



A Procurement Technical Assistance Center (PTAC)

PIECES OF THE PROPOSAL PUZZLE

May 19, 2020



WHAT WE WILL COVER TODAY

- Assumptions
- Making a Plan for Proposal Development
- Pieces of the Proposal
- Tips for Final Editing and Review

Note: Today's webinar focuses on responding to Federal Requests for Proposals (RFPs)

ASSUMPTIONS

- You will tailor your proposal preparation process based upon...
 - The size and resources of your business
 - The complexity and dollar value of the requirement
 - The complexity of the submission being solicited
 - The timeframe you are given to develop the proposal

(NOTE: Our purpose is to provide information, idea's, and a possible framework to consider for development of a moderately complex proposal.)

ASSUMPTIONS

- A Solicitation has been carefully reviewed and a **GO** decision has been made. You...
 - Understand the solicitation and contract requirements
 - Meet all set-aside requirements
 - Have appropriate expertise and resources to perform
 - Believe you can make a reasonable profit
 - Believe you are competitive and have a reasonable chance for award

WHAT'S NEXT?



MAKING A PLAN FOR PROPOSAL DEVELOPMENT

PROPOSAL TEAM –WHO IS RESPONSIBLE FOR..

- Leading the team
- Coordinating submitting any solicitation questions
- Gathering needed resumes, insurance certificates, bonding, etc.
- Drafting various sections of the proposal
- Contacting references for Past Performance
- Obtaining subcontractor pricing
- Estimating costs and determining price to be submitted
- Final editing and review

TEAM MEMBERS SHOULD READ THE SOLICITATION AGAIN

- Pay Particular attention to:
 - The solicitation provisions and contract requirements
 - Requested format and page limitations
 - Evaluation factors and basis for award
 - Significant dates - cut off time for questions, response due date, the date performance begins (any phase –in).

(Tip : Make notes, highlight document, and or use post-it notes.)

TEAM LEADER MAY..

- Establish milestones and due dates for
 - Solicitation questions – including questions from subs
 - Solicitation of subcontractors and receipt of subcontractor proposals
 - Finalization of references and past performance information
 - First complete draft of technical proposal (if any)
 - estimates and final pricing
 - Final review and editing

TEAM LEADER MAY...

- Develop a Proposal Outline
- Take on multiple Roles/Responsibilities on team
- Decide who attends pre-proposal conference (if held)
- Provide Information, Guidance, Support, and Direction
 - Coordination between team members
 - Information from management (plan of performance, needed profit, and proposed staffing)
 - Disseminate Solicitation Amendments

COORDINATING SOLICITATION QUESTIONS

- Questions may be asked in a preproposal conference
- Ask about all ambiguities found - Offerors have a duty to inquire about “Patent” ambiguities
- Have subcontractors review SOW/Specifications for ambiguities or missing information
- Submit questions in writing
- Remember the cut-off date for questions on the solicitation is usually firm

PIECES OF THE PROPOSAL

SECTIONS OF THE PROPOSAL

- Cover Page
- Table of Contents
- Cover Letter
- Technical Proposal
- Past Performance
- Price
- Solicitation Document
- Representations and Certifications

SAMPLE COVER PAGE

ABC Company
Street Address
City, State, Zip Code
Date

- Response to solicitation number XXXXX –XX-X-XXXX, entitled (insert title)
- Please contact John Doe, at john.doe@XYZCompany.com or 414-123-4567 regarding any questions on this proposal.

SAMPLE TABLE OF CONTENTS

Table of Contents

	Page
• Cover Letter	2
• Technical Proposal	4
• Past Performance Information	7
• Price Proposal (could be separate)	9
• Solicitation Document (portions or entire document)	12
• Representations and Certifications	52

(Note; the order should be dictated by solicitation)

COVER LETTER

- Use official company letterhead - name and address of the company submitting proposal
- Include name, address, email, and phone number of individual signing the offer – must have actual authority to bind the company
- Include a persuasive and concise summary on why the company should be awarded the contract.
- Be aware of page limitations for the cover letter and aware of whether cover letter is counted in any other page limitations.

SAMPLE COVER LETTER

ABC Company

Street Address

City, State, Zip Code

Date

Dear (insert name of Contracting Officer):

ABC Company is excited to be able to offer the (insert agency) the enclosed proposal in response to solicitation XXXXX-XX-XXXXX to meet your requirements for (insert requirement). XYZ Company has ...

COMMON EVALUATION FACTORS

- Past performance
- Compliance with solicitation requirements
- Technical capability
- Plan of Performance
- Ability to meet Schedule
- Quality Control Program
- Management capability
- Personnel qualifications/key personnel
- experience
- Price

TECHNICAL PROPOSAL – PAST PERFORMANCE

- Solicitation may request detailed references.
 - Provide only the number of references requested
- Solicitation may request completed questionnaires
- Use the format outlined in solicitation

TECHNICAL PROPOSAL – PAST PERFORMANCE

- Try to provide the most recent and relevant Past performance
 - government -similar requirements, size, and complexity
 - commercial - similar requirements, size and complexity
- If you have no Past Performance you should receive a neutral rating.
- Be prepared to respond to any subsequent questions about poor past performance

SAMPLE REFERENCE REQUEST

In accordance with FAR Part 15.305, offerors without relevant past performance or for whom information is not available will not be evaluated favorably or unfavorably on past performance. However, the proposal of an offeror with no relevant past performance may not represent the most advantageous proposal to the Government.

Company Name _____

Address _____

Contact Name _____

Contact Telephone _____

Contact Email _____

Service/Product Provided _____

Service Period _____

TECHNICAL PROPOSAL – OTHER NON-PRICE FACTORS

- Include narrative for every evaluation factor and sub-factor
- Organize to match the solicitation
- Demonstrate your capabilities to meet the requirements
- Cover who, what, where, when, and how

TECHNICAL PROPOSAL – OTHER NON-PRICE FACTORS

- If personnel is a factor, be as specific as possible with resumes (education, experience, expertise) and anticipated roles.
- Understand the identified relative weight of the factors and sub-factors
- Focus on discriminators

PRICE

- Complete price schedule as presented.
- Recheck math - unit pricing, extensions and totals
- Do not front load costs- Unbalanced pricing could exclude you from award
- Offer a Fair Price

PRICE

- Consider inflation for pricing Options
- Factor in all costs- make a profit
 - Wage determinations
 - Reporting requirements
 - Insurance
 - Background checks

REPRESENTATIONS AND CERTIFICATIONS

In accordance with FAR 52.212-3 Offeror Representations and Certifications – Commercial Items XYZ company hereby certifies they have completed this requirement via SAM.

52.212-3 (b)(2)

The offeror has completed the annual representations and certifications electronically via the SAM website access through <http://www.acquisition.gov>. After reviewing the SAM database information, the offeror verifies by submission of this offer that the representations and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications—Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), as of the date of this offer and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs **NONE** .

TIPS FOR FINAL EDITING AND REVIEW

MAKE SURE THE FINAL PROPOSAL ..

- Is clear, concise, and grammatically correct
- Is persuasive and demonstrates the offeror's capability to perform
- Assumes the government has no prior knowledge of the offeror's capabilities
- Includes all data requested/required – descriptive literature, resumes, licenses, bonding etc.
- Fully addresses all factors and sub-factors,

MAKE SURE THE FINAL PROPOSAL ..

- Complies with page limitations and other format requirements (margin requirements, font and type size requirements etc.)
- Is consistent – no contradictions or ambiguities
- Does not refer back to another page for a response
- Separates the Technical Proposal from the Price Proposal – if required (mark and label envelopes as directed)

MAKE SURE THE FINAL PROPOSAL ..

- Is signed by an individual authorized to bind the contractor
- Acknowledges all solicitation amendments
- Is submitted in the media requested and with the requested number of copies
- Is submitted to the correct email and/or address and room number
- Is submitted in a timely manner

FINAL DO'S AND DON'TS

- If you are unsure if your proposal was received do follow up with the contracting officer.
- Do not contact the contracting officer, end user, 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

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.

RESOURCES

- Acquisition.gov is: <https://www.acquisition.gov/>
- Beta.SAM website - <https://beta.sam.gov>
- Wisconsin Procurement Institute
 - Phone: 414-270-3600
 - www.wispro.org



QUESTIONS?