

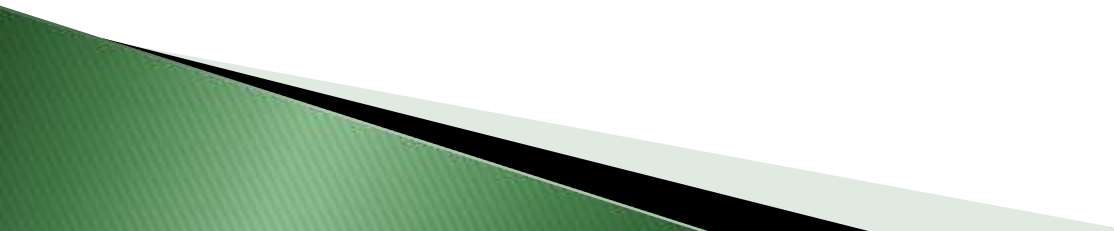
# BIDS AND PROPOSALS



# Goal

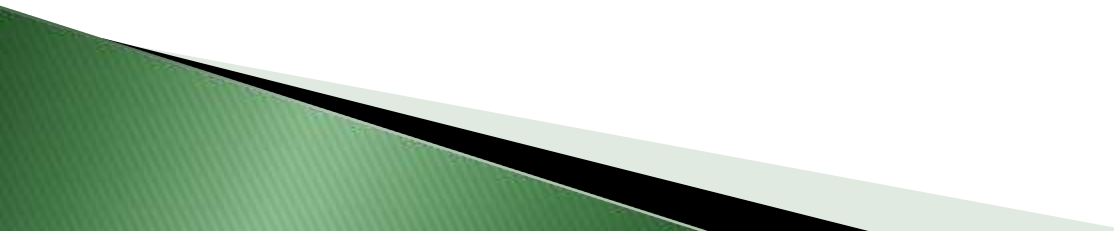
To understand the proposal process and the general criteria necessary to submit a response.

# Objectives

- ▶ To examine the proposal process.
  - ▶ To be able to formulate a strategy for a response.
  - ▶ To recognize the value in attention to detail.
- 

# Definition

Competitive Solicitations are typically referred to as:

- ▶ Requests for Proposals (RFP's) for negotiated actions.
  - ▶ Invitations for Bids (IFB's) in sealed bidding.
- 

# Competition in Contracting

- Competition in Contracting Act of 1984 (CICA)
  - Public Law 98-369
  - Promote full and open competition
  - Results in timely delivery
  - Provides for reasonable costs
- Three levels of competition in contracting
  - Full and open competition
  - Full and open competition after exclusion of sources
  - Other than full and open competition

# Competition in Contracting

- Full and open competition
  - All responsible sources permitted to compete
  - Preferred form of contracting & includes:
    - ✦ Sealed bids
    - ✦ Negotiation

# Competition in Contracting

- ▶ Full and open competition after exclusion of sources
  - Government excludes certain potential sources
  - Establishes or maintains alternative sources to support set asides

# Competition in Contracting

- ▶ Other than full and open competition
  - Violation of Statute unless permitted
  - Least Competitive
  - Least Desirable
  - Detailed Justification at high levels required



# Sealed Bids

- Invitation for Bids (IFB)
  - Time permits
  - Price and price-related factors
  - No discussion
  - More than one sealed bid expected

# Competitive Proposals

- Request for Proposals (RFP)
  - Negotiated acquisition
  - Alternate solutions encouraged
  - Award based on evaluation criteria
  - Price not a major factor
- Request for Information (RFI)

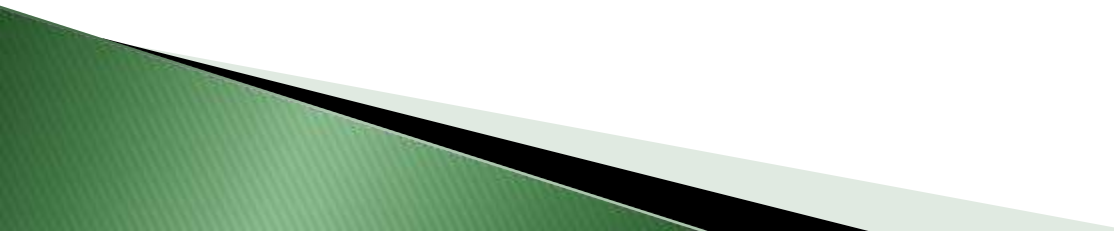
To B<sub>id</sub> or Not To B<sub>id</sub>

# To Bid or Not To Bid

- ▶ Determine your market
- ▶ Registrations
- ▶ Terminology

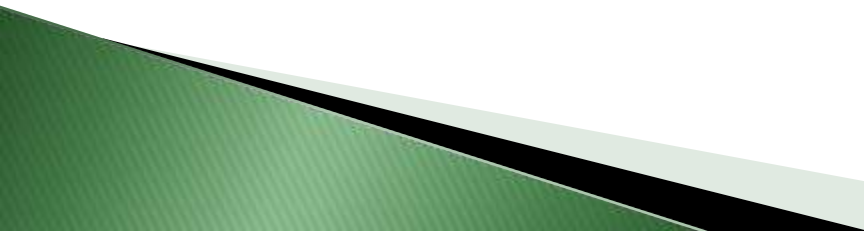
<http://www.dau.mil/pubs/glossary/preface.asp>

# To Bid or Not To Bid

- ▶ Be Realistic
  - ▶ Are you prepared?
  - ▶ Do you have the resources?
  - ▶ What is your potential?
  - ▶ Can you perform?
- 

# Uniform Contract Format

## ▶ Part I – The Schedule

- A – Solicitation /contract form
  - B – Supplies or services
  - C – Description / specifications
  - D – Packaging and marking
  - E – Inspection and acceptance
  - F – Deliveries or performance
  - G – Contract administration data
  - H – Special contract requirements
- 

# Uniform Contract Format

- Part II – Contract Clauses
  - I – Contract clauses
- Part III – List of Documents, Exhibits, and Other Attachments
  - J – List of documents, exhibits, and other attachments
- Part IV – Representations and Instructions
  - K – Representations, certifications, and other statements of bidders
  - L – Instructions, conditions, and notices to bidders
  - M – Evaluation factors for award

# Uniform Contract Format

- ▶ Multi-purpose standard forms
  - SF 33
  - SF 1442
  - SF 1447
  - SF 1449
  - OF 308


[www.gsa.gov](http://www.gsa.gov)



# The Schedule

## SECTION A

### SOLICITATION/CONTRACT FORM

- Number of pages
  - Contract/Solicitation number
  - Type of solicitation
  - Date issued
  - Issuing authority
  - Government contact information
  - Proposal due date, time, and location
  - Offeror acknowledgement, amendments, & signature
- 

# The Schedule

## **SECTION B**

### **SUPPLIES OR SERVICES AND PRICES/COSTS**

- Contract Line Item Numbers (CLIN)
- Brief description
- Prices

## **SECTION C**

### **DESCRIPTION/SPECIFICATIONS/STATEMENT OF WORK**

- Additional description/specifications needed in the statement of work

# The Schedule

## **SECTION D**

### **PACKAGING AND MARKING**

- Packaging requirements
- Marking requirements
- Preservation requirements

## **SECTION E**

### **INSPECTION AND ACCEPTANCE**

- FAR Part 46 – Quality Assurance
- Place and time
- Requirements

# The Schedule

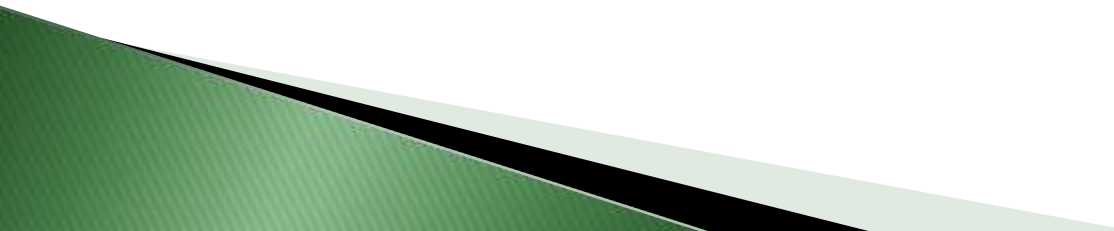
## **SECTION F**

### **DELIVERIES OR PERFORMANCE**

- Identifies place of performance or delivery of items
- Specifies performance or delivery schedule

## **SECTION G**

### **CONTRACT ADMINISTRATION DATA**

- Identifies government contract administrator
  - Payment address information
- 

# The Schedule

## **SECTION H**

### **SPECIAL CONTRACT REQUIREMENTS**

- Special requirements other than those stated in any of the other sections

## **SECTION I** (PART II)

### **CONTRACT CLAUSES**

- Clauses required by law
  - Clauses required by regulation
- 

# The Schedule

## **SECTION J** (PART III)

### **LIST OF DOCUMENTS, EXHIBITS, AND OTHER ATTACHMENTS**

- Contract Data Requirements List (CDRL)
- Drawings
- Past performance
- Must list the title, date, and number of pages for each attached document

## **SECTION K** (PART IV)

### **REPRESENTATIONS, CERTIFICATIONS, AND OTHER STATEMENTS OF BIDDERS**

- ORCA
- Certification and representation requirements

# The Schedule

## **SECTION L** (PART IV)

### **INSTRUCTIONS, CONDITIONS AND NOTICES TO BIDDERS**

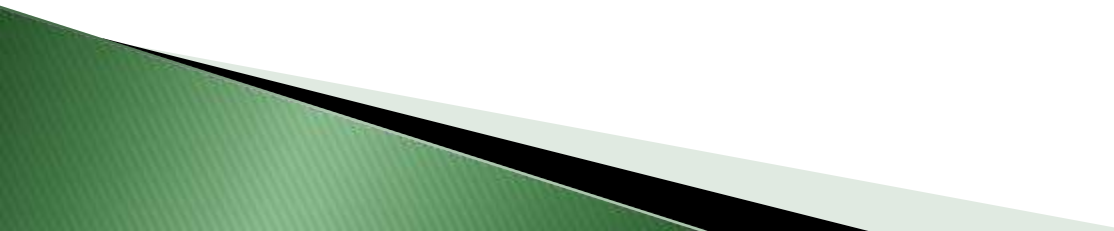
- Instructions to bidders
- Type of contract
- Proposal page limitation
- Due date & time of proposal

## **SECTION M** (PART IV)

### **EVALUATION FACTORS FOR AWARD**

- Technical
  - Cost data
- 

# Process

- ▶ Target agency
  - ▶ Research opportunities
  - ▶ Obtain proposal / Bid
  - ▶ Plan & Strategize
  - ▶ Develop
  - ▶ Review
  - ▶ Submit
- 



# Process

How long does it  
take?

# Target Agency

- ▶ Who do you want to sell to?
  - Determine your market
    - DoD
    - NASA
    - VA
    - GSA
    - DOE

# Research Opportunities

## ▶ Find Proposals

- Agency websites
- Agency office
- Networking
- Notification services

[www.fbo.gov](http://www.fbo.gov)

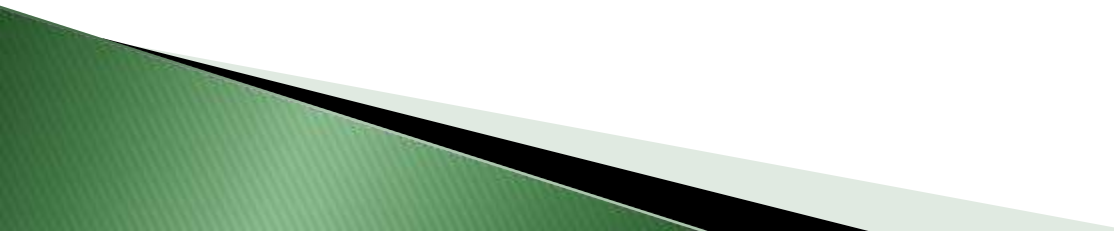
<http://prod.nais.nasa.gov>

## ▶ Print hard copy

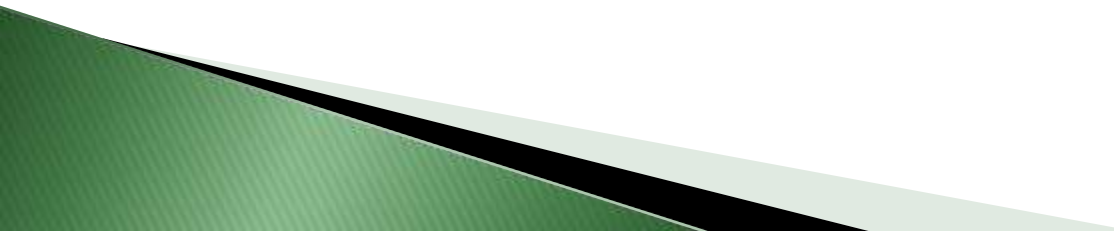
# Obtain Proposal / Bid

- ▶ Receive the Proposal / Bid package
  - Carefully examine the solicitation and verify that you have everything
    - Uniform Contract Format – Section J
  - Make duplicate copies of solicitation
    - 3 ring binders
    - Distribute among team

# Plan & Strategize

- ▶ Assemble a team
  - ▶ Internal meeting
  - ▶ Potential for success
  - ▶ Milestones
- 

# Plan & Strategize

- ▶ Pre-bid/proposal
  - ▶ Questions
  - ▶ Review proposal
  - ▶ Draft
  - ▶ Response
- 

# Plan & Strategize

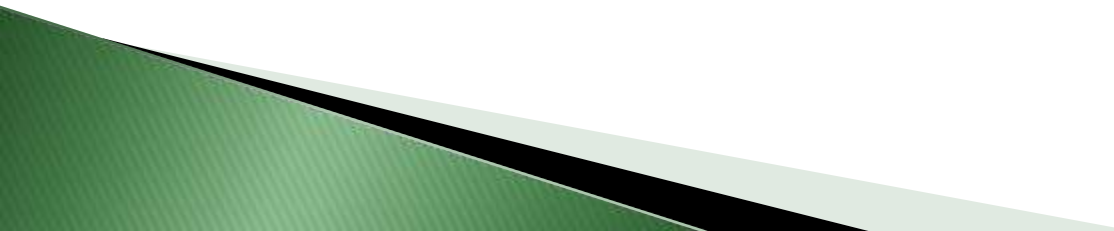
READ

READ

READ

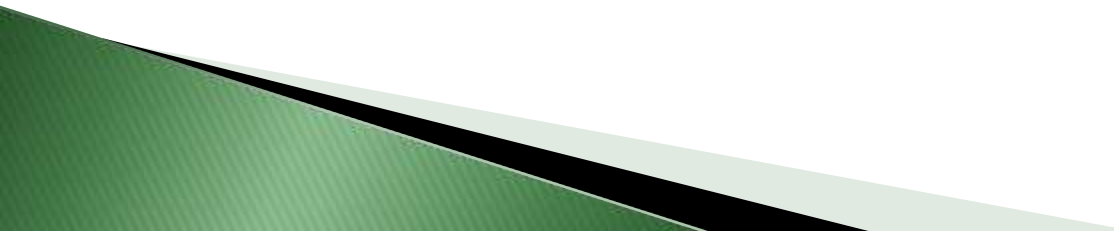
# Develop Response

Keep the following in mind when preparing response:

- Compliance with the instructions
  - Correlation to requirements of proposal
  - Clear and professional
  - Best solution / option
  - Strategy to win
- 

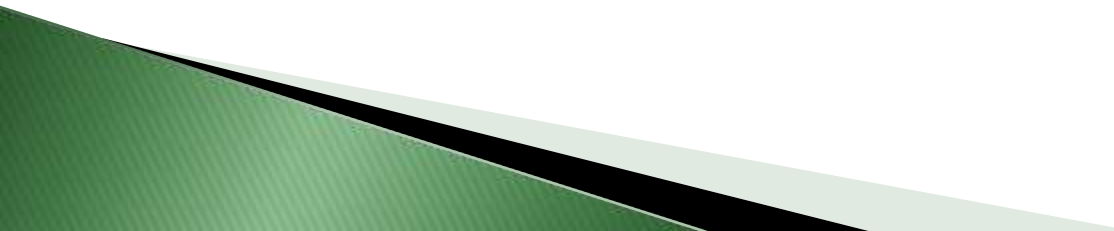


# Develop Response

- ▶ Technical
  - ▶ General
  - ▶ Guidance
- 

# Writing the Proposal

## ▶ Structure

- Follow the instructions
  - Format accordingly
  - Address evaluation criteria
  - Respond to the scope
  - Respond to the technical requirements
  - Fee schedule
- 

# Writing the Proposal

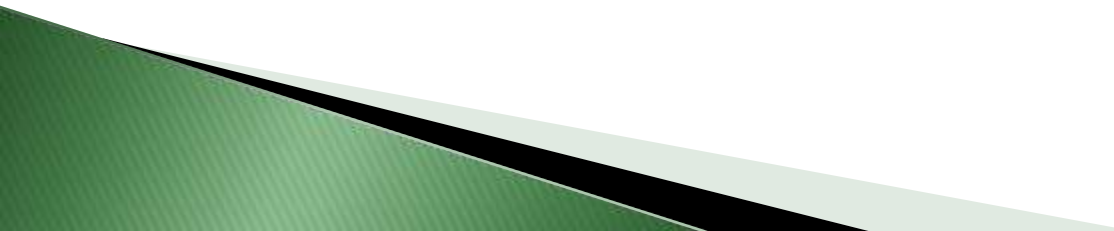
## ▶ Preparation

- Assemble input from team
- Review with team
  - Use checklist
  - Validate order with original package
  - Ensure that every element of evaluation criteria is met

# Writing the Proposal

- ▶ Write with succinctness & accuracy
- ▶ Put the main point up front
- ▶ Answer:
  - Who?                      What?
  - When?                     Where?
  - Why?                        How?

# Writing the Proposal

- ▶ Get to the point and be accurate
  - ▶ Start with main point and then amplify
  - ▶ Avoid ambiguity
  - ▶ Less is Best
  - ▶ Avoid clichés, slang, and trite phrases
  - ▶ Understand what you write
- 

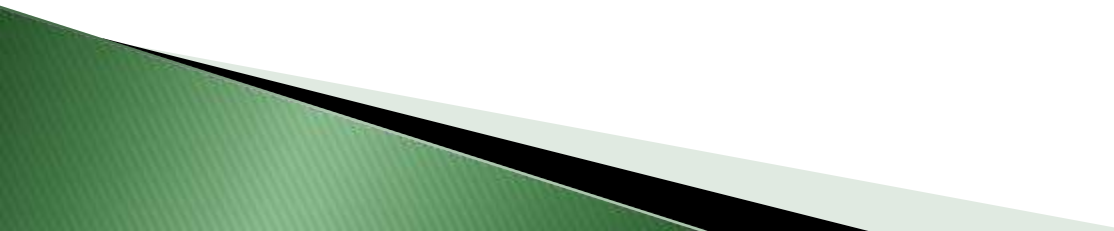
# Writing the Proposal

- ▶ Executive Summary
  - Convey important point
  - Major features & benefits
  - Adjust as you write
  - Graphics
  - Be convincing
  - Substantiate

# Writing the Proposal

- ▶ Check the entire proposal
  - Verify representations & certifications (ORCA)
  - Technical consistency
  - Spelling & grammar
  - Page numbering
  - Section / subsection numbering & agreement
  - Font
    - Type
    - Size
    - Page orientation
  - Each copy has all pages
  - Appropriate signatures
  - Place copies in binders

# Factors for a Successful Proposal

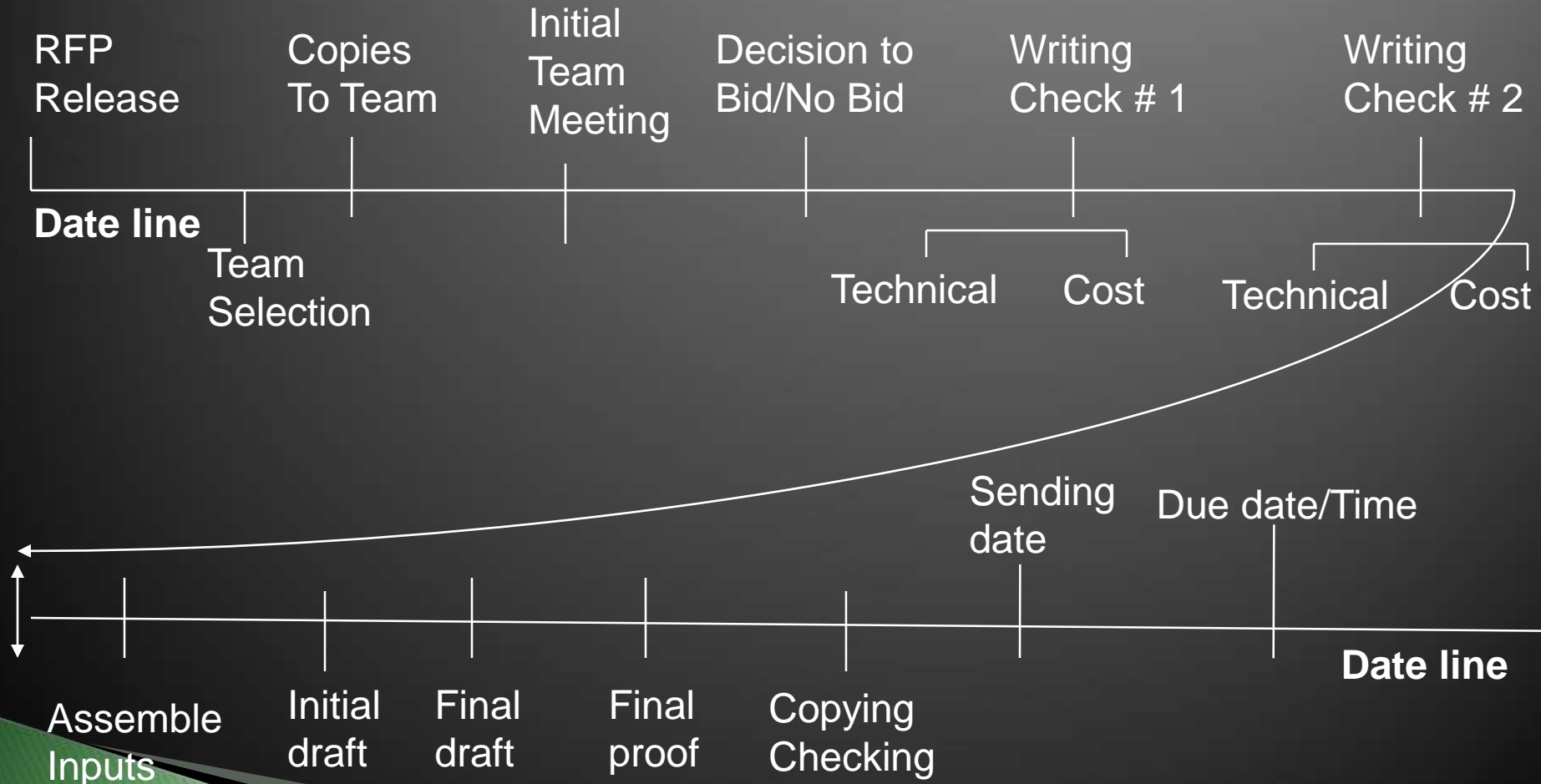
- Introduce your company in writing
  - Know your customer and their problems and/or requirements
  - Present a solution
  - Highlight your company and credentials
- 



# Factors for a Successful Proposal

- ▶ **Winning proposals**
  - Convince evaluators
  - Distinguish themselves from competition

# Proposal Development Time Line

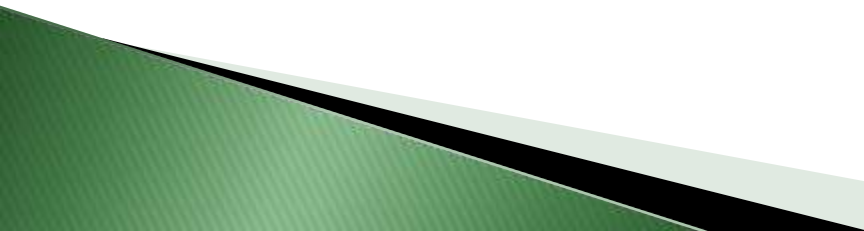


# Oral Presentations

- ▶ Factors to consider if an oral presentation is requested
  - Only one person in charge
  - Rehearse until you are comfortable with the material
  - Plan for what could go wrong
  - Presentation team **MUST** know and understand the proposal content and solution
  - Pay close attention to questions asked and give concise answers
  - Use appropriate graphics

# Factors that Hinder Proposals

## ▶ Why proposals lose points


- Failure to follow instructions
  - Questionable understanding of requirements
  - Incomplete responses
  - Inconsistent responses
  - Noncompliance with specification
  - Insufficient resources
  - Solution / price imbalance
  - Poor proposal organization – not logical
  - Wordiness
- 

# Factors that Hinder Proposals

## ▶ 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
  - Pages not numbered or numbered incorrectly
  - Smudges
  - Poor grammar

# Review

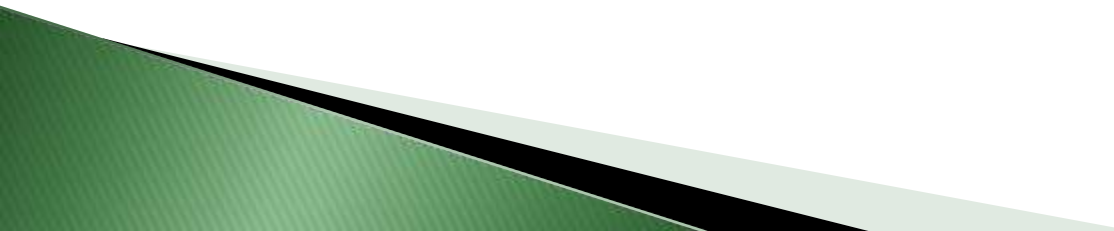
- Scope addressed
  - Fee Schedule
  - Required forms
  - Addenda acknowledged
  - Format
  - Binding
  - Notary (when & where applicable)
  - Signatures
  - Number of copies to submit with the original
  - Make sure you make one copy for your records
  - Bonds
  - Deliver proposal
- 

# Summary

**PLAN**

**STRATEGIZE**

**WRITE**

- ▶ Read
  - ▶ Follow the instructions
  - ▶ Ability to perform
  - ▶ Team
  - ▶ Due dates
  - ▶ Answer the question
- 

IF YOU WIN...

**CELEBRATE!**  
&  
**Get Ready to Perform**





# IF YOU DON'T WIN...

- ▶ Don't get discouraged
  - ▶ Arrange for a debrief
  - ▶ Learn from the experience
  - ▶ Prepare for the next bid
- 