

Bridging Partnerships

Small Business Symposium

Proposal Development
for Government Contractors

April 19, 2018

Sponsored By



Presented By



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A L W A Y S R E A D Y

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Bridging
PARTNERSHIPS
SMALL BUSINESS SYMPOSIUM

TOP 10 TROUBLE SPOTS AND FIXES FOR ENSURING PROPOSAL COMPLIANCE

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Tip 1: Do You Win on Compliance?

NO

*You Do Not Win on Compliance
You Do Lose for Not Being Compliant*

Tip 2: Uniform Contract Format (FAR 15-204-1)

- SF-33 – Solicitation, Offer, and Award Document
- Section A – Procurement Information, POCs, Solicitation Number, etc.
- Section B – Supplies or Services and Price / Cost
- **Section C – Statement of Work (SOW) or Performance Work Statement (PWS)**
- Section D – Packaging and Marking
- Section E – Inspection and Acceptance
- Section F – Deliveries or Performance
- Section G – Contract Administrative Data
- **Section H – Special Contract Requirements**
- Section I – Contract Clauses / General Provisions
- Section J – Attachments, Exhibits
- Section K – Reps and Certs / Statements of Offerors
- **Section L – Proposal Preparation Instructions**
- **Section M – Evaluation Criteria**

Sections your
proposal team
needs

Sections your
contracts/
pricing people
need for
proposal
submittal
compliance and
contract
performance

Tip 3: Don't Write Only to the PWS

Common Pitfalls	Why This Happens	Result
Ignoring Sections L and M in Favor of PWS Only	<ul style="list-style-type: none">• Past proposal experience focused on PWS only• Lack of understanding that Section L and M are the guide to follow	<ul style="list-style-type: none">• A PWS-only approach that overlooks L and M is simply not going to be compliant.

Tip 4: Don't Forget the "Other Stuff"

Common Pitfalls	Why This Happens	Result
Forgetting the "Other Stuff"	<ul style="list-style-type: none">• Section H may contain key personnel, OCI, management plans that you need to address• Is your company able to meet all contract clauses? (Contract Action)• Examining exhibits for their place in the response• "Hidden" requirements, such as a management plan that is to be submitted with the proposal, never mentioned in section L	<ul style="list-style-type: none">• Win themes and win strategies not based upon a complete understanding of the customer (including decision-makers/influencers) or competitor strengths and weaknesses.

Bonus Tip!

Amendments and Questions

- Today, we see more and more Q&As changing the original solicitation requirements instead of amending the solicitation. Q&As should only clarify the existing requirements, not change them.
- **The RISK is clear:** Will evaluators evaluate on the Q&A or the un-amended solicitation?
- When there is question, always ask and clearly identify the risk to the CO.
- When multiple amendments make it a challenge to piece together the compliance RFP, ask that a conformed solicitation be issued.

Tip 5: Tell The Story While Maintaining Compliance

Common Pitfalls	Why This Happens	Result
Assembling “Our Story”	<ul style="list-style-type: none">• Focusing on answering every “shall” statement of the PWS vs. maximizing Section M evaluation scores• Telling the story our way vs. how it is requested in Sections L and M	<ul style="list-style-type: none">• Not following Sections L and M/not addressing exactly what is asked makes us non-responsive at best. At worst, we are non-compliant or technically unacceptable.

Tip 6: Don't Lose on Page Count, Margins, Fonts

Common Pitfalls	Why This Happens	Result
Production Specs Requirements Overlooked	<ul style="list-style-type: none">• Not enough resources and experience to ensure the entire proposal meets all font, sizing, margin, page count, etc., requirements• Rushing through final production without a comprehensive page-by-page look (which can only be done after all content is complete)	<ul style="list-style-type: none">• Companies are thrown out for one paragraph being the wrong font. It happens all the time.

Production Compliance

As critical as any other area of the proposal, all production requirements must be met exactly as specified. They can be the basis of rejection.



PRODUCT COMPLETION CHECKLIST: COMPLIANCE BASED DESKTOP PUBLISHING

Client Proposal Title:	Client Name and Proposal Title Here
Volume:	Volume 2: Technical
Page Count Limit:	30 pages
Current Page Count:	30 pages
Updated Through Amendment:	0003

Requirement	RFP Driven	BID Designs Defined	Client Preference	Template	Pink	Red	Gold	Proof	Am. 0001 Proof
FILES THAT WERE COMBINED									
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FONTS									
Body Text Size	No less than 12 pt.	12 pt.		12 pt.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Body Text Type	Not specified	Times New Roman		Times New Roman	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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1



PRODUCT COMPLETION CHECKLIST: COMPLIANCE BASED DESKTOP PUBLISHING

Requirement	RFP Driven	BID Designs Defined	Client Preference	Template	Pink	Red	Gold	Proof	Am. 0001 Proof
Tables	No smaller than 12 pt.	12 pt.		12 pt.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Graphics	No smaller than 12 pt.				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Restrictions (Condensing, kerning, etc.)	Tracking, kerning, and leading values shall not be changed from the default values of the word processing or page layout software.	We advise against manipulation of fonts. None applied.		No manipulation of fonts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
HEADINGS									
Section Headings		See Section A Below			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Set Page Breaks for Tabs (list sections)	Tab indexing shall be used to identify sections.	Page breaks between main sections		Page breaks between main sections	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
PARAGRAPHS									
Justification	Not specified	Justified		Justified	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pt Before	Not specified	0 pts.		0 pts.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Pt After	Not specified	6 pts		6 pts.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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2



Tip 7: Always Do A Submittal Compliance Review

Common Pitfalls	Why This Happens	Result
<p>Reviewing a Submittal Checklist at White Glove</p>	<ul style="list-style-type: none"> Too many companies focus on last-minute word changes or other non-impactful changes, yet very few complete a final submittal compliance checklist review together at the white glove. Not mandated by company. 	<ul style="list-style-type: none"> High risk of non-compliance. Final days of the proposal are the most intense, stressful, and last-minute.

Proposal Submission Checklist

Volume	Title	Contents	Page Counted?	Page Limit	Printed Y/N	File Type	File name	Verification (Initials)	
I	Technical	Table of Contents	No	Unlimited	Y	PDF	CompanyName_Vol_I_Technical.pdf		
		Glossary of Abbreviations and Acronyms	No	Unlimited					
		Executive Summary	Yes	3 pages, not included in 80 page limitation					
		Technical Factor Cross Reference Matrix	No	Unlimited					
		Subfactor A, Aspect 1 Manning Workload Analysis	Yes	80					
		Subfactor A, Aspect 2 Training Workload Management Plan	Yes						
		Subfactor A, Aspect 3 Recruitment, Training and Retention Plan	Yes						
		Subfactor B, Aspect 1 Organizational Structure	Yes						
		Subfactor B, Aspect 2 Roles, Responsibilities and Communications	Yes						
		Subfactor B, Aspect 3 Transition Plan	Yes						
		Subfactor B, Aspect 4 Courseware Personnel and Instructor Training and Certification Plan	Yes						
		Subfactor C, Aspect 1 Learning Management System	Yes						
		Subfactor C, Aspect 2 Contractor Furnished Equipment	Yes						
		Factor 2 Technical Risk	Yes						
		II	Past Performance						Table of Contents
Glossary of Abbreviations and Acronyms	No				Unlimited				
Past Performance Summary	Yes				1 page				
Past Performance Information (PPI) Contract References	No				Unlimited				
CPARS/Performance Data <i>BID Designs - include BID CPAR PDF file</i>	No				Unlimited				
Subcontractor Consent <i>BID Designs - include AOCE Ltr of Consent</i>	No			Unlimited					
Organizational Structure Change History	No			Unlimited					
Past Performance Information (PPI) Database Tool	No	Unlimited	No	Access	CompanyName_FA489018R0001.accdb				
III	Price Proposal	Table of Contents	No	Unlimited	Y	PDF	CompanyName_Vol_III_Price.pdf	Note: Original should have original signatures	
		Glossary of Abbreviations and Acronyms	No	Unlimited	Y	PDF	<i>Included in Price volume PDF</i>		
		Schedule of Supplies and Services (CLINS)	No	Unlimited	Y	Excel	CompanyName_Vol_III_Price_Spreadsheet.xlsx		
		SF 1449 and Amendments	No	Unlimited	Y	PDF	CompanyName_Vol_III_SF1449_Amendment_1.pdf		
		Representations and Certifications	No	Unlimited	Y	PDF	CompanyName_Vol_III_Reps_Certs.pdf		
		Support Price Backup Data	No	Unlimited	Y	Excel	CompanyName_Vol_III_Supporting_Data.xlsx		



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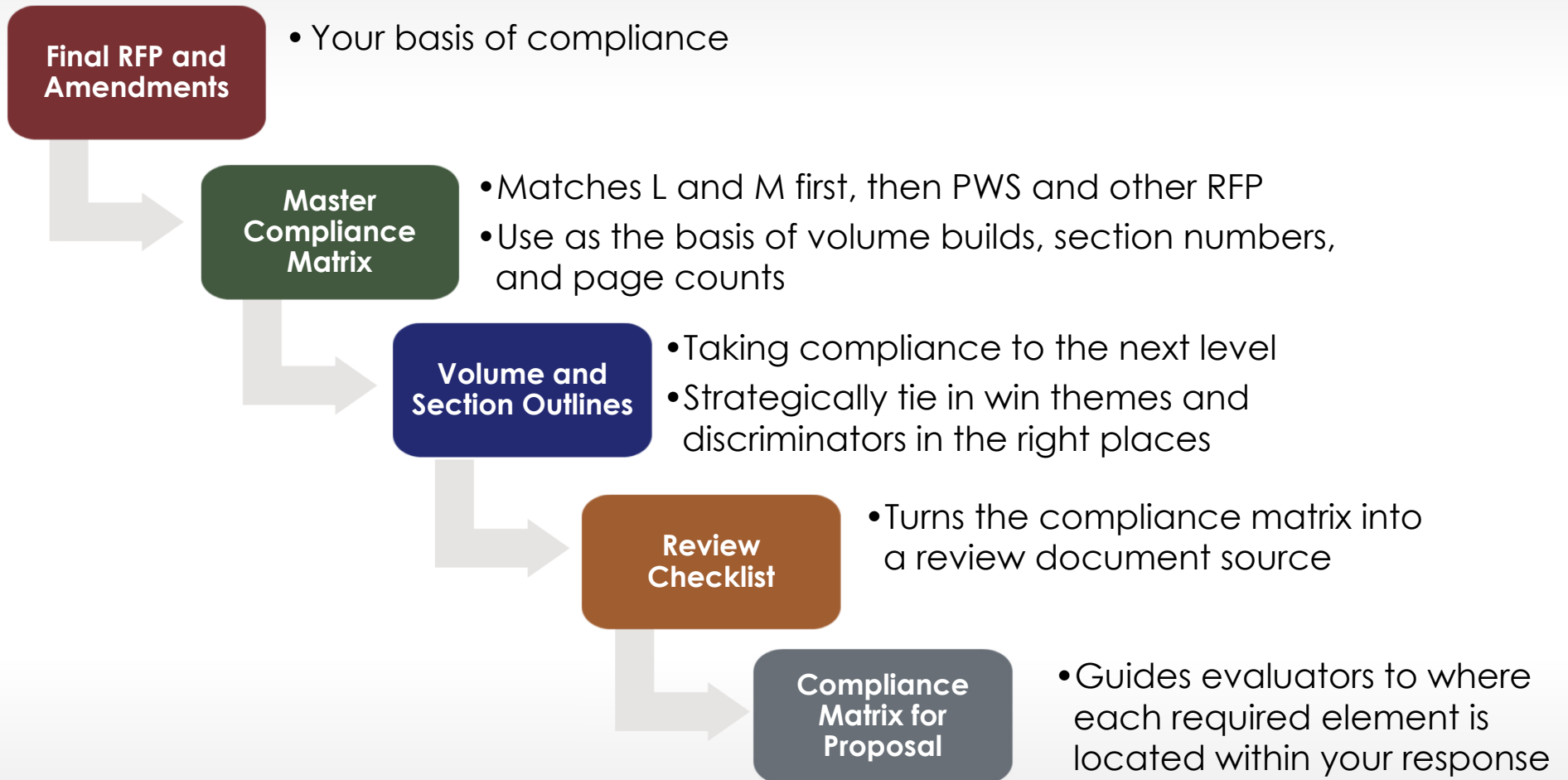
Tip 8: Compliance vs. Responsiveness

- Compliance covers many aspects of the RFP and the response process.
 - Section L – Preparation instructions
 - Section M – Evaluation criteria
 - SOW/PWS – Performance requirements
 - Other RFP – Section H, possible A – additional requirements
- Responsiveness covers how well you address all requirements
 - Not parroting SOW/PWS
 - Fully meeting evaluation criteria

Tip 9: Common Compliance Problems

- Lack of full dissection and attention to all Section L and M statements
- Missing production requirements
- Over-compliance – trying to repeat back every word of the RFP
- Developing a response solely around the PWS/SOW
- Assumptions made where clarifications are required before it is too late

Tip 10: Utilize The Compliance Model



Thank You