

# **Proposal Writing for Government Contracts**

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# Essential Truths

*There are far more losing proposals than winning ones*

*Proposals can lose for reasons beyond the writer's control*

*--- Most lose due to problems in writing*

# Proposals

A proposal is . . . .

A good idea which solves a problem, well expressed, with a clear indication of methods

A marketing document introducing your reader to your company

Is often a legal and binding contract

Should be a “companion book” to the solicitation

A communication process

A relationship building exercise

# Proposals

A proposal is not . . . .

“All about ME”

Anything, anyone really wants to read

Something that can be successfully thrown together at the last minute.

# Why Proposals Win

(Yes, Some do win....)



- They answer the solicitation
- Prove what they are saying
- Include practical examples
- Show clear evidence of the bidder's superior capabilities
- Avoid grandiose, sweeping, unsubstantiated claims

# Winning Proposals Convince!

The Evaluator must be convinced that you...

- Understand the problem
  - Relevant experience
- Can solve the problem
  - Have a detailed plan
  - Identify Issues
  - Risk reduction
- Can deliver the solution
  - Well qualified and dependable
- Provide good value



# Winning Proposals

- Respond to the needs of the Agency
  - Where documented? RFP, Agency's Goals, Mission, Vision, Literature, Strategic Plan, etc
- Satisfies the 5 C's:
  - Clear
  - Complete
  - Comprehensive
  - Concise
  - Convincing

# The Government Contract Award Process

- Tell 'em what you're gonna do
- Do what you said you'd do
- Eliminate unfair advantages
- Suit Government's best interest
- Stay IAW FAR



*(In accordance with Federal Acquisition Regulation)*



# Government Objectives

- Good product
- Timely delivery
- Fair and reasonable price

## *TRANSLATION*

- Want EVERYTHING
- at an impossible schedule
- for an unrealistic price

# Proposal Writing Process

Planning      Efficiency and Accuracy

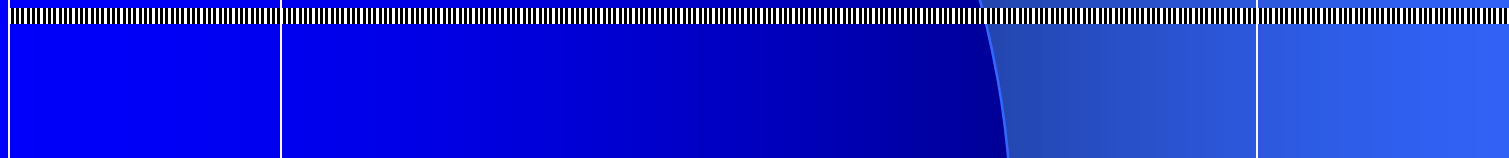
Writing      Create a document that is compliant with the RFP, accurate, competitive, well-presented, with winning bid strategies, and do it under deadline pressure.

Review      Validation !

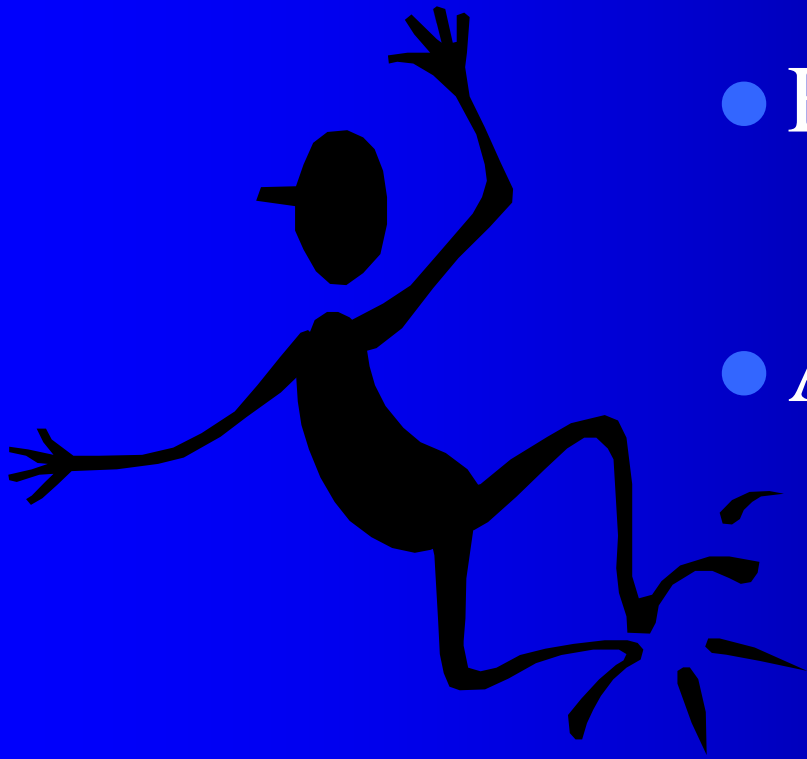
Proposal  
Planning

Proposal  
Writing

Proposal  
Review



# Finding a Bid Opportunity!



- Fed Biz Ops

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

- Agency Web sites

# What's Out There?

- **IFB**      *Invitation for Bids*
  - Requirements easily defined
  - Only concerned with price
  - Public opening of sealed bids
- **RFQ**      *Request for Quotations*
  - Primarily concerned with price
  - Possible “Best Value” considerations
  - No negotiations; Perhaps no contract
- **RFP**      *Request for Proposals*
  - Generally most comprehensive
  - Allows for negotiation of final contract

# What's Out There?

## Various types of award

- Full and Open Competition
  - Sealed bid (low bidder)
  - Two Step
  - Best Value
  
- Other than Full and Open Competition
  - Sole Source

# What's Out There?

- Sources Sought

- Government “tests the water”
- Feasibility or New Technology
- Need for Competition

- Notice of Intent

- Intention to award a contract without competition
- “Sole Source” Award

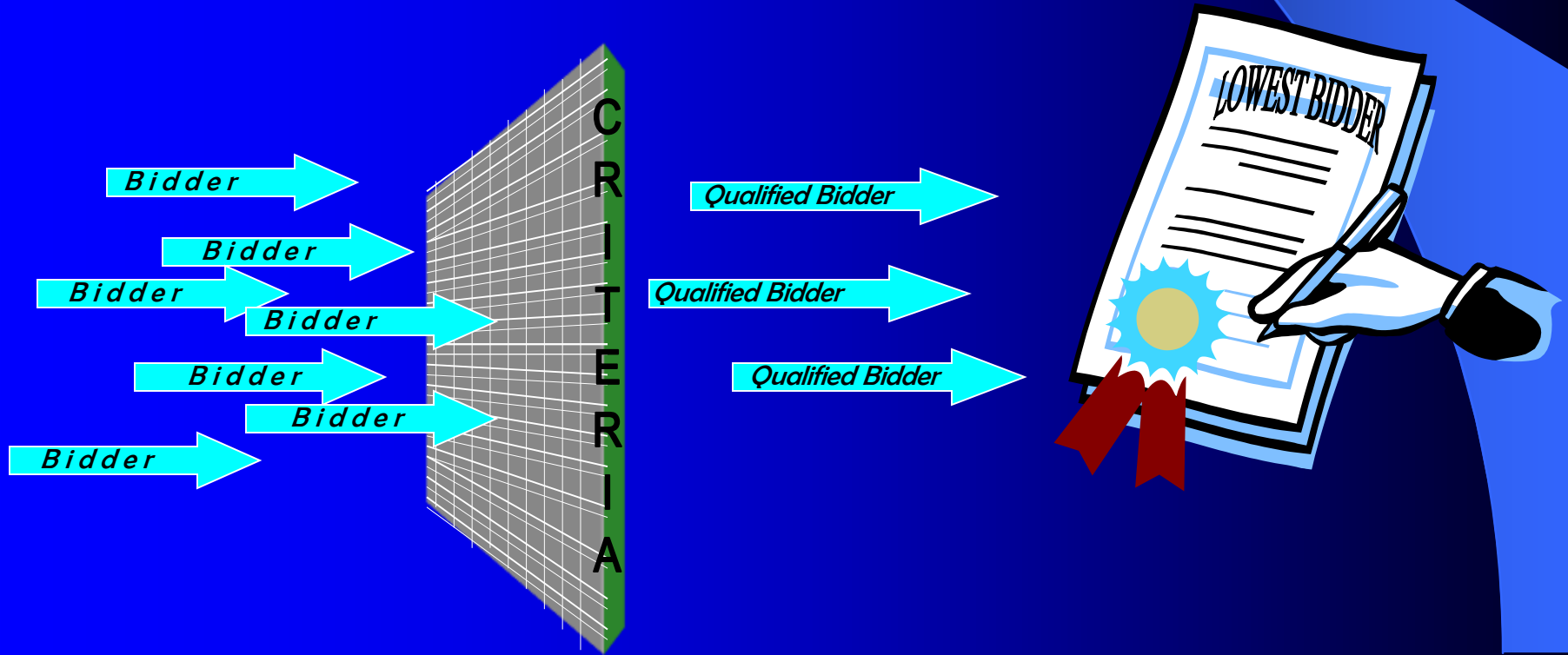
# “Two Step” Award

Also “Lowest Price Technically Acceptable”

- Technical evaluation followed by low bid award

STEP 1: Verify Specific Qualifications (Filter out unqualified bidders)

STEP 2: Low-Bidder Contract Award



# “Two Step” Award

For a successful “Two Step” proposal:

- Identify the criteria
- Make sure you pass each criteria
- Ensure the reader absolutely, positively can tell you pass each criteria

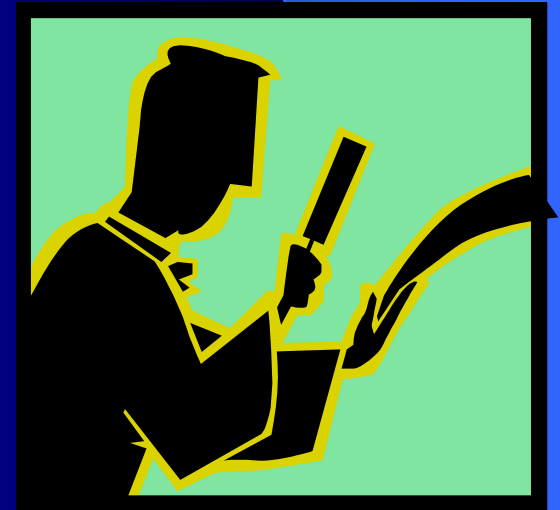
*Otherwise.... You are at risk*



# Best Value Award

*Awarding to Someone Who is Not the Low Bid*

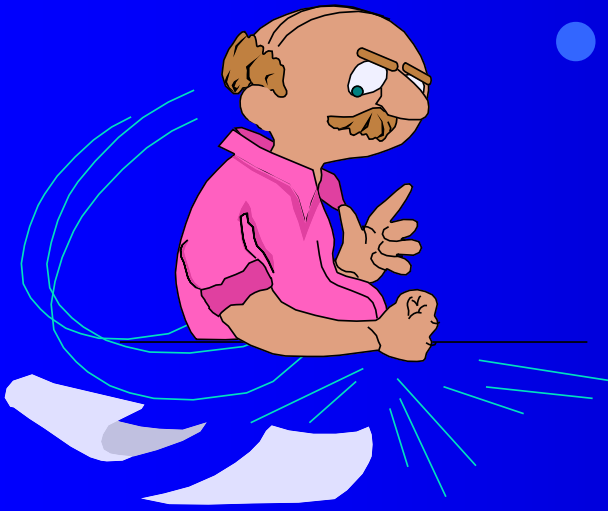
- Award not based primarily on cost
  - Cost is one of several factors
  - Non-cost areas can be significantly more important than cost areas
- Requires extremely thorough evaluation of non-cost areas of the proposal



# Some Basic Data

- Solicitation Number
- Due Date for Proposal
- Type of Solicitation
  - Sealed bid? Negotiated?
  - Commercial products/services?
  - Best Value?
- Issuing Agency
- Contracting Officer
- Set aside?

# Let's Go For It!



- List tasks you must accomplish
- Set up a Time Line
  - Work backward from proposal due date to establish when tasks must be accomplished
  - Identify critical dates: question cut off date; site visits, etc.
- Start to build the proposal shell (annotated outline)

# Where do we start?

- The Solicitation: *Your roadmap*
- Read it thoroughly
  - What is really being asked for?
  - What is the acquisition method?
  - How exactly will the winner be decided?



# The Request for Proposals (RFP)

- Part I – The Schedule

Section A – Solicitation /contract form

Section B – Supplies or services; pricing

Section C – Description / specifications

Section D – Packaging and marking

Section E – Inspection and acceptance

Section F – Deliveries or performance

Section G – Contract administration data

Section H – Special contract requirements

# The Request for Proposals (RFP)

- Part II – Contract Clauses

Section I – Contract clauses

- Part III – Other Attachments

Section J – List of documents, exhibits, and other attachments

# The Request for Proposals (RFP)

- Part IV – Representations and Instructions

Section K – Representations, certifications, and other statements of bidders

Section L – Instructions, conditions, and notices to bidders

Section M – Evaluation factors for award

# The Request for Proposals (RFP)

## - Section L : General Instructions for Offerors

Read !

Understand !

Comply !

## -Section M : Evaluation Description

Basis for award: Best Value, Low Bid, etc

*(Tell 'em what you're gonna do)*



# Questions about the RFP

- If you don't understand it....  
...ASK! (in writing)
- Be sure your questions are succinct
- Word questions carefully
- Verbal information provided by Government is **NOT BINDING!** Ask the Issuing office to publish response with Q&A's to all recipients.

# First Steps

## Get Organized

- Assign a Proposal Manager
  - Put the RFP in a 3-ring binder; Distribute copies
  - Read it! (Several times)
  - Use tabs, “Post-It” notes, highlighters, etc to mark important pages and paragraphs
  - Develop cross reference matrix of requirements (will become your checklist)
  - Critical information may be scattered among many different sections of the RFP, but all essential information is in there

# The Schedule

- Proposal Schedule--
  - MAKE ONE and stick to it!
  - Leave plenty of time for copying, binding, and delivering the proposal.
    - The copier knows that an important document is being copied, so it will break, jam or smudge.
    - Have a backup plan
  - Make sure everybody on the proposal team has a copy of the schedule, and understands his/her role in meeting it.

# First Steps

## Start Writing

- Proposal Outline –
  - Prepare an annotated outline which includes important points from the RFP as well as your own information on what you are planning to say in each section
  - Copy the outline above, delete the original wording, and you have a basic outline for your proposal

# First Steps

(Cont)

- Proposal Outline (Cont.)
  - Indicate the estimated number of pages for each section/subsection of the outline, and the evaluation points.
  - If a team is writing the proposal, indicate who is responsible next to each section/subsection and hold them accountable.
  - Put important instructions on the first page or top of outline, such as: prop due date/time; number of copies; page limits; etc.

# Proposal Preparation

- Make sure you are familiar with the Instructions to Offerors (Section L)
- Stick to the Government's outline in the solicitation
- Study the evaluation criteria, and the points allocated to each section (Section M)

# Evaluation Criteria

- Technical
- Management
- Past Performance
- Cost or Price
- Relative importance?

# Proposal Writing

- Get to the point and be accurate
- Don't bury important points
- Start with main point and then amplify
- Avoid ambiguity
- Less is Best
- Don't lose sight of evaluation criteria
  - If it's not asked for, you don't need it



# Executive Summary

- Executive Summary
  - Convey important points
  - Major features & benefits
  - Guides the remainder of the proposal
  - Adjust as you write
  - Be convincing
  - Substantiate

# Technical Approach

- Needs to answer...
  - Who?
  - What?
  - When?
  - Where?
  - How?
  - Why?

# Management Approach

- Depends on instructions in RFP
- May contain discussion on --
  - How you will manage the overall project
  - How you will manage/oversee the work of your staff and subcontractors
  - Your organization chart of the project
  - Position descriptions of project staff

# Personnel Section

- Depends on instructions in RFP
- May contain discussion on --
  - Experience and skills of your proposed staff members
  - Resumes of key staff may be required
    - Tailor them for this purpose
  - Consider... Why were these specific individuals chosen for your team?

# Past Performance

- Read carefully what's being asked
- How is it relevant?
  - Similar services, location, constraints
- Demonstrated successful performance
- Compliments other proposal areas
- Be truthful – The reviewer will see “the other side of the story” too

# General Guidelines

- YOU MUST:
  - respond to all requirements of SOW
  - demonstrate specific and relevant experience
  - prove your project team has been successful in the past
  - explain what you are going to do and how you are going to do it (better than your competition!)

# General Guidelines

- Remember the Problem / Solution aspect. Get to the heart of the problem. Ask “what are they worried about?”
- Provide solutions that will leave the evaluator worry-free
- Write proposals that include information that is
  - Relevant
  - Compelling
  - Solutions based
  - Supported with facts/details

# General Guidelines

(Cont)

- Tailor your proposal
  - Ensure your proposal is tailored for this specific solicitation
  - The unique problem presented by this office
  - Mention the soliciting agency or office frequently
  - NEVER use the term “client”
- Use professional language; be strong and confident
- Repetition for emphasis– use sparingly
- Keep an eye on the page count throughout



# Configuration Control

*The Art of Keeping Control Despite Changes*

- You must have a version control system
  - Easy to understand; Easy to work with
  - Limits, controls, and records changes
  - Provide a complete and thorough audit trail
  - File naming system, Back-Ups, Dates
- A good system will
  - Document every change (author & date)
  - Confirm changes made as planned
  - Prevent more than one person from accessing files at the same time
  - Tightly control the “master”

# Flow & Traceability

- All statements and claims in the proposal should be traceable to a requirement...  
...and flow to a result
- Ask... “Why is this in my proposal?”  
and... “So what?”  
and... “Who cares?”

# Flow & Traceability

## Test Your Proposal

- Do the following really contribute to your proposal?

When you were founded

Who the founder was

How much you have grown

How long you have been in business

How big you are

How many employees you have

How many locations you have

What your mission is

About your other customers

Where you are located

We're ISO certified

We're certified in...

- Only if they address a requirement or provide benefit back to the Government

# Flow & Traceability

- A good proposal will correspond to the RFP & Statement of Work
- Cross reference tables are acceptable
- Combining requirements can save time and paper

# Substantiate Every Claim

- Be careful of the following...

State-of-the-art technology

Top firm

Great reputation

Premier

Low risk

Excellent customer service

Best value

Respected

Our customers come first

We are the only ones

Leading edge

Quality focused

Uniquely qualified

Innovative

- Without backing these phrases up, they are hollow, worthless, and annoying to the reader

# Costing

- Don't wait until the last minute to gather cost information
- Understand the type of contract you are bidding:
  - firm fixed
  - fixed fee
  - cost-plus
  - time and materials, etc.

# Costing (con't)

- From Technical and Management portions, develop checklist of costs to be included
- Review the solicitation for “hidden costs.”
  - Special insurance requirements
  - Minimum wages established by law
- Be sure your proposed budget is consistent with your proposed effort

# Costing (con't)

- Be explicit: What's included & what's not included
- Comply with data / format requirements
  - Government cost team may need to manipulate your data to fit their models
  - If uncertain, ask to submit a sample for testing
- Gov't will check for completeness, reasonableness, realism



# Other Information

- As required by RFP, such as--
  - Discussion of your Understanding of the Problem
  - Oral presentation
  - Sample of product

# Oral Proposals

- At discretion of Contracting Officer
- Can be
  - Combined with written proposal
  - Instead of written proposal
- Usually structured
- Common with demonstration of product



# Oral Proposals

## (Cont)

- Gather as much information as possible
  - Room layout, equipment, audience
- Remember, the oral proposal is a proposal!
  - Clear, Concise, and Convincing
- Practice, Practice, Practice
  - Rehearse in presentation room
  - Plan for things to go wrong



# Graphics

- A picture is worth a thousand words -- use tables, charts and graphics to summarize information or to break up your narrative
  - *but don't overdo it !*
- Anything vital to understanding your proposal should be in both text and graphic form
- Captions – Steer, focus, emphasize, describe

# Don't Assume

- Anything!  
Got a question... *Ask!*
- That the Government knows your organization's capabilities, staff or the projects you have done.
  - Even if you've performed work for this office in the past
- That the Government team is all that smart

# Proposal Review

- Validation! Check statements, check math, check format
- Ensure that every element of evaluation criteria is met
- Have Red Team conduct a review prior to submittal or if you have a small organization have an outside party review your proposal for you.

# Proposal Review

## (Cont)

- Consistency (good) & Redundancy (bad)
- Spelling errors
- Flow, Uniformity, Logic, Continuity
- Page numbering
- Section/Subsection numbering or lettering
- Appearance of headings, subheadings, font types and font sizes
- Each copy contains all pages, in the proper order

# Check Your Costs

(Re) Do the Math!



- Check and recheck your numbers and formulas
- Document any assumptions and include them in proposal
- Don't make the government guess



# Almost done ...

- Edit to fit page requirements
  - Aim for “maximum minus 10%”
  - Are graphics necessary?
- Page Limit Panic !
  - Last minute editing may be necessary
  - ~~Find, eliminate and remove any useless, redundant, and unnecessary words or paragraphs~~
  - Adjust hyphenation
  - Careful not to violate format requirements



# Make Sure You Have...

- Filled in all the forms in the RFP that you must return
- Kept a copy for your records
- **SIGNED** and Dated your offer unless Electronic submittal is authorized.

# And of course...

- Get it there **ON TIME!**
- USPS, FedEx, UPS
- Electronic Delivery
- Hand Delivery
- Call to verify receipt



# And then what happens?

A look inside the Government's  
Contract Award Process



# The Draft RFP

Question:

Why does the Government issue a draft RFP?



Solicit industry feedback

Increase industry awareness

Encourage questions, comments, suggestions

*Better RFP yields better product !*

# The Request for Proposals (RFP)

Documents the intended contract tasks (Statement of Work; Statement of Objectives)

Documents how the award decision will be made

Documents all requirements of “responsive” bidders

# The Request for Proposals (RFP)

Don't assume....

- The Government Team knows what it's asking for.
- The Government Team is knowledgeable about the required work
- The authors of the RFP and the evaluation team are one and the same
- The RFP is complete and error-free

# Industry Day

Question:

Why does the Government conduct an Industry Day ?

Opportunity for Q & A

Provide offerors information not contained within the RFP that *may* be beneficial in preparing the proposal

*Better proposal yields better product !*



# Industry Day Dilemma

- Offerors get to size up the competition
- Offerors hesitant to ask questions (risk of “tipping their hand”)



.....*Government receives no benefit*

# EVALUATION HEIRARCHY

(Example)

Elements

Areas

Items

Factors

Criteria



# EVALUATION HEIRARCHY

(Example)

Elements

Cost

Non-Cost

Reasonable

Technical

Complete

Management

Realism

Past Perf

Safety

Areas

# EVALUATION HEIRARCHY

(Example)

Element

Non-Cost

Area

Technical

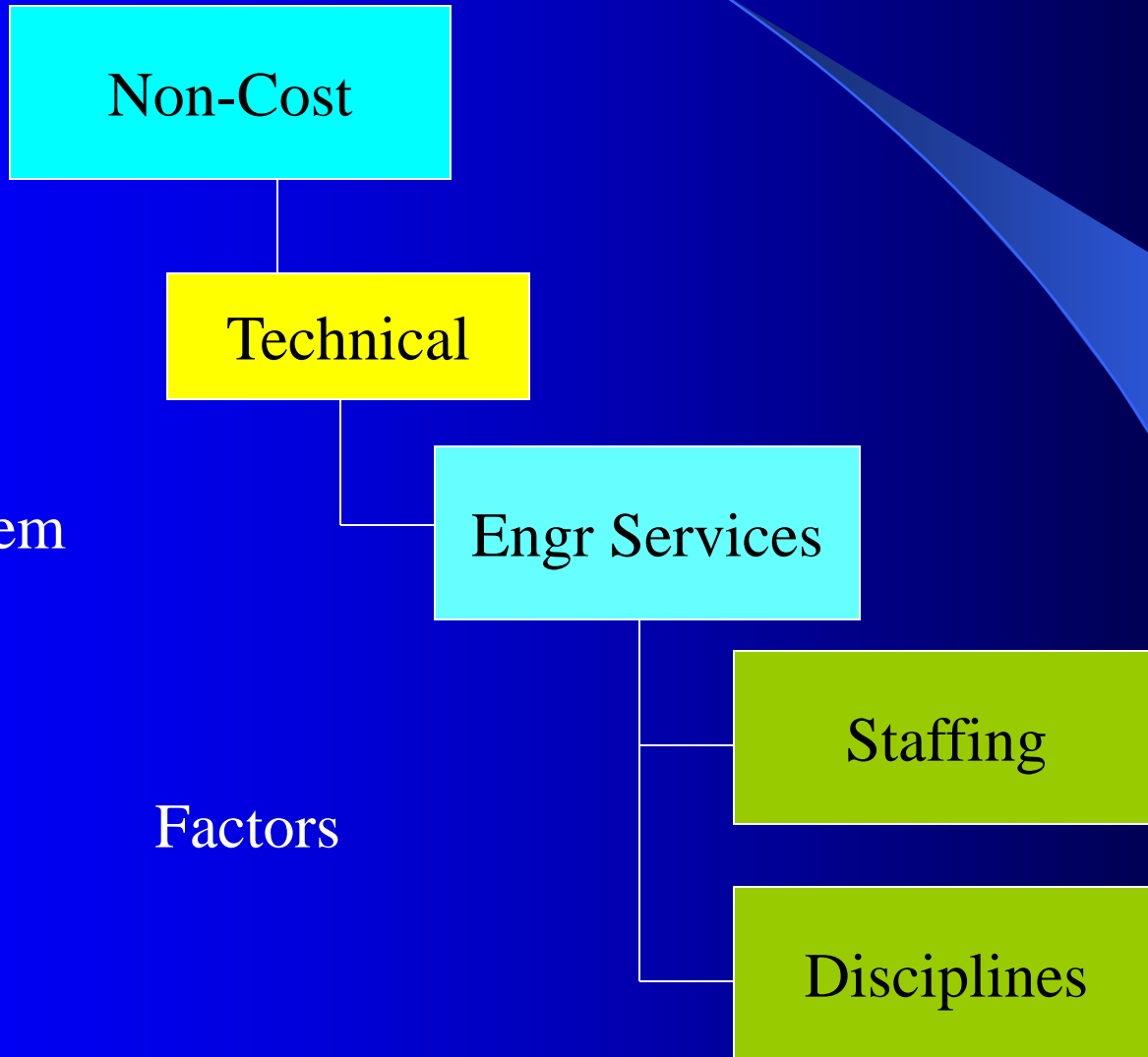
Item

Engr Services

Factors

Staffing

Disciplines



# Evaluation Criteria

Every factor has criteria for assessment

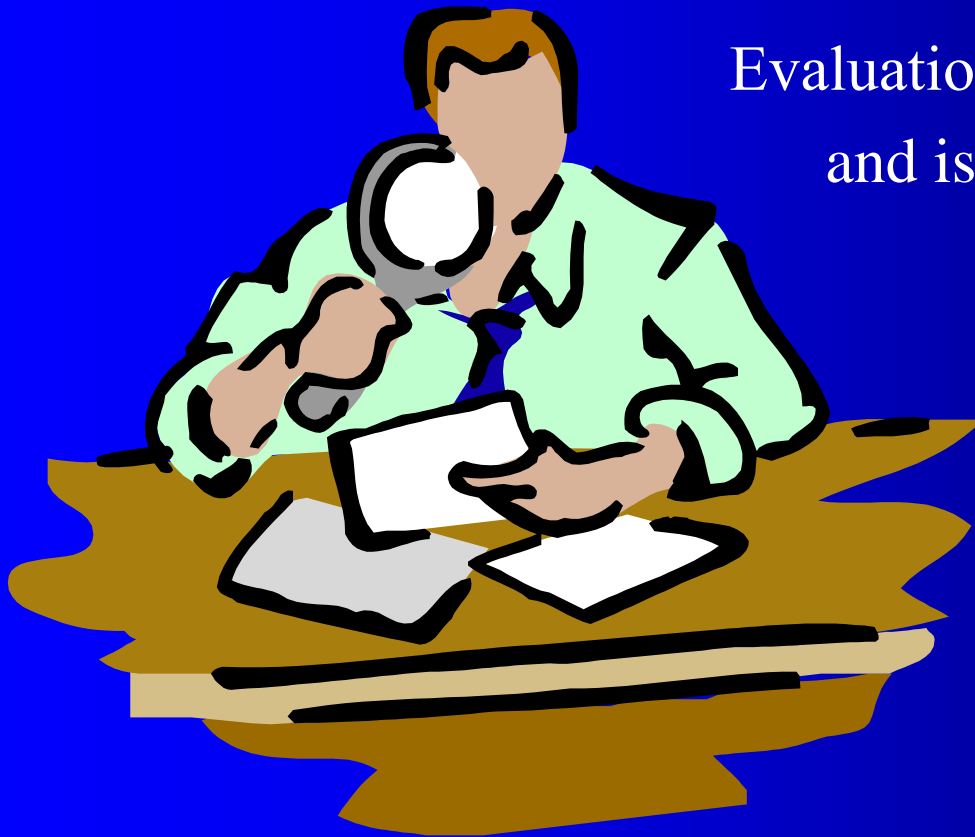
Underlying question: Does the offeror understand the requirements?

Offeror must convince the evaluator that the requirements are understood, and the approach is sound

- Substantiating every claim
- Providing background information
- Tie approach to requirements

# The Evaluation

*A whole lot of fun now!*



Evaluation Team is “sequestered”  
and isolated

Team has access to  
advisors and Past  
Performance sources

# The Evaluation

*A whole lot of fun now!*

Every proposal evaluated separately, w/o comparison

- Strengths, Weaknesses, Score, Risk
- Proposals are not scored relative to each other. No comparison between offerors is permitted

Every factor evaluated separately; Risk assessment may be included in evaluation

- Factors are evaluated and scored by individual team members

Evaluation Team convenes to discuss and reach consensus

- Resulting score is NOT just an average! Score is the result of discussion, argument, persuasion, and debate

# Evaluation Consensus

After every proposal evaluated (strengths, weaknesses, score, risk) first “comparison” made between offerors

Comparison looks for consistency in evaluation scores

Evaluation Team reaches final consensus

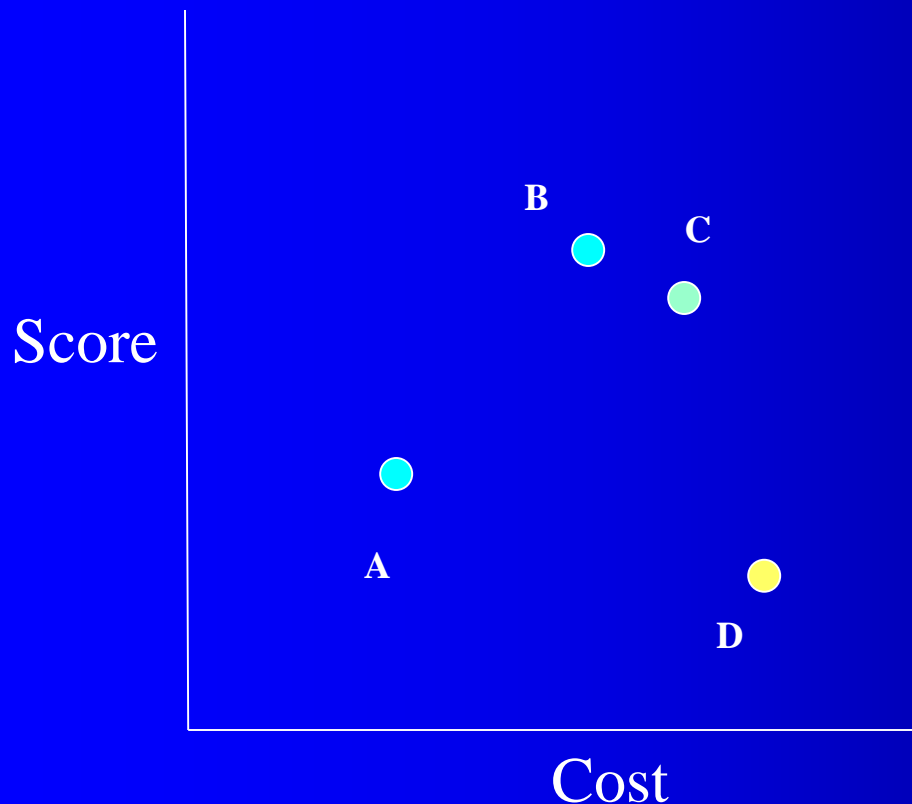
*-- although it may take some time !*





# Evaluation Process

Cost evaluation combines with non-cost evaluation results for integrated comparison across offers

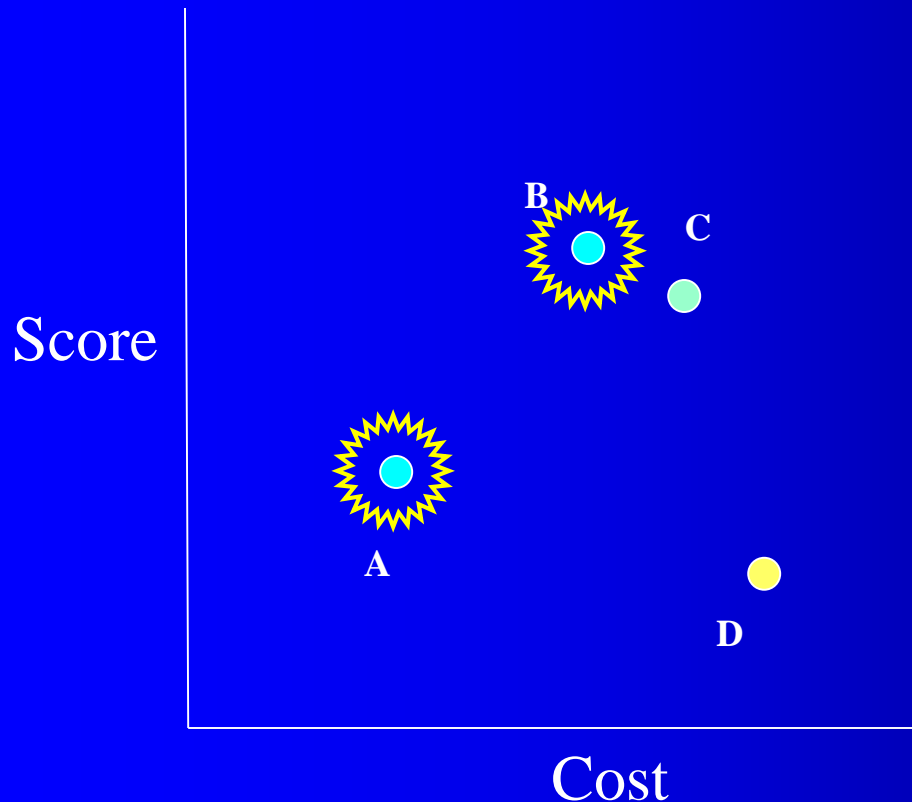


Results presented to the Source Selection Authority (SSA)

Final Award determined by SSA

# Competitive Range

Government may select offerors within a “competitive range” for further discussions and negotiations



Findings of initial evaluations may be provided back to offerors

May have opportunity for revising proposal and “best and final” offer

# Process Integrity

- Evaluation Team must reach consensus on all scores
- All results presented to SSA for decision
- Substantiating information also presented
- Results and basis of award rationale presented to offerors in formal de-briefings

# Award Debriefings

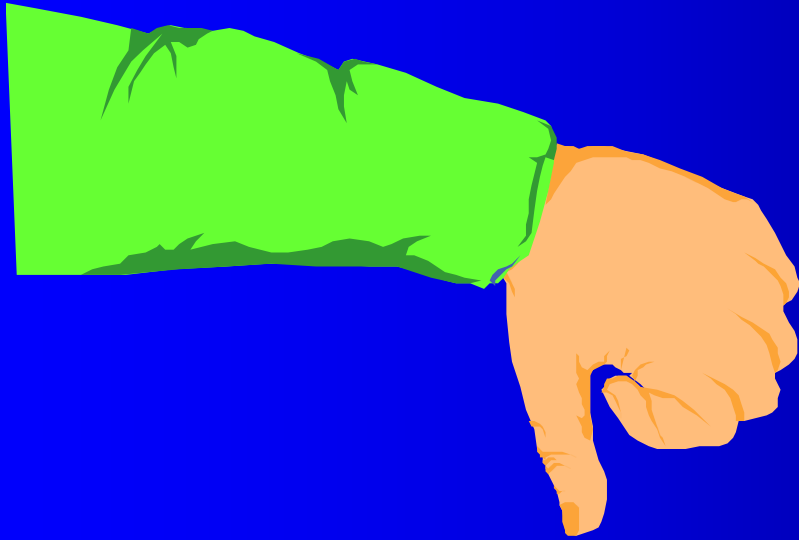
- Describes Government's Source Selection Process
- Provides feedback on strengths and weaknesses
- Releases where offeror "finished" compared to awardee
- Provides useful information for future efforts

**Remember....**

Not an opportunity to challenge Govt's decision

No point by point comparisons

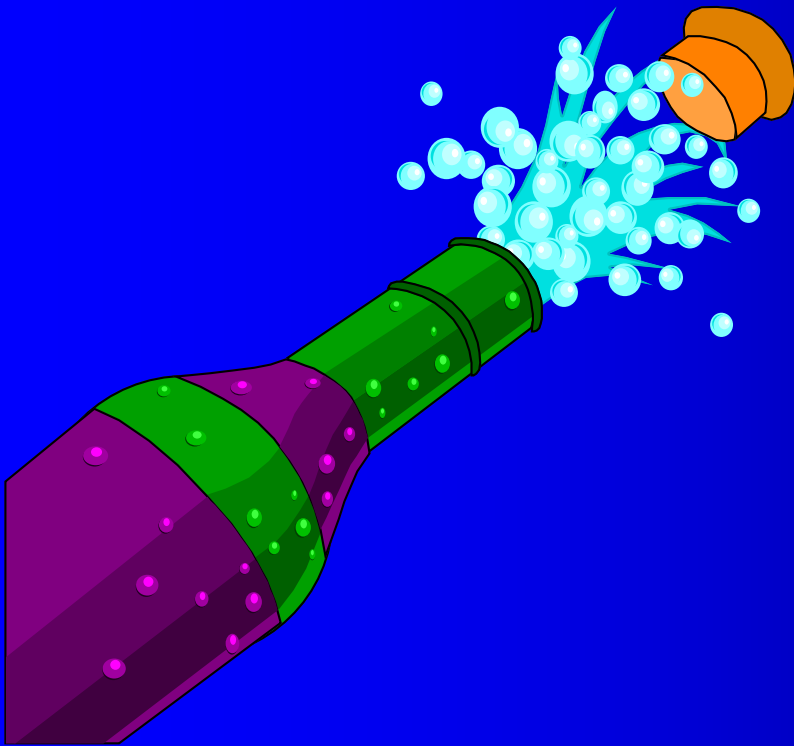
# If You Lose



- Don't get discouraged
- Call the Contracting Officer for debrief
- Learn from your experience and apply it to your next bid

# If You Win

- Celebrate!
- Call the Contracting Officer for debrief
- *And don't forget -- now you have to actually manage and implement your project!*



# Reminders on Preparing a Successful Proposal

- Read the solicitation carefully!
- Go over the checklist (twice!) and make sure each item is addressed
- Make sure tables are legible and easy to understand
- Relevancy must be clear

And ..... always ask for a debriefing

# Simple Advice

Know what type of acquisition is being used

Read & Understand solicitation

If you don't know, ask

Leave nothing to chance

Don't get thrown out!



*Questions ?*