

How to Prepare a Federal Proposal

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Overview

- Disclaimer
- Assumptions
- Sample Solicitation Sections
- Step by Step AKA “What Have I Gotten Myself Into”
 - Past Performance
 - Technical
 - Price/Cost
- Proposals Written by Teams
- Summary

Disclaimer

- Each proposal is unique to the solicitation
- Proposal content, format and complexity varies based on
 - Size of the solicitation or \$\$ value of potential contract
 - Requirements of the solicitation
 - Evaluation criteria and basis for award
 - Type of resulting contract
- You will not be a proposal expert after this seminar
- If you are writing a proposal on your own, the techniques you learn here are applicable and will help you ask the right questions of your future proposal manager(s) as your company grows

Assumptions

- Business development & capture activities are complete
- Signed teaming agreements exist, if required
- Review of any draft solicitation documents complete and you have a favorable PWin
- You developed “win themes” for use in your proposal
 - Win themes should be visible throughout your proposal
 - Objectively, you identified why the Government will choose your company & will tell that story in your proposal
- Pursuit decision has been made to commit internal resources
- You have/are creating a past performance repository

Sample Solicitation Sections

- Section C or the PWS
 - Describes the task(s) the Government wants performed
- Section L “Instructions to Offerors”
 - Describes what content should be in your proposal, how it should be formatted, date/time due, how & where to deliver proposal, number of copies required, etc
- Section M Evaluation Factors for Award
 - Describes the logic the government will apply in order to select a proposal(s) for award

Step By Step

- Successful proposals are not a singular event, but a process
 - Larger companies follow documented processes for writing their proposals
- Conventional approach is to write & review your proposal in stages of completion, allowing time for corrections/addition of content after each review

Step By Step

- Typically, companies use at least 4 sets of reviews
 - Green level – identifies major points you wish to communicate to Government in your proposal
 - Pink level - ~ 50% of draft complete
 - Red level – review after proposal draft complete
 - Gold level – “white glove” check to ensure no obvious or embarrassing errors have been committed, easy to fix
 - Using wrong name of contracting officer/program manager
 - Incorrect labeling of volumes, etc
- If you have multiple writers, have someone other than the writer review their own work – good job for managers

Step By Step

- Create a file of the solicitation, all subsequent government amendments, communication, FAR clauses in the RFP & your proposal - keep under configuration control
 - Create working copies that can be accessed & used by the writer(s)
- Develop and publish to the writer(s) the proposal calendar, highlighting the due dates for major proposal deliverables
 - Caution: not every proposal volume may be due at the same time & this may cause multiple reviews/deliveries to the Government

Sample Proposal Calendar

					Dec 27 RFP Release	28 Create Configuration File
29 Shred RFP Select Past Performances	30 Draft Proposal Outline – Tech, Cost, Past Performance Contact questionnaire recipients	31 Draft Proposal Outline – Cont. Send questionnaires	Jan 1 Publish Outline and Allocate Content	2 Assemble Writer(s)	3 Build Strawman Proposal Write RFP Questions	4 Build Strawman Proposal Write RFP Questions
5 Green Level Review Write RFP Questions	6 Revise Green Level Proposal Pens Down on Submitting Quest	7 Write Review RFP Questions Follow up on questionnaires	8 Write Revise RFP Questions	9 Write Approve RFP Questions	10 Write Submit RFP Questions By Noon	11 Write
12 Write	13 Write	14 Write Verify questionnaire receipt with CO	15 Write Questionnaire follow up if required	16 Pens Down Print	17 Red Review Questionnaire follow up with CO	18 Rewrite
19 Rewrite	20 Rewrite	21 Print for Gold Review	22 Gold Review	23 Publish	24 Ship	25
26	27 RFP Due					

Step By Step

- “Shred” the RFP – identify everything in the proposal that requires you to take action (hint: all verbs or action words)
 - Proposal tools can do this but Excel works well
 - Makes clear what content is required, format, due date
 - Shredding Section L will create a de-facto checklist to determine whether your proposal is compliant
 - Tedious, time-consuming task
 - Prevents overlooking something simple that makes an otherwise brilliant proposal un-awardable

Past Performance

- Common element into most federal (and other government) solicitations is a discussion of your past performance
 - Who have you worked for, what did you do, what were the results, did you deliver on schedule/on budget?
- Start building a repository of completed/in progress contracts for your proposal first draft and future proposals
- Government considers two major elements in evaluation – recency and relevance

Past Performance

- Recency
 - Will be defined in solicitation
 - Commonly, past performance (contract completion) can be no more than 3 years earlier than date of solicitation
 - Construction can go further back
- Relevance
 - Is the past performance citation similar to the work being proposed?
 - Don't cite a past performance for landscaping services for an IT services solicitation

Past Performance

- Which past performances should I use?
 - Remember recency and relevance
 - Contract value similar to value of RFP
 - Which has more credibility for RFP valued at \$1M, a \$500K or a \$5K past performance?
- Use past performances in this order:
 1. For this specific agency
 2. Other federal past performance
 3. State government past performance
 4. Other government past performance
 5. Commercial past performance

Past Performance Volume

- What should be included in a past performance citation? RFP will dictate, but commonly:

Past Performance

Name

Contract/Task Number

Value (To Date)

Period of Performance

Customer Name

E-Mail Address

Phone Number

Fax Number

Discussion: What work did you perform?

Discussion: What was the outcome and how did it benefit the customer?

Discussion: What problems and challenges did you encounter and **MOST IMPORTANTLY**, what did you do to fix/mitigate the issue(s)?

Past Performance

- Government evaluators not limited to your past performance citations in your proposal
- Other sources that are fair game include but not limited to:
 - Government past performance databases
 - Evaluator knowledge of other contracts
 - Evaluators contacting other agencies where your company has held contracts
 - Past performance questionnaires
- You will receive an opportunity to explain/rebut negative information discovered during the evaluation process

Questions to the CO

- After solicitation release, all communication is to the CO
 - The CO can elect not to talk with you, depending upon the nature of the communication
- The solicitation will specify a formal process to submit written questions regarding the solicitation
 - The Government doesn't have to answer the question if they believe offerors should already know the answer
 - **STRATEGY:** All questions and answers will be shared with all bidders – do you want your competitors to have this information?

Technical Volume

- Section L will specify the content, format and length
- Typically, the outline will have:
 1. Introduction paragraph on bidder
 2. Table of pertinent data, SAM UEI#, Cage Code, NAICS, PSC/FSC, small business size, company security clearance, POC for proposal with contact information
 3. Balance of Technical Volume
- Use PWS as guide to content – cross reference to PWS
 - Tell the Government **how** you will perform the task
- Proposal outline should specify length of each section

Technical Volume

- Words of caution
 - Do not “parrot” the PWS back to the Government
 - Do not state “will comply with PWS”
 - Do not insert a table that lists the PWS paragraphs with headings of comply/not comply and then check the comply column for each row
- Will need to be more creative in latter part of proposal when discussing less technical aspects of your proposal - example
 - Facility entry/exit procedures
 - Personnel security clearances

Technical Volume

- Resumes – lots of pitfalls
 - Interview the candidate(s), use contingent offers & concurrence to use resume(s)
 - Your company’s face to the Government
 - Will they represent you well, even under stress?
 - Can they “get along” with the Government?
 - Does the Government know & like the candidate?
- Select a candidate whose skills match PWS requirements
 - Experiences, software tools – revise resume to highlight
 - Ensure candidate agrees to revisions

Technical Volume

- Recruiting incumbents
 - Very risky, but sometimes necessary
 - Unless experienced in task, may want to use a consultant to provide some level of distance between you & incumbents
- Will they give you their resume(s)?
- You will likely have to offer a raise to get the resume
- Will they be loyal?

Cost/Price Volume

- Read Section L very carefully
- Provide what the Government wants in the format requested
- Keep technical/past performance content out of price/cost volume & keep price/cost content out of technical volume
 - Content in the wrong volume likely not to be evaluated
- If permitted, copy solicitation CLIN structure and fill in pricing
 - Remember the KISS principle – extraneous information a bad idea
- Government will use evaluators specializing in price/cost

Proposals Written By Teams

- Used for larger, more complex opportunities requiring a diverse set of writing talents
- Requires greater control of the process & more discipline
- Recommend you appoint someone to serve as the proposal manager and **EMPOWER THEM!**
 - Responsible to ensure the company submits a proposal that is compliant with the solicitation and on time
 - This person, by necessity, will not be liked
- Proposals are stressful, be prepared to diffuse hostilities

Summary

- Proposals are a process, not an event
- You will get better as you work on more proposals
- Submit a compliant proposal, read Section L!
- Begin documenting your company's proposal process – refine over time & make it repeatable
- Create the past performance repository
- Consider being a subcontractor first and work on a few proposals, “learn the ropes” before becoming a prime
 - Buy your prime's proposal manager a cup of coffee and “pick their brain”

Questions?

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