Bridging
PARTNERSHIPS
Small Business Symposium

April 15-16, 2015

TRAC- 6600 Burden Blvd., Pasco, WA 99301- Tri-Cities, WA

Let's be Practical- Evaluating RFPs for Key Requirements

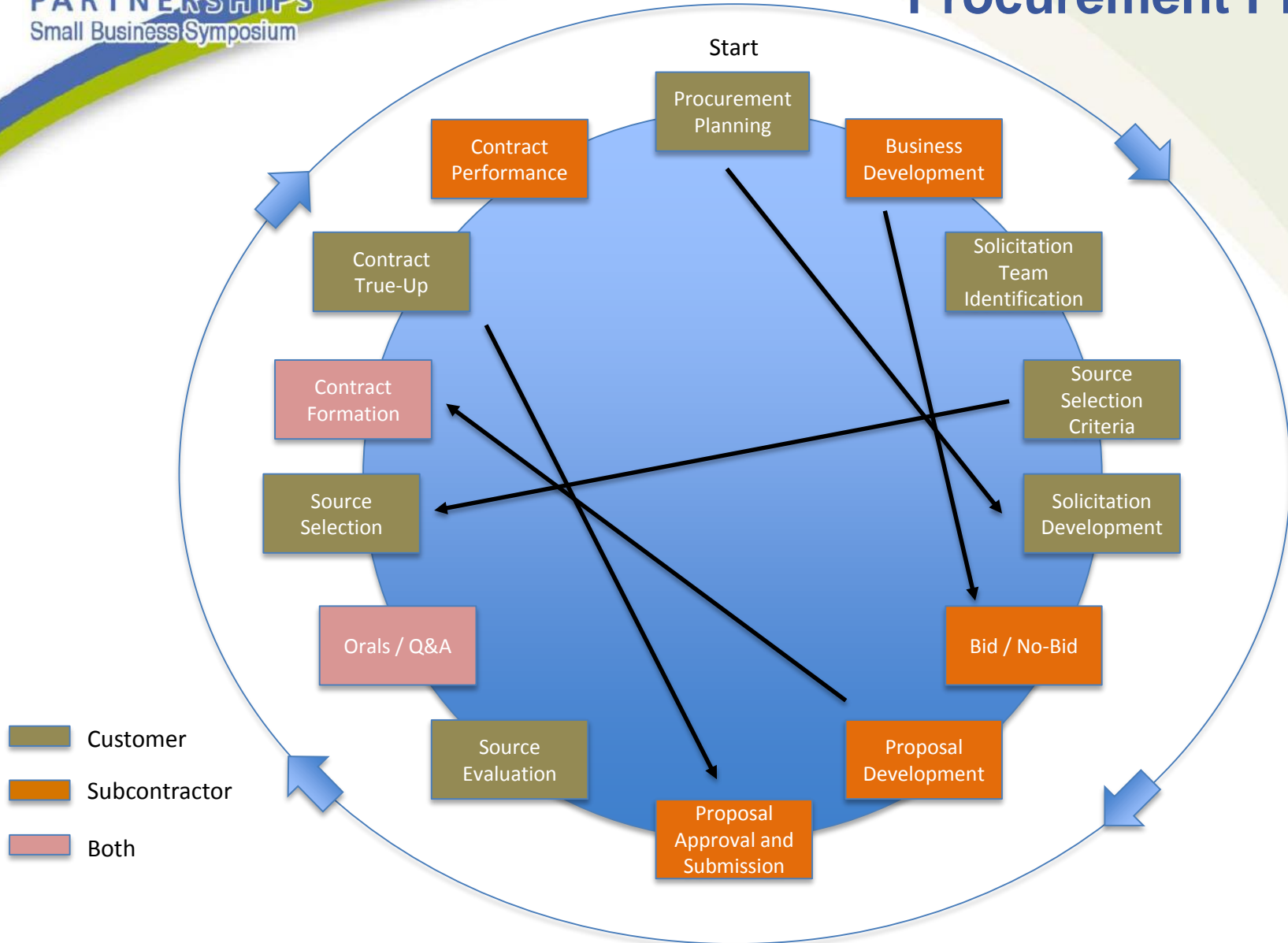**Breakout Session Speaker: Brad A. Edwards**

This presentation focuses on proposal evaluations.

Not all procurement scenarios can be addressed nor can all evaluation approaches be considered.

You as the bidder are responsible for your end product, its quality, solutions, reasonableness, effectiveness and ability to be evaluated.

Much of this is the opinion of the presenter from decades of reviewing or preparing proposals.

Procurement Process

Start

Procurement Planning

Contract Performance

Business Development

Solicitation Team Identification

Contract True-Up

Source Selection Criteria

Contract Formation

Source Selection

Solicitation Development

Orals / Q&A

Bid / No-Bid

Source Evaluation

Proposal Development

Proposal Approval and Submission

Customer

Subcontractor

Both

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Request For Proposal

BACK TO BASICS

- **Soliciting mutually beneficial solutions to problems or objectives issued from a potential Customer**
- **Focus must be on:**
    - **Customer Needs**
    - **Solutions**
    - **Compliance**
    - **Innovation**
    - **Unambiguous commitments**
    - **Risk Management / Mitigation**
- **Stress Benefits**
- **Result must be a Customer focused proposal that is clear, concise and provides a compliance roadmap that simplifies the overall proposal evaluation process**

Request For Proposal

BACK TO BASICS

- **RFP Evaluation Methods:**
  - **Lowest Price (spec'd material)**
  - **Lowest Price – Technically Acceptable (Qualified)**
  - **Best Value – Technically Acceptable (Qualified)**
    - **Best Value factors may include:**
      - **Total cost of implementation**
      - **Risk**
      - **Transition**
      - **Efficiencies**
      - **Innovations**
      - **Etc.**

Post Submission – Evaluation Process

	FP	CR	Hybrid
Customer Step One: Compliance Review			
• **Performed by the Contracting Officer with Staff Support; Go / No-Go step**	X	X	X
• **If the proposal is <u>not</u> compliant it is removed from consideration**	X	X	X
• **Recommendation:** **At proposal development, implement a Compliance Matrix approach (shall, should, will, may, etc.)** **Understand the differences between "SHALL", "SHOULD", "WILL", "MAY"** **Develop the proposal in a structure that can be evaluated efficiently (know your customer)** **Include a clear, concise Executive Overview** **Pay attention to format requirements and page limitations**			
• **Clarification <u>may</u> be asked if there appears to be a mistake**			

Post Submission – Evaluation Process

	FP	CR	Hybrid
Customer Step Two: Competitive Range			
• **If the proposal is compliant…..**	X	X	X
• **Pricing is evaluated separately for outliers**			
• **Is the pricing "plausible" - seeming reasonable or probable**		X	X
• **Is there a Competitive Range**	X		X
• **Recommendations:**			
• **Include a compliance matrix to ease the review**			
• **Write in language appropriate to the requirement**			
• **Make sure there are no mathematical errors**			
• **Clarification may be asked if there appears to be a mistake**			

Post Submission – Evaluation Process

	FP	CR	Hybrid
Customer Step Three: Technical Review			
• **Technical and pricing are separated**	X	X	X
• **Proposal compared to Statement of Work and Specifications**			
• **Determination of understanding and adherence to requirements**			
• **If competitive, the proposals are now scored**	X	X	X
• **Depending on the evaluation method (Lowest Price; Lowest Price – Technically Acceptable; Best Value) the technical review may include other factors**		X	X
• **If competitive, the proposals are now scored against one another**			
• **Recommendations:**			
• **Write your proposal to make it easy on the reviewer**			
• **Include a compliance matrix to ease the review**			
• **Write in language appropriate to the requirement**			
• **Focus on solutions for the customer**			
• **This step may take many forms**			

Post Submission – Evaluation Process

	FP	CR	Hybrid
Customer Step Three: Price/Cost Analysis			
• **Pricing is evaluated for reasonableness (FAR 15.404-1)** • **Comparison to Commercial, Historical, etc**	X	X	X
• **Price Analysis is used when Cost or Pricing Data is not available**	X	X	X
• **Cost Analysis is based on the reasonableness of individual cost elements** • **Cost Analysis can also be used if reasonableness cannot be determined by price analysis**		X	X
• **The conclusion must lead to a determination that the final agreed to price is fair and reasonable**			

• **Recommendations:**
     • **Make sure there are no mathematical errors (accuracy)**
     • **Make sure overheads and G&A apply to the work at hand (realism)**			

Post Submission – Evaluation Process

	FP	CR	Hybrid
Customer Step Four: Orals (Optional)			
• **Normally a presentation and Q&A**	X	X	X
• **Time constrained**			
• **Recommendations:**			
• **Have the program team defined and prepared**			
• **Understand your proposal – technical and pricing**			
• **Stay focused and on script**			
• **Practice, practice, practice**			
Customer Step Five: Source Selection			
• **Internal Process**	X	X	X
• **Results in the final determination of the awardee**			
• **Recommendations:**			
• **You have no involvement here**			

Post Submission – Evaluation Process

	FP	CR	Hybrid
Customer Step Six: Award			
• **If you are selected:**	X	X	X
• **Request a debrief (pay attention to the time limitations)**			
• **Review your proposal and the award for changes**			
• **Initiate performance**			
• **Comply**			
• **If you are not selected:**			
• **Request a debrief (pay attention to the time limitations)**			
• **Perform a lessons learned**			
• **Enhance your process**			
• **Recommendations:**			
• **Accept the decision, Be Nice**			
• **Accept the feedback**			

Compliance Matrix

Solicitation Reference	Functional Requirement	Compliance (Shall, Will, Should, May)			Compliance Reference	Notes
		Full	**Partial**	**None**		

Solution Accountability Matrix

Solicitation Reference	Functional Requirement	Solution	Proposal Accountability (Name)			
			Design	**Technical Volume**	**Pricing**	**Notes**
			Name	Name	Name	

Others to consider: Risk Matrix, Solutions Business Case, Terms and Conditions Matrix, etc.