



A Procurement Technical
Assistance Center (PTAC)



HOW TO SUCCESSFULLY COMPLETE AND SUBMIT A REQUEST FOR PROPOSAL

MILWAUKEE PUBLIC SCHOOLS 3RD ANNUAL BUSINESS SYMPOSIUM

April 26, 2019 – Milwaukee, WI



ABOUT WPI SUPPORTING THE MISSION

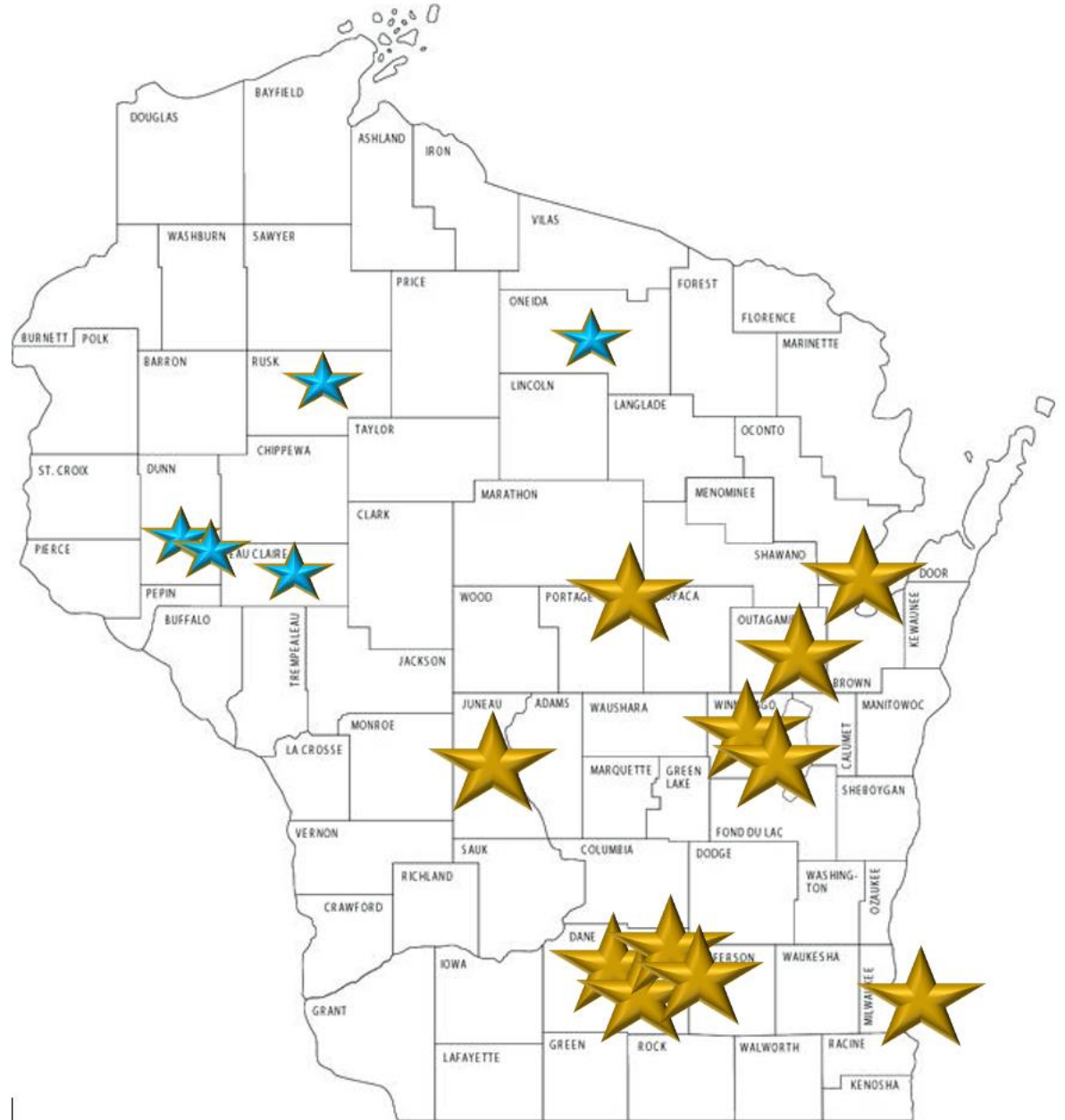
SERVING WISCONSIN
COMPANIES FOR 31 YEARS!

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

*WPI is a Procurement Technical Assistance Center (PTAC) funded in part by
the Defense Logistics Agency (DLA), WEDC and other funding sources.*

WPI OFFICE LOCATIONS

- MILWAUKEE – *Technology Innovation Center*
- MADISON –
 - *FEED Kitchens*
 - *Dane County Latino Chamber of Commerce*
 - *Wisconsin Manufacturing Extension Partnership (WMEP)*
 - *Madison Area Technical College*
- CAMP DOUGLAS– *Juneau County Economic Development Corporation (JCEDC)*
- STEVENS POINT – *IDEA Center*
- GREEN BAY - *Advance Business & Manufacturing Center*
- APPLETON – *Fox Valley Technical College*
- OSHKOSH –
 - *Fox Valley Technical College*
 - *Greater Oshkosh Economic Development Corporation*
- EAU CLAIRE – *Western Dairyland*
- MENOMONIE
 - *Dunn County Economic Development Corporation*
 - *UW Stout - Manufacturing Outreach Center*
- LADYSMITH – *Indianhead Community Action Agency*
- RHINELANDER – *Nicolet Area Technical College*



Search ...

[BLOG](#) [SERVICES](#) [ABOUT](#) [CLIENT PORTAL](#) [DONATE](#) [CONTACT](#)



[EVENT CALENDAR](#)

[FEDERAL GOVERNMENT](#)

[STATE & LOCAL GOVERNMENT](#)

[GRANTS](#)

[SUCCESS & AWARDS](#)

[FAQS](#)

CURRENT EDITION OF THE WPI NEWSLETTER

www.wispro.org



UPCOMING EVENTS [→](#)

WED
24

U. S. Department of Veterans Affairs (VA) Site Visit – Tomah, WI

April 24 @ 10:00 am - 12:00 pm
Tomah WI

WED
24

U. S. Department of Veterans Affairs (VA) Site Visit – Iron Mountain, MI

April 24 @ 10:00 am - 12:00 pm
Iron Mountain MI

THU
25

U. S. Department of Veterans Affairs (VA) Site Visit – Tomah, WI

April 25 @ 10:00 am - 12:00 pm
Tomah WI

THU
25

U. S. Department of Veterans Affairs (VA) Site Visit – Iron Mountain, MI

April 25 @ 10:00 am - 12:00 pm
Iron Mountain MI

[View More...](#)

CURRENT OPPORTUNITIES (5) [→](#)

SO WHAT DOES WPI REALLY DO.....

PROVIDES TECHNICAL ASSISTANCE to CURRENT AND POTENTIAL GOVERNMENT CONTRACTORS AND SUBCONTRACTORS

- INDIVIDUAL COUNSELING – at our offices, at clients facility or via telephone / GoToMeeting
- SMALL GROUP TRAINING – workshops and webinars
- CONFERENCES to include one on one or Roundtable sessions
- LAST YEAR WPI provided training at over 100 events, provided services to over 1,200 companies.

WHAT WE WILL COVER TODAY

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

BASICS

SHOULD YOU SUBMIT A RESPONSE

Review the solicitation document.

- Do you have expertise in the area of work
- Do you have resources available to complete the contract
- Do you have time to submit an excellent proposal
- Are you able to make a profit
- Do you understand the specific contract requirements, evaluation process, and number of awards being made

WHAT DO YOU KNOW ABOUT THE REQUIREMENT?

- 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 MPS really looking for? Review essential requirements vs nice to have requirements.
- Note due date - draft a time line for proposal submission.
- Ask questions by question due date in document.
- Note submission requirements and any page limitations.

WHAT NOW

WHAT TO AVOID

- Nonconformance with the instructions may result in rejection of your proposal
- Do not simply rephrase or restate MPS'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 respondent's capability to satisfactorily perform the objectives and how their total offer will meet MPS'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 MPS 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.

WHAT TO INCLUDE

- Demonstrate ability to meet all solicitation requirements including terms and conditions, and technical requirements.
- Narrative response to non-priced evaluation factors should be in the same order as outlined in solicitation.
- Sign your proposal.
- Submit proposal in media requested, and include the number of copies requested.

WHAT TO RETURN

- Proposal
- Exhibits and Appendixes that need to be completed
- Past Performance Information
- Bonding, if required

Additional common items to return include:

- Resumes
- Insurance Certificates
- Licenses

WRITING THE PROPOSAL

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.

MPS PROPOSAL OUTLINE

MPS may provide a section called Proposal Format and Content. Use it as an outline and follow the directions for each section and tab.

Failure to address the Minimum Proposal Requirements may result in rejection of the entire proposal.

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.
- Use the format outlined in the solicitation
- Can generally use commercial past performance.

CONTRACT COMPLIANCE SERVICES (CCS)

MPS Contract Compliance Services (CCS) requirements must be complied with

- HUB firm participation
- Student Employment and/or Student Career Education

Solicitation will outline specific requirements for that procurement

CONTRACT PRICING

- Complete price schedule
- Check, double check, and then recheck pricing, extensions, and totals.
- 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.
- Offer a fair price.

EVALUATION FACTORS

- Simple requirements may only have a couple of evaluation factors.
- Complex requirements may have evaluation factors and significant sub factors.
- Review solicitation document to determine specific evaluation factors.
- Determine the basis for award.
- Evaluation will be based on information in the proposal.

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 MPS
- Answer questions completely
- Provide details on pricing if requested

BEST PRACTICES

- Note any requirements for specific type/sized font, margin requirements, and maximum number of pages.
- Mark and label envelopes as instructed to.
- Note address to submit response to.
- Submit timely – late offers are not accepted.

BEST PRACTICES

- Attend any pre-proposal conference.
- 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. Evaluations can take time – you need to have patience.
- Realize it may take several tries before you are awarded your first contract.

SUMMARY

- While the basic information applies whether responding to a Bid, RFP, or RFQ, there are differences, so read each document carefully.
- Responding to a MPS requirement takes time, careful planning and a complete understanding of the requirement. The key is pulling together a complete response that clearly describes why your company is the best fit to perform the work and offers the best solution at a competitive price.



QUESTIONS?

UPCOMING TRAINING - EVENTS

ACQUISITION HOUR LIVE WEBINAR SERIES

- April 30, 2019 – **Update on the Hour Wage Labor Law** – [CLICK HERE](#) for additional information – presented by Corey Walton, Community Outreach and Resource Planning Specialist – U.S. Department of Labor/Wage & Hour Division
- May 7, 2019 – **Learning about the Surety Bond Guarantee From the U.S. SBA** – [CLICK HERE](#) for additional information – presented by Tamara Murray, Underwriting Marketing Specialist, U.S Small Business Administration (SBA), Office of Surety Guarantees
- May 22, 2019 – **The U.S. SBA 8(a) Certification Program and HUBZone Certification** – [CLICK HERE](#) for additional information – presented by Shane Mahaffy, Lead Business Opportunity Specialist, U.S. Small Business Administration (SBA) and Benjamin Blanc, Wisconsin Procurement Institute (WPI)
- May 28, 2019 – **Introduction to Certifications Available to Woman Owned Businesses** – [CLICK HERE](#) for additional information - presented by Shane Mahaffy, Lead Business Opportunity Specialist, U.S. Small Business Administration (SBA) and Kim Garber, Wisconsin Procurement Institute (WPI)
- May 29, 2019 – **Innovation in the Federal Marketplace** – [CLICK HERE](#) for additional information – presented by Marc Violante, Wisconsin Procurement Institute (WPI)
- June 11, 2019 – **GSA Schedule Contract Management and Administration** – [CLICK HERE](#) for additional information – presented by Steve Makovec, Wisconsin Procurement Institute (WPI)
- June 12, 2019 - **State and Federal Certifications for Veteran and Service Disabled Veteran Owned Businesses** – [CLICK HERE](#) for additional information - presented by Shane Mahaffy, Lead Business Opportunity Specialist, U.S. Small Business Administration (SBA) and Benjamin Blanc, Wisconsin Procurement Institute (WPI)
- June 25, 2019 – **Integrating DFARS Requirements Into Your Day-to-Day Cyber Practices** - [CLICK HERE](#) for additional information – presented by Marc Violante, Wisconsin Procurement Institute (WPI)
- June 26, 2019 – **Current Trends in Federal Acquisition** – [CLICK HERE](#) for additional information – presented by James Hasik, Senior Fellow, Center for Government Contracting, George Mason University School of Business



Presented by



WI-CLANS HWCC-FACC project funded in part by Wells Fargo Diverse Community Capital.

Business Financing, Planning and Developing New Market Opportunities

As a new or established growing small business, you face many challenges. For your business to succeed, you need to develop and use a toolbox of resources. These sessions will connect you to business development resources from your area and the State of Wisconsin that could fuel your business growth strategy.

May 14th - Stevens Point, CREATE Portage County (IDEA Center)

May 15th - Eau Claire, Western Wisconsin Women's Business Center
(Chippewa Valley Technical College)

May 16th - Hayward, LCO Community College

REGISTER AT: <https://tinyurl.com/wiclanswpi>

For more information please contact Cassie Hutzler at cassieh@wipro.org or (414) 270-3600

This workshop covers:

- Access to Capital
- Certifications
- Doing Business with the Government
- Growth
- Resources for Small Business
- Succession Planning and Acquisition
- Social Media

<https://events.r20.constantcontact.com/register/eventReg?oeidk=a07eg2dzueua8cbb9f8&oseq=&c=&ch=>



13th Annual Wisconsin Government Opportunities Business Conference (GOBC)

In partnership with Volk Field ANG and Fort McCoy

[AGENDA](#)
[EVENT
HOSTS](#)
[SPEAKERS](#)
[SPONSORS](#)
[EVENT
COMPETITIONS](#)
[BUYER
MEETINGS](#)
[EVENT
PARTNERS](#)

Registration

For additional information regarding this event, contact Dave Olson at davido@wispro.org or (608) 338-8018.

CLICK HERE to REGISTER.

Location

The 13th Annual Wisconsin Government Opportunities Business Conference (GOBC) will take place at the

**Volk Field Air National Guard Base, Building 475 –
100 Independence Drive – Camp Douglas, WI 54618**

13TH ANNUAL WISCONSIN GOVERNMENT OPPORTUNITIES BUSINESS CONFERENCE (GOBC)

In Partnership with Volk Field ANG and Fort McCoy

JULY 30-31, 2019

The 13th Annual Wisconsin Government Opportunities Business Conference (GOBC), previously known as the Volk Field – Fort McCoy Small Business Conference, is scheduled for July 30th and 31st at Volk Field in Camp Douglas, Wisconsin. Businesses from the Midwest will have the opportunity to participate in two days of technical training with a focus on Infrastructure Opportunities, Federal, State and Local Government Opportunities, Information Security, Manufacturing and Teaming.

Attendees will have the opportunity to hear from and meet with regional experts, leaders of the community, potential customers, potential partners and will also have the opportunity to meet one on one with various government and corporate buyers. All businesses including Small, Large, Disadvantaged, HUBZone, Minority-Owned, Native / Tribal Owned, Woman-Owned, Veteran-Owned and Service-Disabled Veteran-Owned firms will benefit from this event.

EARLY REGISTRATION ENDS June 14, 2019

EVENT REGISTRATION ENDS July 18, 2019

<https://volkfieldsbconference.org/>

MARKETPLACE 2019 – Milwaukee, WI October 23-24, 2019



**WISCONSIN ECONOMIC
DEVELOPMENT CORPORATION**

Thank you to our host.



**MILWAUKEE
PUBLIC SCHOOLS**

PRESENTED BY

Wisconsin Procurement Institute (WPI)

www.wispro.org

Carol Murphy | Business Development Specialist

carolm@wispro.org 414-270-3600

10437 Innovation Drive, Suite 320
Milwaukee, WI 53226