

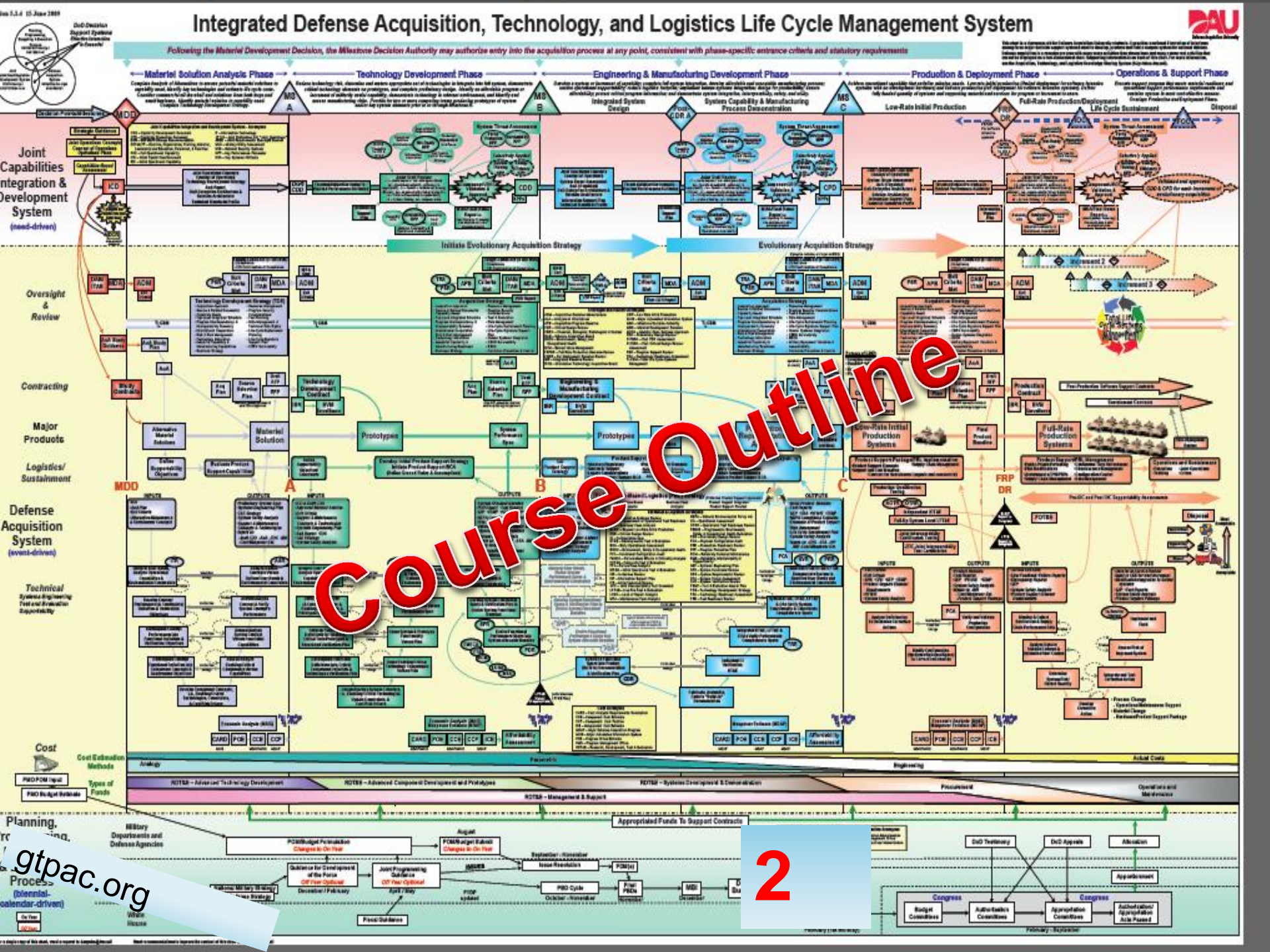
Preparing Successful Bids, and Cost/Price Proposals

Joe Beaulieu

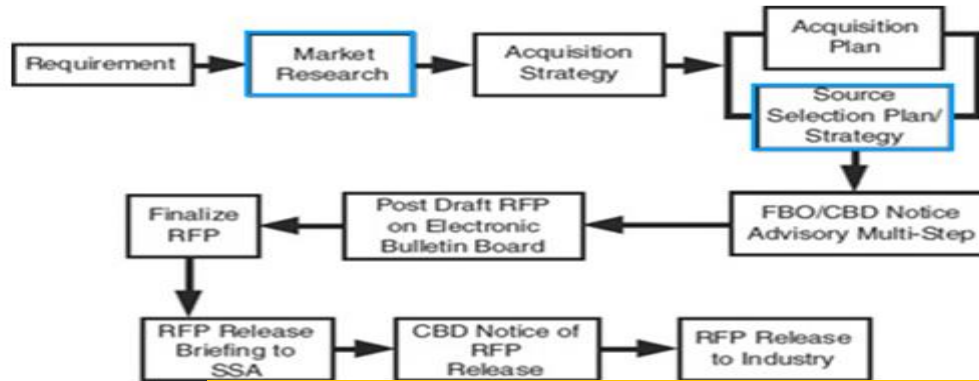
joe.beaulieu@innovate.gatech.edu

www.gtpac.org

08 Apr 2013

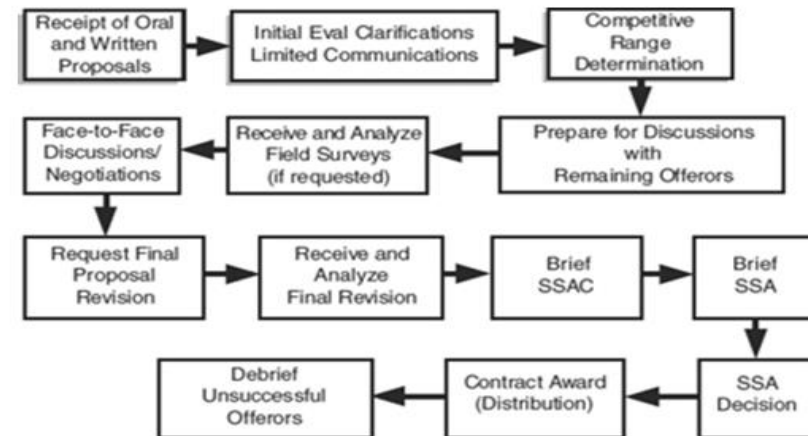


Pre-Solicitation Process



***** YOUR BID *****

Post-Solicitation Process



GTPAC'S 7 STEP PROCESS

- ▶ Registration
- ▶ Develop a marketing strategy
- ▶ Know the “right people”
- ▶ Consult a reference library
- ▶ **Search for opportunities**
- ▶ **Bid**
- ▶ **Perform**

7 OBJECTIVES

- Finding opportunities
- Decoding the Solicitation
- Determine Your Potential
- The Technical Proposal
- The Cost Proposal
- Putting it all together
- Unsolicited proposals

OBJECTIVES – *Finding opportunities*

- **FEDBIZOPS** (www.fbo.gov)
- **SBIR** (www.sbir.gov)
- **Grants.gov** (www.grants.gov)
- **DIBBS** (<https://www.dibbs.bsm.dla.mil>)
- **Georgia's Team Market Place**
(http://ssl.doas.state.ga.us/PRSapp/PR_index.jsp)
- **Other Local Govt Websites**
(www.google.com)

FOR
EXAMPLE

Home

Getting Started

General Info

Opportunities

Agencies

Privacy



Search more than **29,000*** active federal opportunities.

Posted Date: Last 90 Days ▼

Set-Aside Code: Any ▼

Place of Performance: Any State or Territory ▼ Type: Any ▼

Keyword / Solicitation #: Agency:

Search

Additional criteria and multiple selections are available on the [advanced search form](#).

** Notices posted within the last 90 days.*



ATTENTION: Agency users are responsible for properly uploading controlled, unclassified material to FBO using the access control procedures for document packages and attachments detailed in the [FBO Buyers Guide](#). Do not upload ANY classified materials to FBO.

Buyers / Engineers

Government users may post, manage, and award opportunities.

Username

[View Opportunities](#)

Vendors / Citizens

Vendors and citizens may register and retrieve opportunities.

Username

[Find Opportunities](#)



RECOVERY

Locate actions funded by the American Recovery and Reinvestment Act.

[SEARCH RECOVERY OPPORTUNITIES](#)

[SEARCH RECOVERY AWARDS](#)



FBO RECOVERY REPORTS

- [Click here for Opportunities](#)
- [Click here for Awards](#)

Click [here](#) to learn more.



SMALL BUSINESS EVENTS

[Learn more](#) about the Small Business Central Event Listing or [search now](#) for events.

[SEARCH SMALL BUSINESS EVENTS](#)



VENDOR COLLABORATION

FBO now contains the Vendor Collaboration Central Event Listing. [Learn more](#) or [search](#).

gtpac.org

7

Home


Getting Started

General Info

Opportunities

Agencies

Privacy

Buyers: [Login](#) | [Register](#) Vendors: [Login](#) | [Register](#)  Accessibility

Opportunities

◀ RETURN TO HOME

Opportunities List

Advanced Search

Search Results

Archives

Keyword / Solicitation #:



TIPS


Posted Date:


Last 90 Days



Search

Clear

 [Search by Agency, Set-aside, State, and Type](#)

 [Search by Classification, NAICS code, Recovery actions, and more](#)

1 - 20 of 29032

Sort By Posted On (Desc.)

Showing 20

per page

[1](#) | [2](#) | [3](#) | [4](#) | [5](#) | [6](#) | [7](#) » [\[1452\]](#)

Opportunity	Agency/Office/Location ▼	Type ▼ / Set-aside ▼	Posted On ▲
 Charter Vessel Services for Surfclam and Ocean Quahog Surveys for the Northeast Fisheries Science Center EA133F-12-RP-0083 F -- Natural resources & conservation services	Department of Commerce National Oceanic and Atmospheric Administration (NOAA) Eastern Region Acquisition Division	Solicitation / Total Small Business	May 08, 2012
 Coloring Books and Material for the USCG Sea Partners Campaign HSCGG8-12-Q-MMN103 76 -- Books, maps & other publications	Department of Homeland Security United States Coast Guard (USCG) Commander, USCG Telecommunication & In Systems Command	Special Notice (Modified) / Total Small Business	May 08, 2012
 .../Media/Childrens Services/Audio Visual	Department of the Army		

8



Y--Single Award Task Order Contract (SATOC) in Support of the Center of Standardization for Dining Facilities within the jurisdiction of the Norfolk District and the North Atlantic Division, Corps of Engineers for the Northwest Region

Solicitation Number: W91236-09-R-0011
Agency: Department of the Army
Office: U.S. Army Corps of Engineers
Location: U.S. Army Engineer District, Norfolk

Notice Details

Packages

Interested Vendors List

Print

Link

Complete View

[Original Synopsis](#)

Presolicitation

Dec 05, 2008

3:26 pm

[Changed](#)

Dec 18, 2008

1:32 pm

[Changed](#)

Dec 18, 2008

1:37 pm

[Changed](#)

Jan 09, 2009

6:34 pm

[Changed](#)

Jan 09, 2009

6:36 pm

[Changed](#)

Jan 09, 2009

6:36 pm

Solicitation Number:

W91236-09-R-0011

Notice Type:

Presolicitation

Synopsis:

Added: Dec 05, 2008 3:26 pm Modified: Jan 09, 2009 6:33 pm [Track](#)

[Changes](#)

Solicitation is posted

Added: Dec 05, 2008 3:26 pm Modified: Feb 12, 2009 12:20 pm [Track](#)

[Changes](#)

Amendment 02 is posted.

Added: Feb 12, 2009 12:14 pm

Single Award Task Order Contract (SATOC) in Support of the Center of Standardization for Dining Facilities within the jurisdiction of the Norfolk District and the North Atlantic Division, Corps of Engineers for the Northwest Region

ALL FILES

[A09R0011](#)

Dec 18, 2008

[Locked](#)

[Amendment 1](#)

Jan 09, 2009

[A09R0011-01.pdf](#)

[A09R0011-02](#)

Feb 12, 2009

[Locked](#)

GENERAL INFORMATION

Notice Type:

Presolicitation

Original Posted Date:

December 5, 2008

Posted Date:

February 12, 2009

Response Date:

gtpac.org

9



Y--Single Award Task Order Contract (SATOC) in Support of the Center of Standardization for Dining Facilities within the jurisdiction of the Norfolk District and the North Atlantic Division, Corps of Engineers for the Northwest Region

Solicitation Number: W91236-09-R-0011
Agency: Department of the Army
Office: U.S. Army Corps of Engineers
Location: U.S. Army Engineer District, Norfolk

Notice Details

Packages

Interested Vendors List

Complete View

[Original Synopsis](#)

[Changed](#)
Dec 18, 2008
1:32 pm

[Changed](#)
Dec 18, 2008
1:37 pm

[Changed](#)
Jan 09, 2009
6:34 pm

[Changed](#)
Jan 09, 2009
6:36 pm

[Changed](#)
Jan 09, 2009
6:36 pm

[Changed](#)
Jan 09, 2009
6:36 pm

[Back](#)

[Add To Watchlist](#)

[Add Me To Interested Vendors](#)

Solicitation Number:
W91236-09-R-0011

Notice Type:
Presolicitation

Synopsis

Added: Dec 05, 2008 3:26 pm Modified: Feb 12, 2009 12:26 pm [Track](#)

Solicitation is posted

Added: Dec 05, 2008 3:26 pm Modified: Feb 12, 2009 12:26 pm [Track](#)

[Changes](#)

Amendment 02 is posted.

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Single Award Task Order Contract (SATOC) in Support of the Center of Standardization for Dining Facilities within the jurisdiction of the Norfolk District and the North Atlantic Division, Corps of Engineers for the Northwest Region

[A09R0011](#)

Dec 18, 2008

[Locked](#)

[Amendment 1](#)

Jan 09, 2009

[A09R0011-01.pdf](#)

[A09R0011-02](#)

Feb 12, 2009

[Locked](#)

GENERAL INFORMATION

Notice Type:
Presolicitation

Original Posted Date:
December 5, 2008

Posted Date:
February 12, 2009

Response Date:

Must be registered
In FedBizOpps

10

gtpac.org

OBJECTIVES

- Finding opportunities
- *Assemble & Decode the Solicitation*



TYPES OF SOL (4)

▶ Pre-solicitation

- Track, add to watch list

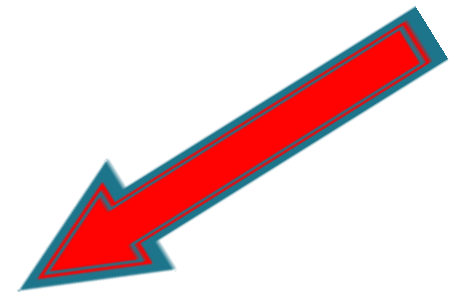
▶ Combined Synopsis-Solicitation

▶ Solicitations

- Request for Proposal (RFP)
- Invitation to Bid (IFB)
- Request for Quote (RFQ)

▶ Sources Sought (market survey)

- Respond with a capability statement
- <http://gtpac.org/2010/05/what-is-a-capabilities-statement-and-why-should-i-have-one/>



CAPABILITY STATEMENT Sample Template

Title this document: Capability Statement

Show your logo and contact information, with a specific person's name, phone and email.

TargetGov Tip: This is a CONTENT template, not a design template. Add color & graphic elements!

Competencies

Shortly describe your company's core competencies to the agency's specific needs using bullet points

Use keyword heavy bullet points for each agency, prime or teaming opportunity statement to the agency, and for each specific opportunity. The statement should be one page, one side only. Do not use Word, PowerPoint or other format.

Performance

List past customers for whom you have done similar work. Prioritize by related agency, to all federal to other government to commercial contracts. If the past projects do not relate to the targeted agency's needs, do not list it.

TargetGov Tip: Ideally, include specific contact information for immediate references. Include name, title, email, phone.

Differentiators

Identify what makes you different from your competitors and how this benefits the targeted agency

TargetGov Tip: Relate your key differentiators to the needs of the agency, prime or teaming partner.

COMPANY DATA

One very brief company description detailing pertinent data.

TargetGov Tip: Readers will visit your web site for additional information. Make sure your web site is constantly updated and government-focused.

List Specific Pertinent Codes

- DUNS
- Socio-economic certifications: 8(a), HUB Zone, SDVOB, etc.
- NAICS (all)
- CAGE Code
- Accept Credit and Purchase Cards
- GSA Schedule Contract Number(s)
- Other federal contract vehicles
- BPAs and other federal contract numbers
- State Contract Numbers

Your logo, address, phone numbers (voice, mobile and fax) email, web site and other related contact information



8 VARIETIES OF CONTRACTS

- ▶ Fixed Price
 - Firm Fixed Price (FFP)
 - Fixed Price w/Economic Price Adjustment (FPEPA)
 - Fixed Price w/Award Fee (FPAF)
- ▶ Cost Reimbursement
 - Cost Plus Incentive Fee (CPIF)
 - Cost Plus Fixed Fee (CPFF)
- ▶ Time & Material (T & M)
- ▶ Labor Hour (LH)
- ▶ Indefinite Delivery Indefinite Quantity (IDIQ)

FAR Part 16

Sections of the solicitation

- × Federal model often mimicked by other levels of government
- × Part I - The Schedule (Sections A - H)
- × Part II - Contract Clauses (Section I)
- × Part III - Attachments/Exhibits (Section J)
- × Part IV – Representations, Selection Criteria, and Instructions (Sections K - M)


FAR Part 15.204

FEDERAL Uniform Contract Format

× Part I—The Schedule

- +Section A--Solicitation/Contract Form**
- +Section B--Supplies/Prices**
- +Section C--Descriptions/Specs/SOW**
- +Section D--Packaging/Marking**
- +Section E--Inspection & Acceptance**
- +Section F--Deliveries or Performance**
- +Section G--Contract Admin. Data**
- +Section H--Special Contract Provisions**

FEDERAL Uniform Contract Format

- × **Part II--Contract Clauses**
 - + **Section I--Contract Clauses**
 - × **Part III--Attachments/Exhibits**
 - + **Section J--List of Attachments**
 - × **Part IV--Representations & Instructions**
 - + **Section K--Representations & Certifications**
 - + **Section L--Instructions/Notices**
 - + **Section M--Evaluation Criteria**
 - × **Consult: FAR Part 15.204 - Contract Format**
- 

OBJECTIVES

- Finding opportunities
- Decoding the Solicitation
- ***Determine Your Potential***

Grade yourself against the Criteria

- ▶ **Work performed of similar size and scope**
- ▶ **References**
- ▶ **Evidence of financial capacity**
- ▶ **Resumes of principals**
- ▶ **Qualifications of team member**
- ▶ **Vendor registration**
- ▶ **Certifications and pre-approvals**










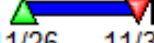
	A	B	C	D	E	F	G	H	I	J	K	L	M	
1	Proposal Manager							Client Name						
2	Office Location							Procurement Name						
3	Business Unit							Estimated Total Value						
4	Estimated B&P Cost							Per Year Value						
5														
6	Go/No Go Decision													
7														
8	Bid Factors	Bid Factor Scoring Scale										Estimated Score		
9		Negative			Neutral			Positive				Our Company	Top Competitor	
		1	2	3	4	5	6	7	8	9	10			
10	1.Are you known by the client?	Unknown to this client			Known to client, but not fully cultivated			Well-developed working relationship; excellent track record						
11	2.Is this the first you heard of procurement?	Did not expect RFP; unprepared			Generally understood RFP; prepared			Extensive experience; good track record; confirmed intelligence						
12	3.What is our overall technical capability/position?	Not qualified			Qualified			Can meet/exceed every requirement; technically superior						
13	4.Can we provide a qualified staff?							In-house staff available						
14	5.Are subcontractors available?							Yes; will enhance overall performance						
15	6.What is the long term relationship?				Excellent long term			Excellent long term; excellent short term						
16	7.Can we respond to all needs; complete, comprehensive response	Understand problems, project & client needs; can respond						Can meet/exceed all requirements; have compelling story; know hot buttons						
17	8.Who are our competitors?	Competitor is strongly favored or UNKNOWN			Open competition with no strong favorite			We are strongly favored over competition; incumbent						
18	9.Is project within our geographic region?	Poor geographic presence/experience			Good geographic presence/experience			Strong geographic presence and experience						
19	10.What is our pricing competitiveness?	Must cut corners; cost share; risky			Reasonable & competitive; reasonable risks			Honest, credible price within known limits; acceptable risks						
20	Total score of factors evaluated													
21	Potential score (number of factors evaluated times 10)													
22	Decision should be about 75+% of maximum score for a "Go" decision (the top competitor.)													

Assign responsibilities / Update schedule **Blue Team**

- ▶ **Make sure everyone knows their role, who's in charge, and what the deadlines are**
- ▶ **Update proposal development schedule daily**
- ▶ **Establish back-up plans**
- ▶ **Don't forget to allow time for delivery**
- ▶ **Make a GANTT Chart**

Proposal Preparation - SOL # A-07-12345

Page 1 of 1

Percent Complete	Start Date	End Date	TASK	November				
				27	3	10	17	24
0%	11/1/07	11/5/07	Read RFP, Prepare Questions					
0%	11/1/07	11/6/07	Submit questions to agency.					
0%	11/2/07	11/4/07	Assign proposal team.					
0%	11/7/07	11/7/07	Attend pre-proposal conference.					
0%	11/3/07	11/26/07	Prepare technical proposal.					
0%	11/10/07	11/26/07	Prepare price proposal.					
0%	11/10/07	11/20/07	Blue team review and feedback.					
0%	11/20/07	11/26/07	Red team scoring and feedback.					
0%	11/20/07	11/26/07	Revisions.					
0%	11/26/07	11/30/07	Final assembly of proposal for delivery.					

OBJECTIVES

- Finding opportunities
- Decoding the Solicitation
- Determine Your Potential
- ***The Technical Proposal***

Follow Instructions “to the letter” Complete & Submit

- ▶ Attention to detail is paramount
- ▶ Look for proposal-writing instructions in the RFP (section L in federal RFPs)
- ▶ Your proposal now will be viewed as your work later
- ▶ If you are asked to answer 10 questions, answer 10: not 9 - nor 11
- ▶ You cannot be late!

Abide by communication rules

- ▶ Early in solicitation process, two-way communication is common
- ▶ After Q&A period, communication with officials may be curtailed, even prohibited
- ▶ Post-proposal submittal, communication may be limited
- ▶ Familiarize yourself with exact rules

Theme Development

- × **Backbone of your proposal**
 - Your Strength
 - What separates you from the pack
 - How you will provide more “bang for their buck”
 - Prove that all indicators “point” to you
- × **Why should the government buy from you?**
 - Value
 - Quality
 - Experience
 - Advanced methods
- × **Consistent in Technical and Cost proposals**
- × **Must answer – What is special about you?**

Keys to Proposal Success

- × **The purpose of a proposal is to sell &**
 - + **Introduce yourself (company) in writing**
 - + **Demonstrate an in-depth knowledge your customer and his/her problems and requirements**
 - + **Present a solution**
 - + **Highlight your company and credentials**

▪ *more ...*

Keys to Proposal Success

× Winning proposals...

- × Convinces the evaluators that you understand requirements
- × Convinces the evaluators that you can solve their problem(s)
- × Convinces the evaluators that you can provide value
- × Convinces the evaluators that you can do the job (facts, figures, references, insights, and resumes)

▪ more ...

Keys to Proposal Success

- ▶ **Winning proposals distinguish themselves from the competition**
 - **Convince the evaluators that you are better**
 - **Convince the evaluators that your solution is clearly superior due to price, risk, technical merit, value added**
 - **Convince the evaluators that your firm will cause the least amount of problems**

Pleasing proposal readers

- ▶ Highlight important ideas
- ▶ Make certain those ideas stand out
- ▶ Back up ideas with facts/evidence
- ▶ Help make evaluators' job easier
- ▶ Make it easy for the evaluator to find specific answers in your proposal

Elements of Successful Proposals

- ▶ **Executive summary**
- ▶ **Responsiveness/compliance matrix**
- ▶ **Indexes**
- ▶ **Bullets**
- ▶ **Transmittal letter**
- ▶ **Table of contents**
- ▶ **Graphics**
- ▶ **Headers and footers**

The Executive Summary

- ▶ Executive Summary should be written by the “Proposal Manager”
- ▶ Style and language must be convincing
- ▶ Write Exec Summary first
 - Influences train of thought
 - Guides rest of proposal
 - Difficult if done last
 - Adjust as necessary as you write other parts
 - May use some graphics
 - Limit to one/two pages

“...you had me at hello...”



Why Proposals Lose Points

- × Failure to follow instructions
- × Questionable understanding of requirements
- × Incomplete responses—no specifics
- × Noncompliance with specification
- × Insufficient resources or insufficient information about resources
- × Technical/price imbalance
- × Poor proposal organization – not logical
- × Wordiness

Why Proposals Lose Points

- × Failure to show relevance of past performance
- × Unsubstantiated rationale for approaches
- × Restating requirements without explaining how they will be performed
- × Unprofessional appearance, typos, unnumbered pages, smudges, poor grammar, white out, etc.

The Technical Proposal

- × May be required to address
 - +management past performance
 - +personnel
 - +technical
 - +safety
 - +facilities
 - +past performance
 - +quality assurance
 - +environmental concerns
 - +security
- × Look for guidance in SOW, proposal prep instructions, and evaluation criteria

OBJECTIVES

- Finding opportunities
- Decoding the Solicitation
- Determine Your Potential
- The Technical Proposal
- ***The Cost Proposal***

The Cost Proposal

- × Make best offer first time
- × BAFO request may come into play, but don't count on it
- × Double-check numbers
- × Make it easy to read
- × Separate task developing cost proposals
 - + Not in business to lose money
 - + Recover costs & ROI
 - + Need good indirect rates

3 types of costs

► Allowable

- Allowable costs are defined in the FAR as costs that are reasonable and chargeable to the contract.
- (See FAR 31.201-2)

► Allocable

A cost can be allocated to a government contract if it:

- (a) is incurred specifically for the contract;
- (b) benefits both the contract and other work, and can be distributed to them in reasonable proportion to the benefits received;
- (c) is necessary to the overall operation of the business, although a direct relationship to any particular cost objective cannot be shown.

► Reasonable

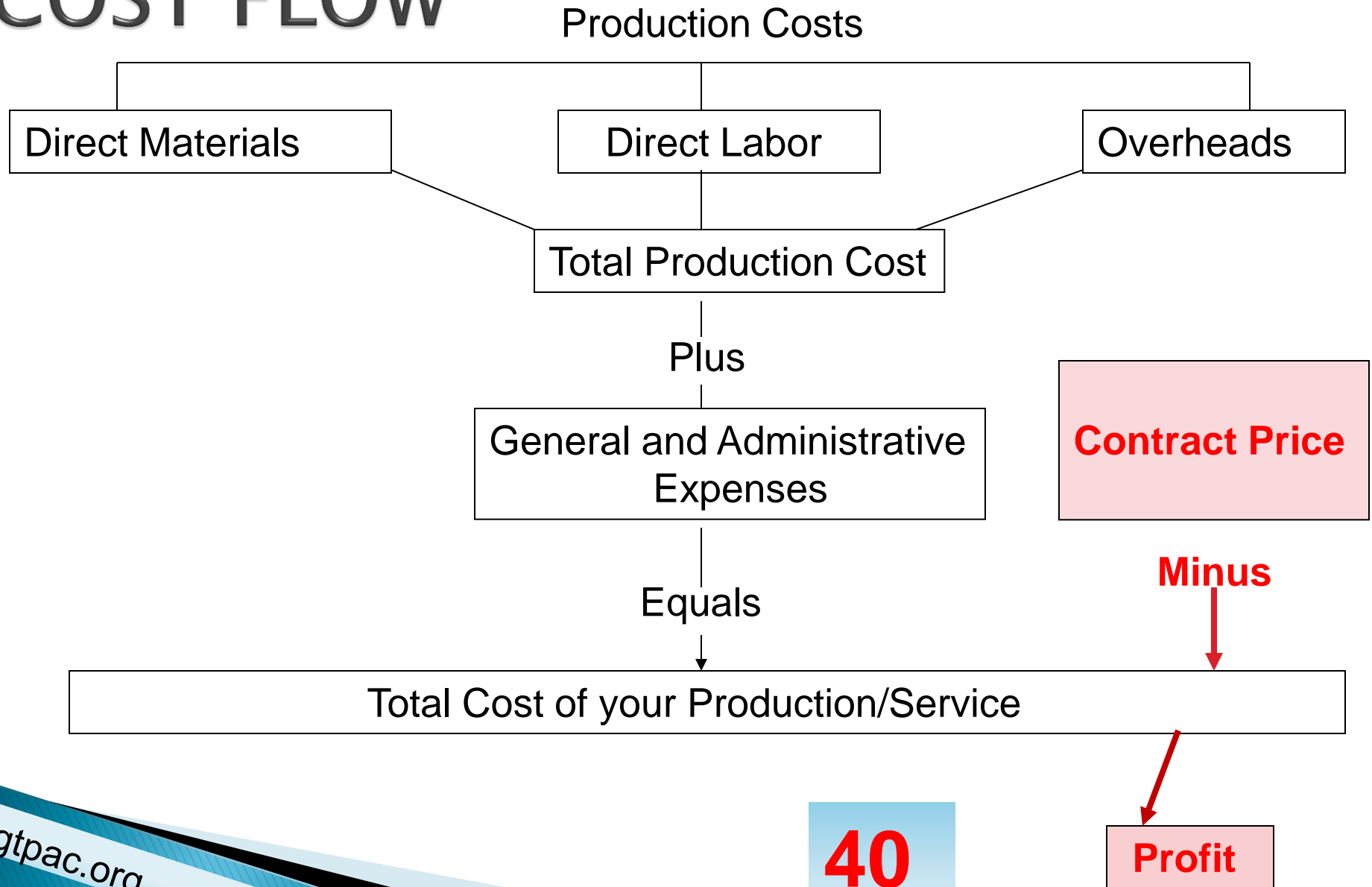
- A fair and reasonable price is the price point for a good or service that is fair to both parties involved in the transaction.
- This amount is based upon the agreed-upon conditions, Promised quality and timeliness of contract performance.
- In government contracting, a fair and reasonable price is subject to both statutory and regulatory limitations.

EXCELLENT RESOURCES

+FAR Part 31 - Contract Cost Principles and Procedures

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

COST FLOW



More References

- ▶ **Federal Acquisition Regulation (FAR)**
 - **Subpart 15.4 – Contract Pricing**
 - **Table 15-2**
 - **Part 31 – Contract Cost Principles & Procedures**
- ▶ **Cost and Accounting Standards (CAS) from CFR**
- ▶ **DCAA Contract Audit Manual (CAM)**
 - **Information for Contractors**
 - **NASA cost estimating handbook**
 - **SBA pricing your products or services guide**



DEFENSE CONTRACT AUDIT AGENCY

8725 JOHN J. KINGMAN ROAD, SUITE 2135
FORT BELVOIR, VA 22060-6219

PPS

June 26, 2012

DCAA MANUAL
NO. 7641.90

http://www.dcaa.mil/DCAAP_7641.90.pdf

INFORMATION FOR CONTRACTORS

1. PURPOSE. This manual supersedes DCAA Pamphlet 7641.90, *Information for Contractors*, dated January 2005. The manual is designed to assist contractors in understanding applicable requirements and to help ease the contract audit process. It describes what contractors should expect when doing business with the U.S. Government and interacting with DCAA auditors.

OBJECTIVES

- Finding opportunities
- Decoding the Solicitation
- Determine Your Potential
- The Technical Proposal
- The Cost Proposal
- *Putting it all together*
 - Blue Team - Red Team
 - Submission
 - You cannot be late!

Assign responsibilities / Update schedule **Blue Team**

- ▶ **Make sure everyone knows their role, who's in charge, and what the deadlines are**
- ▶ **Update proposal development schedule daily**
- ▶ **Establish back-up plans**
- ▶ **Don't forget to allow time for delivery**
- ▶ **Make a GANTT Chart**
- ▶ **Writes the proposal or bid**

YOUR RED TEAM SUPPORT

- ▶ GTPAC can be your **red** team
- ▶ Schedule as far in advance as possible
- ▶ Send the **RED TEAM**...
 - Copy of the Govt's solicitation
 - Marked up with your all questions
 - Reference by a website or a URL is OK
 - Your first draft/best effort at a bid
 - Digital documents via e-mail attachments
 - Your best effort is mandatory
 - **RED TEAM** cannot “write” your bid for you
- ▶ Incorporate red line comments & suggestions

ALWAYS be on-time
ALWAYS be responsive
ALWAYS be responsible
ALWAYS pay attention
to the details

**CONGRATULATIONS.
YOU JUST WON THE CONTRACT.
NOW WHAT?
“IT’S SHOWTIME & YOU GOTTA
PERFORM”**



Contract Administration (Roles)

- ▶ At a minimum, your company must....
 - Read the contract, and read it again and again and again...
 - Go over the contract with the customer
 - Understand all the key clauses, especially change clauses, the termination process, and the payment clauses
 - Attend all meetings
 - Produce the deliverables IAW the contract
 - Submit invoices
 - Resolve issues
- ▶ At a minimum, the govt must....
 - Measure your progress against the project plan.
 - Conduct inspections and audits of your work.
 - Evaluate your compliance of legal & contractual requirements
 - Process your invoice submittals

This is what
GTPAC's bid
“war room”
looked like
during our last
bid & proposal
process



Thanks for your attention...
Good Hunting...
Press on...

Questions?