

PROPOSAL WRITING Strategies



Opportunities 2008

3/10/2008

Archie Black

PROCUREMENT COUNSELOR



Small Business & Technology Development
Center (SBTDC)

North Carolina Procurement Technical
Assistance Center (PTAC)

University North Carolina-Charlotte

3/10/2008



Small Business & Technology Development Center (SBTDC)

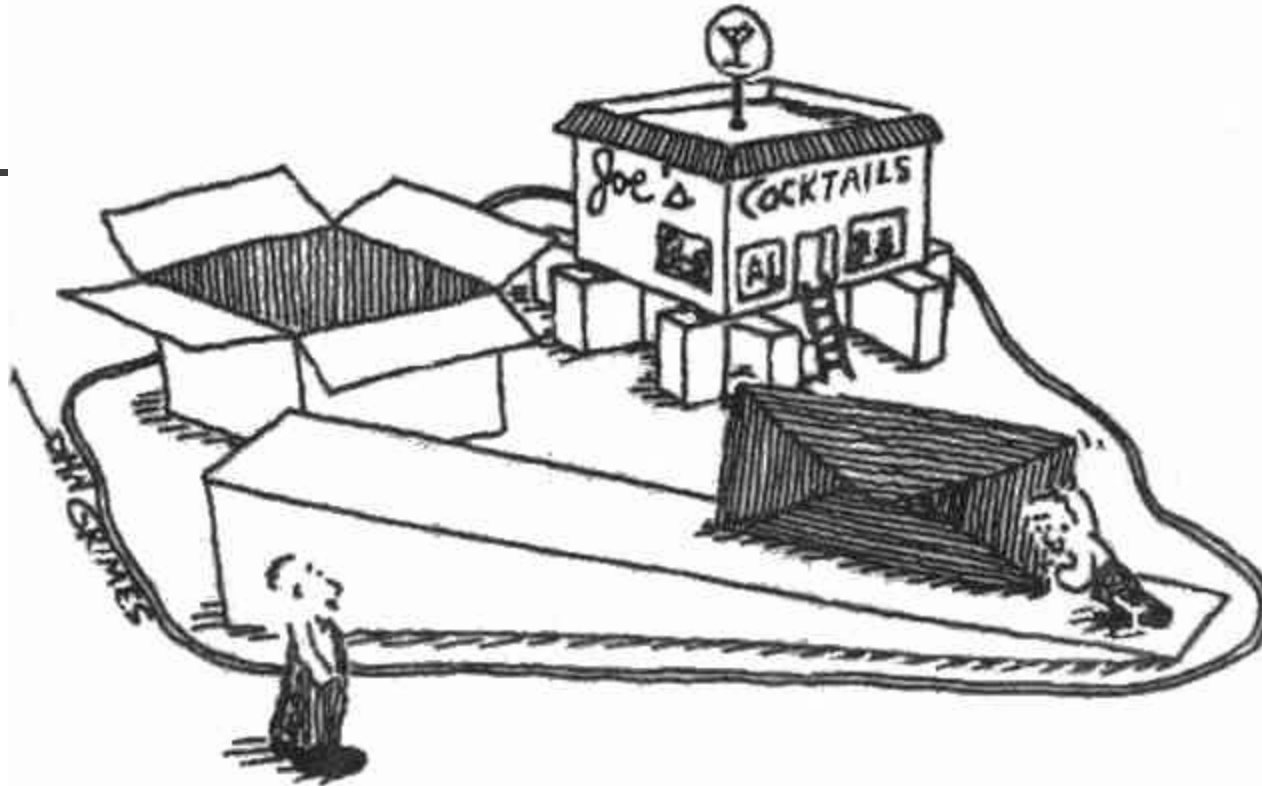
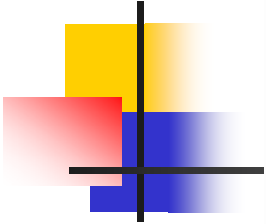
- **Business Services - Confidential one-on-one counseling**
 - General Business - planning, marketing, financing, human resources & operations
 - Manufacturing & Technology Development and Commercialization
 - International Business
 - Marine Trades
 - Management Education Services
 - Government Procurement (PTAC)



Procurement Technical Assistance Center

- Assist small to medium sized businesses, with two to three years business experience
 - Sell products and services to federal, state and local governments
 - Understand government rules and regulations
 - Identify contracting opportunities
 - Complete mandatory registrations and certifications
 - Review bids and proposals
 - Research contract award histories

www.ncptac.org



*"Bob, I didn't realize
you pushed the envelope,
raised the bar, and
thought outside the box."*

*"Outta the loop,
huh, Frank?"*



OVERVIEW

- Products and Services
- Define – Request for Proposal
- Products and Services
- 10 Steps to Respond
- 5 Cs for Proposal Review
- Pitfalls to Avoid



Request for Proposal

- invitation for suppliers, through a bidding process, government is looking for “best value”
- process is lengthier than others, so it is used only where its many advantages outweigh any disadvantages and delays caused



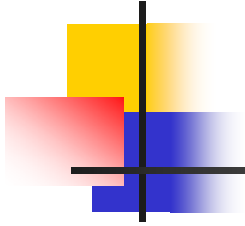
BEST VALUE

- Offeror has submitted a proposal with highest ranking on basis of evaluation of cost and non-cost factors
 - greatest (best) value to the government in terms of performance, technical capacity, risk management, cost or price, management and other factors."



Products and Services

- **36% - Services (Engineering, R&D, Management, Business, Health)**
- **35% - Supplies and Equipment**
- **19% - Agriculture, Transportation, Communications, Utilities, Finance and Administration)**
- **7% - Construction**
- **3% - Wholesale/Retail**



10 Steps to Respond



3/10/2008



1. Read It & Assemble Parts

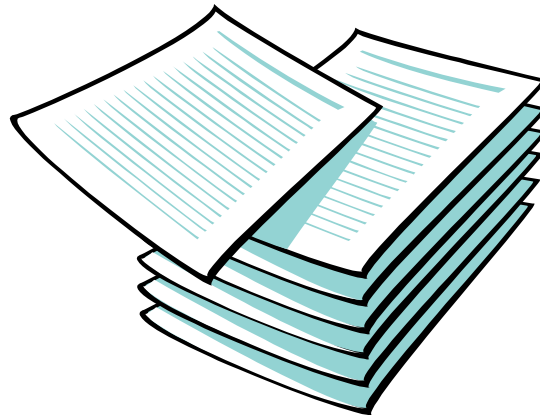
- Read the solicitation.
- Determine the “solicitation type”.
- Determine the “contract type”.
- Assemble all the attachments and materials incorporated by reference.
- Assemble all amendments





Solicitation Type

- IFB – Invitation for bid.
- RFP – Request for proposal.
- RFQ – Request for Quotations.
- RFQ – Request for Qualifications.





Contract Type

- FFP – Firm Fixed Price
- CPFF – Cost Plus Fixed Fee
- T&M – Time and Material
- IDIQ – Indefinite Delivery/Indefinite Quantity
- Other types are used, or a hybrid of two or more types, or variations of the above.



2. Solicitation Review

- Make sure you get the correct one, many have numerous versions.
- Get all amendments and keep checking the applicable website for new amendments
- Save the original on hard copy and disk
- Have a working copy that you can mark up
- Keep all documents related to the solicitation (e-mail, letters, mfr, etc.).



Is This The Right Opportunity For My Company?

- Can you meet all the requirements included in the solicitation
- Make a decision to respond, is it in your company's best interest
 - Do you have time to provide a quality proposal
 - Do you have the capacity to perform the work



3. Solicitation Analysis

- Read it again, more carefully this time marking all action items
- Use a highlighter to identify actions required to prepare the proposal and a different color for actions required in performing
- Make marginal notes for what you need to do for each requirement
- Make a list of actionable items



Solicitation Breakdown – SF 33

- Part I – The Schedule
 - Section A - H
- Part II – Contract Clauses
 - Section I
- Part III – List of Attachments
 - Section J
- Part IV – Representations and Instructions
 - Section K - M



Key Solicitation Sections

- Section **A** - Solicitation/Contract Form
 - basic information from the buyer, bid number, issuance date, and purchase authority
- Section **C** - Description/Specifications/Statement of Work
 - brief description of services or supplies and the quantities sought

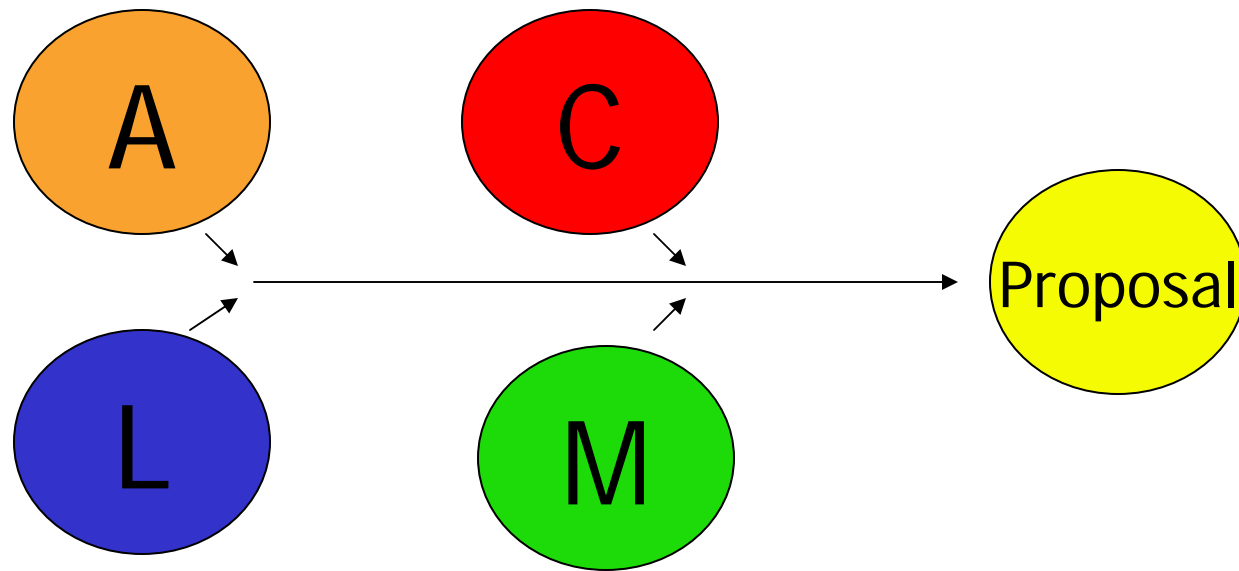


Key Solicitation Sections

- Section **L** - Instructions, Conditions, and Notices to Officers
 - description of how to prepare, organize and format the proposal
- Section **M** - Evaluation Factors for Award
 - provides the criteria that will be used in judging which proposal best meets the requirements of the government



Bringing It Together...





4. Make A Plan

- PLAN is a 4-letter word not often used...
- KISS METHOD – don't overdo the planning instead of the job.
- Basic plan: what/when/who/where
 - what are the tasks/when its due/who is responsible/where to submit
 - focus on meeting the proposal due date



5. Implement Action Items

- Identify all action items that will affect the price, time or method
- Provide all required information in enough detail to give the customer confidence that you thoroughly understand the requirements



How To Implement

- Complete all required forms as instructed
- Information should be clear and concise
 - Write enough...most people don't.
- Follow the solicitation format
 - use solicitation's sequence to make it easier for evaluator to follow
- Address the requirements (technical, management, personnel, financial, etc).



THE REAL DEAL

IF YOU CAN'T CONVINCe THE CUSTOMER, YOU
WON'T WIN!





The Government Customer

- Small Business Specialist
 - advocates the use of small businesses
- Contracting Officer or representative
 - Legal responsibility for a contract
 - Ensures that requirements for competition is met
 - Monitor contract performance
- Program Manager
 - manages funding
 - technical expert
- End User
 - uses the product or service



6. Gather-Assemble-Compile

- Using the task lists or “action item list”, collect all the parts.
- Arrange them in the specified sequence.
- Make a Table of Contents; use divider tabs.
- Make a cover page, brief cover letter or Executive Summary.
- Conduct a scrubdown in-house, then have a PTAC counselor scrub it for you.





Proposal Structure and Content

- Executive Summary
- Technical Approach
- Management Plan
- Corporate Experience
- Personnel
- Business Proposal





The Executive Summary

- The first document read by the evaluators
 - it is critical and sets the tone for your proposal
 - Outlines why your company would provide the best service
- Identify the attributes that will set your business apart from your competitors:
 - Quality? Experience? Cost Efficiency? Methods?
 - Think in terms of features and benefits.
 - Be attentive to the evaluation criteria in Section M



7. Communication

- Attend pre-proposal conference/site visit
- Assign **ONE** individual to administer all communication
- Log all communications, keep notes and copies of everything
- Direct questions to name identified in the solicitation/proposal



8. Proposal Submission

- Make sure all required signatures and dates are provided
- Acknowledge receipt of all amendments
- Submit all required forms and supporting documents requested
- Submit before the closing date and time





5 Cs Proposal Review

- **Coherence** – The coherence review is also the time to remove unnecessary language and make the proposal as streamlined as possible.
 - Does the proposal make sense?
 - Is there too much use of technical jargon?
 - Is every section clearly written?
- **Completeness** – The completeness review is also the time to discuss modifying strategy to make sure the proposal is providing the best possible value
 - Is every requirement in the RFP fully addressed?
 - Are there any gaps in strategy?



5 Cs Proposal Review

- **Compliance** –

- Do all sections conform to relevant guidelines and regulations?
- Is proper legal language in place to protect proprietary information?

- **Consistency** –

- Are all sections formatted the same way and in the same font?
- Does the proposal appear to be a unified whole?
- Are units, terms of measurement, etc. consistent throughout, and consistent with the RFP requirements?



5 Cs Proposal Review

- **Correctness –**

- Are there any grammar or spelling errors?
- Keep a special eye out for “numerical typos.” They’re harder to see, but an error in pricing or units could lose the contract for you – or worse, commit you to a contract that won’t be profitable to fulfill.

9. Negotiations

- The government's option to open discussions with contractor's determined to be in competitive range
- Have a clearly defined negotiation strategy
 - be willing to compromise
 - be reasonable and competitive
- Be prepared to justify all costs (direct and indirect)
- Document discussions





10. Debriefings of Offerors

- An offeror, upon its written request received by the agency within 3 days after the date on which that offeror has received notification of contract award in accordance with FAR 15.503(b), shall be debriefed and furnished the basis for the selection decision and contract award

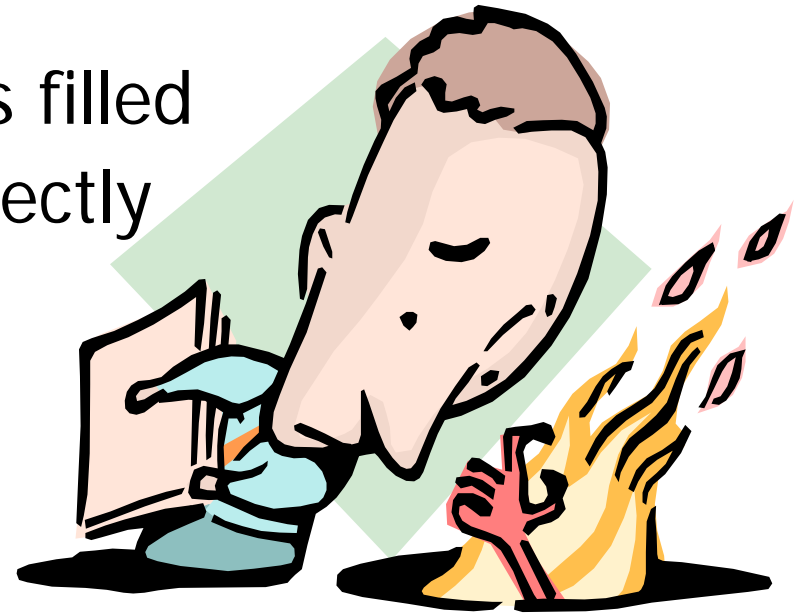


Debriefings of Offerors

- To the maximum extent practicable, the debriefing should occur within 5 days after receipt of the written request.

Avoiding 3 Common Pitfalls

- Be Responsive
 - Timely
 - All forms/documents filled out completely and correctly
- Be Responsible
 - Technical Capability
 - Past Performance
- Be Competitive
 - Fair and reasonable price
 - Best value for what is specified





Writing Tips

- Spend time on Executive summary
- Identify company & sol. # on each page
- Be sure technical response is clear, concise responsive to the specification
- Use simple straightforward writing style
- Use spell and grammar check, use page numbers
- Comply with specified page limitations
- Identify all proprietary data.



Pricing Tips

- Submit a price that is fair & reasonable.
 - Obtain pricing history from gov't if available
 - Know your competition and be competitive
 - Be able to justify all direct and indirect costs
 - Include a reasonable overhead and profit percentage



Review – Proposal tips

- Follow all the instructions.
- Follow the sequence.
- Focus on customer's mission and goals.
- Unlike a bid or quotation, a proposal describes in detail what you can do to support the mission.
- Cost data, check and recheck.
- Let your Executive summary introduce your business



Summary – Evaluation of Offers

- Responsive-did you submit the required documents in the required format?
- Responsible-is your company qualified and eligible to receive the contract/award?
- Competitive-is your price “fair and reasonable under the circumstances?
- Technically Acceptable-does your product or service meet the customer’s requirement?



Some Final Thoughts

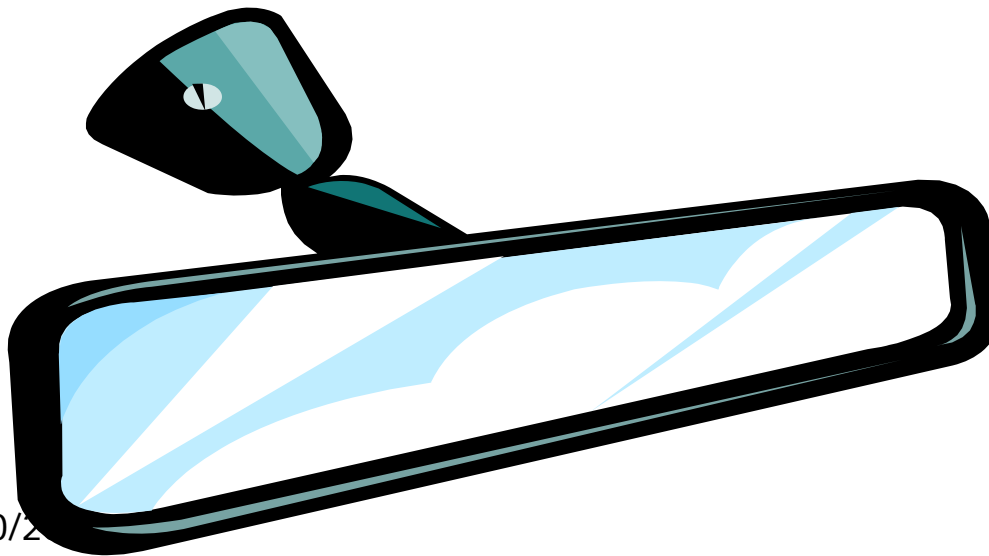
- Build relationships before the proposal is due
- Don't submit a proposal for a Cadillac anticipating that the government will accept a Volkswagen performance

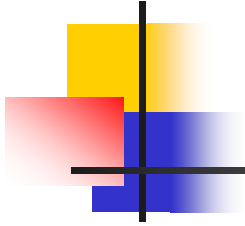


PROPOSAL WRITING BASICS

“In the business world, the rearview mirror is always clearer than the windshield.”

Warren Buffet





QUESTIONS

Archie Black

8701 Mallard Creek

Charlotte, NC 28269

704.548.1090

ablack@sbtcdc.org