



ACQUISITION HOUR: PREPARING A WINNING GOVERNMENT PROPOSAL

February 1 @ 11:00 am - 12:00 pm

Presented by Carol Murphy, WPI



Webinar Etiquette

PLEASE

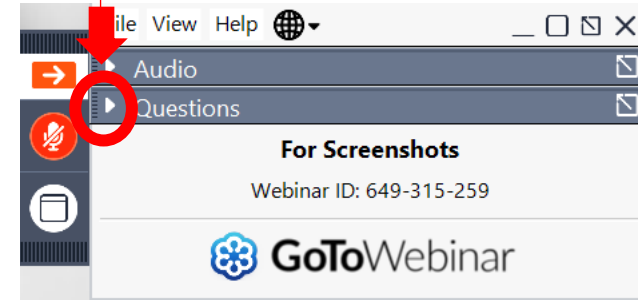
- Log into the GoToWebinar session with the name that you registered with online
- Place your phone or computer on MUTE
- Use the QUESTIONS option to ask your question(s).
 - We will share the questions with our guest speaker who will respond to the group

THANK YOU!



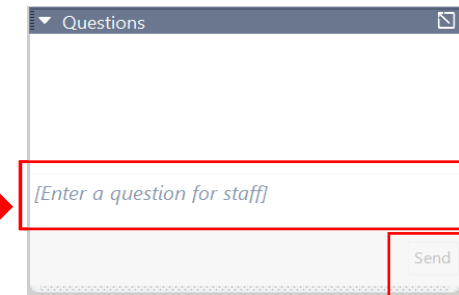
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USING THE QUESTIONS BOX

Type questions
here at any time
during a
presentation



Click Send when ready to submit a question



Wisconsin
Procurement
Institute

~~A Procurement Technical
Assistance Center (PTAC)~~

As of October 1 2022 –

WPI is now a **DOD APEX ACCELERATOR** – under the
Department of Defense

OFFICE OF SMALL BUSINESS PROGRAMS (OSBP)



WPI is Wisconsin's APEX ACCELERATOR

The APEX Accelerators program, under management of the Department of Defense (DOD) Office of Small Business Programs (OSBP), plays a critical role in the Department's efforts to identify and engage with a wide range of businesses entering and participating in the defense supply-chain. The program provides the education and training that all businesses need to participate to become capable of participating in DOD and other government contracts.

More about WPI

- WPI provides services to all of Wisconsin's 72 counties
 - Individual counseling at our offices, client's facility or virtually
 - Small group training – webinars and workshops
 - Conferences including one on one buyer meetings – Marketplace, The Contracting Academy, Small Business Academy, Wisconsin Federal Contractor Forum, Acquisition Hour, Cyber Fridays, DOD Roadmap series, Government Opportunities Business Conference, End of Year Federal Contractor Update, Annual DOD Contract Management Update, Evening FAR sessions and more.....
- Last year WPI sponsored or participated in over 80 events
- Last year WPI provided technical assistance to over 1300 companies
- The APEX Accelerator is funded in part through a cooperative agreement with the Department of Defense
- WPI is also funded by the Wisconsin Economic Development Corporation (WEDC), contributions and in-kind

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 (MATC)*

■ ASHLAND

- *Ashland Area Development Corporation*

■ CAMP DOUGLAS

- *Juneau County Economic Development Corporation (JCEDC)*

■ EAU CLAIRE

- *Western Dairyland*

■ FOND DU LAC

- *Envision Greater Fond du Lac*

■ GREEN BAY

- *NWTC Startup Hub*

■ LACROSSE

- *Veterans in Professions*

■ MANITOWOC

- *Progress Lakeshore*

■ OSHKOSH

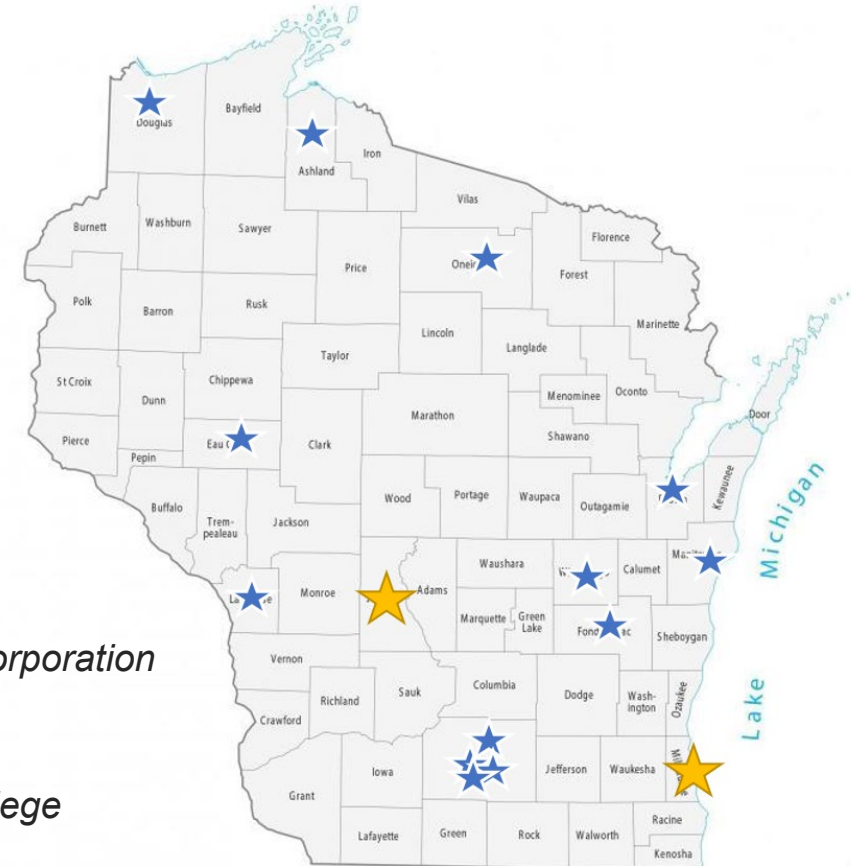
- *Greater Oshkosh Economic Development Corporation*

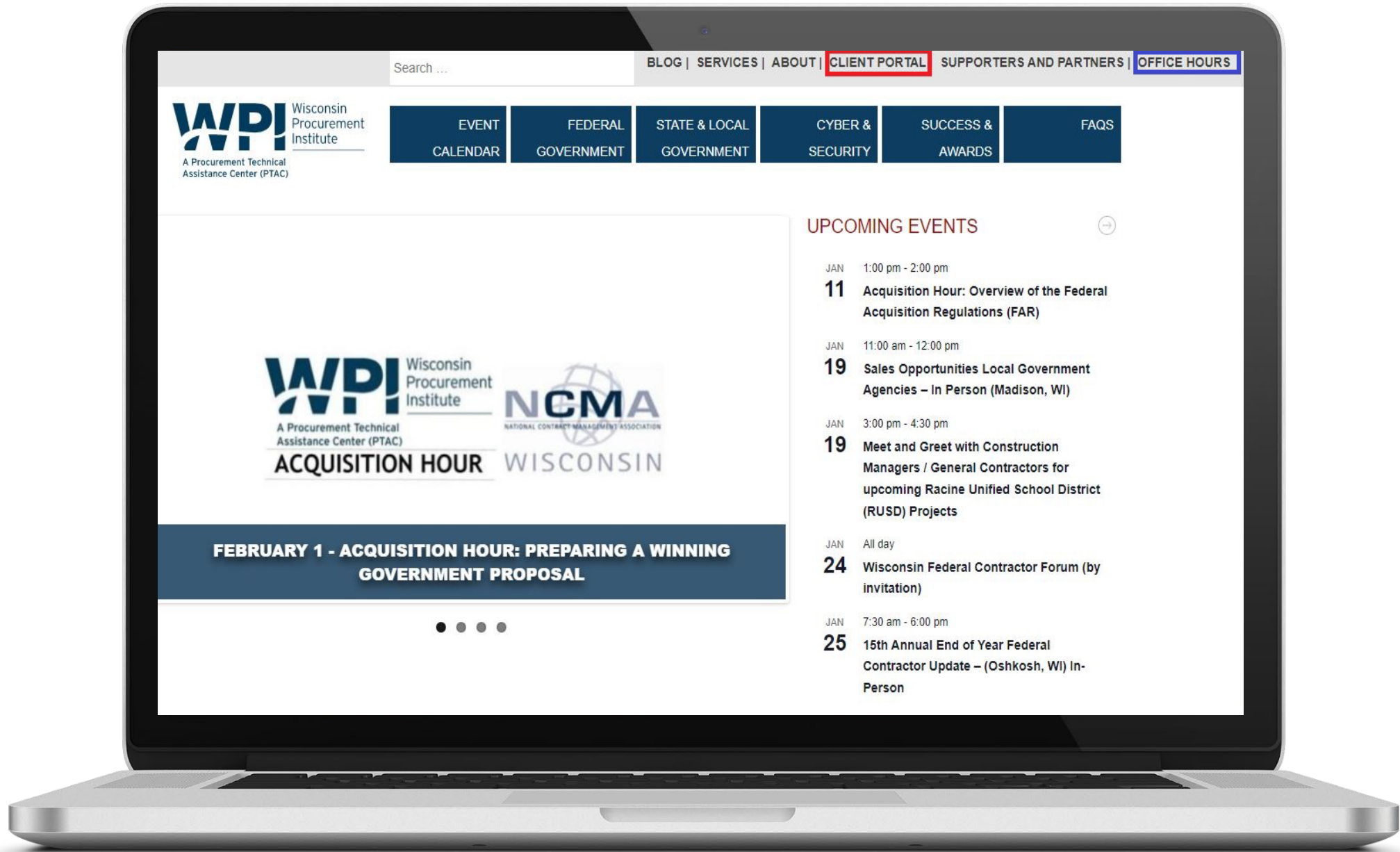
■ RHINELANDER

- *Nicolet Area Technical College*

■ SUPERIOR

- *Small Business Dev Center; UW Superior*





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FEBRUARY 1 - ACQUISITION HOUR: PREPARING A WINNING GOVERNMENT PROPOSAL



UPCOMING EVENTS

- JAN 1:00 pm - 2:00 pm
11 Acquisition Hour: Overview of the Federal Acquisition Regulations (FAR)
- JAN 11:00 am - 12:00 pm
19 Sales Opportunities Local Government Agencies – In Person (Madison, WI)
- JAN 3:00 pm - 4:30 pm
19 Meet and Greet with Construction Managers / General Contractors for upcoming Racine Unified School District (RUSD) Projects
- JAN All day
24 Wisconsin Federal Contractor Forum (by invitation)
- JAN 7:30 am - 6:00 pm
25 15th Annual End of Year Federal Contractor Update – (Oshkosh, WI) In-Person

What we will Cover Today

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

Assumptions

Assumptions

- The solicitation has been carefully read/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

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

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
- Contract type, evaluation factors and basis for award
- Significant dates - cut off time for questions, response due date, the date performance begins (any phase –in).
- Make notes, highlight document, and or use post-it notes

(Tip – unless you are responding to a complex requirement – you do not need to hire a consultant – you can do this.)

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
- 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

What do you know about the requirement

- Who will be evaluating the proposals
- What is the evaluation criteria
- What does the government want
- What does your business have that meets their needs
- Use their own language
- Tell them what they need to know to evaluate your capabilities

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
Table of Contents	3
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 – use the letter to showcase your company – provide the reader with a snapshot of what is to follow
- 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

(Solicitation document may inform contractors the relative importance of the factors)

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 – focus on firm's strengths
- Cover who, what, where, when, and how
- Include all data and information requested

Technical Proposal – other non-price Factors

- 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

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

Writing the technical proposal

- Start with an outline based on information from the solicitation document
- Include all technical evaluation factors. Organize proposal to match solicitation
- Include any required statements, sample reports, resumes, etc.
- Review solicitation again to make sure nothing has been overlooked

Outline - sample

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

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 _____

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
- Consider inflation for pricing Options
- Factor in all costs – wage determinations, reporting requirements, insurance, background checks
- Make a profit

CONTRACT TERMS

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

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** .

Additional advice

- Attend any pre-proposal conference / meeting. Sign in last
- Look for amendments
- Note address to submit response to as it maybe different from what is on the first page
- Submit timely – late offers are not accepted
- Demonstrate knowledge in the proposal by providing as much insight as possible into the issue, the industry, and the government
- If requested provide Descriptive Literature even if offering Brand Name item
- Follow all instructions provided

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

Tips for Final editing and review

Make sure the final proposal ..

- Is clear, concise, correct spelling, 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 – return copies if requested signed by same person signing proposal
- 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

- 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, 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
- Contact WPI for free assistance

What makes a proposal responsive

Responsive Proposals

Comply with all requirements of the solicitation

- Timely submission in the correct media requested
- Signed
- Follows all instructions including organizational, format, page limits, and outlines
- Easy to navigate and evaluate
- Meets the government's requirement
- Demonstrates offeror's capabilities to provide the government exactly what it wants

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.

DEBRIEFING

debriefing

- Always request a debriefing. Even if you win the award request a debriefing
- For Federal Government procurements, submit in writing within three (3) days after the date on which contract award notification was received
- Debriefing – Do not become defensive or challenge the government's decision, try to learn what the company could have done better or differently so it can improve the odds of winning on the next opportunity. It may be best to have an uninvolved person contact the government

resources

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

ACQUISITION HOUR LIVE WEBINAR SERIES

- March 1
Service Contracts with Federal Agencies
- March 8
ESRS Individual Subcontractor Reporting (ISR) Basics
- April 5
Overview of Contractor Performance Assessment Reporting System (CPARS)
- April 19
No-Cost Federal Market Research Tools: SAM.gov, DSBS, and USA Spending
- May 9
The Procurement Integrated Enterprise Environment (PIEE) – Wide Area Workflow (WAWF)
- June 6
Government Furnished Property

...More information and registrations at wispro.org/events

February 1, 2023

Expanding Business Opportunities in Rural Wisconsin

Newly Designated HUBZones

Jackson County

February 8

Black River Area Chamber of Commerce
120 W Water St | Black River Falls, WI 54615

Marinette County

February 9

Marinette County Courthouse
1926 Hall Ave | Marinette WI 54143

The HUBZone program (Historically Underutilized Business Zone) supports small business growth with a goal of awarding at least 3% of federal contract dollars as well as 3% of large federal contractor subcontracting dollars to certified companies each year. The HUBZone map now includes Jackson and Marinette counties on the SBA HUBZone map as “Governor-Designated Covered Areas.” Currently, many Federal agencies and Federal prime contractors are not meeting their HUBZone goals.



DOD Supply Chain: Cyber Workshop

Wisconsin manufacturers are facing a significant challenge in meeting cyber and security compliance requirements that are being included in their Defense, Federal and commercial contracts and subcontracts.

Join us at one of the following in person sessions to learn from a veteran of the IT Industry as he provides insights and guidance on what manufacturers can do to improve their security position in a rapidly shifting digital landscape while positioning themselves to meet both existing and upcoming supply chain requirement (such as NIST SP 800-171, CMMC, ITAR).

All session are scheduled for 10 am - Noon

March 9

Envision Greater Fond Du Lac
23 S Main St Ste 101
Fond du Lac, WI 54935

March 15

Progress Lakeshore
202 N 8th St Ste 101
Manitowoc, WI 54220

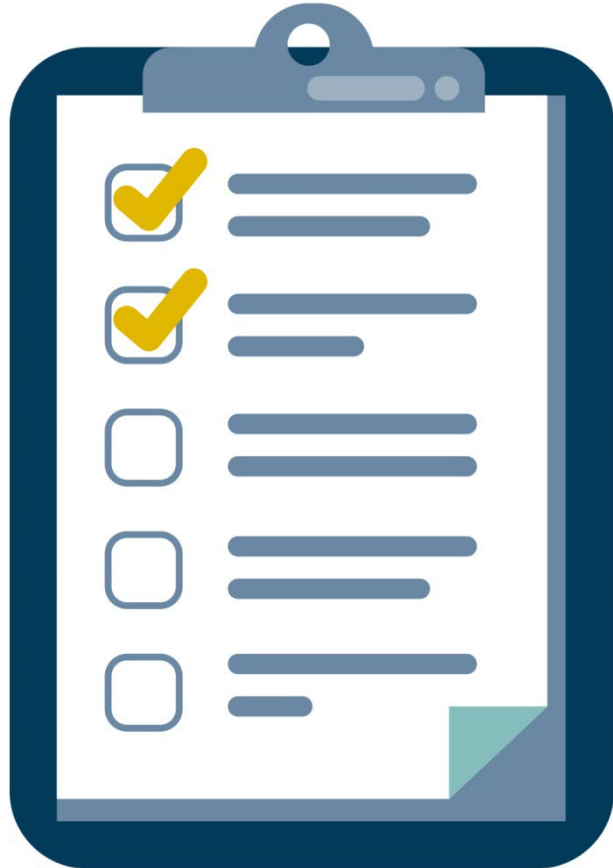
March 21

Greater Oshkosh EDC
100 N Main St Ste 104
Oshkosh, WI 54901

wispro.org/events

February 1, 2023

SURVEY



CONTINUING PROFESSIONAL EDUCATION



This webinar is eligible for 1 CPE credit.
For a certificate of this credit please contact:

Caroline Boettcher

carolineb@wispro.org

PRESENTED BY

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