



# **Acquisition Hour: Preparing a Winning Government Proposal**

**March 27 | Noon – 1:00 pm**

**Presented by:**

**Carol Murphy, Wisconsin Procurement Institute**

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# Webinar Etiquette

## PLEASE

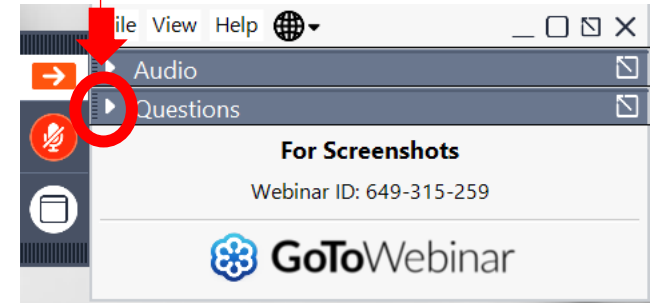
- Log into the GoToWebinar session with the name that you registered with online
- Place your phone or computer on MUTE
- Use the QUESTIONS option to ask your question(s).
  - We will share the questions with our guest speaker who will respond to the group

## THANK YOU!



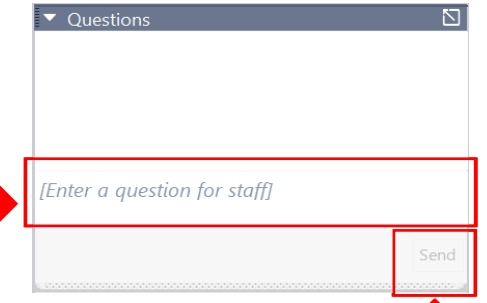
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*Assisting Wisconsin businesses compete in the government marketplace.*

### **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.

### **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.....

[www.wispro.org](http://www.wispro.org)

# 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

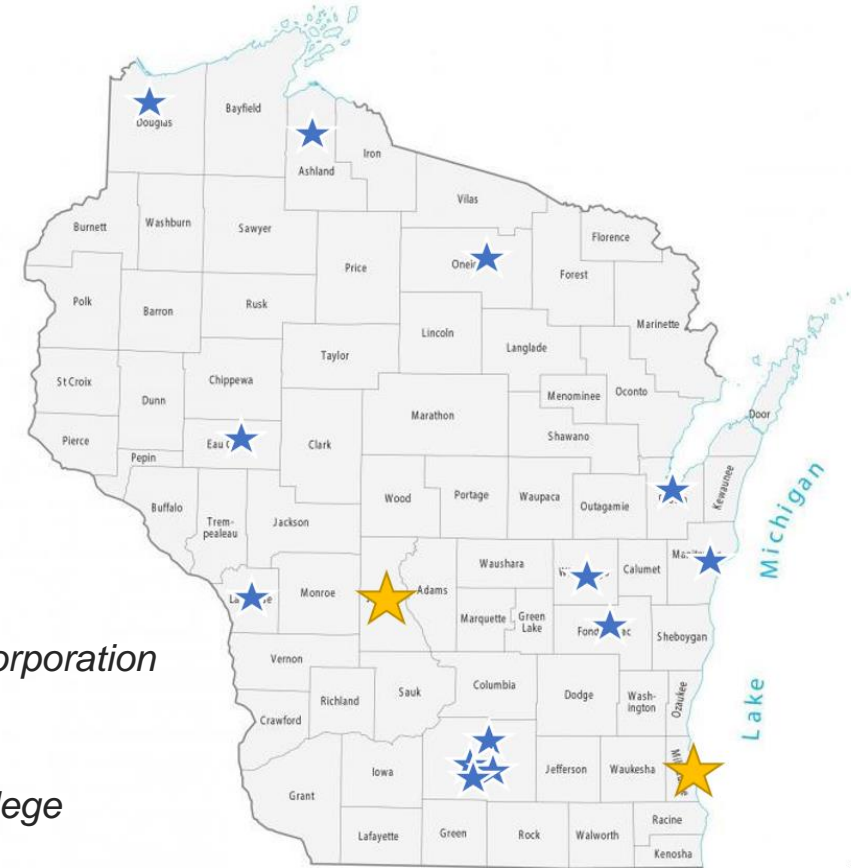
- *Greater Oshkosh Economic Development Corporation*

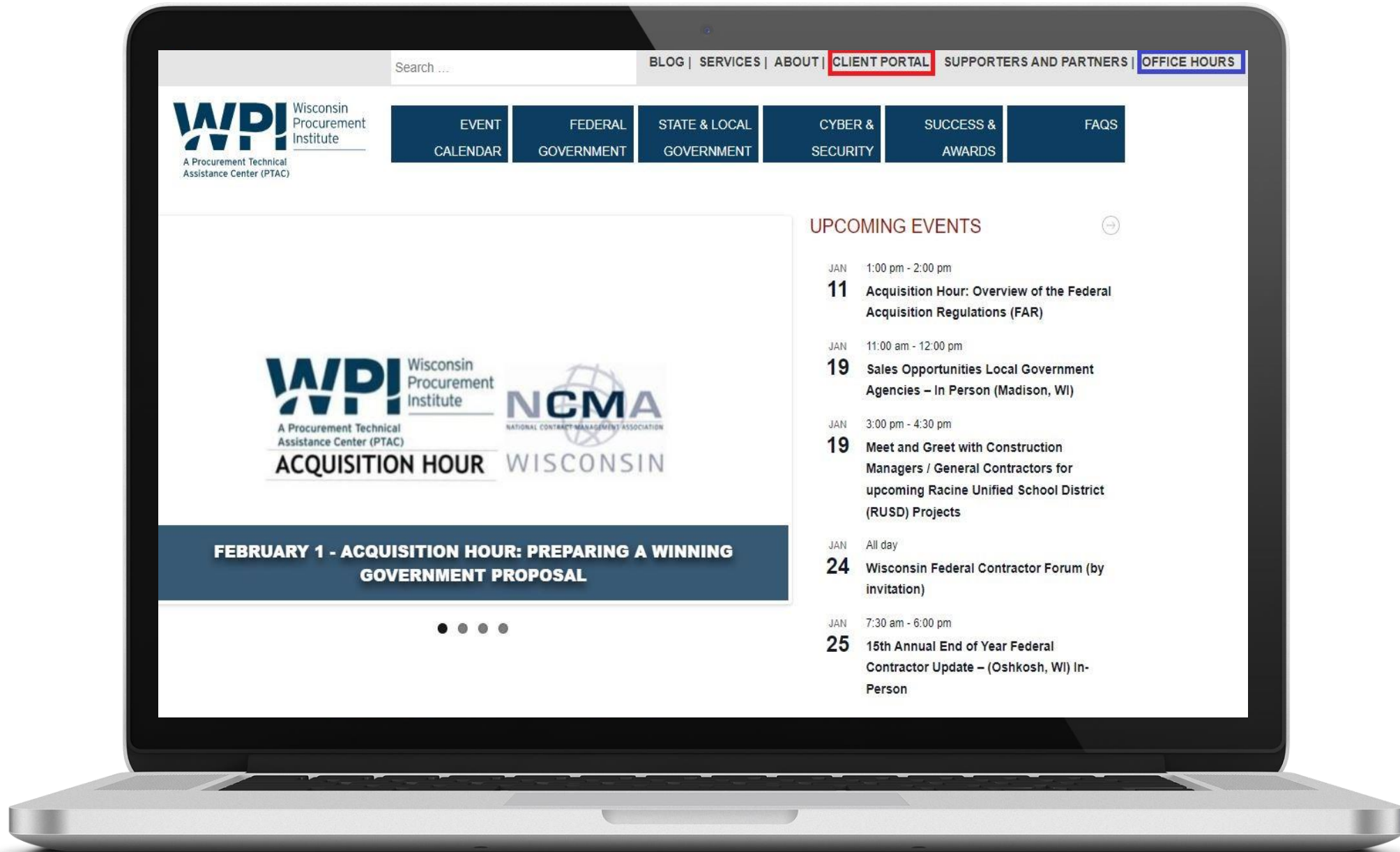
## ▪ RHINELANDER

- *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 a reasonable profit can be made
  - Believe pricing will be competitive and have a reasonable chance for award

# ASSUMPTIONS

- Tailor proposal preparation based upon...
  - The size and resources of the business
  - The complexity and dollar value of the requirement
  - The complexity of the submission being solicited
  - The timeframe provided 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 IS KNOWN 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@ABCCompany.com](mailto:john.doe@ABCCompany.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 the 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 the government's requirements for (insert requirement). ABC 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 there is no Past Performance - business 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 the 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 in SAM accessed through <http://www.sam.gov>. After reviewing SAM 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 Products and Commercial Services, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard(s) applicable to the NAICS code(s) referenced for this solicitation), at the time this offer is submitted 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 make the contact if they need any additional information. The Government can move very slowly – patience is required
- 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

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- 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

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FAR - Acquisition.Gov

<https://www.acquisition.gov/>

SAM.Gov

[SAM.gov | Home](https://sam.gov)

Wisconsin Procurement Institute - Phone: 414-270-3600

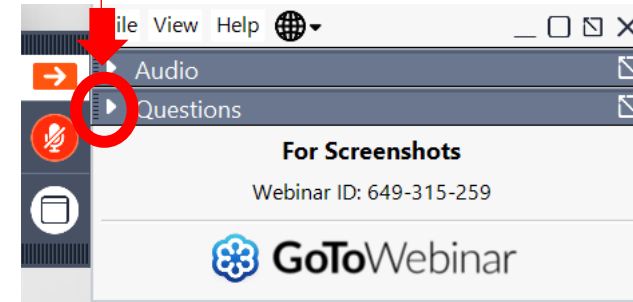
[www.wispro.org](http://www.wispro.org)

# QUESTIONS?



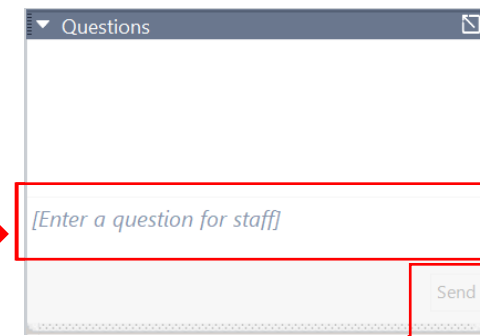
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# UPCOMING TRAINING - EVENTS

# ACQUISITION HOUR LIVE WEBINAR SERIES

- March 27  
**Preparing a Winning Government Proposal**
- April 24  
**Overview of the Contractor Performance Assessment Reporting System (CPARS)**

**...More information and registrations at [wispro.org/events](https://wispro.org/events)**

# EMERGING ISSUES LIVE WEBINAR SERIES

• ~~February 29~~

~~From SBIR/STTR to DPA Title III – An Overview of Federal Innovation Programs, Needs and Marketplace~~

• ~~March 14~~

~~Suggested Process for Creating a Federal Business Development Strategy~~

• March 28

Defense Production Act Title III – Unique Opportunities for Unique Companies

**...More information and registrations at [wispro.org/events](http://wispro.org/events)**



# April 3, 2024

Oshkosh Waterfront Convention Center  
1 N Main St, Oshkosh, Wisconsin 54901

## GUEST SPEAKERS

- Susan Depies-Styer, COL U.S. Army, Director, Land Supplier Operations, DLA Land and Maritime, Columbus, Ohio
- DLA Small Business Representative

**...More information and registrations at [wispro.org/events](https://wispro.org/events)**



# WFCF

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**Wisconsin Federal  
Contractor Forum**

# April 10, 2024

*MSOE Dwight and Dian Diercks Computational Science Hall  
1025 N Milwaukee St, Milwaukee, WI 53202*

Join the Wisconsin Procurement Institute (WPI) Board of Directors, Wisconsin federal contractors, Federal agency and prime contractor representatives at this year's in-state Wisconsin Federal Contractor Forum (WFCF).

**...More information and registrations at [wispro.org/events](https://wispro.org/events)**



**April 30**

*In Person*

**May 1-3**

*Virtual*

**More information and registrations at [wispro.org/events](https://wispro.org/events)**



# 10th Annual DOD Contract Management Update

# May 16, 2024

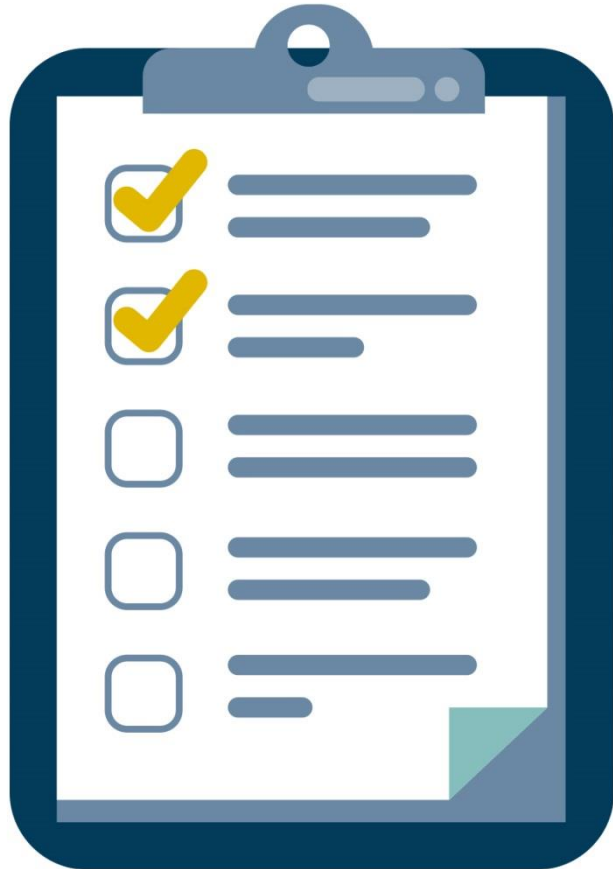
*Fox Valley Technical College, DJ Bordini Center  
5 N Systems Dr, Appleton WI 54914*

The DoD supply chain continues to experience a changing regulatory, economic, and fiscal environment. NCMA Wisconsin and WPI will tackle the challenges and discuss emerging opportunities that are critical to the success of a wide range of suppliers. From the large business prime manufacturer to the small business machine shop to the SBIR tech supplier, you'll be sure to gain valuable insight via technical briefs and candid discussions.

**...More information and registrations at [wispro.org/events](https://wispro.org/events)**



# SURVEY



March 27, 2024

# CONTINUING PROFESSIONAL EDUCATION



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

**Neelu Patil**

[neelagangap@wispro.org](mailto:neelagangap@wispro.org)

# PRESENTED BY

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