

Acquisition Hour

How to Analyze Federal Solicitations

July 9 | Noon – 1:00 pm

Presented by:
Mark Dennis, Wisconsin Procurement Institute





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 and training to all of Wisconsin's 72 counties

- Individual counseling at our offices, client's facility or virtually
- Small group training – webinars and workshops including Acquisition Hours, Cyber Fridays, Evening FAR sessions, Federal Market Insights and Local Government Sales Opportunities
- Conferences the Governors Marketplace, The Contracting Academy (TCA), WEDCs Small Business Academy, Wisconsin Federal Contractor Forum [DC and in-state], Government Opportunities Business Conference GOBC) with WI military bases, End of Year Federal Contractor Update, Annual DOD Contract Management Update, and more.....

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)*

- **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*

- **SUPERIOR**

- *Small Business Dev Center; UW Superior*





WHAT WE WILL COVER TODAY

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

ASSUMPTIONS

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- The solicitation has been carefully read and reviewed, and a **GO** decision has been made. You...
 - Understand the solicitation and contract requirements
 - Meet any 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 pre-proposal conference
- Ask about all ambiguities found - Offerors have a duty to inquire about “Patent” ambiguities
- Have subcontractors review the Statement of Work or Specifications for ambiguities or missing information
- Collate and submit questions in writing to the contract office
- 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

SECTIONS OF THE PROPOSAL

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- Cover Page
- Table of Contents
- Cover Letter
- Technical Proposal
- Past Performance
- Price
- Solicitation Document
- Representations and Certifications* (if not covered in SAM)

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,
phone 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 match the 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)

HEADERS AND FOOTERS

- Check to see if the solicitation specifies this formatting.
- Or, during Q&A period, ask if there is a preferred format.

Suggestions: Use the four corners of the pages.

- HEADERS: include Solicitation Notice ID number, Company Name.
If using a logo, keep it tiny, but also include company name.
- FOOTERS: Date of Proposal, pagination i.e. "Page 1 of 32."

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 proposal evaluators have no prior knowledge of your company 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

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 corporate or home office resources, mitigation techniques, quality control, and safety processes.

Outline:

- Corporate 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 from the contracting office
- Be prepared to respond to any subsequent questions about poor past performance and corrective actions taken

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, i.e. a “loaded” labor rate that includes overhead.
- Offer a Fair Price.
- Consider and document inflation for pricing Options, i.e. CPI
- 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 and acknowledge receipt.
- 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 artwork, or other embellishments are generally unnecessary and are not desired. (Including an updated Capabilities Statement is customary)

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 documents and / or 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 no-cost technical review assistance

WHAT MAKES A PROPOSAL RESPONSIVE

RESPONSIVE PROPOSALS

Comply with all requirements of the solicitation

- Timely submission in the correct media requested
- Signed, printed name and title, dated
- Follow 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! Ask why you won, or did not win.
- 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. (Perhaps have a less-involved representative 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

Upcoming Events

Acquisition Hour

The Acquisition Hour webinar series covers a range of topics from market entry, sales growth, small business certifications, compliance, and more. Attendees receive 1 CPE credit for attending.

- **July 9** – Writing a Winning Government Proposal
- **July 23** – Federal Invoicing: PIEE / Wide Area Workflow
- **August 6** – Writing an Effective Capabilities Statement
- **August 20** – End of the Federal Fiscal Year Spending: Are You Ready?

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



Cyber Thursday

Cyber Friday is a series of one-hour webinars focusing on critical topics for DOD contractors and subcontractors in cyber security, data security, and CMMC. Attendees receive 1 CPE credit for attending.

- ~~June 26 – FAR 52.204-21: The Forgotten Baseline of Federal Cybersecurity~~
- **July 31** – CMMC 2.0: What Contractors Must Know in 2025
- **August 28** – The Federal Cybersecurity Horizon: Zero Trust, FedRAMP, & Supply Chain Risk

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

19th Annual Wisconsin Government Opportunities Business Conference (GOBC)

In Partnership with Wisconsin's Military Installations

~~July 9~~

Truax Field

July 30

Fort McCoy

GOBC will provide you the opportunity to gain insights into:

- **COFFEE with the COMMANDER**
- Current operations and priorities at Wisconsin's Federal and State government agencies and military facilities
- Connecting with agency and installation leadership, operational staff and buyers
- Locating and bidding on current and future procurement opportunities
- Resources available to assist your business in winning government prime and subcontracts

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

REGISTER TODAY ★ ★ ★ ★

NDIA GREAT LAKES 16TH ANNUAL MEETING 07.17.2025

CHICAGO, IL

HOSTED BY



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