

# 2015 Small Business Government Contracting Series

## **TYPES OF FEDERAL SOLICITATIONS**

March 17, 2015



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**Providing expert technical  
assistance to  
FEDERAL, STATE and LOCAL  
GOVERNMENT  
Contractors  
And Subcontractors**

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**A Procurement Technical  
Assistance Center (PTAC)  
Serving the Wisconsin Business  
Community**

**WPI Offices located at:**

**Milwaukee County Research Park**

10437 Innovation Drive, Suite 320  
Milwaukee, WI 53226

414-270-3600 FAX: 414-270-3610

**Juneau County Economic Development Corp.**

122 Main St - Camp Douglas, WI 54618

608-427-2455 FAX: 608-427-2086

**Western Dairyland EOC, Inc.**

418 Wisconsin St. - Eau Claire WI 54703

608-427-2455 FAX: 608-427-2086

**Fox Valley Technical College – DJ Bordini Center**

5 Systems Drive – Appleton WI 54912

920-840-3771 FAX: 414-270-3610

**Racine County Economic Development Corporation – Launch Box**

141 Main Street, Suite 2, Racine, WI 53403

414-270-3600 FAX: 414-270-3610

**Madison Enterprise Center**

100 S. Baldwin St., Madison, WI 53703

608-444-0047 FAX: 414-270-3610

**Food Enterprise & Economic Development (FEED)**

1219 N. Sherman Ave., Madison, WI 53704

608-444-0047 FAX: 414-270-3610

**Wausau Region Chamber of Commerce**

200 Washington Street, Wausau, WI 54403

920-456-9990 FAX: 414-270-3610

**[www.wispro.org](http://www.wispro.org) - [info@wispro.org](mailto:info@wispro.org)**

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## 8 WAYS A SHUTDOWN WOULD DAMAGE HOMELAND SECURITY

### UPCOMING EVENTS [→](#)

02/26/2015  
FEDERAL PRIME CONTRACTOR GROUP MEETING  
ST. FRANCIS (MILWAUKEE) »

03/03/2015  
SMALL BUSINESS GOVERNMENT CONTRACTING  
SERIES: SELLING TO THE DEPARTMENT OF VETERANS  
AFFAIRS  
WAUWATOSA »

03/04/2015  
ACQUISITION HOUR: LEARNING ABOUT WAWF - IRAPT  
WEBINAR »

03/09/2015  
ENTERING THE GOVERNMENT MARKET - A PRIMER  
RACINE »

03/11/2015  
ACQUISITION HOUR: PREPARING FOR CSPR AUDIT  
WEBINAR »

### CURRENT OPPORTUNITIES (7) [→](#)

#### GET STARTED WITH THE BASICS

Questions & answers on how to get started.

[GET STARTED](#)

#### SIGN-UP FOR OUR NEWSLETTER

Stay up-to-date with the latest WPI news.

[SIGN UP](#)

#### HAVE A QUESTION? WE'RE HERE TO HELP.

One of our staff of experts is available to answer your questions.

[GET HELP](#)

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## 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 and Assistance, 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

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# What we will Cover Today

- Types of Solicitations and Documents
- NAICS Codes
- Set Asides
- Forms Used
- Locating Solicitations On-Line

# Types of Documents

- Request For Information (RFI)
- Request For Quotations (RFQ)
- Invitation For Bid (IFB)
- Request For Proposal (RFP)

# Request For Information (RFI)

- Sources Sought Announcement
- Is not a solicitation
- Government is conducting Market Research
- Issued for planning purposes to see what type of competition is available
- Based upon responses received then solicitation may be issued on a broader scale
- Used when Government thinks they know what they want but may need more information from vendors. Typically followed by a solicitation.

# Request For Quotation (RFQ)

- Least formal of the solicitations
- Allows Government to obtain information and costs from vendors.
- Typically used for small-dollar commercial contracts or purchases. (Simplified Acquisitions)
- Allows for quick evaluation by Government of quotes received.
- Generally used for under \$150,000, however can be used for requirements up to \$6.5 million.
- Open Market RFQs over \$25,000 are posted to Federal Business Opportunities Website (FBO).

See FAR 13

# Request For Quotation (RFQ)

The RFQ does not solicit binding offers. A Quotation is not an offer and cannot be accepted by the Government to form a binding contract.

The Government offers the contractor a contract when they issue an order/contract.

A contract is established when the contractor accepts the Government's offer. Contractor acceptance occurs by signing an order/contract, furnishing the supplies or services ordered, or by proceeding with the work to the point where substantial performance has occurred.

# Invitation For Bid (IFB)

- Sealed Bidding employs competitive bids and public opening of bids.
- Bidder agrees to perform the work described in a contract at a specified cost.
- Bids are evaluated without discussions (negotiations).
- Most formal of the solicitations.

See FAR 14

# Invitation For Bid (IFB)

- Contract award is made to the lowest price responsive, responsible bidder.
- Responsive means a submitted bid which conforms in all material respects to the IFB. Bidder has taken no exceptions to the contract, has not crossed out anything.
- Responsible means a bidder has the capability in all respects to fully perform the contract requirements. Has integrity and reliability to assure good-faith performance. Government may consider financial resources, past performance, experience, organization, technical skills, delivery, and facilities.

# Invitation For Bid (IFB)

- IFBs clearly describes Government requirements.
- Open Market IFBs over \$25,000 are posted to Federal Business Opportunities Website (FBO).
- Sealed bids are submitted to be opened at the time and place stated. Bid price is recorded on abstract and becomes public information.
- Generally used for construction projects, however, could be used for a clearly defined requirement like a semi-truck load of copy paper.

# Invitation For Bid (IFB)

- Bids cannot be changed once they have been opened.
- Shall be firm-fixed price contract or fixed-price contract with economic price adjustment.
- Binding contract is awarded by the Government with the contracting officer's signature on the contract.

# Request For Proposal (RFP)

- A contract awarded using other than sealed bidding procedures is a negotiated contract.
- Used to communicate the Government requirements to prospective contractors and to solicit proposals from them.
- Used when the Government has a problem but does not know how to solve it.
- RFPs describe the Government's requirement, anticipated contract terms and conditions, information required to be in the submitted proposal, and factors used to evaluate the proposal and their relative importance.

See FAR 15

# Request For Proposal (RFP)

Award made by use of the “Best Value” to the Government.

- Tradeoff Process - allows for cost/technical trade off – Government may pay more for higher ranked technical offer.
- Lowest Price Technically Acceptable – each offer evaluated on pass/fail to be determined acceptable or unacceptable. From acceptable offers lowest priced will receive the award.
- Oral Presentations – provide an opportunity for dialogue among the parties. Solicitation should provide details regarding the presentation.

# Request For Proposal (RFP)

## Competitive Range and Rounds of Negotiations

If the Government receives numerous proposals, they may establish a competitive range consisting of the highest ranked technical proposals that would be in line for a contract award. All others will be removed from the competition and notified. The current rule is “when in doubt leave them out”.

Meaningful discussions are held and Government will request revised proposals. Listen carefully to what the Government is telling you and, if possible, revise your proposal appropriately.

# Request For Proposal (RFP)

- Government may award on initial proposals or allow for discussions with revised proposals.
- Open Market RFPs over \$25,000 are posted to Federal Business Opportunities Website (FBO).
- Contract award is made when the Government accepts either the entire proposal or part of the proposal. Contractor's proposal becomes part of the contract.


# NAICS

- North American Industry Classification System Codes (NAICS)
- Small Business Size Standards are expressed in millions of dollars or number of employees
- Check NAICS code and small business size standard
  - i.e. 236220 Commercial and Institutional Building Construction
  - \$33.5 million
- Located on the SBA website: <https://www.sba.gov/content/small-business-size-standards>

# Set Asides

- Set Asides are procurements reserved for Small Business or Small Business subset
  - Small Business
  - Woman-Owned Small Business
  - Veteran-Owned Small Business (Department of Veterans Affairs only)
  - Service-Disabled Veteran-Owned Small Business
  - HUBZone Small Business
  - 8(a)
- FAR states all procurements under \$150,000 shall be set aside for Small Businesses.
- You must meet the set aside requirements to submit a response

# SF 1449

SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30				1. REQUISITION NUMBER	PAGE 1 OF
2. CONTRACT NO.		3. AWARD/EFFECTIVE DATE	4. ORDER NUMBER	5. SOLICITATION NUMBER	6. SOLICITATION ISSUE DATE
7. FOR SOLICITATION INFORMATION CALL: 		a. NAME		b. TELEPHONE NUMBER (No collect calls)	8. OFFER DUE DATE/ LOCAL TIME
9. ISSUED BY		CODE		10. THIS ACQUISITION IS	
				<input type="checkbox"/> UNRESTRICTED OR <input type="checkbox"/> SET ASIDE: % FOR: <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> EMERGING SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> 8(A)	
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED	12. DISCOUNT TERMS			13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)	13b. RATING
<input type="checkbox"/> SEE SCHEDULE					14. METHOD OF SOLICITATION
15. DELIVER TO	CODE			16. ADMINISTERED BY	CODE
17a. CONTRACTOR/OFFEROR	CODE		FACILITY CODE	18a. PAYMENT WILL BE MADE BY	CODE
TELEPHONE NO.					

# SF 18

<b>REQUEST FOR QUOTATION (THIS IS NOT AN ORDER)</b>	THIS RFO <input type="checkbox"/> IS <input type="checkbox"/> IS NOT A SMALL BUSINESS SET-ASIDE	PAGE OF PAGES 
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1. REQUEST NO.	2. DATE ISSUED	3. REQUISITION/PURCHASE REQUEST NO.	4. CERT. FOR NAT. DEF. UNDER BDSA REG. 2 AND/OR DMS REG. 1	RATING
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5a. ISSUED BY	6. DELIVER BY (Date)
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5b. FOR INFORMATION CALL (NO COLLECT CALLS)		7. DELIVERY	
NAME	TELEPHONE NUMBER		<input type="checkbox"/> FOB DESTINATION <input type="checkbox"/> OTHER <small>(See Schedule)</small>

	AREA CODE	NUMBER	9. DESTINATION	
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8. TO:				
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a. NAME	b. COMPANY	b. STREET ADDRESS	
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c. STREET ADDRESS			c. CITY	
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d. CITY	e. STATE	f. ZIP CODE	d. STATE	e. ZIP CODE
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10. PLEASE FURNISH QUOTATIONS TO THE ISSUING OFFICE IN BLOCK 5a ON OR BEFORE CLOSE OF BUSINESS (Date)	<p><b>IMPORTANT:</b> This is a request for information, and quotations furnished are not offers. If you are unable to quote, please so indicate on this form and return it to the address in Block 5a. This request does not commit the Government to pay any costs incurred in the preparation of the submission of this quotation or to contract for supplies or service. Supplies are of domestic origin unless otherwise indicated by quoter. Any representations and/or certifications attached to this Request for Quotation must be completed by the quoter.</p>
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**11. SCHEDULE (include applicable Federal, State and local taxes)**

ITEM NO.	SUPPLIES/ SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
(a)	(b)	(c)	(d)	(e)	(f)

# SF 33

<b>SOLICITATION, OFFER AND AWARD</b>		1. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)		RATING	PAGE OF PAGES
2. CONTRACT NUMBER	3. SOLICITATION NUMBER	4. TYPE OF SOLICITATION <input type="checkbox"/> SEALED BID (IFB) <input type="checkbox"/> NEGOTIATED (RFP)		5. DATE ISSUED	6. REQUISITION/PURCHASE NUMBER
7. ISSUED BY		CODE	8. ADDRESS OFFER TO <i>(If other than Item 7)</i>		

**NOTE:** In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder".

## SOLICITATION

9. Sealed offers in original and \_\_\_\_\_ copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if handcarried, in the depository located in \_\_\_\_\_ until \_\_\_\_\_ local time \_\_\_\_\_  
(Hour) (Date)

**CAUTION - LATE Submissions, Modifications, and Withdrawals:** See Section L, Provision No. 52.214-7 or 52.215-1. All offers are subject to all terms and conditions contained in this solicitation.

10. FOR INFORMATION CALL:	A. NAME	B. TELEPHONE <i>(NO COLLECT CALLS)</i>		C. E-MAIL ADDRESS
		AREA CODE	NUMBER	

## 11. TABLE OF CONTENTS

(X)	SEC.	DESCRIPTION	PAGE(S)	(X)	SEC.	DESCRIPTION	PAGE(S)
PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES			
	A	SOLICITATION/CONTRACT FORM			I	CONTRACT CLAUSES	
	B	SUPPLIES OR SERVICES AND PRICES/COSTS		PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACH.			
	C	DESCRIPTION/SPECS./WORK STATEMENT			J	LIST OF ATTACHMENTS	
	D	PACKAGING AND MARKING		PART IV - REPRESENTATIONS AND INSTRUCTIONS			
	E	INSPECTION AND ACCEPTANCE			K	REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS	
	F	DELIVERIES OR PERFORMANCE					
	G	CONTRACT ADMINISTRATION DATA			L	INSTRS., CONDS., AND NOTICES TO OFFERORS	
	H	SPECIAL CONTRACT REQUIREMENTS			M	EVALUATION FACTORS FOR AWARD	



# On Line Searches

# WPI Bid Matching Service

- Free Service offered by WPI
- Total of 2229 sites searched
- Tailored to your search criteria to locate opportunities that will be of interest to you

# Resources:

- FAR: <http://www.acquisition.gov/far/>
- Federal Business Opportunities (FedBizOpps) website - <https://www.fbo.gov/>
- Wisconsin Procurement Institute  
Phone: 414-270-3600 [www.wispro.org](http://www.wispro.org)



# Upcoming WPI Events

- ***Small Business Government Contracting Series continues the first and third Tuesday of each month through June, 2015 – Milwaukee, WI***
- ***Acquisition Hour (Weekly Webinar) through June, 2015***
- ***2015 National Energy Form and Small Business Industry Days – April 13-16, 2015 - Rosemont, IL***
- ***How to Do Business with the US Forest Service – April 21, 2015 – Park Falls, WI***
- ***Cost and Pricing for Department of Defense Contractors and Subcontractors – April 29, 2015 - Pewaukee, WI***
- ***12<sup>th</sup> Annual Women’s Business Conference – April 30, 2015 – Eau Claire, WI***
- ***3<sup>rd</sup> Annual Department of Veterans Affairs Business Conference – May 12, 2015 – Milwaukee, WI***
- ***Doing Business with the National Park Service – June 23, 2015 – Ashland, WI***
- ***9<sup>th</sup> Annual Volk Field Small Business Conference – July 29 – 30, 2015 – Camp Douglas, WI***
- ***Marketplace 2015 – October 29-30, 2015 – Milwaukee, WI***

# 9TH ANNUAL VOLK FIELD SMALL BUSINESS CONFERENCE –

## CONTRACTING IN TIMES OF EMERGENCY, DISASTERS AND CRISIS

July 29 – 30, 2015 – Camp Douglas, WI



### Sponsored and Hosted by:

- Volk Field Air National Guard Base
- Juneau County Economic Development Corporation
- US Small Business Administration
- Western Dairyland
- Wisconsin Procurement Institute
- Monroe County Economic Development
- SBDC – UW La Crosse
- Northwest Michigan PTAC

### PROGRAM HIGHLIGHTS:

*Current Issues in Government Contracting*  
*Contracting Opportunities in Emergency*  
*Preparedness and Disaster Relief*  
*Networking and Individual Meetings*  
*Capabilities Statement Exhibit*  
*Capabilities Presentation Competition*  
*Financing and Bonding for your Small*  
*Businesses*  
*Social Media*

UPDATED information will be posted to

<http://tinyurl.com/Volk2015> or contact David Olson at 608-427-2455 or [davido@wispro.org](mailto:davido@wispro.org)

# For Assistance or Additional Information - Contact

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Milwaukee, WI 53226

414-270-3600 or [carolm@wispro.org](mailto:carolm@wispro.org)