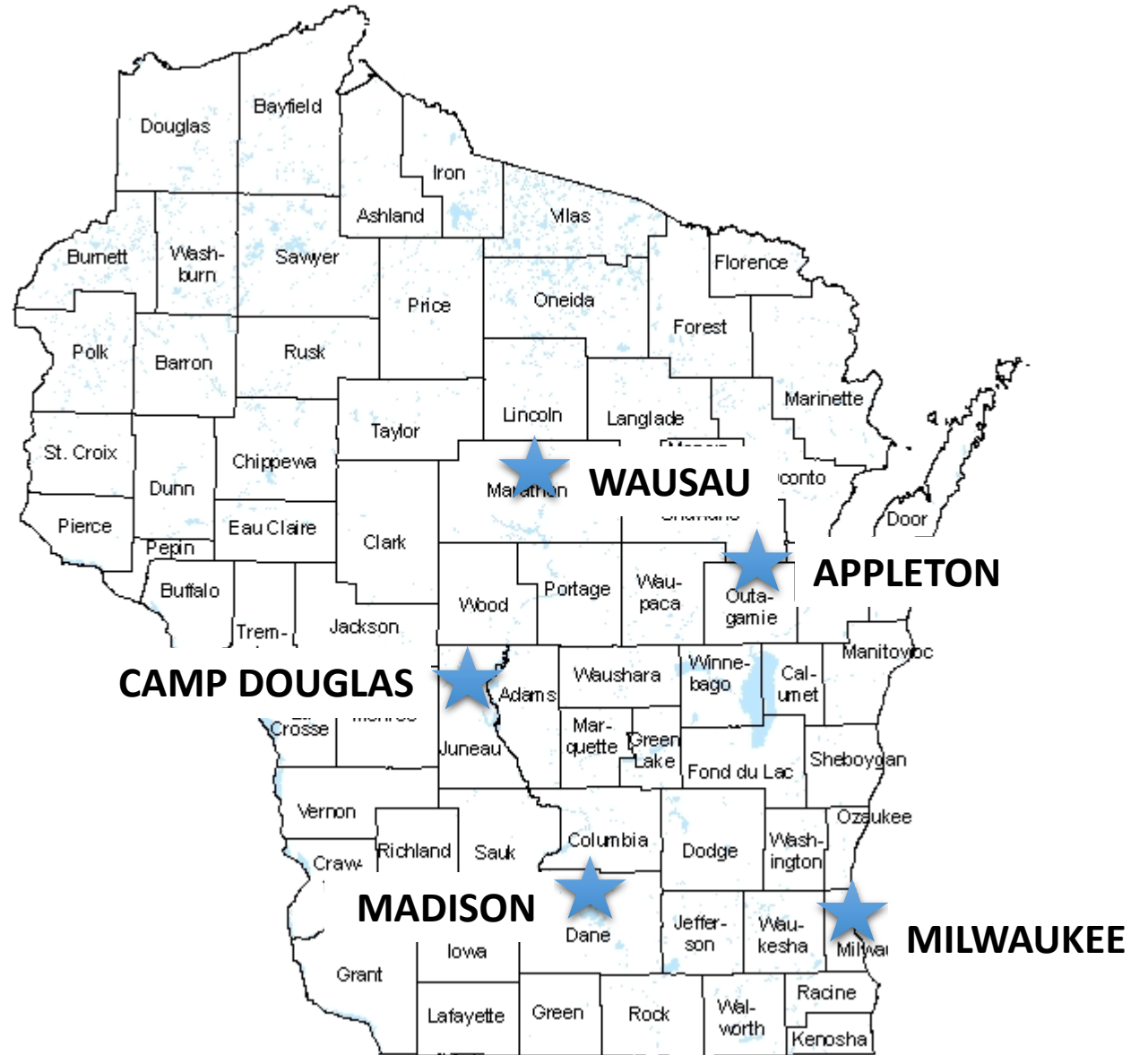
ABOUT WPI SUPPORTING THE MISSION

SERVING WISCONSIN
COMPANIES FOR 30 YEARS!

Assist businesses in creating,
development and growing their sales,
revenue and jobs through Federal, state
and local government contracts.

WPI OFFICE LOCATIONS

- MILWAUKEE – *Technology Innovation Center*
- MADISON –
 - *Madison Enterprise Center*
 - *FEED Kitchens*
- CAMP DOUGLAS – *Juneau County Economic Development Corporation (JCEDC)*
- WAUSAU – *Wausau Region Chamber of Commerce*
- APPLETON – *Fox Valley Technical College*



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GRANTS

SUCCESS &
AWARDS

FAQS

CONTRACTING BASICS AND WOMAN OWNED BUSINESS CERTIFICATIONS - MAY 3RD, MADISON

www.wispro.org

UPCOMING EVENTS

APRIL 26 2018
PREPARING A WINNING GOVERNMENT PROPOSAL
MILWAUKEE »

MAY 1 2018
FEDERAL ACQUISITION REGULATIONS (FAR) REVIEW -
SESSION 12: PARTS 42-45

MAY 3 2018
CONTRACTING BASICS AND WOMAN OWNED
BUSINESS CERTIFICATIONS
MADISON, WI »

MAY 3 2018
BUILDING YOUR BUSINESS – DEVELOPING THE TOOLS
FOR GROWTH AND SUCCESS FOR NATIVE AND TRIBAL
SMALL BUSINESSES
HALES CORNERS (MILWAUKEE) »

MAY 8 2018
ACQUISITION HOUR: HOW TO QUICKLY ANALYZE
SOLICITATIONS

CURRENT OPPORTUNITIES (3)

SERVICES OFFERED BY WPI

- FREE Bid Matching Services
- Individual Counseling and Assistance
- Locating Local, State and Federal Opportunities
- Government Market Strategy Development
- Training in use of Government websites and tools
- Assistance with System for Award Management (SAM) Registration
- Assisting in Market Research Process
- Development of Market Profile
- Small Business Subcontracting Plans Development, Outreach and Reporting
- Small Group Training
- Outreach and training with Local, State and Federal agencies
- Assist with Pre and Post Award Functions
- Assistance with Agency Specific Contracting Requirements
- Assistance with Contracting Regulations and Requirements, including FAR, DFAR, CFR
- Assistance with GSA Schedule Preparation and Administration
- Assistance with Local, State and Federal Certifications, including:
 - Service Disabled & Veteran Owned Small Business, HUBZone, Woman Owned Small Business, 8(a) Business Development Program
 - State
 - Local
 - DBE
- Bid review and Submission Assistance
- Proposal review and Submission Assistance
- Capabilities Statement and Related Government Marketing Material Development
- Assistance in Locating and Developing Teaming Partners and Subcontractors
- Updated Government Market Information

WHAT WE WILL COVER TODAY

- Basics
- Getting Started
- What Now
- Writing the Proposal
- Best Practices

BASICS

ASSUMPTIONS

Solicitation has been reviewed and a GO decision has been made

- Meet any set-aside requirements
- Have expertise in the area of work
- Have resources available to complete the contract
- Have time to submit an excellent proposal
- Are able to make a profit
- Understand type of solicitation used, method of award, and type of contract to be awarded.

WHO IS YOUR AUDIENCE?

- Who will be evaluating your proposal?
- What is the evaluation criteria?
- What do they want?
- What do you have that meets their needs?
- Use their own language
- Tell them what they want to hear

GETTING STARTED

ESTABLISH A TEAM

- One person should be in charge of coordinating all efforts of the response.
- How large of a team formed can depend on the size of your business. Team should include finance, human resources, leadership, and project management.
- Develop strategy, are you going for highly differentiated value added services or lowest priced bid?
- UNLESS you are responding to a complex proposal - you do not need to hire a consultant – you can do this.

REVIEW SOLICITATION DOCUMENT

- Team leader should read the entire package again, including all attachments. Make sure you understand it.
- Highlight the document. Mark it up. Use post-its.
- Pay close attention to any “between the lines” information.
- What is the government really looking for? Review essential requirements vs nice to have requirements.
- Note due date - draft a time line for proposal submission
- Note submission requirements and page limitations

REVIEW SOLICITATION DOCUMENT

- Prepare questions for submission to the contracting officer and submit timely there is usually a cutoff time for questions.
- Avoid questions that can be answered through research or public information.
- Decide if various staff can be working on the proposal at the same time, i.e. technical proposal by experts, administrative staff assembling resumes of key personnel
- Follow the rules. The government forbids contact with the end user during the solicitation process.

WHAT NOW

WHAT TO AVOID

- Nonconformance with the instructions may result in an unfavorable proposal evaluation
- Do not simply rephrase or restate the Government's requirement, address how the proposal intends to meet the requirement
- Elaborate brochures or documentation, binding, detailed art work, or other embellishments are generally unnecessary and are not desired

WHAT TO INCLUDE

- Proposal should provide sufficient information to demonstrate the offerors capability to satisfactorily perform the objectives and how their total offer will meet the Government's requirement.
- Proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for substantiating the validity of the stated claims.
- Assume the Government has no prior knowledge of your abilities and experience even if you are the incumbent.

WHAT TO INCLUDE

- Show your capabilities, don't just tell. Never overstate qualifications. Focus on firm's strengths.
- Provide specifics on proposed staffing, being very clear on who the responsible person is, and identify other key members of the team, their area(s) of expertise and their anticipated roles.
- Include all data and information requested in the solicitation. Note it may be located in multiple areas.
- Demonstrate ability to meet all solicitation requirements including terms and conditions, representations and certifications, and technical requirements.

WHAT TO INCLUDE

- Narrative response to non-priced evaluation factors should be in the same order as outlined in solicitation.
- Complete any necessary fill-ins or new certifications and return with your proposal.
- Sign your proposal. First page of solicitation.
- Return any solicitation amendments, signed by the same official signing the proposal.
- Submit proposal in media requested, and include the number of copies requested.
- Include a Cover Letter. Use Table of Contents and tabs, if needed.

WHAT TO RETURN

- Proposal
- Solicitation document, document may indicate what pages to return
- Past Performance Information

Additional common items to return include:

- Descriptive literature
- Resumes
- Insurance Certificates
- Licenses
- Bonding, if required

WRITING THE PROPOSAL

COVER LETTER

- Note page limitations for cover letter. Also note if cover letter counts towards any other page limitations.
- Include name and address of company submitting proposal.
- Include name, address, e-mail address and telephone number of person with the actual power to legally bind the company
- Cover letter should persuade the government as to why the company should be awarded the contract.

WRITING THE PROPOSAL

- Start with an outline based on information from the solicitation document.
- Include all technical evaluation factors. Organize proposal to match solicitation.
- Address how you will meet the requirement. Completely cover the who, what, where, how, and why.
- Include any required statements, sample reports, resumes, etc.
- Review solicitation again to make sure nothing has been overlooked.

OUTLINE

Example:

The proposal should demonstrate how the offeror plans for use of its home office resources, mitigation techniques, quality control, and safety processes.

Outline:

- Home Office Resources
- Mitigation Techniques
- Quality Control
- Safety Processes

PAST PERFORMANCE INFORMATION

- Review solicitation requirements. May need to provide detailed information or even send out questionnaires to your references. Provide only the number they ask for.
- Note any page limitations and number of copies
- Use the format outlined in the solicitation
- Relatively new companies with no prior past performance should be rated neutral having no positive or negative significance. However, try to provide something.
- Can generally use commercial past performance.

CONTRACT PRICING

- Complete price schedule
- Check, double check, and then recheck pricing, extensions, and totals.
- How are you going to price option years?
- You must make a profit.
- Never low ball your proposal thinking you will make money on contract modifications.
- Factor in all costs to complete contract, including reporting requirements.

CONTRACT PRICING

- Determine profit level to be used. Generally use same level for commercial customers with similar work.
- Factor in hidden contract requirements that increase your costs, i.e. insurance requirements, labor wage rates.
- Factor in requirements not standard to your industry that will cost you more to provide, i.e. employee background checks.
- Offer a fair price.

CONTRACT TERMS

- Understand the impact clauses may have on your proposal. Referenced Provisions/Clauses have the same impact as those in full text.

EVALUATION FACTORS

- Simple requirements may only have a couple of evaluation factors.
- Complex requirements may have evaluation factors and significant sub factors.
- Common evaluation factors used include:
 - Past performance
 - Compliance with solicitation requirements
 - Technical excellence
 - Management capability
 - Personnel qualifications
 - Prior experience
 - Price

EVALUATION FACTORS

- Review solicitation document to determine specific evaluation factors.
- Determine the basis for award.
- Evaluation will be based on information in the proposal.
- Note any requirements for oral presentations and make necessary preparations to participate.

BEST PRACTICES

BEST PRACTICES

- Customize the proposal.
- If you are reusing a proposal make sure you change it as necessary.
- Demonstrate knowledge in the proposal by providing as much insight as possible into the issue, the industry, and the government
- Answer questions completely
- Provide details on pricing if requested
- Review Salient Characteristics – Product features the Government cannot live without
- If requested provide Descriptive Literature even if offering Brand Name item

BEST PRACTICES

- Note any requirements for specific type/sized font, margin requirements, and maximum number of pages.
- Mark and label envelopes as instructed to. Generally price and technical proposals are submitted in separate volumes/envelopes.
- Note address to submit response to. May be different than what is on the first page.
- Submit timely – late offers are not accepted.
- Submit required samples as specified in the solicitation.

BEST PRACTICES

- Attend any pre-proposal conference. Sign in last.
- See if you can submit alternative proposals
- Follow any instructions provided
- Look for amendments.
- Never refer back to another page for a response. Rephrase the answer again.
- Better qualifications increase your chances of winning, not prettier proposals.
- Contact WPI for assistance.

FINAL DOS AND DON'TS

- Prior to submittal, do have someone else review the proposal.
- If you are unsure if your proposal was received do follow up with the contracting officer.
- Do not contact the contracting officer or program manager during the evaluation. They will contact you if they need any additional information. The Government can move very slowly – you need to have patience.
- Realize it may take several tries before you are awarded your first contract.

SUMMARY

- Responding to a solicitation is not the same as responding to a grant.
- While the basic information applies whether responding to a Federal, State, or Local solicitation, there are differences, so read each document carefully.

SUMMARY

Writing an effective proposal takes time, careful planning and a complete understanding of the requirement. The key is pulling together a proposal that clearly describes why your company is the best fit to perform the work and offers the best solution at a competitive price.

Thank you to our hosts.



UPCOMING TRAINING - EVENTS

WHAT IS WPI'S CURRENT WEBINAR SCHEDULE?

May 8, 2018 – **How to Quickly Analyze Solicitations** – [CLICK HERE](#) for additional information – presented by Carol Murphy – Wisconsin Procurement Institute (WPI)

May 9, 2018 – **Change in Ownership on a Small Business and Consequences for Government Contracts, Certifications and Succession Planning** – [CLICK HERE](#) for additional information – presented by Emily A. Constantine – Attorney – Husch Blackwell LLP

May 9, 2018 – **The Future of SAM.gov** – [CLICK HERE](#) for additional information – presented by Kim Garber – Wisconsin Procurement Institute (WPI)

May 22, 2018 – **Export Compliance and Small Business** – [CLICK HERE](#) for additional information – presented by Emily A. Constantine – Attorney – Husch Blackwell LLP

May 23, 2018 – **Cyber Security for Current and Prospective DOD Contractors and Subcontractors** – [CLICK HERE](#) for additional information – presented by Marc Violante – Wisconsin Procurement Institute (WPI)

June 5, 2018 – **Invoicing the Department of Defense Using WAWF/iRAPT** – [CLICK HERE](#) for additional information – presented by Benjamin Blanc – Wisconsin Procurement Institute (WPI)

June 6, 2018 – **Flow-down Clauses – Management and Responsibilities for Federal Contractors** – [CLICK HERE](#) for additional information – presented by Carol Murphy – Wisconsin Procurement Institute (WPI)

June 12, 2018 – **Code of Business Ethics and Conduct in Government Contracting** – [CLICK HERE](#) for additional information – presented by Emily A. Constantine, Attorney, Husch Blackwell LLP

June 13, 2018 – **Update on the Fair Labor Standards Act** – [CLICK HERE](#) for additional information – presented by Corey Walton, Community Outreach and Resource Planning Specialist, U.S. Department of Labor/Wage & Hour Division

<https://www.wispro.org/faqs/what-is-wpis-webinar-schedule/>

CONTRACTING BASICS AND WOMAN OWNED BUSINESS CERTIFICATIONS

MAY 3, 2018 MADISON, WI

| | |
|-----------------|---|
| Start Date | May 3, 2018 |
| End Date | May 3, 2018 |
| Time | 11:30 am - 1:30 pm |
| Facility | Wisconsin Women's Business Initiative Corporation |
| Address | 2300 S Park St, Madison, WI 53713 |
| Register Online | Register for Event |

As owner of a woman owned business, you may be considering leveraging your woman owned business status in the government and corporate marketplace. Woman owned businesses can receive an advantage when selling to various Public and Private entities.

During this session we will start by providing some insights on how to determine what markets might be your best fit and what qualities are most valued in this marketplace.



REGISTER

Wisconsin Women's Business Initiative Corporation (WWBIC)

U.S Small Business Administration (SBA)

Wisconsin Procurement Institute (WPI)

<https://www.wispro.org/events/13552/>

6TH ANNUAL U.S. DEPARTMENT OF VETERANS AFFAIRS BUSINESS CONFERENCE

MAY 16, 2018 MILWAUKEE

| | |
|-----------------|---|
| Start Date | May 16, 2018 |
| End Date | May 16, 2018 |
| Time | 8:00 am - 4:30 pm |
| Facility | Hampton Inn |
| Address | 8201 W Greenfield Ave, Milwaukee, WI 53214 |
| Contact Info | Carol Murphy carolm@wispro.org 414-270-3600 |
| Register Online | Register for Event |

This conference will focus on procurement procedures and business opportunities for veteran owned businesses with the Department of Veterans Affairs, VISN 12 area consisting of Milwaukee, WI; Madison, WI; Tomah, WI; Chicago, IL; Danville, IL; and Iron Mountain, MI with eight medical centers, 38 outpatient clinics, eight nursing homes, and six domiciliaries, providing health care services to the 700,000 Veterans who reside within its four state (Illinois, Michigan's Upper Peninsula, Wisconsin, and Northwest Indiana) area. Overall, the Department of Veterans Affairs spends over \$23 billion annually.



REGISTER

U.S. Department of Veterans Affairs (VA)

Wisconsin Department of Veterans Affairs (WDVA)

National Contract Management Association (NCMA) – Wisconsin Chapter

Northwest Michigan PTAC

US Small Business Administration (SBA)

Wisconsin Procurement Institute (WPI)

<https://www.wispro.org/events/6th-annual-u-s-department-of-veterans-affairs-business-conference/>

12TH ANNUAL VOLK FIELD – FORT MCCOY SMALL BUSINESS CONFERENCE

JUNE 19, 2018 FORT MCCOY, WI

| | |
|--------------|--|
| Start Date | June 19, 2018 |
| End Date | June 20, 2018 |
| Facility | Ft. McCoy Building 905 |
| Address | Ft. McCoy Building 905 11th Avenue Fort McCoy, WI |
| Contact Info | Dave Olson davido@wispro.org (608) 338-8018 |

Previously known as the Annual Volk Field Small Business Conference – this year, the conference will be held at Ft. McCoy.

SAVE THE DATE!



Fort McCoy

Volk Field Air National Guard Base

Juneau County Economic Development Corporation

American Indian Chamber of Commerce (AICCW) – First American Capital Corp. (FACC)

Center for Economic and Entrepreneur Development (CEED)

Small Business Administration (SBA)

Western Dairyland

Wisconsin Economic Development Corporation (WEDC)

Wisconsin Procurement Institute (WPI)

<https://www.wispro.org/events/12th-annual-volk-fieldfort-mccoy-small-business-conference/>



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Governor's Conference on Minority Business Development
Welcoming minority, woman and veteran-owned businesses

December 13 - 14, 2017

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SAVE THE DATES
2018 MARKETPLACE
December 12-13, 2018

LOCATION:
Potawatomi Conference Center
Milwaukee, Wisconsin

THANK YOU

2017



QUESTIONS?

PRESENTED BY

Wisconsin Procurement Institute (WPI)

www.wispro.org

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Milwaukee, WI 53226