OST GLOBAL SOLUTIONS

B&P ACADEMY

How to Develop a Compliant Proposal

OST Bid & Proposal Academy Course

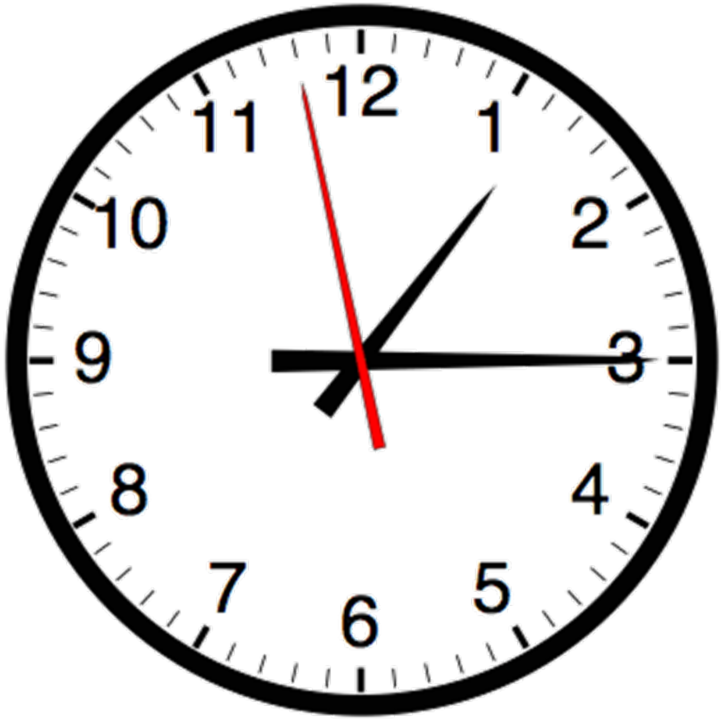
www.ostglobalsolutions.com

Agenda

OST GLOBAL SOLUTIONS

B&P ACADEMY

- 09:00 – 10:30 AM Training
- 10:30 – 10:45 AM Break
- 10:45 AM – 12:00 PM Training
- 12:00 – 01:00 PM Lunch Break
- 01:00 PM – 02:45 PM Training
- 02:45 PM – 03:00 PM Break
- 03:00 PM – 04:00 PM Training
- 04:00 PM – 05:00 PM Flex



Please, give yourself the benefit of focus and limit email and use of cell phones to breaks

Learning Objectives

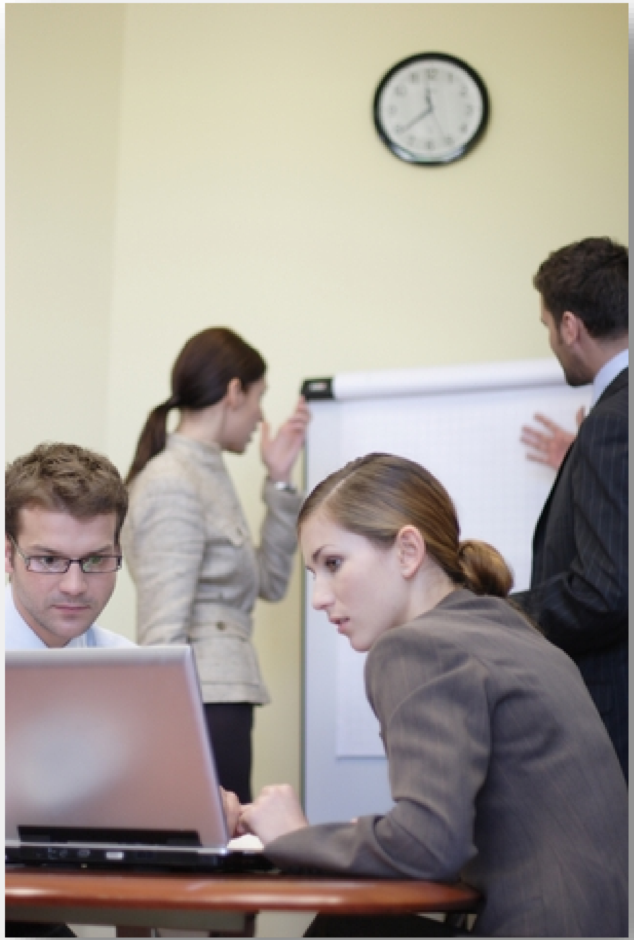
OST GLOBAL SOLUTIONS

B&P ACADEMY

- Understanding how properly annotated outlines help reduce stress in proposals and get a higher score with evaluators
- Navigating different types of RFX structures like a professional
- Mastering the techniques for structuring proposal outlines correctly
- Setting up compliance matrixes
- Developing cross-reference matrixes
- Developing compliance checklists
- Allocating the page count correctly
- Developing effective resumes and past performance templates
- Setting up outlines for business and cost volumes
- Creating useful annotations to guide the authors
- Incorporating proposal mock-up elements into the outline
- Incorporating section flow into the outline
- Reviewing and refining the outline
- Issuing assignments to the authors using an annotated outline
- Navigating through the pros and cons of working with storyboards and writers' work packages
- Setting up the storyboards correctly for the writers to eliminate typical storyboard breakdowns
- Checking compliance at reviews
- Preparing a compliant proposal for submission

How to Maximize the Learning Process

- How adults learn:
  - Understand WHY things work a certain way
  - Participate in exercises
  - Ask questions
  - Relate the material to your own experience
  - Take notes
- Bring up topics of interest to your job
- Move around during exercises



Introductions – Who is Who

- Your Name, Position, Company
- An interesting fact about your life
- Experience with proposals
- What are you looking to get out of this training?

Module 1

Overview of Outlines

Why Develop an Annotated Outline?

OST GLOBAL SOLUTIONS

B&P ACADEMY

Annotated outlines help reduce stress in proposals and get a higher score with evaluators

- Outline integrates the proposal upfront and reduces “writers’ drift” and compliance issues
- It is the proposal manager’s vision for how the final product will read
- It helps issue and track completion of proposal assignments
- It enables compliance tracking
- It organizes the process

Outlining is Not a Mechanical Process

OST GLOBAL SOLUTIONS

B&P ACADEMY

- An annotated outline is a creative product that's a cross between:
  - A topical outline
  - A Cross-Reference ("Compliance") Matrix
  - RFP requirements shred/checklist
  - Style sheet
  - Assignments
  - Mockup
  - Storyboards with framework to think through the sections
  - Conceptual framework for the proposal content

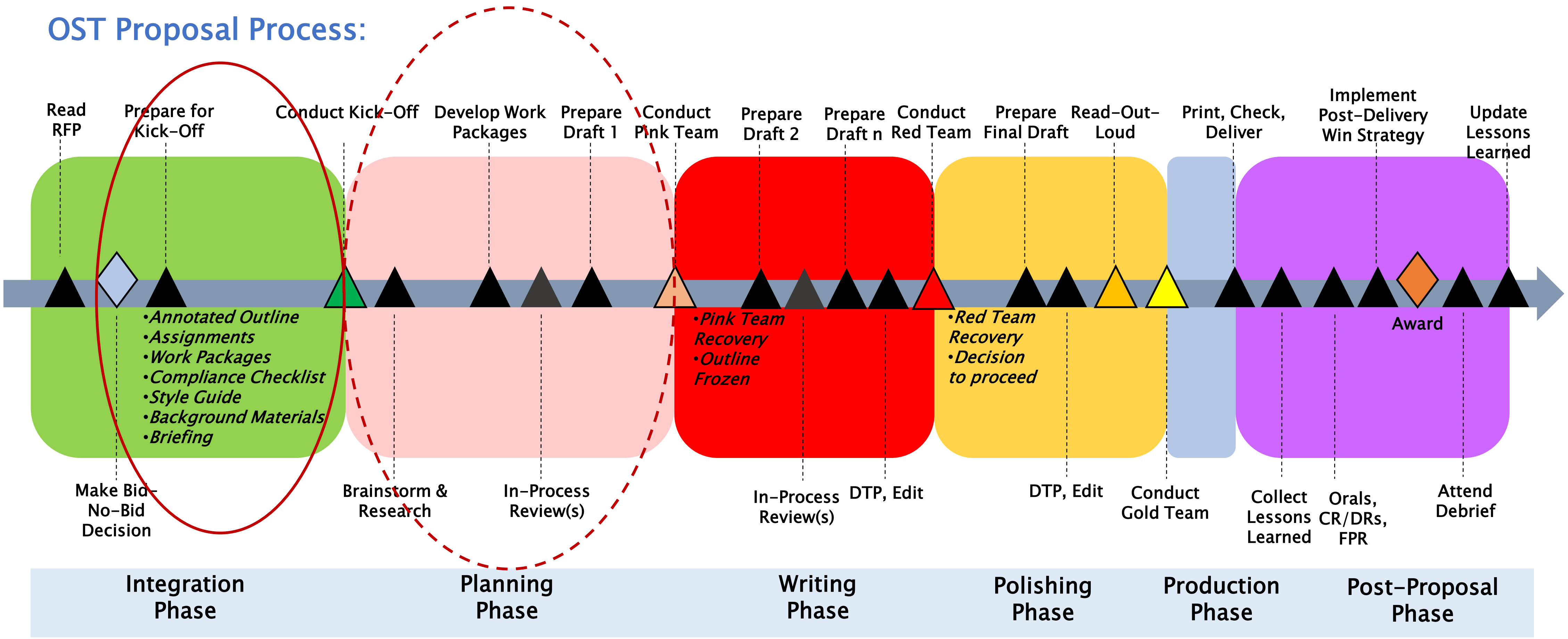
- Proposal manager truly digests and masters the RFP, removing most guesswork for the writers

Where Outlining Fits in the Proposal Process

OST GLOBAL SOLUTIONS

B&P ACADEMY

OST Proposal Process:



The Most Basic Proposal Outline: A Cross-Reference Matrix

RFP Section						PROPOSAL				
Sec L	Sec M	Sec C	Other Refs	Proposal Section Title	Proposal Section No.	Work Package	Lead/Drafter(s)	Eval Points	Text	Art
L.IV.A.2.(b)		5.2.1 - 5.2.5		Basic IDIQ - Headquarters Commandant (HQ CMDT)	1.1.2	Work Package 4	Linda Bogaczek/Eric Acree		3.00	
L.IV.A.2.(b)(1)	M.1.C.(1).(a)		Att 11, 12	Sample Task 3, IT Support Services.	1.1.2.1	Work Package 5	Linda Bogaczek/Eric Acree		1.00	
L.IV.A.2.(b)(1)(a)	M.1.C.(1).(a)		Att 11, 12	Service Desk/Desktop Support.	1.1.2.1.1	Work Package 5	Linda Bogaczek/Eric Acree/Tom Lee/GD Person (Kelli Calllahan?)		1.00	
L.IV.A.2.(b)(1)(b)	M.1.C.(1).(a)		Att 11, 12	NETOPS.	1.1.2.1.2	Work Package 5	Linda Bogaczek/Eric Acree/Tom Lee/GD Person (Kelli Calllahan?)		1.00	
L.IV.A.2.(b)(1)(c)	M.1.C.(1).(a)		Att 11, 12	Application Support.	1.1.2.1.3	Work Package 5	Linda Bogaczek/Eric Acree/Tom Lee/GD Person (Kelli Calllahan?)		1.00	
L.IV.A.2.(c)		5.3.1-5.3.4		Basic IDIQ - Assistant Chief of Staff, G-3 (ACofS, G-3)	1.1.3	Work Package 6	John Keenan?		1.00	
L.IV.A.3.				Basic IDIQ	1.2	Work Package 7	Someone with ITIL and Service Desk background knowing incident and problem mgmt		4.00	
L.IV.A.3.(a)	M.1.C.(1).(a)		Att 7, 8	Sample Task 1, Installation Support Modules Support for the C-TNOSC.	1.2.1	Work Package 2	David Strong/Rhonda Medina/GD Person with incident and problem mgmt background		2.00	
L.IV.A.3.(b)	M.1.C.(1).(a)		Att 9, 10	Sample Task 2, Web Proxy Support for the C-TNOSC	1.2.2	Work Package 3	David Harper/GD Person		2.00	

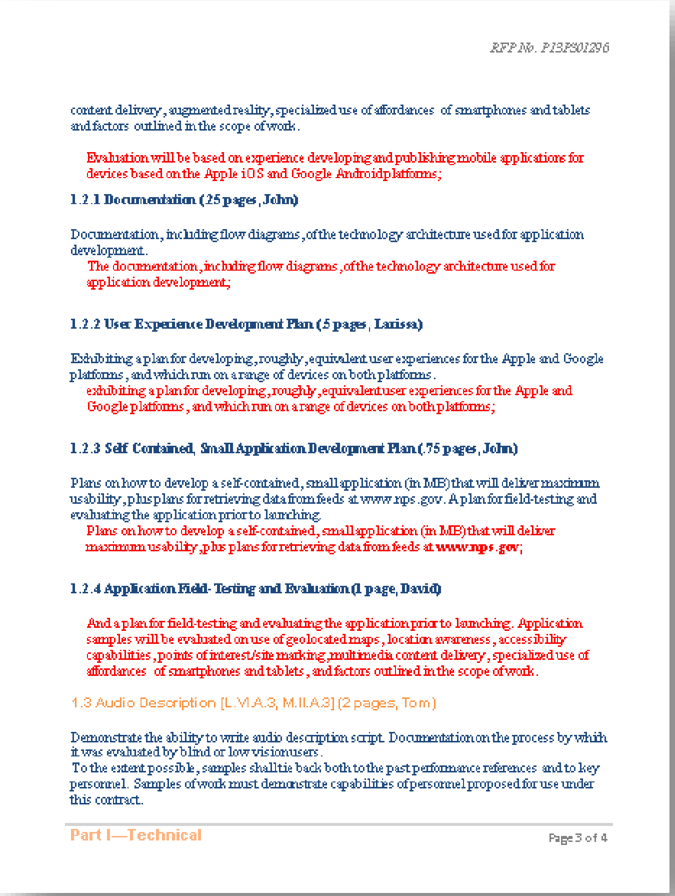
Sheet1 Sheet2 Sheet3

Many proposal managers feel that this outline is sufficient to issue assignments to writers, but it is not the case

A Step Up in Helpfulness

Outline in MS Word

- Set up in a proposal template or a blank Word document
- Structures the proposal and serves as a “skeleton”
- Provides the requirements that fit into that section to make life easier for the writer
- Adds authors and page count allocations to provide additional guidance
- If it is a template, serves as a style sheet
  - Tip: Teach your writers to “Paste Special, Unformatted Text”



RFP No. P13PS01296

content delivery, augmented reality, specialized use of affordances of smartphones and tablets and factors outlined in the scope of work.

Evaluation will be based on experience developing and publishing mobile applications for devices based on the Apple iOS and Google Android platforms;

1.2.1 Documentation (25 pages, John)

Documentation, including flow diagrams, of the technology architecture used for application development.

The documentation, including flow diagrams, of the technology architecture used for application development;

1.2.2 User Experience Development Plan (5 pages, Larissa)

Exhibiting a plan for developing, roughly, equivalent user experiences for the Apple and Google platforms, and which run on a range of devices on both platforms.

exhibiting a plan for developing, roughly, equivalent user experiences for the Apple and Google platforms, and which run on a range of devices on both platforms;

1.2.3 Self Contained, Small Application Development Plan (.75 pages, John)

Plans on how to develop a self-contained, small application (in MB) that will deliver maximum usability, plus plans for retrieving data from feeds at www.nps.gov. A plan for field-testing and evaluating the application prior to launching.

Plans on how to develop a self-contained, small application (in MB) that will deliver maximum usability, plus plans for retrieving data from feeds at **www.nps.gov**;

1.2.4 Application Field- Testing and Evaluation (1 page, David)

And a plan for field-testing and evaluating the application prior to launching. Application samples will be evaluated on use of geolocated maps, location awareness, accessibility capabilities, points of interest/site marking, multimedia content delivery, specialized use of affordances of smartphones and tablets, and factors outlined in the scope of work.

1.3 Audio Description [L.VI.A.3, M.II.A.3] (2 pages, Tom)

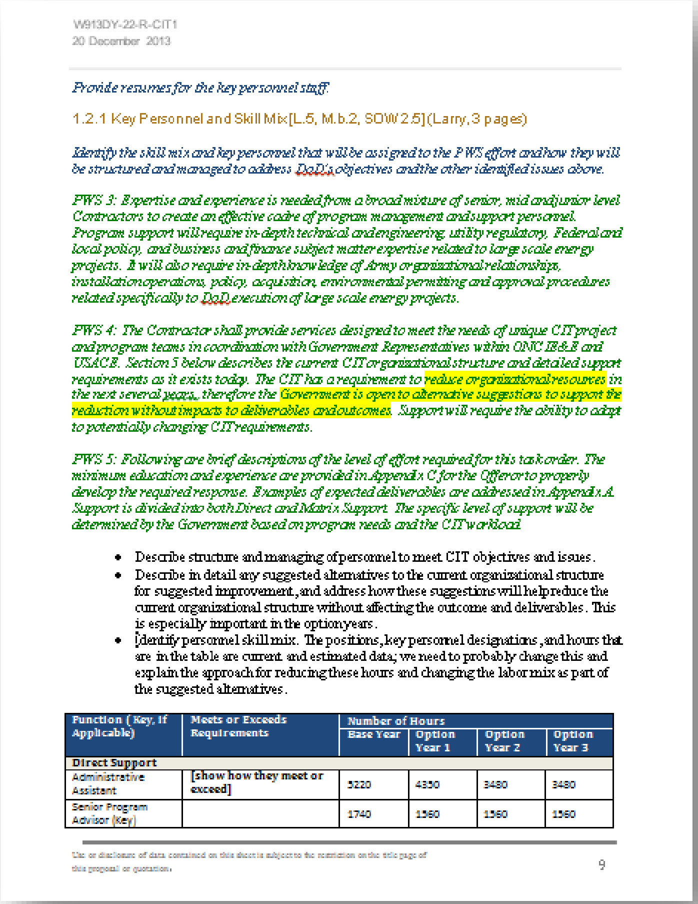
Demonstrate the ability to write audio description script. Documentation on the process by which it was evaluated by blind or low vision users.

To the extent possible, samples shall tie back both to the past performance references and to key personnel. Samples of work must demonstrate capabilities of personnel proposed for use under this contract.

Part I—Technical Page 3 of 4

An Annotated Outline – The Most Helpful Kind

- Offers a step up from the regular Word Outline:
  - Provides explicit instructions
  - Adds interpretations
  - Adds tables with instructions, graphics concepts, etc.
  - Builds in cross-references
  - May even add win themes, section transitions, and already developed solution descriptions or boilerplate



W913DY-22-R-CIT1
20 December 2013

Provide resumes for the key personnel staff.

1.2.1 Key Personnel and Skill Mix [L.5, M.b.2, SOW 2.5] (Larry, 3 pages)

Identify the skill mix and key personnel that will be assigned to the PWS effort and how they will be structured and managed to address DoD's objectives and the other identified issues above.

PWS 3: Expertise and experience is needed from a broad mixture of senior, mid and junior level Contractors to create an effective cadre of program management and support personnel. Program support will require in-depth technical and engineering, utility regulatory, Federal and local policy, and business and finance subject matter expertise related to large scale energy projects. It will also require in-depth knowledge of Army organizational relationships, installation operations, policy, acquisition, environmental permitting and approval procedures related specifically to DoD execution of large scale energy projects.

PWS 4: The Contractor shall provide services designed to meet the needs of unique CIT project and program teams in coordination with Government Representatives within ONC IE&E and USACE. Section 5 below describes the current CIT organizational structure and detailed support requirements as it exists today. The CIT has a requirement to reduce organizational resources in the next several years, therefore the Government is open to alternative suggestions to support the reduction without impacts to deliverables and outcomes. Support will require the ability to adapt to potentially changing CIT requirements.

PWS 5: Following are brief descriptions of the level of effort required for this task order. The minimum education and experience are provided in Appendix C for the Offeror to properly develop the required response. Examples of expected deliverables are addressed in Appendix A. Support is divided into both Direct and Matrix Support. The specific level of support will be determined by the Government based on program needs and the CIT workload.

- Describe structure and managing of personnel to meet CIT objectives and issues.
- Describe in detail any suggested alternatives to the current organizational structure for suggested improvement, and address how these suggestions will help reduce the current organizational structure without affecting the outcome and deliverables. This is especially important in the option years.
- Identify personnel skill mix. The positions, key personnel designations, and hours that are in the table are current and estimated data; we need to probably change this and explain the approach for reducing these hours and changing the labor mix as part of the suggested alternatives.

Function (Key, If Applicable)	Meets or Exceeds Requirements	Number of Hours			
		Base Year	Option Year 1	Option Year 2	Option Year 3
Direct Support					
Administrative Assistant	[show how they meet or exceed]	5220	4350	3480	3480
Senior Program Advisor (Key)		1740	1560	1560	1560

Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal or quotation.

9

An Annotated Outline Must Be Paired with an Assignments/Cross Reference/Status Tracking Matrix

OST GLOBAL SOLUTIONS

B&P ACADEMY

- A Word annotated outline is not enough for a well-organized proposal effort – a punch list of actions for each sections and visual status are vital to continuous situational awareness and progress tracking
- Transfer your outline headings and compliance items into a table
- Use the following format for this living, constantly updated document:

Proposal Section No.	Proposal Section Title	Section L	Section M	PWS	Other	Page Limit	Author and Support	Actions to Get to Blue	Status
									Not Started
									In Progress
									Good
									Ready

Please, Complete an Assignment or Quiz for **Module 1** Prior to Listening to the Next Module

Quiz

OST GLOBAL SOLUTIONS

B&P ACADEMY

1. Government proposal outlining is a straight-forward process that’s easily automated.
   - ❑ a. True
   - ❑ b. False

2. Which one of the following is NOT true?
   - a) Outline is the proposal manager’s vision for how the final product will read
   - b) Outline sets up the proposal correctly upfront to reduce “writers’ drift” and compliance issues
   - c) To issue and track assignments, an MS Word table of contents that accompanies your annotated outline is enough, if you put authors’ names and compliance references in section titles
   - d) An outline enables compliance tracking and organizes the proposal writing process

Module 2

Navigating RFPs and RFQs

Solicitations Come in Different Packages and Types

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Request for proposal (RFP) for a requirements contract: traditional negotiated procurement of professional services, systems, and solutions where proposals are complex; usually includes several volumes that cover technical and management approach, past performance, and price. Price is almost always separate from technical response.
- Request for quote (RFQ): a solicitation for a fixed-price, non-sealed bid contract. Often doesn't ask for price separately from technical.
- Invitation for bid (IFB): a request to submit the technical proposal, and if it is deemed acceptable, then submit a sealed, fixed-price bid. IFBs are mostly used in construction or in situations where the requirements are very clearly defined.
- Task Order or Delivery Order RFPs: RFPs for a Task Order under an indefinite delivery multiple award contract that are page-limited and time-limited and are often structured similarly to one another on the same vehicle.
- Requests for Information, Sources Sought: Although these deliverables may not result in contract award, they require a compliant response that catches customer's attention.

RFPs Can Differ Significantly in Form and Structure

OST GLOBAL SOLUTIONS

B&P ACADEMY

Since there is no one centralized government authority, RFPs differ wildly depending on the office that issues them

- Alphabetical
  - A-M with standard FAR meanings for the sections
  - Other alphabetical specific to the agency (ex. GSA, VA…)
- Non-alphabetical
  - Numbered
  - Organized into distinct sections in several separate documents
  - Unnumbered
- RFPs for commercial items vs. more custom services and solutions
- May even be in the HTML format in the body of the SAM announcement
- Usually RFPs from the same agency, contracting office, and/or IDIQ vehicle will look like one another
- Learn how to recognize various requirements in the RFP regardless of how it is set up

How to Read an RFP

Reading an RFP cover-to-cover will take more time – instead navigate to the most important parts first

- Whether traditionally set up or not, you don't read an RFP like a book, from start to end
- Task Order packages on IDIQ contracts and other types of RFPs have sections with the same functions:
  - Instructions (A, L)
  - Evaluation Criteria (M)
  - Statement of Work (C or J)
  - "Other"
- Start reading with the order above first (A, L, M, C (J) or equivalents), then read the rest

Please, Complete an Assignment or Quiz for **Module 2** Prior to Listening to the Next Module

Module 2 Exercise: Navigate a Classic Alphabetical RFP with Sections A-M

OST GLOBAL SOLUTIONS

B&P ACADEMY

*Walk through the RFP handout to identify each of the sections and information offered in them; Use Word file: **Modules 2-3 Exercise - RFP***

- A – standard offer form
- B – supplies or services and prices
- C – descriptions/specifications/performance work statement (PWS)
- D – packaging and marking
- E – inspection and acceptance
- F – deliveries or performance
- G – contract administrative data
- H – special contract requirements
- I – contract clauses
- J – attachments – a *"flexible"* section designation
- K – representations, certifications, and other statements of offerors
- L – instructions, conditions, and notices to offerors
- M – evaluation criteria for award

Module 3

Identifying RFX Requirements for Outlining

Not Every Section is Important for Outlining

OST GLOBAL SOLUTIONS

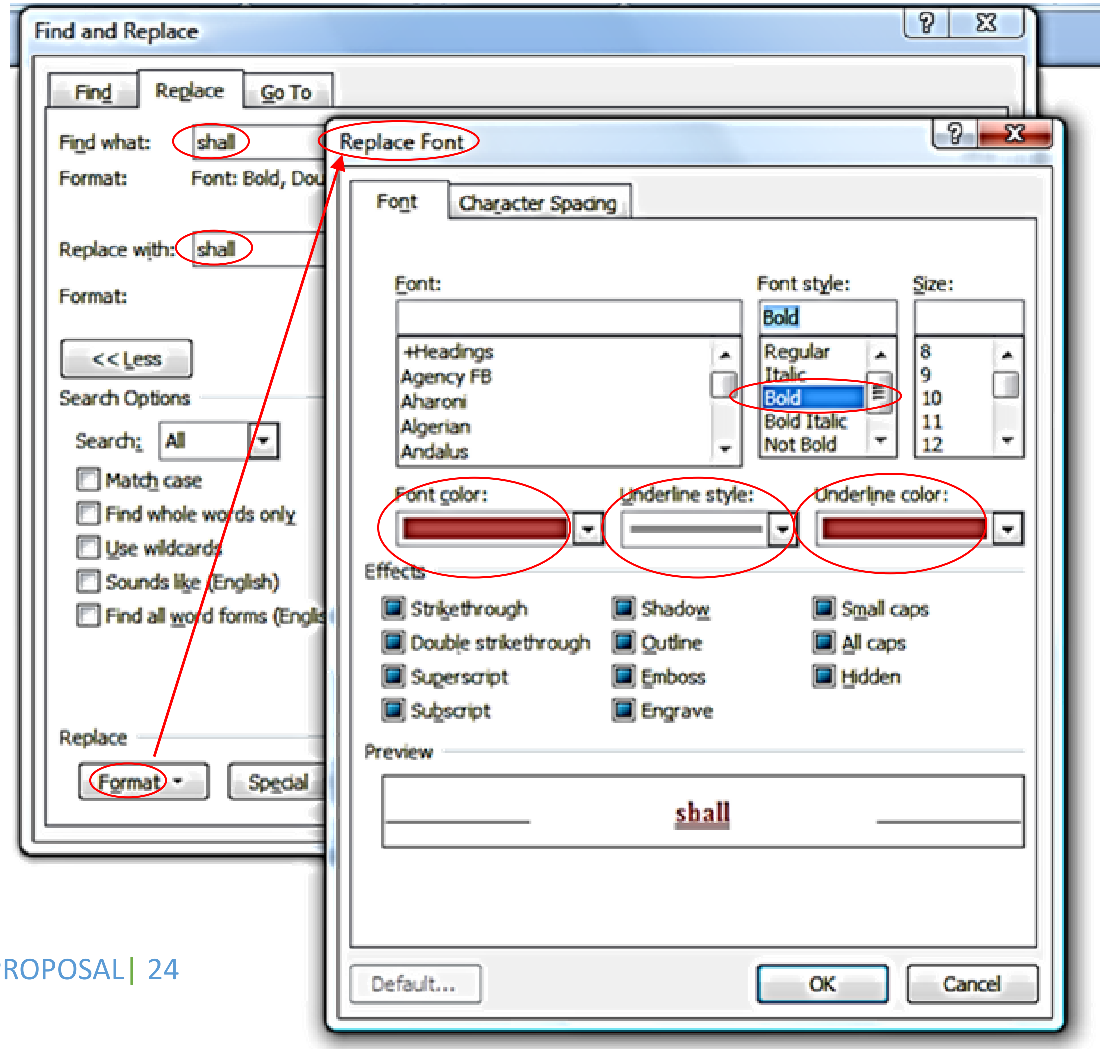
B&P ACADEMY

- Sections important to outlining:
  - Everything that instructions dictate to include in the proposal
  - Everything that will be evaluated
  - The actual tasks in the statement of work
  - Specifications and standards
  - Deliverables
- Could be presented at a higher level if proposal is severely page-limited
- Sections that are not as important and would make proposal overly bureaucratic
- They should be taken into consideration when developing the approach but don't need to appear in the text
- Examples include: Work hours, getting travel clearance, obtaining Common Access Cards, etc.

Find the Requirements Easily

OST GLOBAL SOLUTIONS

Highlighting key requirement words may help draw your eye to the requirements and help highlight the difference between INFORMATION and REQUIREMENT



Look for Major Requirement Words:

- Shall
- Will
- Require
- Change
- Must
- Should
- Comply
- Request
- Submit
- Remove
- Include
- Incorporate
- Contain
- Commit
- Constraint
- Guideline
- Respond
- Ensure
- Not
- ASAP

Excellent Point from a LinkedIn Question About “Ignoring” Some Compliance Requirements

OST GLOBAL SOLUTIONS

B&P ACADEMY

“You pose an interesting question. How many times have I been approached by a seasoned, senior executive asking if I've prepared a "compliance matrix" that's responsive to all the "shalls" in an RFP. It only takes 10 minutes with Word to parse a 200-page document for all the "shalls" to discover how futile that exercise can be in figuring out which parts are necessary in outlining.

The next step seems to involve judgment and experience to decide what the evaluators will care about and what they won't. And to make it even more subjective, throw in the Capture team's assessment of what the customer "really" wants and you end up concluding there are no tools, processes, or formulae that will deliver a winning proposal. Winning takes diligence, analysis, judgment, insight, many pairs of eyes, and perhaps a bit of luck.

I think the most likely truth is: most acquisition teams don't truly understand the process by which an RFP is turned into a proposal, and all the subtle and not-so-subtle cues proposal professionals read into RFPs can be misleading. Consequently, a formulaic approach to proposal development HAS to be tempered with judgment and customer intel.

So, yes: I ignore LOTs of "shalls" to leave space to address what we believe will be truly valued and defensibly scored.”

By Nils van den Beemt

Role of Section M, Evaluation Criteria

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Although instructions tell you what to include in the proposal, what evaluators use to decide the winner is all-important
- Make sure you clearly understand what is:
  - Evaluated and counts to distinguish between winners and losers
  - Not evaluated but must be included just to be compliant
- This knowledge helps you make important decisions that drive:
  - Page allocation
  - Resource allocation
  - Emphasis for persuasion purposes (win themes, visuals, use of bold font)
  - The ultimate outline structure (subsections/elements that help evaluators score)
  - Reviewer instructions that imitate government evaluation of your proposal

OST GLOBAL SOLUTIONS

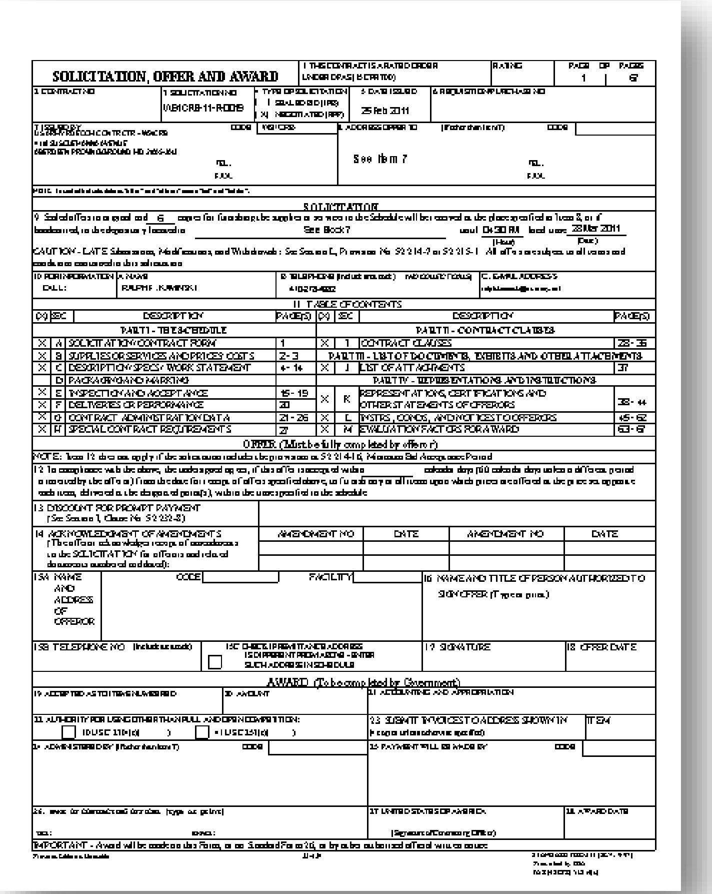
B&P ACADEMY

Please, Complete an Assignment or Quiz for **Module 3** Prior to Listening to the Next Module

Module 3 Exercise: Identify Sections Pertinent to Outlining

1. Identify sections and information important to know when outlining the proposal
2. Identify sections that would not make it into the outline but are important to take into consideration as they inform your solution development
3. Identify sections and information that are important for contract execution but are not as relevant to outlining

Use the Word file: **Modules 2-3 Exercise - RFP**


SOLICITATION, OFFER AND AWARD

Module 4

Set Up Your Proposal Template

Setting Up Template and Styles Compliant with the RFP

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Margins
- Fonts
- Spacing between the lines and paragraphs (ex: One blank line)
- Graphics and Tables captions: Make decision between Exhibit and Table/Figure
- Markings on the proposal document (disclaimers, volume number, etc.)
- Any restrictions (ex: No Offeror's logo on proposal document pages)
- Color restrictions (ex: Black font on white pages)
- Page numbering (consecutive, by section, etc.)
- Tabulation
- What's in or out of the page count
- "Front matter": Table of Contents, Table of Figures, Table of Tables, Acronyms, Cross-Reference Matrix, etc.
- Other

Cover and Title Page

- Carefully review what's included in the title/cover requirements, and craft the page
- Cover and title page are not always synonymous in hard copy submissions
  - Cover goes outside the binder in hard copy submissions
  - Title page goes inside the binder
- May include less information on the binder cover than title page in hard copy submissions to make it more visually attractive, as long as the title page is inside the binder
- In electronic submissions cover and title page are the same

Mail Transportation for Afghanistan
Proposal – June 29, 2010
RFP # W52P1J-10-R-0139
Volume I: Technical Proposal for Mail Transportation

Submitted to:
Rock Island Contracting Center
Attention: Cheryl Nielsen
(309) 782-8693
cheryl.nielsen@us.army.mil
CCRC-RJ, Rock island, IL 61299-8000
Buildings 350 & 390 & 60

Submitted by:
Ursus Group, LLC
Authorized Contact: Robert Baird
(703) 919-6357 rbaird@ursusllc.com
4000 Legato Road, Suite 1100
Fairfax, VA 22033

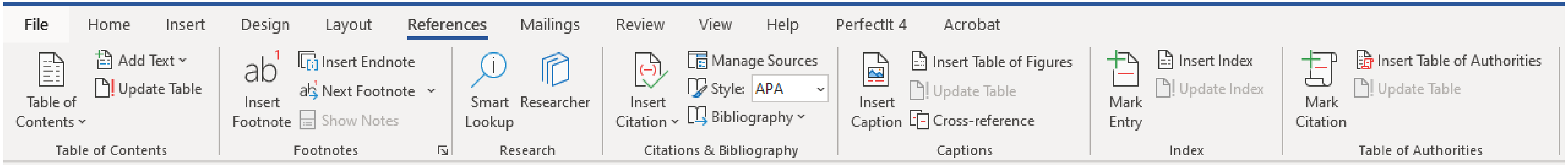
This proposal includes data that shall not be disclosed outside of Rock Island Contracting Center and shall not be duplicated, used, or disclosed-in whole or in part-for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this offeror as a result of, or in connection with, the submission of this data, Rock Island Contracting Center, Inc. shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit Rock Island Contracting Center's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in all sheets in this volume.

Table of Contents and Other References

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Insert a section break after the cover
- Insert a Table of Contents and maybe other reference tables – choose the format and level of detail necessary
- Consult the RFP – does it specify the level of detail, and the types of tables (Table of Figures, Table of Tables) you must include?
- Does the RFP distinguish between Figures and Tables or can you reference Exhibits (Tables and Figures together)?
- Follow with the section break, adjust pagination to roman numerals unless instructed otherwise by the RFP



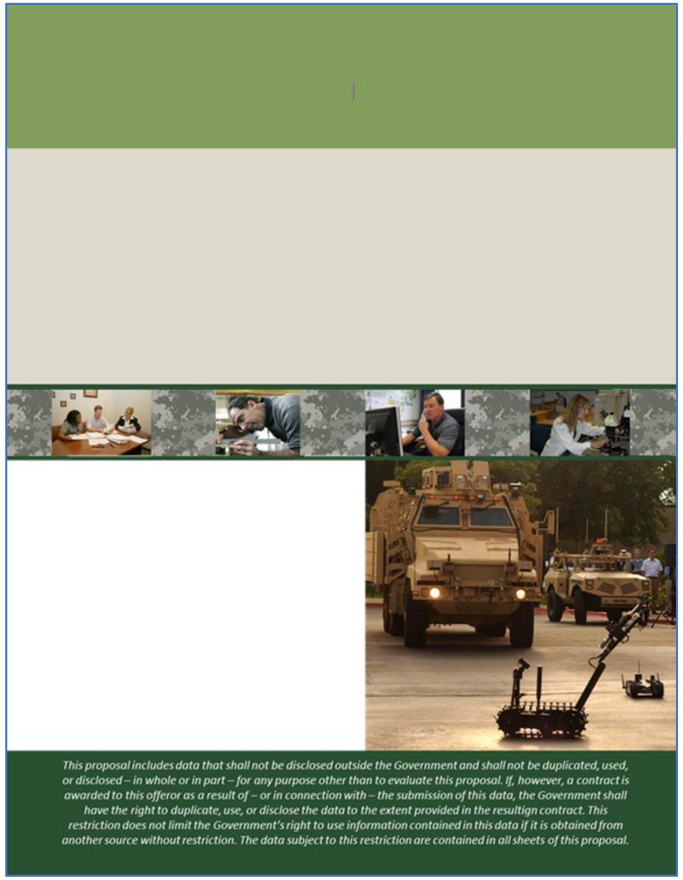
Please, Complete an Assignment or Quiz for **Module 4** Prior to Listening to the Next Module

Module 4 Exercise: Set Up Your Title Sheet and Proposal Template

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Set up a compliant proposal template
- Start with the cover/title sheet using the provided Word file: **Module 3 – Proposal Cover**
- Locate RFP customer and title (usually in the statement of work; also in the SAM or other opportunity listing)
- Add RFP number, customer, due date, volume number, and other required information
- Ensure all the compliance elements required by the RFP are present



Module 5

Structuring Proposal Outlines

Outline Development Process

OST GLOBAL SOLUTIONS

B&P ACADEMY

Just like anything in proposals, outlining is an iterative process

Don't stop at a top-level outline and leave figuring out the details to authors

Proposal Manager Creates the Requirements-Based Outline first

- **Start with L (Instructions)**
- **Add in M (Evaluation Criteria)**
- **Add C or J (Statement of Work)**
- **Add H, CDRLs, etc.**

Some of this information can be added right away, and other after brainstorming

The first cut takes place before brainstorming, and the second step after

- **Add your interpretation of requirements**
- **Add templates for tables**
- **Add must-have figure placeholders**
- **Add applicable win themes**
- **Add other points of discussion if known**
- **Add cross-references between sections and volumes**
- **Add introductions and transitions**

Be prepared to rearrange and tweak as your thinking matures

Rearrange bullets within sections and streamline while minding compliance

Submit for in-process reviews, improve, and freeze the compliance part after Pink Team

Focus on Telling the Story While Remaining Compliant

OST GLOBAL SOLUTIONS

B&P ACADEMY

Outlining is more of an art than a craft

- The more the RFP is open to interpretation, the more decision-making you have to make
- Picture the best way to present information so that:
  - It is easy to evaluate
  - Parts are easily identifiable – the evaluator doesn't have to hunt and peck to find information
  - It follows the RFP instructions order logically: decide what instructions to outline by, and what sections to work in where they fit
  - It tells the story
  - It is not repetitive
  - It responds to the requirements while not regurgitating them

Read Requirements Phrases Carefully

OST GLOBAL SOLUTIONS

B&P ACADEMY

Note that there are several different possible keyword combinations and ways to outline the section

- L.3.1.4 The offeror shall propose their ability to provide an adequate amount of personnel with the appropriate labor mix to fulfill the requirements set forth in the SOW.

- **Go Slow**
- **Men at Work**

- **Go**
- **Slow Men at Work**

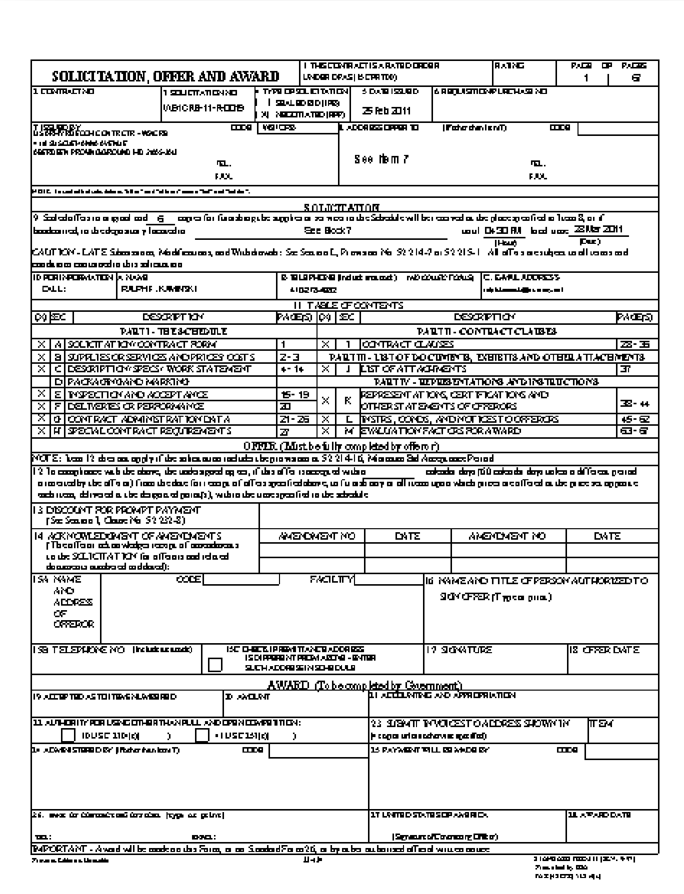
Please, Complete an Assignment or Quiz for **Module 5** Prior to Listening to the Next Module

Module 5 Exercise: Structure the Proposal Outline Correctly

OST GLOBAL SOLUTIONS

B&P ACADEMY

1. Brainstorm on how should you structure outline – decide on the best approach
2. Build the skeleton outline first (volumes, sections, subsections, etc…)
   - Follow the instructions first
   - Then integrate evaluation criteria and figure out how you will map the statement of work to your outline
3. Debrief on how you decided to structure your outline and why


SOLICITATION, OFFER AND AWARD

SOLICITATION

OFFER

AWARD

Use the Word file: **Modules 2-3 Exercise - RFP**

Module 6

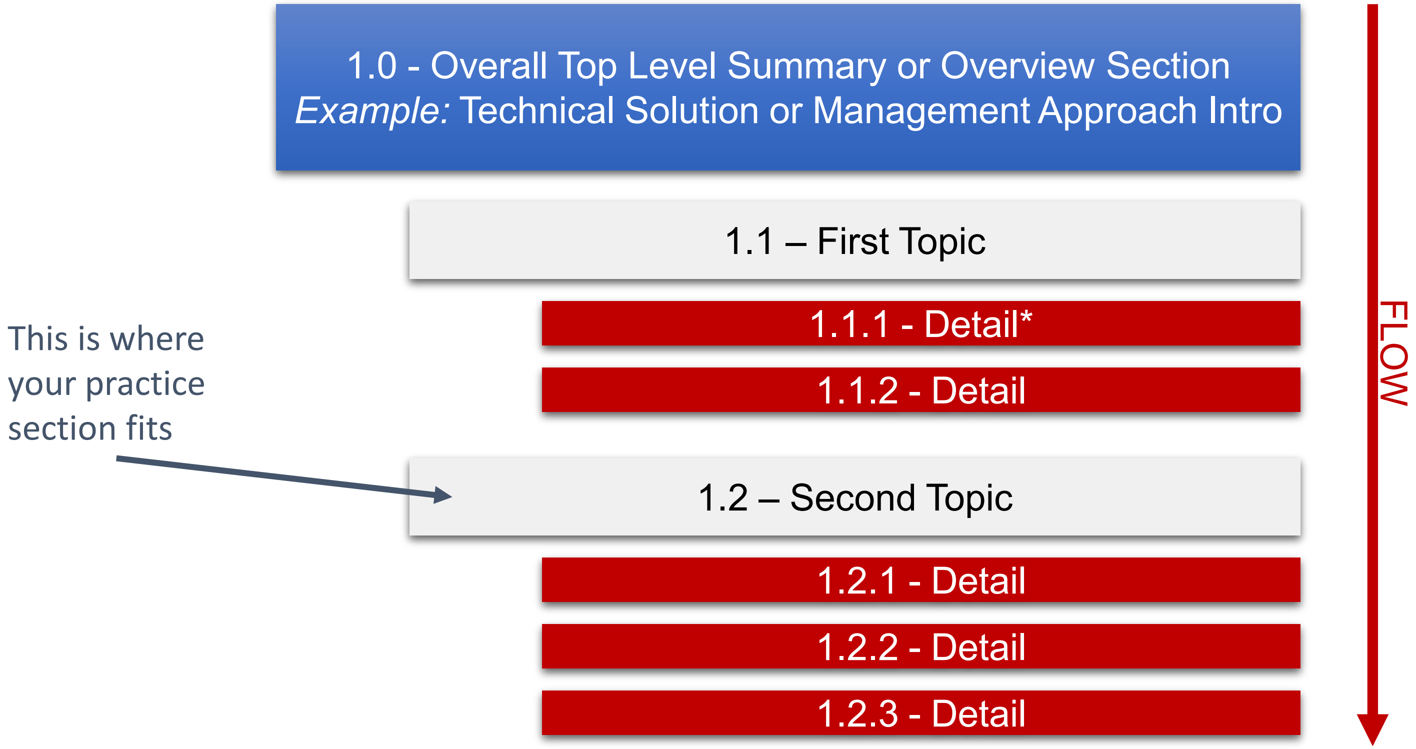
Properly Titling and Numbering Proposal Sections

Proposal Level Section Flow

OST GLOBAL SOLUTIONS

B&P ACADEMY

If the RFP permits, go from general to specific, and from an overview to greater detail



- Blue: Evaluator that doesn't have expertise in the field (usually the contracting officer)
- Light grey: Evaluator with some expertise (usually the project manager, other evaluators that are not as familiar with the program)
- Red: Subject Matter Expert Reader (Contracting Officer's Technical Representatives, SETA contractors, etc.)

Naming and Numbering Your Sections

OST GLOBAL SOLUTIONS

B&P ACADEMY

Emulate your customer's name and numbering conventions as much as possible

- Mimic your customer's order, numbering system, and naming conventions
- Make your proposal easy to evaluate
- Follow the RFP order (no matter how logical or illogical)
- Incorporate customer's section names into yours, with some adjustments
- Always explain how you are deviating from the order, if you select to do so

RFP:

L.2.5 Show capability of providing analysts who have fluency in the PWS target languages.

Proposal:

1.5 Capability of Providing Analysts with Fluency in the PWS Target Languages

Numbering Can Be a Bit Tricky

OST GLOBAL SOLUTIONS

B&P ACADEMY

You can assign your own numbers to the outline, and track compliance to the RFP numbering in brackets in the section heading

- **Don't get carried away with numbering and over-number sections**
  - Too many headings detract from the story and eat up page count
- **Try not to go down deeper than four levels**
  - Use bolding to drill down further
  - Only go deeper if the RFP structure so requires
- **If there are multiple volumes with a narrative, consider starting numbering with volume numbers to give your proposal sections unique numbers – make sure it doesn't contradict the RFP**
- **Only subdivide sections when there are more parts than one**

- **Volume 1 – 1.0**
  - Section 1.1
  - Section 1.2
    - Section 1.2.1
    - Section 1.2.2
      - Section 1.2.2.1
      - Section 1.2.2.2
- **Volume 2 – 2.0**
  - Section 2.1
  - Section 2.2
    - Section 2.2.1
    - Section 2.2.2
      - Section 2.2.2.1
      - Section 2.2.2.2
- **Volume 3 – 3.0**
  - Section 3.1
  - Section 3.2
    - Section 3.2.1
    - Section 3.2.2

Add Compliance References to Your Section Headings

- Add L, M, Statement of Work
- Consider adding other requirements (CDRLs, H, etc.)
- May add WBS References
- May track compliance at major section levels, or at subsection levels
- If tracking at subsection levels, only add unique compliance items such as the Statement of Work and CDRLs

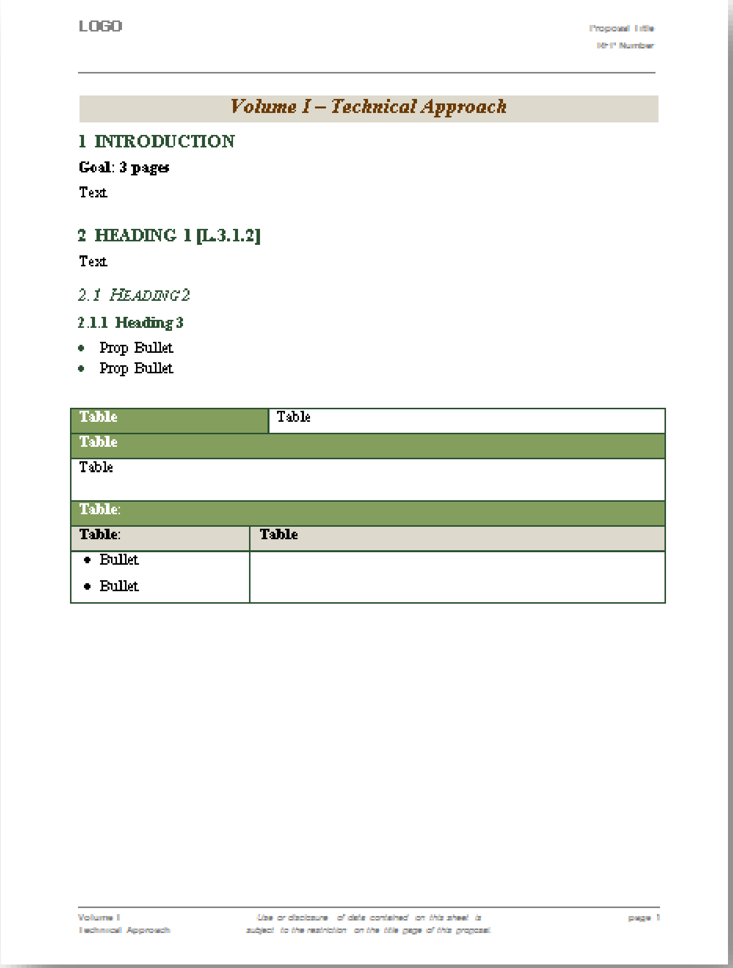
1.0 Management Approach [L.2.1, M.2.1.3, C.2.5, CDRLs A001, A002]

Please, Complete an Assignment or Quiz for **Module 6** Prior to Listening to the Next Module

Module 6 Exercise: Transfer Your Outline to the Proposal Template and Add RFP Requirements

- Use *Paste Special, Unformatted Text*
- Assign the right heading levels to the outline using styles or format painter
- Start inserting RFP text (instructions, evaluation, SOW) into the Technical Approach section
- Use RFP reference information in section headings so that the evaluator can track your proposal to the RFP
  - 2.1.2 Personnel Recruitment Plan [SOW 3.1.2]
- Add authors' names (fictional) and page count allocations in a different color
- Build the entire outline before you begin annotations, even though it can be tempting to start annotating as you build

Use the Word file: **Module 6 Exercise - Proposal Template**


LOGO

Proposal Title
RFP Number

Volume I – Technical Approach

1 INTRODUCTION

Goal: 3 pages

Text

2 HEADING 1 [L.3.1.2]

Text

2.1 HEADING 2

2.1.1 Heading 3

- Prop Bullet
- Prop Bullet

Table	Table
Table	
Table	
Table:	
Table:	**Table**
• Bullet • Bullet	

Volume I
Technical Approach

Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal

page 1

Module 7

Understanding the Evaluation Criteria

Create a Scoring Tree to Understand the Weighting of the Evaluation Criteria

OST GLOBAL SOLUTIONS

B&P ACADEMY

Understanding the relative importance of evaluation criteria helps allocate page count and resources

- Evaluation factors:

  (1) Mission Support

  Factor 1 – Technical Approach
  Factor 2 – Management
  Factor 3 – Quality Control

  (2) Past Performance

  (3) Price

50 pages total

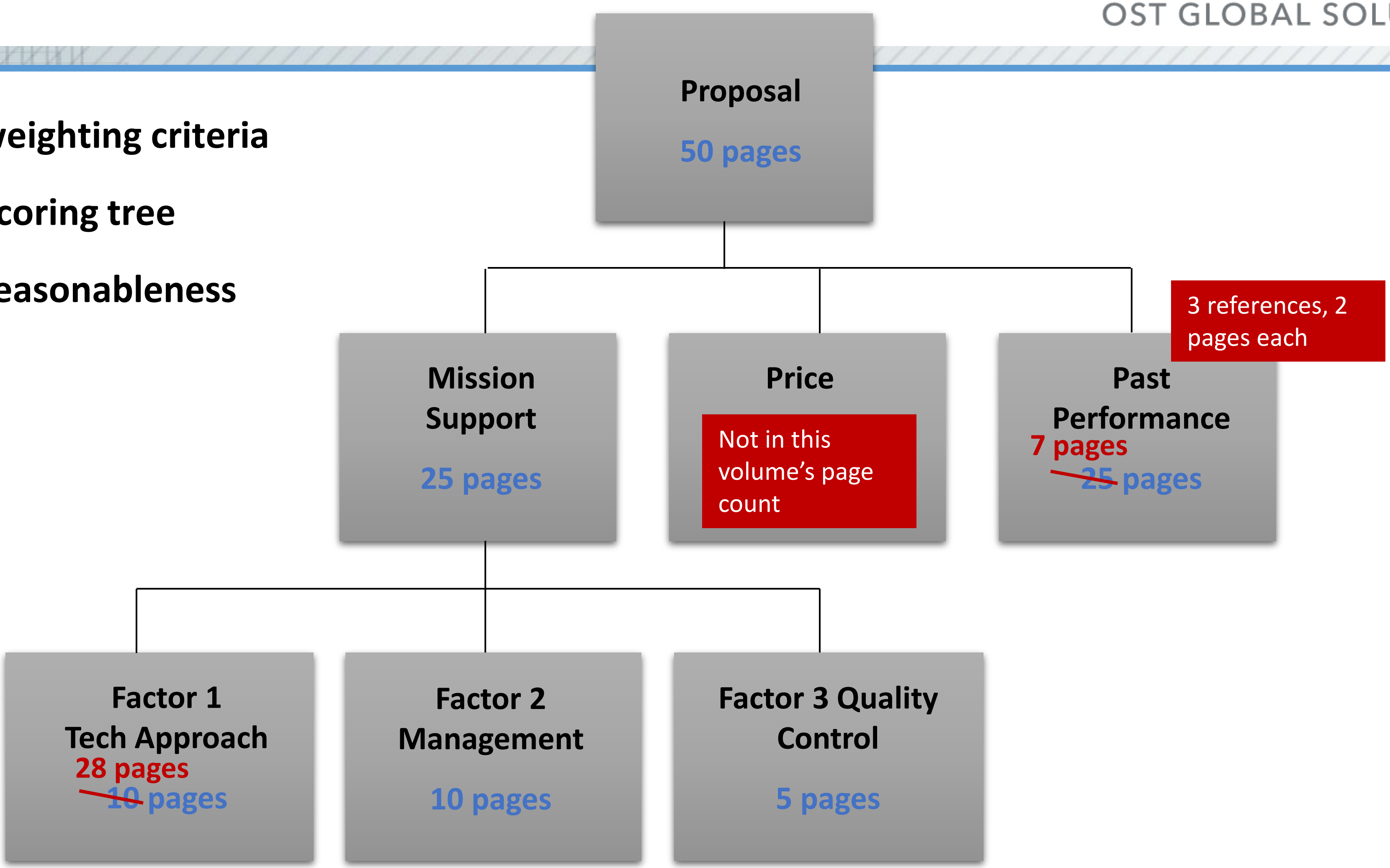
- The Mission Support factor is more important than the Past Performance factor and more important than the Price Factor
- The Past Performance Factor and Price Factor are equal in importance
- Under Mission Support, Factor 1 - Technical Approach, and Factor 2 - Management are of equal importance, and each of these Factors is more important than Factor 3 - Quality Control

Page Allocation – Results and Exercise

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Check the weighting criteria
- Develop a scoring tree
- Adjust for reasonableness



Please, Complete an Assignment or Quiz for **Module 7** Prior to Listening to the Next Module

Module 7 Exercise: Create a Scoring Tree and Assign Page Counts

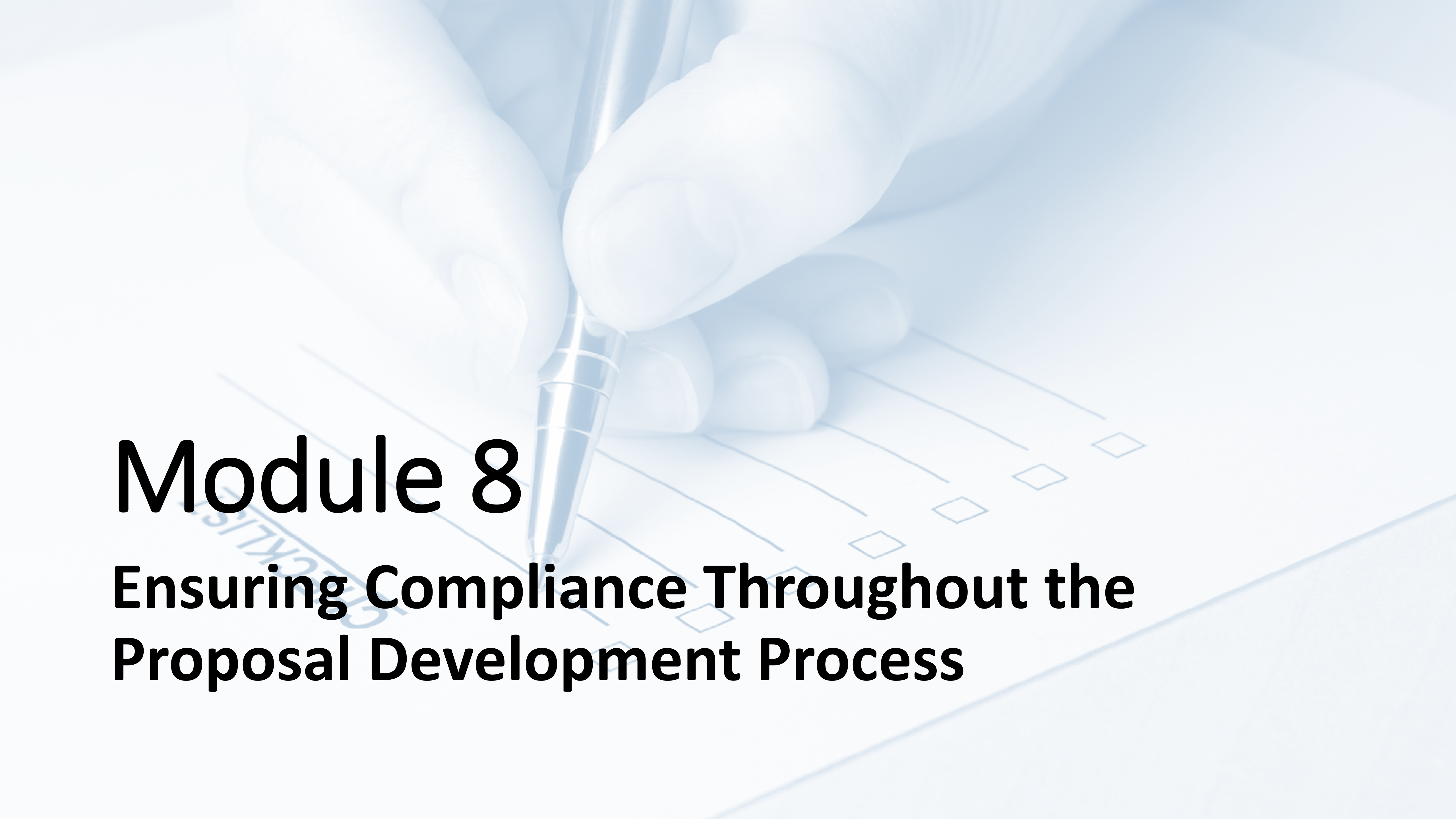
OST GLOBAL SOLUTIONS

B&P ACADEMY

1. Create a scoring tree
2. Assign page counts for our practice proposal (write page count allocations in brackets in the headings of the outline you are creating)

Use section M.3.1.2 from the Word file: **Modules 2-3 Exercise - RFP**

M.3.1.2 The evaluation factors include (1) Technical, (2) Past Performance, (3) Cost/Price. Technical is more important than past performance which are both significantly more important than Cost/Price. Within the Technical proposal, the organization, management, and technical approach is equal in importance to the ability to provide knowledgeable personnel, and is somewhat more important than the ability to provide an adequate amount of personnel. The Government is willing to pay more if increases in, for example, technical merit of the proposal so warrants. The Cost/Price Factor may become more significant in contributing to the source selection decision if proposals are comparable.



Module 8

Ensuring Compliance Throughout the Proposal Development Process

Various Matrixes: Proposal Manager's and Evaluator's Helpers

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Cross-Reference Matrix
- Compliance Matrixes:
  - By RFP Section
  - By RFP Section with requirements language
- Compliance Checklist

Cross-Reference Matrix

OST GLOBAL SOLUTIONS

B&P ACADEMY

Prop. Section #	Section Title	L	M	C	Other	Page
1.2	Engineering Approach	L.2.2	M.1.a	C.3.5	H.12	12
1.2.1	Command and Control System	L.2.2	M.1.a	C.3.5.1	Attachment 1	14

- Used in page-limited proposals
- Sometimes required by the customer
- Tracks how compliance gets addressed in proposal sections
- Shows how RFP requirements “intersect”
- Usually is the basis for the outline
- When compliance is tracked in section headings, a Table of Contents can serve as a cross-reference matrix

Compliance Matrix

OST GLOBAL SOLUTIONS

B&P ACADEMY

Section L	Proposal Section Number	Section Title	Page
L.2.2	1.2	Engineering Approach	12
L.2.2	1.2.1	Command and Control System	14

… … …

Section C	Proposal Section Number	Section Title	Page
C.3.5	1.2	Engineering Approach	12
C.3.5.1	1.2.1	Command and Control System	14

- Is easier for evaluators to track compliance as it goes in the order of the RFP
- Goes on for pages and is not suited for page-limited proposals
- Usually is provided for instructions, evaluation criteria, and statement of work

Another Variation of a Compliance Matrix

OST GLOBAL SOLUTIONS

B&P ACADEMY

Requirement Reference	Requirement Language	Proposal Section Number and Title	Proposal Page
L.3.a.1	Offeror shall discuss the technical approach where it pertains to mail delivery.	2.1 Technical Approach	Page 5
L.3.a.1	Offeror's proposal shall also include the approach to security.	2.1.1.2 Security	Page 7

- Very convenient for an evaluator
- May backfire if you have not been 100% thorough with compliance
  - Often compliance matrixes are there to create an impression of thoroughness even if you had to fudge it in some areas

Compliance Checklist

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Used for reviews to check compliance
- Also used to shred the RFP to ensure incorporation of every requirement

	RFP – Statement of Work			YES	NO	Outline Section No.
4.0 GENERAL	4.1 Contractor Transition	4.1.1	The Contractor ***shall*** conduct phase-in procedures beginning 60 calendar days prior to the performance date specified in Section F of the contract.			2.4.1
			The Contractor ***shall*** submit a phase-in plan for evaluation with its proposal.			2.4.1
			The phase-in ***requires*** coordination with the incumbent Contractors.			2.4.1
		4.1.2	At least 60 calendar days prior to contract completion, the Contracting Officer (KO) and Contracting Officers Representative (COR) ***will*** notify the Contractor of all outstanding requirements that ***shall*** be completed prior to contract termination.			2.4.1
			The Contractor ***shall*** provide personnel with a level of knowledge, skills, abilities, and aptitude in services to support the deliverables of this contract.			2.4.1
			Contractor employees working under this contract ***shall*** be able to fluently speak, read, and write English.			2.4.1

Numbering Compliance Items

OST GLOBAL SOLUTIONS

B&P ACADEMY

L3. PROPOSALS INSTRUCTIONS.

a). Proposals shall be submitted in the English language. Page size is identified as follows: Pages shall be 8.5 x 11 inches or A4 size: font style shall be Times New Roman, font shall be no smaller than 10pt. Text shall be framed

in such a way that is should be able to be copied to 8.5 x 11 inch paper without losing data. Exhibits larger than 8.5 x 11 inches are permitted but will count as 2 pages and must be folded to 8.5 x 11 inches or A4 size.

(b). Offerors must demonstrate their understanding of the Government's requirements. Interested offerors shall submit their proposals and other information in four (4) separate sections as follows:

1. **Section I - Signed offer (Signed Standard Form 33 (SF33) with CLIN pricing.**
2. **Section II - Technical Proposal.**
3. **Section III - Past Performance**
4. **Section III – Representations and Certifications and other statements of Offeror.**

Each section shall be submitted in official file clearly marked with the solicitation number and section number. The cover of each file shall be clearly marked. "SECTION __OF PROPOSAL FOR (FIRM's NAME)". The offeror shall also provide one file with all of the sections that shall not have the company name and/or identifying marks but shall be clearly marked with the solicitation number and sections. The proposal shall comprise a succinct presentation of the desired information. Conciseness is essential.

(c). Each section shall be arranged as follows:

Section I – Offer. Shall consist of the following:

1. Signed SF 33. Offerors shall complete blocks 12-18 of the SF 33 and must be signed by an official authorized to bind the offeror.

2. Price Proposals **(Factor 1)**: The offeror shall submit fully burdened firm-fixed prices for all of the Analysts (Base year and Option Years) **in US Dollars**. The offeror shall also submit a fully burdened hourly rate for overtime hours. The not-to exceed estimated costs for travel expenses (CLINs 0002, 1002 and 2002) have be provided by the Government. **NOTE:** The "All Source Intelligence Analysts" working at the Stuttgart, Germany work site shall not be reimbursed under this contract for daily lodging, food or transportation. Pricing is required for CLIN 0003 for a one-time phase in (mobilization) period. CLINs 7500, 7501, 7502 and 7503 may be priced separately or included in the monthly rates. Offerors must enter total amounts (i.e. quantity multiplied by the unit price to the nearest cent. Rounding up or down to the nearest dollar is not acceptable. The offeror agrees to hold the prices in its offer firm for a 90 calendar days from the date specified for receipt of offers.

Section II – Technical Proposals (Factor 2 – Technical). The technical proposal shall not

[L3.(c).Sec I.1]

- **Track compliance to instructions, evaluation criteria, statement of work, and any other pertinent sections and attachments**
- **In select cases, may also track your sections to WBS**

Please, Complete an Assignment or Quiz for **Module 8** Prior to Listening to the Next Module

Module 8 Exercise: Create the Initial Outline and Cross-Reference Matrix

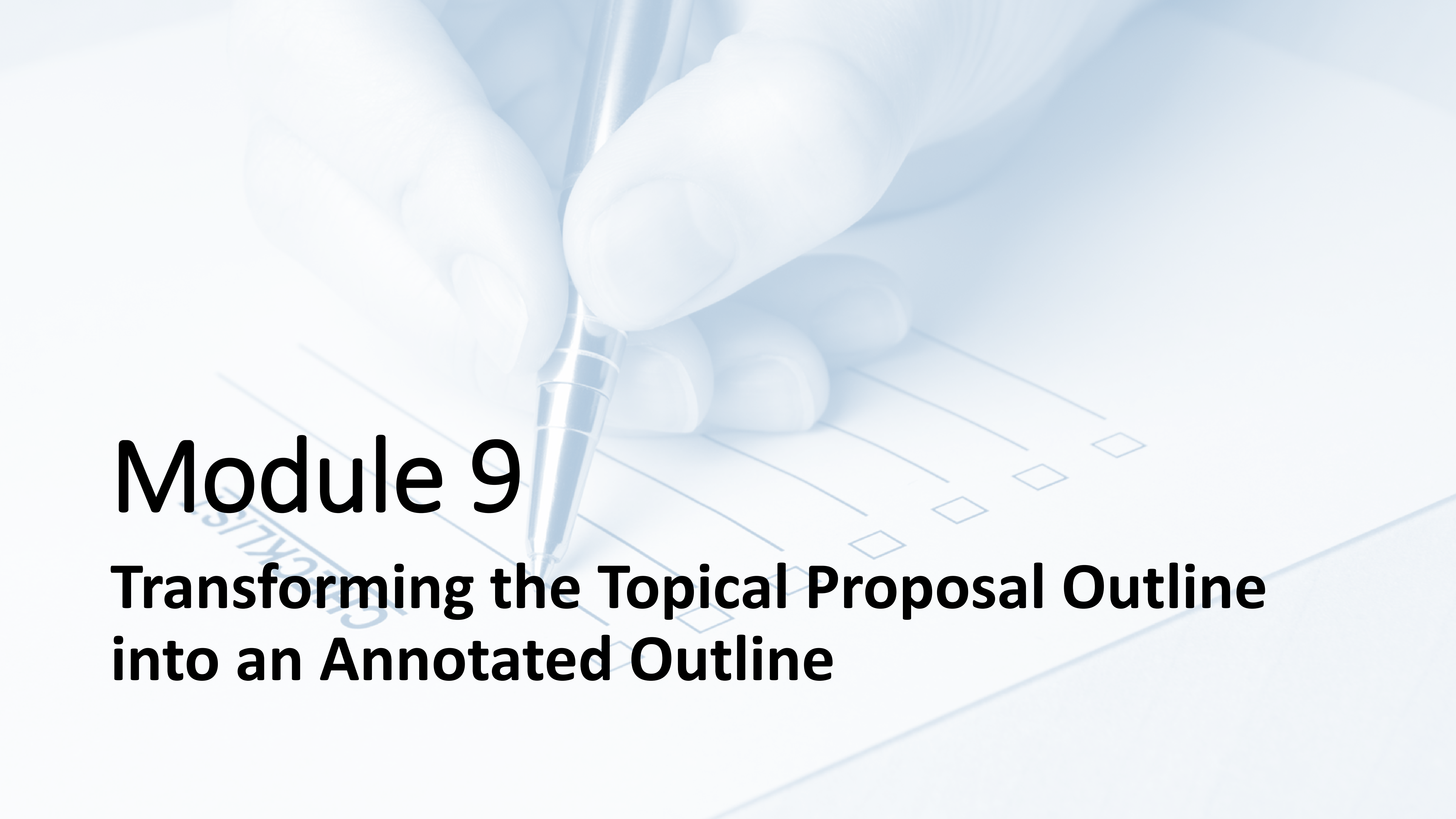
OST GLOBAL SOLUTIONS

B&P ACADEMY

This type of outline helps keep a succinct view of the structure, assignments, page allocations, compliance, and status

- Transfer your logic to the Word or Excel/Smartsheets-based outline to figure out the numbering and compliance
- Fill out section titles, page count allocations, and RFP section references

Proposal Section No.	Proposal Section Title	Section L	Section M	PWS	Other	Page Limit	Author and Support	Actions to Get to Blue	Status
									Not Started
									In Progress
									Good
									Ready



Module 9

Transforming the Topical Proposal Outline into an Annotated Outline

Annotated Outline Development

OST GLOBAL SOLUTIONS

B&P ACADEMY

The next step in outlining is the hardest part

Don't stop at a top-level outline and leave figuring out the details to authors

Proposal Manager Creates the Requirements-Based Outline first

- **Start with L (Instructions)**
- **Add in M (Evaluation Criteria)**
- **Add C or J (Statement of Work)**
- **Add H, CDRLs, etc.**

Some of this information can be added right away, and other after brainstorming

The first cut takes place before brainstorming, and the second step after

- **Add your interpretation of requirements**
- **Add templates for tables**
- **Add must-have figure placeholders**
- **Add applicable win themes**
- **Add other points of discussion if known**
- **Add cross-references between sections and volumes**
- **Add introductions and transitions**

Be prepared to rearrange and tweak as your thinking matures

Rearrange bullets within sections and streamline while minding compliance

Submit for in-process reviews, improve, and freeze the compliance part after Pink Team

Incorporate and Infuse Section Flow

OST GLOBAL SOLUTIONS

B&P ACADEMY

*Design the proper paragraph flow for greater persuasion, to make your sections **compelling** by design; Use 8Ws to guide the paragraph flow*

Higher level summary sections - X or X.X outline levels
Why: Customer problem, challenge, or key risk factor behind the requirement
What: What do we propose to do in response to the requirement?
Who: Who exactly is going to do this part of work, by name and title?
How: Step-by-step approach with benefits to the customer and risk mitigation
When: In what sequence we are going to do it per schedule, or when have we done it before?
Where: Indicate the location or facility, or say where we have done it before successfully
Wow: Powerful section conclusion

Lower level sections for X.X.X levels and further down
Only if you have room: Why
What, Who, and How
Only if you have room: When, Where and Wow

Example of Outline Annotations

OST GLOBAL SOLUTIONS

B&P ACADEMY

5.2.1 System Transition Strategies [L.2.5.(a).(3).i, C.5.12, M.2.1.c, H.5.3, Exhibit C.2] (4 1/2 pages)

- Introduce key issues involved in system transition, showing understanding of the processes the system is intended to support and type of data in the databases.
- Discuss key assumptions.
- Discuss transition **strategies** we will employ for **hardware, software, and data.**
- *(This section requires further outlining).*

Graphic Concept: Show functional requirements for the condition of the system before conversion, and To-Be state. **(2/3 page)**

5.2.2 System Transition Risks and Mitigations [L.2.5.(a).(3).ii, C.5.12, M.2.1.c] (2 pages)

- Discuss key considerations organized around top transition risks; include transition feasibility risks, technical performance of the converted system etc. Show the risks in the table:

Risk and Rationale	Probability/ Impact	Mitigation	Probability/Impact with Mitigation

Please, Complete an Assignment or Quiz for **Module 9** Prior to Listening to the Next Module

Module 9 Exercise: Create Useful Annotations to Guide the Authors

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Pick out all the key phrases that constitute direct requirements from the RFP
- Highlight what information is the evaluator looking for?
- Ask questions that will stimulate the writers
- Add tables and raw graphic concepts
- Add focus box placeholders and other mockup elements

Module 10

Developing Past Performance Template

Building a Past Performance Template

OST GLOBAL SOLUTIONS

B&P ACADEMY

When developing past performance solution in advance of the RFP, use the same contracting office's typical structure for past performance template

- Present your past performance in a table
  - It usually this allows for a smaller font so you can fit more information if page-limited
  - At the very least, organize all the customer information in the table, with the rest as a narrative
- Tailor this table exactly to what the RFP requires
- If the RFP requires *agency name, contract dollar amount, contract type, period of performance, Contracting Officer's name, contact information (phone, email, fax)*, this is exactly what the table cells should include
- The next part is project summary and relevancy

<table>
<tr><td>Agency:</td><td>Contract Dollar Amount:</td><td>Contract Type:</td><td>Period of Performance:</td></tr>
<tr><td>DISA</td><td>$34,567,000</td><td>FFP</td><td>01/14/2009-01/14/2010</td></tr>
<tr><td colspan="4">Contracting Officer:</td></tr>
<tr><td colspan="4">Name: James Smith
Phone: 202-555-1212
Email: jsmith@disa.mil
Fax: 202-555-1234</td></tr>
<tr><td colspan="4">Project Summary:</td></tr>
<tr><td colspan="4">[Brief description of the project]</td></tr>
<tr><td colspan="4">How This Project is Relevant to the RFP:</td></tr>
<tr><td colspan="4">[Call outs of this RFP's Statement of Work areas, and then description of what you did on this project that's highly similar to each of the Statement of Work areas]</td></tr>
</table>

Another Template Example

This template is more explicit in showing relevancy; and explains how and why you should describe the problems

1. Project: Title	
2a. Reference/Technical POC: Name: Address: Phone: Email:	**2b. Reference/Contracting POC:** Name: Address: Phone: Email:
3. Contract Number: xxx	**4. Contract Period of Performance:** xxx
5. Contract Type: xxx	**6. Contract Value:** xxx
7. Contract Overview: Xxx	

Relevancy to the Scope of Work:	**How Our Team Meets or Exceeds the Requirement:**
SOW 3.1	xxx
SOW 3.2	xxx
SOW 4.1	xxx
SOW 4.2	xxx
SOW 4.3	xxx
SOW …	xxx

Problems Encountered and Their Resolution:

IMPORTANT NOTE FOR YOU WHEN YOU ARE PREPARING THIS PAST PERFORMANCE:

Addressing a problem head on and showing your own twist on how you solved that problem is your chance to tell your side of the story about how conscientious you are. Odds are, they know anyway (or will find out soon), so this is your chance to acknowledge it before it's too late.

Filling Out the Template

There are a few rules while filling out the template

- Embed instructions to the writers to ensure consistency
- Display your advantages:
  - Explicit relevance above all
  - Organize in accordance with the RFP requirements
  - If a project is only relevant to a couple of RFP areas, don’t list all RFP areas and show "not relevant"
  - Reuse **this** RFP’s terminology
  - State explicitly why it is relevant or good: *"Our experience on this project is highly relevant to this RFP because..."*
- Remind the writers to refer to the SOW/PWS for the past performance project

How to Make Your Past Performance Sizzle

Here is how you go for the gold in the past performance area and outdo your competition

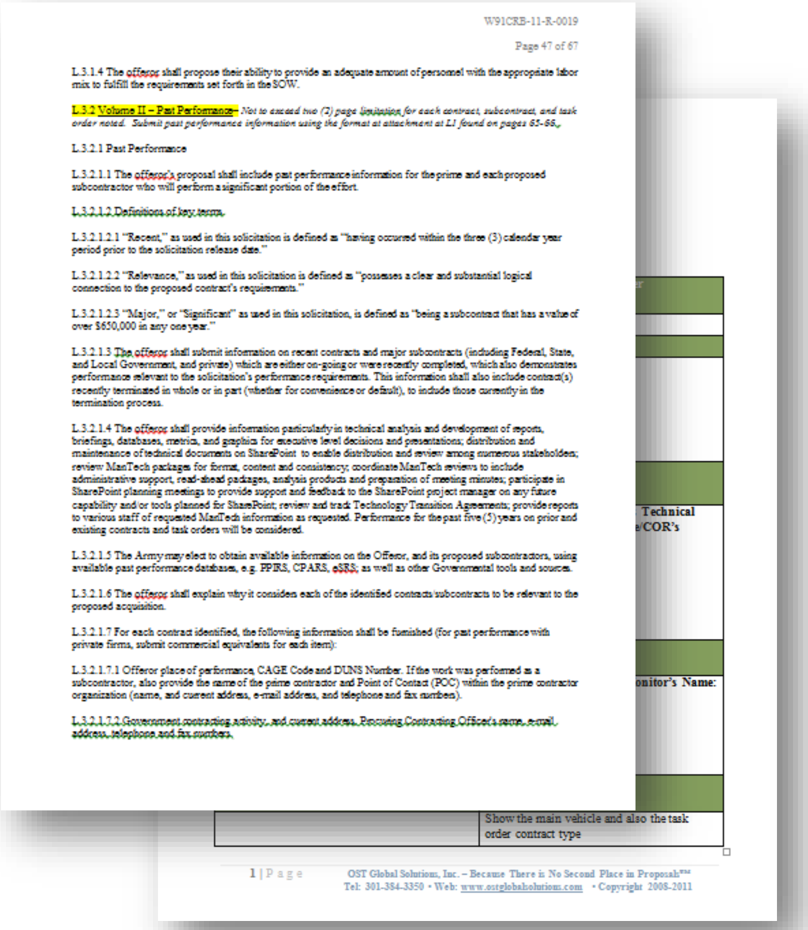
- Showcase:
  - Technical, program management skills
  - Unique capabilities, facilities, products
  - Resourcefulness
  - Improvements that resolved problems
- Use direct quotes from award fee letters, awards, commendations, and customer emails
- Include such graphics as Award Fee Improvement Curve (Award fee % over time)

Please, Complete an Assignment or Quiz for **Module 10** Prior to Listening to the Next Module

Module 10 Exercise – Develop Past Performance Template

This exercise is a tad challenging but will help you understand compliance in past performance templates

- Build a Past Performance Template using the instructions
- Use the table format in MS Word or draw by hand
- Do not miss any requirements



W91CRB-11-R-0019

Page 47 of 67

L.3.1.4 The offeror shall propose their ability to provide an adequate amount of personnel with the appropriate labor mix to fulfill the requirements set forth in the SOW.

L.3.2 Volume II – Past Performance– *Not to exceed two (2) page limitation for each contract, subcontract, and task order noted. Submit past performance information using the format at attachment at L1 found on pages 65-66.*

L.3.2.1 Past Performance

L.3.2.1.1 The offeror's proposal shall include past performance information for the prime and each proposed subcontractor who will perform a significant portion of the effort.

L.3.2.1.2 Definitions of key terms.

L.3.2.1.2.1 "Recent," as used in this solicitation is defined as "having occurred within the three (3) calendar year period prior to the solicitation release date."

L.3.2.1.2.2 "Relevance," as used in this solicitation is defined as "possesses a clear and substantial logical connection to the proposed contract's requirements."

L.3.2.1.2.3 "Major," or "Significant" as used in this solicitation, is defined as "being a subcontract that has a value of over $650,000 in any one year."

L.3.2.1.3 The offeror shall submit information on recent contracts and major subcontracts (including Federal, State, and Local Government, and private) which are either on-going or were recently completed, which also demonstrates performance relevant to the solicitation's performance requirements. This information shall also include contract(s) recently terminated in whole or in part (whether for convenience or default), to include those currently in the termination process.

L.3.2.1.4 The offeror shall provide information particularly in technical analysis and development of reports, briefings, databases, metrics, and graphics for executive level decisions and presentations; distribution and maintenance of technical documents on SharePoint to enable distribution and review among numerous stakeholders; review ManTech packages for format, content and consistency; coordinate ManTech reviews to include administrative support, read-ahead packages, analysis products and preparation of meeting minutes; participate in SharePoint planning meetings to provide support and feedback to the SharePoint project manager on any future capability and/or tools planned for SharePoint; review and track Technology Transition Agreements; provide reports to various staff of requested ManTech information as requested. Performance for the past five (5) years on prior and existing contracts and task orders will be considered.

L.3.2.1.5 The Army may elect to obtain available information on the Offeror, and its proposed subcontractors, using available past performance databases, e.g. PPIRS, CPARS, eSRS; as well as other Governmental tools and sources.

L.3.2.1.6 The offeror shall explain why it considers each of the identified contracts/subcontracts to be relevant to the proposed acquisition.

L.3.2.1.7 For each contract identified, the following information shall be furnished (for past performance with private firms, submit commercial equivalents for each item):

L.3.2.1.7.1 Offeror place of performance, CAGE Code and DUNS Number. If the work was performed as a subcontractor, also provide the name of the prime contractor and Point of Contact (POC) within the prime contractor organization (name, and current address, e-mail address, and telephone and fax numbers).

L.3.2.1.7.2 Government contracting activity, and current address, Procuring Contracting Officer's name, e-mail address, telephone and fax numbers.

Show the main vehicle and also the task order contract type

Module 11

Developing Resume Templates

Important Resume Tips

OST GLOBAL SOLUTIONS

B&P ACADEMY

Resumes require a level of consistency and standardization to send a message that you are trustworthy

- Use requirements language in the resume – same terms as the RFP
- In the Summary paragraph, highlight the areas most important to "sell" in each position
- The summary paragraph is personal (Mr. Johnson has experience in…), but exclude all personal names and pronouns from the rest of text
- Professional experience starts with the most recent job, with duties and quantified technical/management/cost reduction accomplishments, tied to the requirements
- Tie everything to the exact position requirements and statement of work by calling those out for ease of evaluation

RULE BOOK FOR RESUMES – CUSTOMIZE FOR EACH PROPOSAL THAT REQUIRES LARGE QUANTITY OF RESUMES; IT GOES WITH SAMPLE RESUME FORMAT.

Employee Name and Proposed Position: Times New Roman, 14 pt., Bold

- First, Last Name and Nickname, if any (Nickname if any) and Last Name
  - Jerry (Brue) Smith
  - Sarah Johnson

- **Resume Number: Times New Roman, 12 pt.**

Proposed Position: Times New Roman, 12 pt., Bold

- Program Manager, Human Resource Manager, etc.

All Remaining Table Headings: Times New Roman, 12 pt., Bold

Fill-in Box Content: Times New Roman, 12 pt.

- **Current Employer**
- **Availability**
- **Security Clearance**
- **Signed Letter of Intent**

Summary Qualifications: Times New Roman, 12 pt. Bold

- 1st Line: Mr./Ms. NAME has over XX years of experience in WHAT. Be as specific as possible.
- If he or she was in the Service, include what retired as (Colonel, Major, etc.).
- Summarize relevant accomplishments in terms of quantity (if available) and type of projects completed.
- **Bold text if person has experience in**:

  List One:
  - Supporting (Customer name and key program(s)) or initiatives in the past or on current programs
  - Supporting the end user (such as Warfighter, etc.) in any of the following areas:
    - List RFP areas….

  List Two:
  - List SOW Areas of experience – all condensed to key sentences; reference numbers if necessary

Relevancy of Education, Background, and Experience

- RFP Requirement:
  - **Minimum of** TOP SECRET (TS)/Sensitive Compartmented Information (SCI) CLEARANCE access and/or be eligible for immediate adjudication by the cognizant security authority upon award of the contract.
  - **Must be** trained, qualified, certified, and licensed, as appropriate, to perform the efforts specified in this contract prior to starting work
  - **Key Personnel Required** include Program Manager and an Alternate

1 | Page

Resume Template Example

OST GLOBAL SOLUTIONS

B&P ACADEMY

Current Employer	*Xxx (key credential such as clearance, or key area of expertise relevant to the RFP)*
XXX	zzz
Professional Profile Summary:	
▪ Total years of experience in ..., ..., and ...: x years ▪ xxx ▪ Education: xxx	
Required Skills:	
Stakeholder identification and facilitation: xxx ***An understanding of the Federal, State and Local environments:*** xxx ***XXX:*** xxx	
Experience Relevant to this Project (incorporating SOW references)	
SOW 3.1: How you did it on other projects (quoting stats, numbers, specific names etc.) ***SOW 3.2:*** xxxx ***SOW 4.1:*** xxxx ***SOW N:*** xxxx	
Professional Affiliations and Certifications	
▪ xxxx	
Chronological Employment History:	
Company: xxx **Title: xxxxx** ▪ xxxxxxx	**Month 200x to Present**
Company: xxx **Title: xxxxx**	**Month 200x to Month 200x**

Resume Template with Detailed Instructions

Detailed instructions help make your resumes more consistent

Employee Name –Proposed Position

Key Personnel Resume No. XX of XX

Current Employer	Availability	Security Clearance	Signed Letter of Intent
XX	**100%**	**(Minimum required):** TOP SECRET (TS)/Sensitive Compartmented Information (SCI)	Yes (See Attachment __ Page No.___)

Summary Qualifications

Mr. **XX** has excelled during **NNN** years of experience as a ________(position) on **XX** (insert names) contracts with the **XX** (government agencies/customers) in the areas of **XX** for **NNN** systems and **NNN** equipment. He __________(verb such as “managed” or whatever is the key function of this position)…on such programs as … (insert program names). Since (insert date for current job responsibilities), he has maintained….**NNN** (describe levels of effort.) He has (insert job responsibilities), including the oversight of **NNN** subcontractors. In these positions, Mr. **XX** has worked with (insert relevant customer/agency names). He gained experience with (insert agency names) in accomplishing (insert relevant tasks). Mr. **XX** holds a (insert degree type) degree in (insert major) from (insert college attended).

Relevancy of Background and Experience

RFP Requirement	How Our Candidate Meets the RFP Requirement
RFP Requirement: Management experience to facilitate _______(customer)’s mission in (pick top relevant category [from List One in Rule Book] for this employee: Strategic and operational intelligence; Operations; Research; Technical Analysis; Policy Assistance; Data Management; Resource, Personnel, Administrative, or Management Support Areas), including **NNN years** of (pick 2nd most relevant category for this employee’s experience) • **NNN years** of working experience in (describe top relevant category for employee) • **NNN years** working experience in (describe 2nd relevant category)	**How Our Candidate Meets the RFP Requirement:** Mr. **XX** has **NNN years** of directly relevant management experience in (fill in category 1 title) in the period from **XX** (insert date) to the present, while employed as (insert position title) for *NNN yrs.* at (insert company name); *NNN yrs. at* (insert company name); *NNN yrs. at* (insert company name); *NNN yrs. at* (insert company name); and *XX yrs. at* (insert company name). **Summary point; meets or exceeds requirements** • **Mr. XX has over NNN years** of working experience in (insert experience categories) from (insert date) to the present while employed for *NNN yrs.* as Program Manager as discussed above and *NNN yrs.* as **XX** at **XX** company. • **Mr. XX has over NNN years** working experience in (insert experience categories) (insert product category) from (insert date) to the present in the course of his NNN-year program management career.

Please, Complete an Assignment or Quiz for **Module 11** Prior to Listening to the Next Module

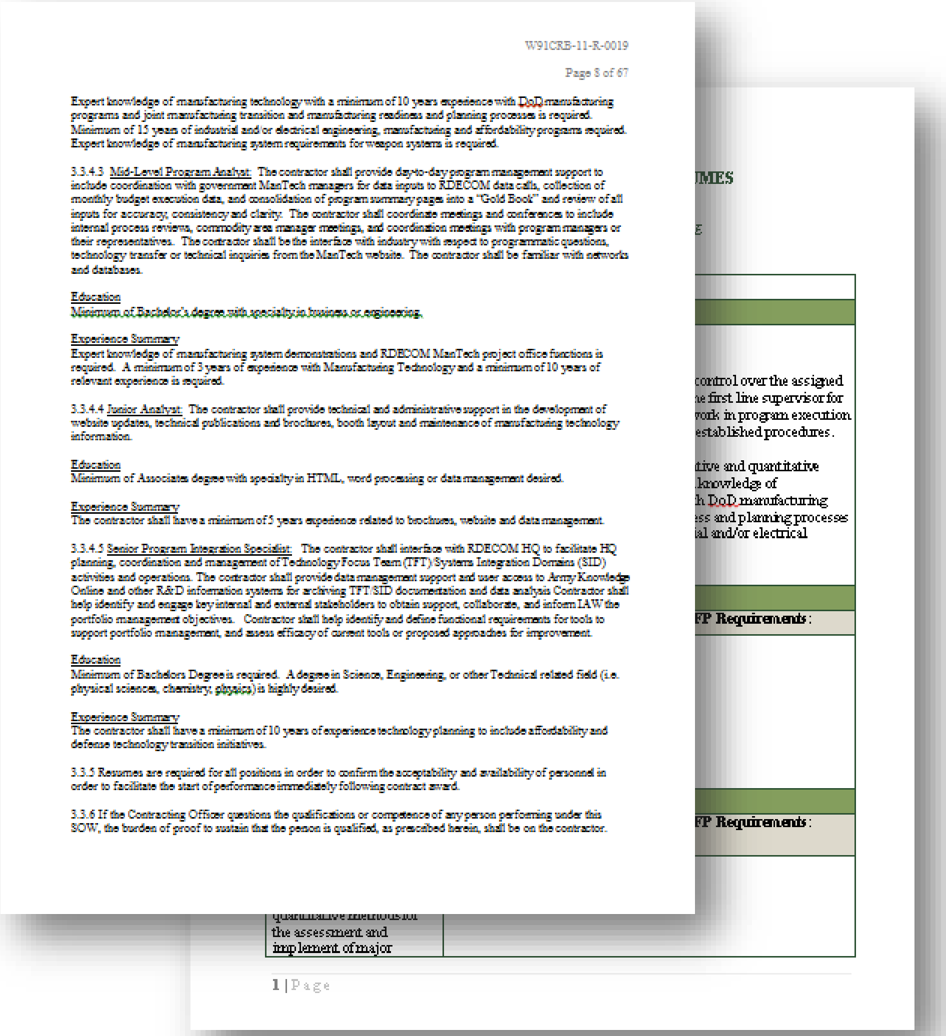
Module 11 Exercise: Design Resume Template for Your Practice Section

OST GLOBAL SOLUTIONS

B&P ACADEMY

- Design resume template for your practice section
- How would you tailor the summary section?
- Show compliance with all the key requirements
- Don’t forget to show SOW references

Reference Word file: **Module 11 - Resumes template example**


W91CRB-11-R-0019

Page 8 of 67

Expert knowledge of manufacturing technology with a minimum of 10 years experience with DoD manufacturing programs and joint manufacturing transition and manufacturing readiness and planning processes is required. Minimum of 15 years of industrial and/or electrical engineering, manufacturing and affordability programs required. Expert knowledge of manufacturing system requirements for weapon systems is required.

3.3.4.3 Mid-Level Program Analyst: The contractor shall provide day-to-day program management support to include coordination with government ManTech managers for data inputs to RDECOM data calls, collection of monthly budget execution data, and consolidation of program summary pages into a "Gold Book" and review of all inputs for accuracy, consistency and clarity. The contractor shall coordinate meetings and conferences to include internal process reviews, commodity area manager meetings, and coordination meetings with program managers or their representatives. The contractor shall be the interface with industry with respect to programmatic questions, technology transfer or technical inquiries from the ManTech website. The contractor shall be familiar with networks and databases.

Education
Minimum of Bachelor's degree with specialty in business or engineering.

Experience Summary
Expert knowledge of manufacturing system demonstrations and RDECOM ManTech project office functions is required. A minimum of 3 years of experience with Manufacturing Technology and a minimum of 10 years of relevant experience is required.

3.3.4.4 Junior Analyst: The contractor shall provide technical and administrative support in the development of website updates, technical publications and brochures, booth layout and maintenance of manufacturing technology information.

Education
Minimum of Associates degree with specialty in HTML, word processing or data management desired.

Experience Summary
The contractor shall have a minimum of 5 years experience related to brochures, website and data management.

3.3.4.5 Senior Program Integration Specialist: The contractor shall interface with RDECOM HQ to facilitate HQ planning, coordination and management of Technology Focus Team (TFT)/Systems Integration Domains (SID) activities and operations. The contractor shall provide data management support and user access to Army Knowledge Online and other R&D information systems for archiving TFT/SID documentation and data analysis Contractor shall help identify and engage key internal and external stakeholders to obtain support, collaborate, and inform IAW the portfolio management objectives. Contractor shall help identify and define functional requirements for tools to support portfolio management, and assess efficacy of current tools or proposed approaches for improvement.

Education
Minimum of Bachelors Degree is required. A degree in Science, Engineering, or other Technical related field (i.e. physical sciences, chemistry, physics) is highly desired.

Experience Summary
The contractor shall have a minimum of 10 years of experience technology planning to include affordability and defense technology transition initiatives.

3.3.5 Resumes are required for all positions in order to confirm the acceptability and availability of personnel in order to facilitate the start of performance immediately following contract award.

3.3.6 If the Contracting Officer questions the qualifications or competence of any person performing under this SOW, the burden of proof to sustain that the person is qualified, as prescribed herein, shall be on the contractor.

Module 12

Developing Cost Proposal Templates

Don’t Skip the Cost Proposal Outline

OST GLOBAL SOLUTIONS

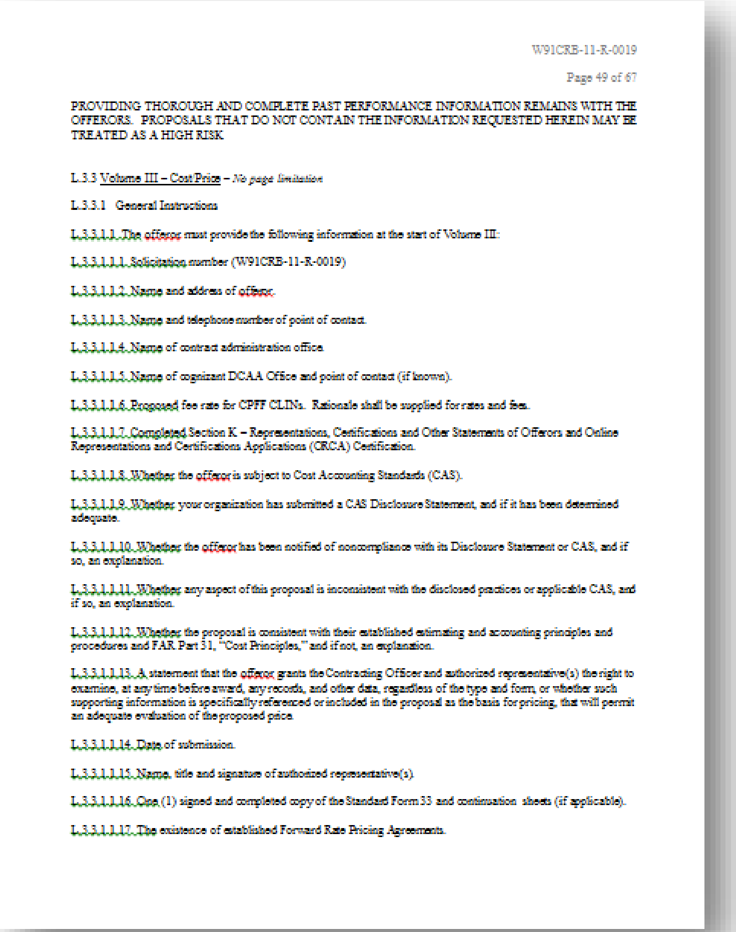
B&P ACADEMY

- Often if you don’t drive the cost proposal outline development, the cost team may leave it to the end
- Cutting and pasting may put you out of compliance
- Ensure that you drive the process and track the cost proposal development the same as the rest of the proposal
- Make sure you coordinate closely with the cost team on table set up

Please, Complete an Assignment or Quiz for **Module 12** Prior to Listening to the Next Module

Module 12 Exercise: Set Up an Outline for the Cost/Price Volume

- Go over the requirements
  - Are there any requirements you find confusing?
- How would you go about building a Cost/Price Volume?
- Jot down a rough draft of an outline, noting where you may need guidance from your finance team


W91CRB-11-R-0019

Page 49 of 67

PROVIDING THOROUGH AND COMPLETE PAST PERFORMANCE INFORMATION REMAINS WITH THE OFFERORS. PROPOSALS THAT DO NOT CONTAIN THE INFORMATION REQUESTED HEREIN MAY BE TREATED AS A HIGH RISK

L.3.3 Volume III – Cost/Price – *No page limitation*

L.3.3.1 General Instructions

L.3.3.1.1. The offeror must provide the following information at the start of Volume III:

L.3.3.1.1.1. Solicitation number (W91CRB-11-R-0019)

L.3.3.1.1.2. Name and address of offeror.

L.3.3.1.1.3. Name and telephone number of point of contact.

L.3.3.1.1.4. Name of contract administration office.

L.3.3.1.1.5. Name of cognizant DCAA Office and point of contact (if known).

L.3.3.1.1.6. Proposed fee rate for CPFF CLINs. Rationale shall be supplied for rates and fees.

L.3.3.1.1.7. Completed Section K – Representations, Certifications and Other Statements of Offerors and Online Representations and Certifications Applications (ORCA) Certification.

L.3.3.1.1.8. Whether the offeror is subject to Cost Accounting Standards (CAS).

L.3.3.1.1.9. Whether your organization has submitted a CAS Disclosure Statement, and if it has been determined adequate.

L.3.3.1.1.10. Whether the offeror has been notified of noncompliance with its Disclosure Statement or CAS, and if so, an explanation.

L.3.3.1.1.11. Whether any aspect of this proposal is inconsistent with the disclosed practices or applicable CAS, and if so, an explanation.

L.3.3.1.1.12. Whether the proposal is consistent with their established estimating and accounting principles and procedures and FAR Part 31, "Cost Principles," and if not, an explanation.

L.3.3.1.1.13. A statement that the offeror grants the Contracting Officer and authorized representative(s) the right to examine, at any time before award, any records, and other data, regardless of the type and form, or whether such supporting information is specifically referenced or included in the proposal as the basis for pricing, that will permit an adequate evaluation of the proposed price.

L.3.3.1.1.14. Date of submission.

L.3.3.1.1.15. Name, title and signature of authorized representative(s).

L.3.3.1.1.16. One (1) signed and completed copy of the Standard Form 33 and continuation sheets (if applicable).

L.3.3.1.1.17. The existence of established Forward Rate Pricing Agreements.

Module 13

Creating Proposal Storyboards and Work Packages

Traditional Storyboards Pitfalls

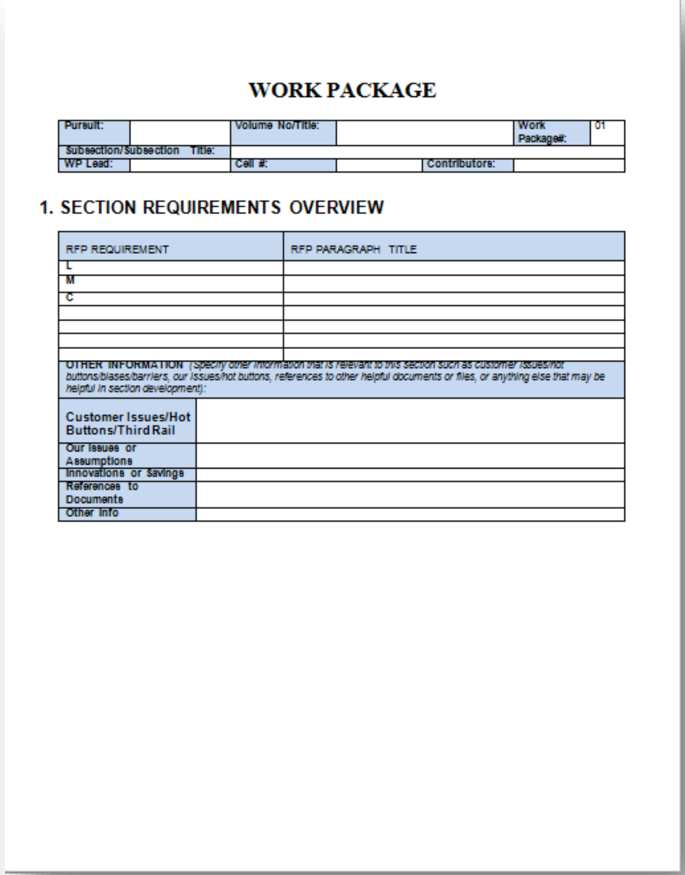
OST GLOBAL SOLUTIONS

B&P ACADEMY

- Most RFPs are too straight-forward and short for storyboards
- Storyboards are difficult to format and work with, and they are inefficient in that you work in a separate document and then have to transfer information into the proposal
- Storyboards are difficult to move information into and out of – making transition to the first draft onerous
- Storyboards scare authors who are not used to the format
- Storyboards put too much time and effort into documents that are typically abandoned by the authors after the Pink Team
- Storyboards don’t provide good instructions and guidance on how to develop the material and what to do with that material after
  - Storyboards require “win themes,” without pointing where they fit in the draft
- Storyboards don’t address everything that should go into a section – an annotated outline will provide more specific instructions
- Storyboards are not flexible as the information you need to collect varies

When to Use Work Packages instead of an Annotated Outline

- When the effort is large and complex, with hundreds or thousands of pages
- When you don’t have enough time to create an annotated outline
- When someone on the executive team loves storyboards and feels that it’s a requirement for a winning proposal



WORK PACKAGE

Pursuit:		Volume No/Title:		Work Package#:	01
Subsection/Subsection Title:					
WP Lead:		Cell #:		Contributors:	

1. SECTION REQUIREMENTS OVERVIEW

RFP REQUIREMENT	RFP PARAGRAPH TITLE
L	
M	
C	

OTHER INFORMATION *(Specify other information that is relevant to this section such as customer issues/hot buttons/biases/barriers, our issues/hot buttons, references to other helpful documents or files, or anything else that may be helpful in section development):*	
Customer Issues/Hot Buttons/Third Rail	
Our Issues or Assumptions	
Innovations or Savings	
References to Documents	
Other Info	

Work Packages: Part 1

WORK PACKAGE

1. SECTION REQUIREMENTS OVERVIEW

Pursuit:		**Volume No/Title:**		**Work Package#:**	01
Subsection/Subsection Title:					
WP Lead:		**Cell #:**		**Contributors:**	
RFP REQUIREMENT	*RFP PARAGRAPH TITLE*				
L					
M					
C					
OTHER INFORMATION *(Specify other information that is relevant to this section such as customer issues/hot buttons/biases/barriers, our issues/hot buttons, references to other helpful documents or files, or anything else that may be helpful in section development):*					
Customer Issues/Hot Buttons/Third Rail					
Our Issues or Assumptions					
Innovations or Savings					
References to Documents					
Other Info					

Work Packages – Part 2

OST GLOBAL SOLUTIONS

B&P ACADEMY

2. KEY GRAPHICS

2.1 Quantity of Visuals That Need to Be Created for This Section:
Figures (pictures, charts, graphs, etc.): ___
Tables: ___
Focus Boxes: ___
Vignettes and Did You Know It? Boxes: ___

2.2 Steps for developing Figures. *Use this process for each new figure:*

Step 1. Develop Initial Graphic Concept. *Describe your graphic verbally or paste here your inspiration – what you would like to see in a picture. Describe how you would use this image. Ask questions: What is it, what would you like it to represent? You can be very vague at first:*

Step 2. Write the Action Caption Text. *What is your Primary Objective? Focus on MAKING VERBS VISIBLE. Answer the following questions:*

- *WHAT IS IT THAT YOU ARE TRYING TO DEPICT?*
- *WHAT DOES IT DO?*
- *WHAT DOES IT DO BETTER THAN THE COMPETITION?*
- *WHAT DOES IT DO FOR THE CUSTOMER? WHY SHOULD THE CUSTOMER CARE?*

Work Packages – Part 3

3. ANNOTATED OUTLINE

[NOTE TO PROPOSAL MANAGER: THIS SECTION GETS HEAVILY MODIFIED BY THE PROPOSAL MANAGER TO ADAPT TO THE ACTUAL ANNOTATED OUTLINE AND USE THE QUESTIONS BELOW AS THE AIDES IN FURTHER ELABORATING ON EACH PART OF THAT ANNOTATED OUTLINE. UNNECESSARY QUESTIONS SHOULD BE STRIPPED]

3.1 The exercise below is helpful in developing a strong introduction for your section, or the top-level section. This introduction should explore customer's pain or real reason behind the requirement, which shows our true understanding. It should also state why we should win, and what is that we offer that's beneficial to the customer (and how it is beneficial). By going through the exercise below, we are bound to surface powerful ideas and text.

3.1.a. Why We Should Win – Section Introduction/Hook. *List Major Customer Issues, Must-Haves, and Hot Buttons.*
Summarize in bullet format, as applicable to this section, what are customer's worry items, risks that are inherent in the nature of this work, real concerns, core needs, reasons behind the requirements, hidden agendas, etc:

- Xx
- xx

3.1.b. Section Discriminators. *Discriminators are features of our offer that are both important to the customer and that differentiate us from the competition – e.g., make us fairly unique in the customer's eyes. Please list things that are unique or are significant strengths in the customer's eyes that apply to this section.*

- Xxx
- xxx

A. *3.1.c. Ghosting.* **Can you think of indirect statements ("ghosts") that play up our competition's weaknesses or downplay/neutralize their strengths? Please consult the Black Hat presentation if nothing comes to mind, and talk to the capture manager.**

Work Packages – Part 3 cont.

OST GLOBAL SOLUTIONS

B&P ACADEMY

Why will we do whatever it is that we have to do? What will happen if we don't do it? *(This tells the customer that we have a deep understanding of potential problems and risks inherent in this work.)*

- xx
- xx

What exactly will we do? *(Do not regurgitate the RFP – state what our offer is)*

- xx
- xx

Who will do it? *(Be specific – name teams, positions, and people)*

- xx
- xx

How will we do it? *(This is our actual detailed approach that can be literally presented as a list of steps we will take to accomplish this requirement. Describe specific processes, tools, techniques, methodologies, and schedule.)*

- xx
- xx

Where will we do it? (If relevant, state in what sequence this action has to be accomplished, or at which site, or at what point.)

Work Packages – Part 4

4. NEXT STEPS

4.1 Information Gathering. *What additional information/research do you need to complete this section?*

-

4.2 Data Call. *What items should be included in a data call to other subject matter experts? Include specific experience items, questions, or statistics/metrics needs.*

-

4.3 Decisions and Actions Needed. *What decisions or actions are needed before completing this section? Who is responsible?*

Decision/Action Needed	Person Responsible

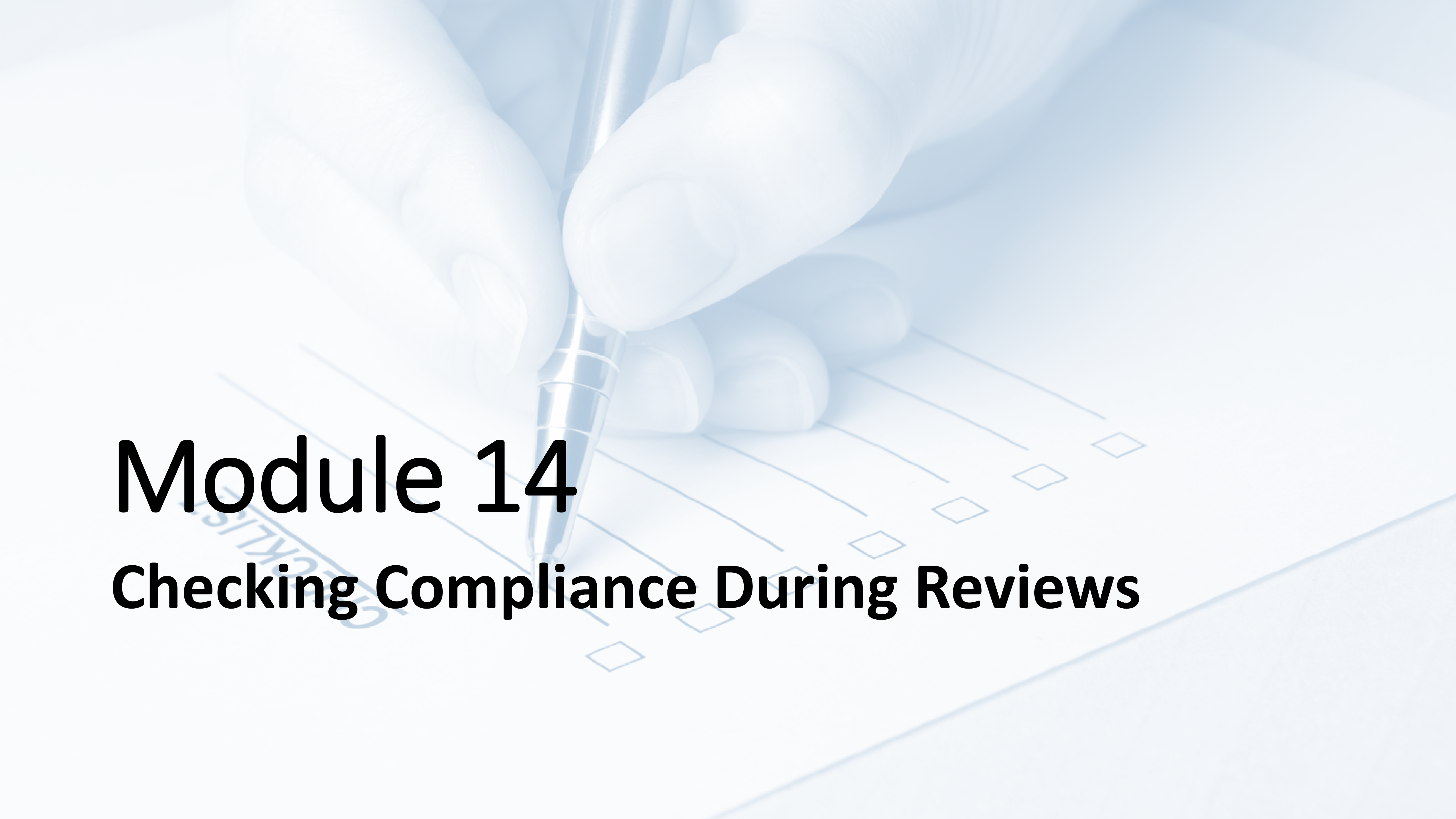
OST GLOBAL SOLUTIONS

B&P ACADEMY

Please, Complete an Assignment or Quiz for **Module 13** Prior to Listening to the Next Module

Module 13 Quiz

- What are the downsides of using storyboards?
- In which situations is it appropriate to use a storyboard (work package)?
- What are the functions of different portions of the work package?



Module 14

Checking Compliance During Reviews

Reviewer Feedback and Compliance Check: Pink

Ref	Content	Reqmt?	Complied With?	Comments?
	The **plan shall include** all subcontractors' efforts and **shall**, at a minimum **include**:	Reqmt	Yes	
a.	The staffing **required** and the skill sets of the staff.	Reqmt	Maybe	Not sure what the final table will look like, and how you will fit in all the skillset info
	This **shall include** number and level of security clearances of each of the personnel.	Reqmt	Yes	
	This staffing level **shall include** existing and available key technical and management personnel.	Reqmt	Yes	
b.	The management practices, controls and standards that **will** be established to **ensure** the effort is efficient and seamless.	Reqmt	NO	didn't find in text
	The **plan shall** address safety, staffing levels and any **plans** to increase staff in surge conditions (ad hoc quick reaction requirements and situations).	Reqmt	Maybe	This section is still missing a lot of information. But it's there.
c.	A detailed organization and staffing chart including all proposed labor categories that delineates clear lines of control and decision making, functional responsibilities for each organizational element including subcontractors, and communication for management, supervisory, and technical personnel, coordination inside and outside of the **contractor**'s organization.	Reqmt	NO	Not a chart that has all labor categories. Subs don't have responsibilities delineated on org.

At Pink Team, the compliance is somewhat relative because some information may be still missing: Yes, No, Maybe, So-So

Reviewer Feedback and Compliance Check: Red

Ref	Content	Score	Complied With?	Weakness / Strengths / Comments
	VOLUME II – BUSINESS Approach FACTOR			
	Subfactor 2 – Personnel Requirements			
	For Key Personnel, each **Offeror shall provide** resume(s) and supporting documentation, with PII redacted.	Unaccepta	NO	Many resumes don't include the nice bios we sold them with in the section; they don't show tie to the requirements, don't use requirements language, the math doesn't add up, and clearance is Secret vs. TS/SCI
	The resume(s) **will** not be counted against any page limitations.			
	If subcontracting any of the key personnel, subcontractors **shall include** their key personnel resume within their electronic submissions.			n/a
	If a subcontractor **includes** key personnel resumes in their electronic submissions directly to the Government, they **shall** be in a separate file from their cost proposal.			n/a
	The minimum acceptable education, experience, certification(s) and clearance levels are identified in the Labor Category Requirements (TOR Attachment 0005) and/or in the PWS.	Unaccepta	NO	There is no explicit ties between the resumes and PWS. Resumes require major rework.
	Submitted resumes **shall** not exceed three pages each	Unaccepta		Task Order lead is over; many resumes are 1 page and need beefing up.

At Red Team, the compliance is absolute: Yes or No

Final Compliance Check

- Always run a compliance check prior to proposal submission
- Create a submission checklist ahead of time to prevent missing an item that was required
- Run a punch list until the end to ensure you took care of all proposal-related action items
- “Quadruple-check”

Proposal – Production Checklist			
	Target Date	Completed	Comments
Technical Proposal Basic Requirements			
Separate Technical and Business Proposals			
Offerors are expected to respond with technical and business proposals for the entire project and the total period of performance, including all base tasks and optional tasks.		☐	
To expedite the proposal evaluation, all documents required for responding to the RFP should be placed in the following order: Volume I. Technical Proposal. Volume II. Business Proposal.		☐	
Page and Font Restrictions			
All pages must be numbered.		☐	
Pages must be letter size (8.5 x 11 inches)		☐	
Margins must be a minimum of .75 inches on each side		☐	
The size of the font should be NO smaller than the size of Times Roman 12pt for the Technical Proposal		☐	
NO smaller than the size of Times Roman 10pt for the Appendices		☐	
NO smaller than the size of Times Roman 8pt for Exhibits and Graphics but the offeror can utilize any legible font style.		☐	
Proposal and Exhibits			
The technical proposal must not exceed 100 pages in length, including the executive summary and technical discussion.		☐	
Cover page and table of contents are not included in the page count for the technical proposal.		☐	
Exhibits used (placed) in the technical proposal discussion will count as a page and should be numbered as such.		☐	
Exhibits and Appendices must be labeled and numbered.		☐	

See Word file: Module 14 - Proposal_Production Checklist Example

Recap

OST GLOBAL SOLUTIONS

B&P ACADEMY

- What is the order of developing a proposal outline?
- What is the difference between compliance matrix, cross-reference matrix, and compliance checklist?
- What are the pros and cons of annotated outlines versus work packages or storyboards?
- What is your biggest takeaway from this class?

Thank You! Continue Taking More Courses to Advance Your Knowledge!

7361 Calhoun Place, Suite 560

Rockville, MD 20855

Phone: 301-384-3350

service@ostglobalsolutions.com

www.ostglobalsolutions.com