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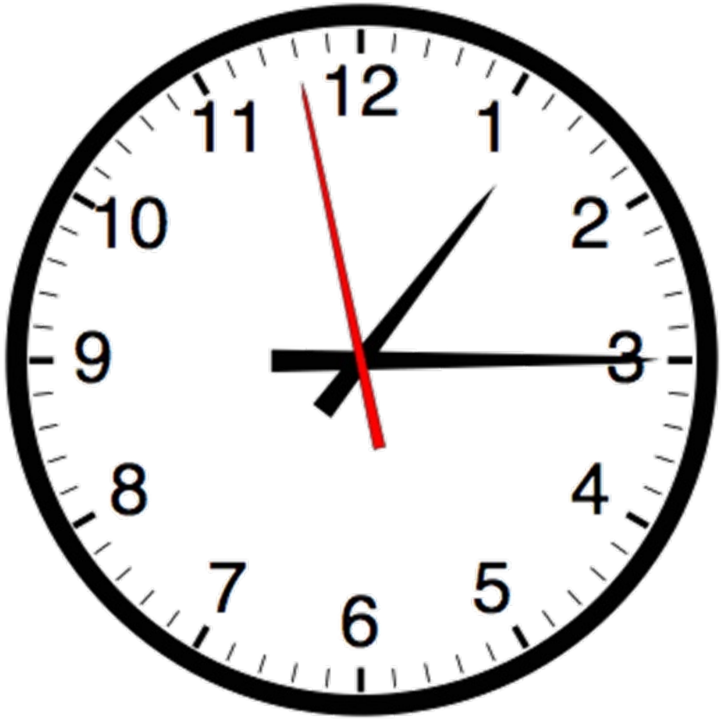
How to Develop a Compliant Proposal

OST Bid & Proposal Academy Course

Agenda

- 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

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- Understanding compliance
- 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
- Working with Q&A and Amendments
- Checking compliance at reviews
- Preparing a compliant proposal for submission

How to Maximize the Learning Process

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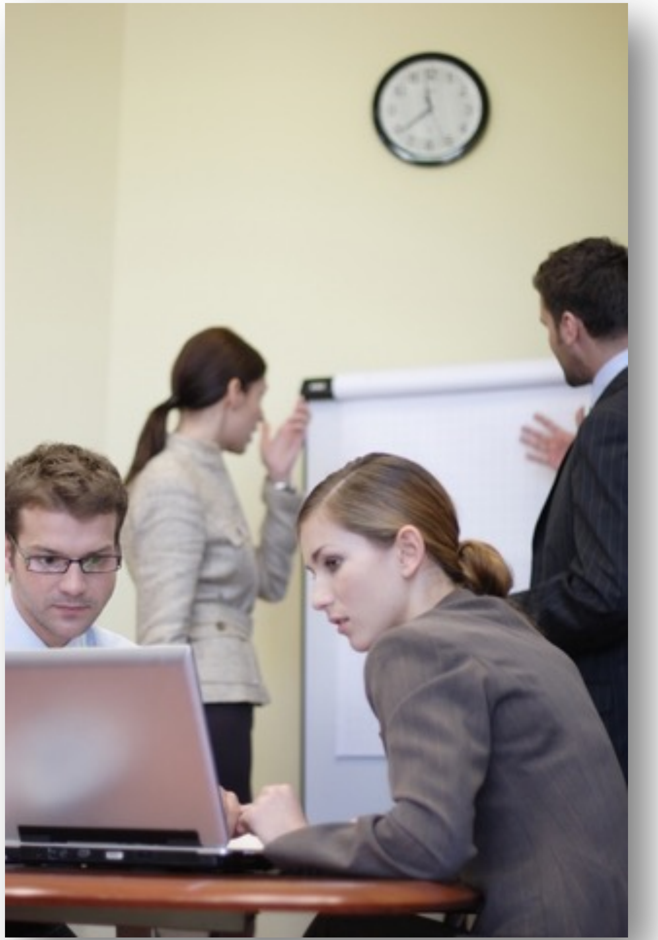
- How adults learn:
  - Understand WHY things work a certain way
  - Participate in exercises
  - Ask questions
  - Relate the material to your own experience
  - Take notes
- Bring up topics of interest to your job
- Move around during exercises



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

How to Ensure Your Proposal Is Compliant

What is Compliance?

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- Compliance is:
  - Submitting everything that the RFP requires
  - Answering every requirement the way the government asked
- If the proposal is non-compliant, it gets removed from consideration or gets a lower score.
- Compliance goes deeper than merely catching every RFP requirement and writing a response to it - it must show **responsiveness**.
- To be deemed compliant, your proposal response needs to be of substance.
  - It cannot be "we will comply with" or "we will deliver" this and that, or merely mentioning a requirement and giving it some lip service.
  - The proposal must respond to that requirement by answering at a minimum WHAT will be done, WHO will do it, and HOW it will be done, as well as WHEN and WHERE it will be done if applicable.
- As a proposal professional, your proposals must be 100% compliant 100% of the time.

Three Types of Compliance

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1. INSTRUCTIONAL COMPLIANCE

Following the RFP Instructions to Offerors

2. ADMINISTRATIVE COMPLIANCE

Filling Out the Required Forms and Submitting the Right Attachments and Documents.

3. TECHNICAL COMPLIANCE

Providing a Technical Solution That Meets All RFP Requirements – Otherwise Referred to as Responsiveness.

Compliance is Built In From the Start and is Checked Till Submission

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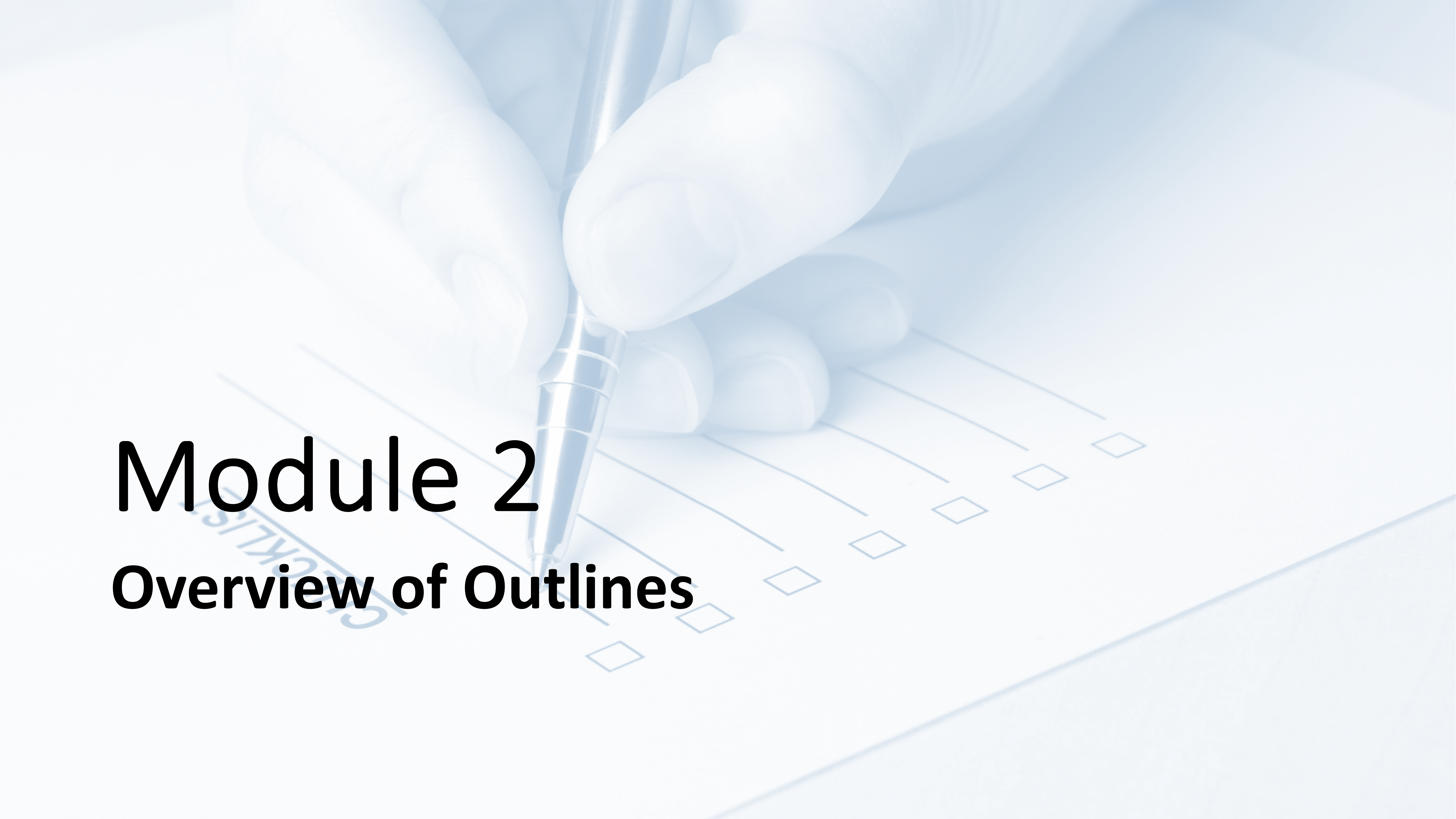
- Preparation and review of the annotated outline (Is the outline built correctly? Does it include everything needed? Are all the volumes and attachments built correctly?)
- In-process reviews (Is there a "writer's drift" and how should we adjust course? Are the writers responding completely to the requirements?)
- Amendments and Q&As issuance, when changes need to be made.
- Reviews:
  - Pink Team (Check of outline compliance and compliance of the information that's in the document by this point. Customer readiness level of the proposal is at 60%.)
  - Red Team (Full content compliance check in addition to all the requirements being addressed. Customer readiness level of the proposal is at 90%.)
  - Read-Aloud Review (did we address every requirement?)
  - Gold Team (Is everything compliant in form and in substance? Customer readiness level is 99.99%)
- Production (White Glove) (Did we assemble the package correctly? Did we include absolutely everything? Customer readiness level is 100%)
- Final compliance check (Quadruple-check: are there all the pieces necessary for submission?)

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

Quiz

1. Which of the following is NOT a type of compliance necessary for a successful proposal?
   a) Instructional Compliance
   b) Technical Compliance
   c) Financial Compliance
   d) Administrative Compliance
2. True or False: A proposal that tells what you will do to show that your company will comply with the requirements is considered substantively compliant.
3. What is the importance of "responsiveness" in the context of technical compliance? From your observations, please, share an example of how you have seen a proposal demonstrate this characteristic or fail to do so.



Module 2

Overview of Outlines

Where Outlining Fits in the Proposal Process

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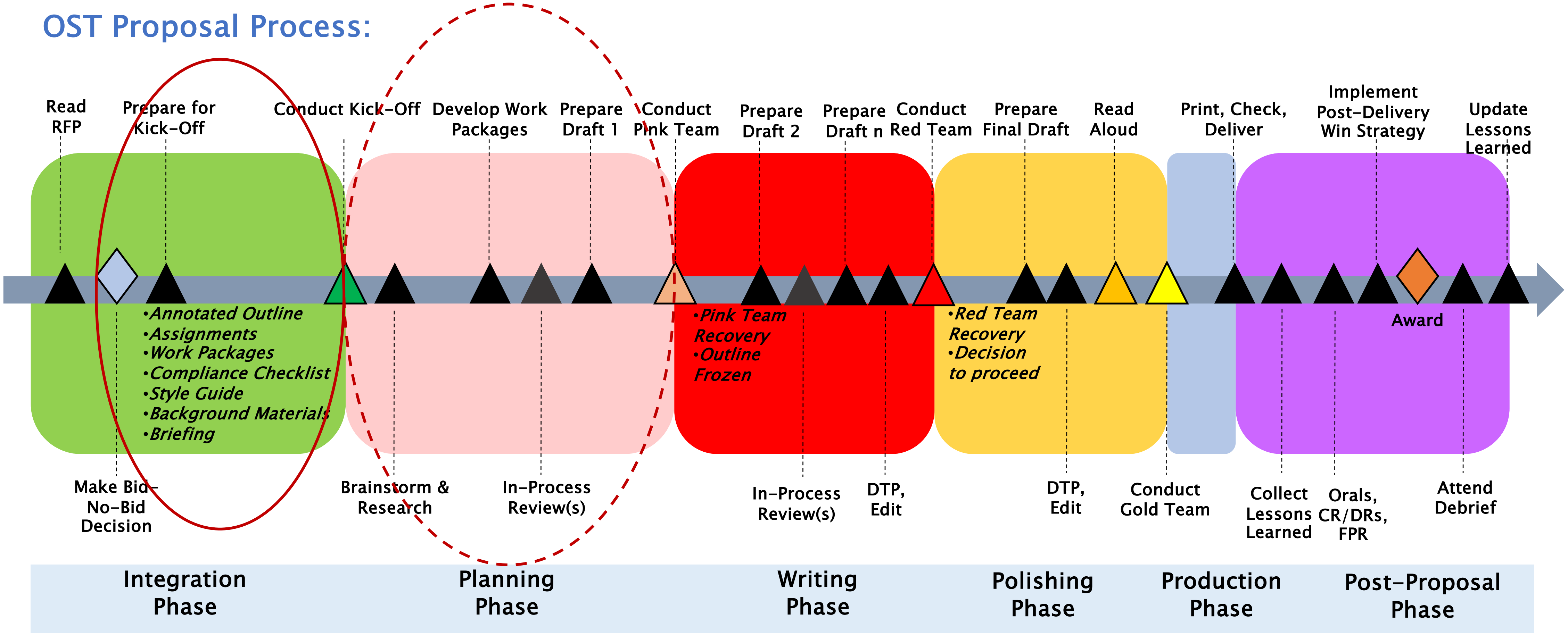
OST Proposal Process:



Outlining is the Foundation of Instructional Compliance

- Proposal outlining is figuring out how to tell a compelling story within the confines of the instructional and administrative compliance.
- Instead of one set of instructions, RFPs often come in multiple parts and documents with requirements sprinkled in multiple places.
- You must figure out how to correlate these requirements to each other – "integrate" the proposal upfront.
- It is about putting puzzle pieces together that become an integrated proposal development architecture.
  - Some RFPs are highly prescriptive and outlining is straightforward and mechanical.
  - Other RFPs make outlining more of an art with substantial decision making – it is not a mechanical process.
  - Many RFPs are a mix of both the art and the craft.

A Classical Outline Used to Organize Work and Track Compliance

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	

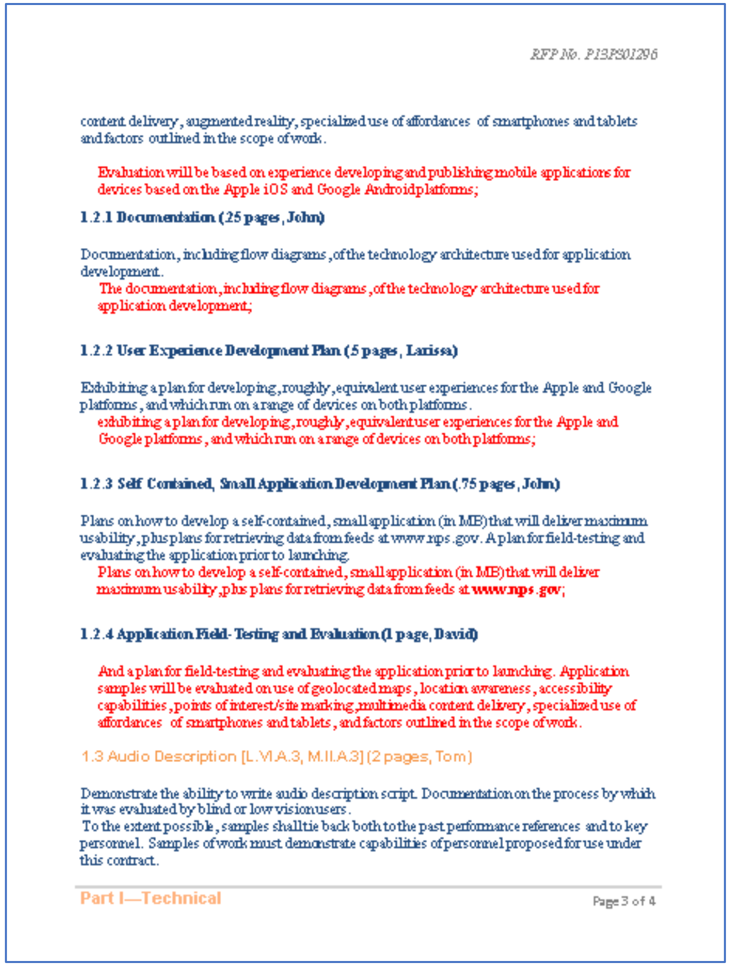
Sheet1 Sheet2 Sheet3

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

A Regular Outline with Requirements Included is a Step Up in Helpfulness

The outline with requirements, page counts, and assigned names pasted in is better than just a list of headings in a separate document

- Set up in a proposal template or a blank MS Word document
- Structures the proposal and serves as a “skeleton”
- Provides the requirements allocated to that section to make life easier for the writer
- Adds authors and page count allocations to provide additional guidance
- Serves as a style sheet if developed inside the company’s proposal template
    - Tip: Teach your writers to “Paste Special, Unformatted Text” into the templates to ensure clean Styles



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 is More of a Creative Hybrid Product

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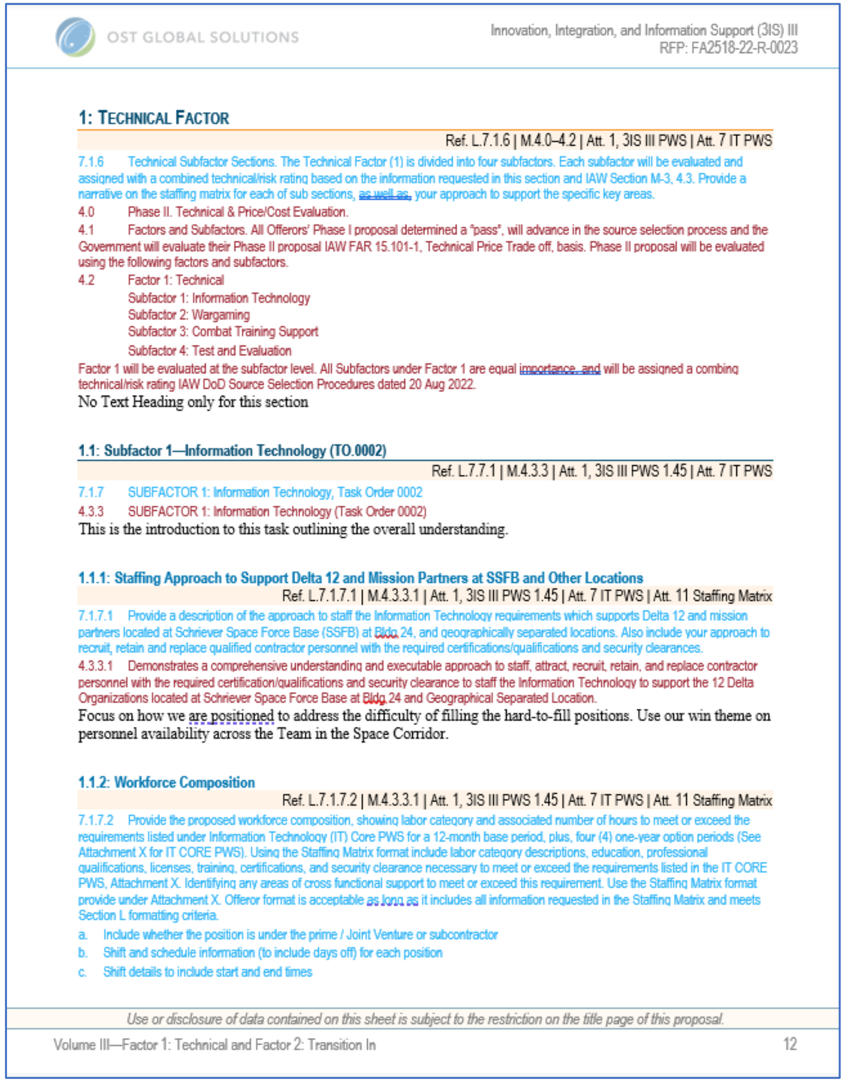
- While developing an annotated outline, a proposal manager truly digests and masters the RFP, removing most guesswork for the writers, creating:
  - A topical outline
  - RFP requirements shred/checklist
  - A Cross-Reference (“Compliance”) roadmap laid out in a Word Document
  - Assignments roadmap
  - A proposal mockup
  - Style sheet
  - Storyboards with framework to think through the sections
  - Conceptual framework for proposal content



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Innovation, Integration, and Information Support (3IS) III
RFP: FA2518-22-R-0023

1: Technical Factor

Ref. L.7.1.6 | M.4.0–4.2 | Att. 1, 3IS III PWS | Att. 7 IT PWS

7.1.6 Technical Subfactor Sections. The Technical Factor (1) is divided into four subfactors. Each subfactor will be evaluated and assigned with a combined technical/risk rating based on the information requested in this section and IAW Section M-3, 4.3. Provide a narrative on the staffing matrix for each of sub sections, as well as, your approach to support the specific key areas.

4.0 Phase II. Technical & Price/Cost Evaluation.

4.1 Factors and Subfactors. All Offerors' Phase I proposal determined a "pass", will advance in the source selection process and the Government will evaluate their Phase II proposal IAW FAR 15.101-1, Technical Price Trade off, basis. Phase II proposal will be evaluated using the following factors and subfactors.

4.2 Factor 1: Technical
Subfactor 1: Information Technology
Subfactor 2: Wargaming
Subfactor 3: Combat Training Support
Subfactor 4: Test and Evaluation

Factor 1 will be evaluated at the subfactor level. All Subfactors under Factor 1 are equal importance, and will be assigned a combing technical/risk rating IAW DoD Source Selection Procedures dated 20 Aug 2022.

No Text Heading only for this section

1.1: Subfactor 1—Information Technology (TO.0002)

Ref. L.7.7.1 | M.4.3.3 | Att. 1, 3IS III PWS 1.45 | Att. 7 IT PWS

7.1.7 SUBFACTOR 1: Information Technology, Task Order 0002

4.3.3 SUBFACTOR 1: Information Technology (Task Order 0002)

This is the introduction to this task outlining the overall understanding.

1.1.1: Staffing Approach to Support Delta 12 and Mission Partners at SSFB and Other Locations

Ref. L.7.1.7.1 | M.4.3.3.1 | Att. 1, 3IS III PWS 1.45 | Att. 7 IT PWS | Att. 11 Staffing Matrix

7.1.7.1 Provide a description of the approach to staff the Information Technology requirements which supports Delta 12 and mission partners located at Schriever Space Force Base (SSFB) at Bldg 24, and geographically separated locations. Also include your approach to recruit, retain and replace qualified contractor personnel with the required certifications/qualifications and security clearances.

4.3.3.1 Demonstrates a comprehensive understanding and executable approach to staff, attract, recruit, retain, and replace contractor personnel with the required certification/qualifications and security clearance to staff the Information Technology to support the 12 Delta Organizations located at Schriever Space Force Base at Bldg 24 and Geographical Separated Location.

Focus on how we are positioned to address the difficulty of filling the hard-to-fill positions. Use our win theme on personnel availability across the Team in the Space Corridor.

1.1.2: Workforce Composition

Ref. L.7.1.7.2 | M.4.3.3.1 | Att. 1, 3IS III PWS 1.45 | Att. 7 IT PWS | Att. 11 Staffing Matrix

7.1.7.2 Provide the proposed workforce composition, showing labor category and associated number of hours to meet or exceed the requirements listed under Information Technology (IT) Core PWS for a 12-month base period, plus, four (4) one-year option periods (See Attachment X for IT CORE PWS). Using the Staffing Matrix format include labor category descriptions, education, professional qualifications, licenses, training, certifications, and security clearance necessary to meet or exceed the requirements listed in the IT CORE PWS, Attachment X. Identifying any areas of cross functional support to meet or exceed this requirement. Use the Staffing Matrix format provide under Attachment X. Offeror format is acceptable as long as it includes all information requested in the Staffing Matrix and meets Section L formatting criteria.

a. Include whether the position is under the prime / Joint Venture or subcontractor
b. Shift and schedule information (to include days off) for each position
c. Shift details to include start and end times

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Volume III—Factor 1: Technical and Factor 2: Transition In 12

An Annotated Outline is Most Helpful to Writers

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- Offers a step up from the regular MS Word Outline with Requirements:
  - Provides explicit instructions on how to address the requirements, with their interpretations
  - Adds tables with instructions, graphics concepts, etc.
  - Builds in cross-references
  - May add win themes, section transitions, and already developed solution descriptions or boilerplate
  - **Tip:** Be careful not to overwhelm inexperienced proposal writers that may have "too much" stuff in the outline – walk each person through the material, don't trust them to figure it out on their own

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

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9

Why Develop an Annotated Outline?

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

- “Integrates” the proposal upfront and reduces “writers’ drift” and compliance issues
- Keeps all the requirements at a writer’s fingertips
- Enables compliance tracking and reviews
- Unclutters tracking of the completion status of proposal sections
- Helps organize the content management process

An Annotated Outline is Best Paired with an Assignments/Cross Reference/Status Tracking Matrix

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- An MS Word annotated outline is not enough for a well-organized proposal effort – a punch list of actions for each section and visual completion status are vital to continuous situational awareness and progress tracking
- Transfer your outline headings and compliance items into a table
- Consider 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 2** Prior to Listening to the Next Module

Module 2 Quiz

1. What is a key benefit of using an annotated outline in the proposal development process?
   a) It facilitates a better understanding of the Request for Proposal (RFP), thereby minimizing the reliance on guesswork by writers.
   b) It is only used for formatting the final proposal document.
   c) It replaces the need for an initial proposal draft.
   d) It is used to determine the technical specifications of the product or service being proposed.
2. Which statement best describes the difference between a regular MS Word outline with requirements and a proper annotated outline?
   a) An annotated outline should not contain any win themes or graphics concepts.
   b) An annotated outline is less detailed and only includes the section titles.
   c) A regular outline with requirements does not include explicit instructions or interpretations for addressing the requirements.
   d) A regular outline with requirements is more comprehensive and includes win themes and boilerplate content.
3. What should be paired with an MS Word annotated outline to ensure a well-organized proposal effort?
   a) A detailed biography of each team member.
   b) A list of all potential competitors.
   c) The final draft of the proposal.
   d) An Assignments/Cross Reference/Status Tracking Matrix.

Module 3

Navigating RFPs, RFQs, and Other Solicitation Types

There Are Different Types of Government Solicitations

- **Request for proposal (RFP) for a requirements contract or an Indefinite Delivery Vehicle (IDV):** 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. These have many flavors in and of themselves, that come with different formats.
- **Request for quote (RFQ):** a solicitation for a fixed-price, non-sealed bid contract. Often doesn't ask for price separately from technical.
- **Task Order, Call 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 contract vehicle.
- **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.
- **Request for Information, Sources Sought:** Although these deliverables may not result in contract award, they require a compliant response that catches customer's attention.

And More Solicitation Types

- **Broad Agency Announcements (BAA):** R&D solicitations that describe a specific research area and request proposals from industry or academia to conduct research and development in that area.
- **Other Transaction Authority (OTA) or OT Solicitation:** A flexible mechanism that allows specific government agencies, such as the DoD, NASA, and the Department of Homeland Security, to enter into transactions that are not contracts, grants, or cooperative agreements. Other OTA solicitation types include Request for White Papers (RWP), Request for Project Proposals (RPP), and Consortium Membership Request from a consortium between industry, academia, and non-profit members.
- **Commercial Solutions Openings (CSO):** This relatively new type of solicitation is designed to acquire innovative commercial items, technologies, or services that directly fulfill requirements, close capability gaps, or provide potential technological advances. Used often to enter into OTAs.
- **Request for Solutions (RFS):** Often used in government innovation units like the Defense Innovation Unit (DIU), an RFS solicits innovative solutions or prototypes to rapidly fulfill the most pressing needs of the government.
- **Small Business Innovation Research (SBIR) and Small Business Technology Transfer (STTR) Solicitations:** These programs encourage domestic small businesses to engage in Federal Research/Research and Development (R/R&D) that has the potential for commercialization. Often referred to as government "Seed" capital.
- **Request for Expressions of Interest (RFEI):** An RFEI is used when a procuring entity wants to gather market interest or capabilities from potential vendors, often prior to issuing a formal solicitation.

But Wait – There is More!

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- **RFPs or RFQs for Single/Sole Source Justifications:** Not a competitive solicitation, but a formal request for proposal to contract without a competitive process, usually due to unique capabilities or situations where only one provider can fulfill requirements.
- **Notice of Funding Opportunity (NOFO):** This is a formal announcement by a government agency or a private foundation that funds are available for a specific program or project. NOFOs typically outline the scope of the funding program, eligibility requirements, the application process, and the criteria that will be used to evaluate submissions.
- **Program Announcements (PA):** Used primarily by federal agencies such as the National Institutes of Health (NIH), PAs are formal statements about new or ongoing extramural activities or programs that are used to solicit applications for grant-supported research.
- **Funding Opportunity Announcement (FOA):** A public document that announces the availability of federal funds for specific grant or cooperative agreement programs. This is the government's equivalent of a Request for Proposal (RFP) for grants and typically outlines the funding agency's expectations and requirements.
- **Cooperative Agreement Notice (CAN):** Similar to a NOFO, a CAN is used when the government anticipates substantial involvement with the recipient during the performance of the activities funded by the award.
- And more (think all the NASA-specific solicitation types, such as Announcement of Opportunity, etc.)

DON'T BE INTIMIDATED BY THE DIFFERENT SOLICITATION TYPES – THEY HAVE SIMILAR CHARACTERISTICS AND RECOGNIZABLE PARTS IMPORTANT TO OUTLINING. LEARN HOW TO FIND THOSE PARTS AND WORK WITH THEM.

NOTE THAT YOU NEED ALL THE RELEVANT DOCUMENTS AT HAND AS SOME SOLICITATIONS REFER TO DOCUMENTS NOT INCLUDED IN THE SOLICITATION BUT ARE IMPORTANT TO OUTLINING.

Check How the Solicitation is Set Up

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Check How the RFP is Structured to Understand Where the Relevant Requirements Are Hiding

- 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, sometimes published elsewhere and not included with the solicitation
  - Unnumbered (bulleted or not)
  - Stream of consciousness (the most painful kind)
- May even be in the HTML format in the body of the SAM announcement
- May hide in Attachments or Appendices
- May issue additional requirements in amendments and clarify in Question and Answer responses that are important to read to gain full understanding
- May include templates and explanations for preparing the response on the agency's website – do your research

What a Solicitation Looks Like

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SAM.GOV

Home Search Data Bank Data Services Help

Contract Opportunity
- General Information
- Classification
- Description
- Attachments/Links
- Contact Information
- History

Award Notices

Follow

SEWP VI DRAFT RFP- 80TECH23R0001

Note: There have been new actions to this contract opportunity. To view the most recent action, please click here.

INACTIVE

Contract Opportunity

Notice ID
80TECH23R0001

Related Notice

Department/Ind. Agency
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
Sub-tier
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION
Office
NASA IT PROCUREMENT OFFICE

Looking for contract opportunity help?

APEX ACCELERATORS

APEX Accelerators are an official government contracting resource for small businesses. Find your local APEX Accelerator for free government expertise related to contract opportunities.

https://sam.gov/opp/37298dea43964737b0c55d80081f5ed9/view

Document	File Size	Access	Updated Date
_SEWP VI DRFP80TECH23R0001 Cover Letter.pdf	326 KB	Public	Sep 11, 2023
_SEWP VI DRFP80TECH23R0001 Cover Letter.pdf (Deleted)	325 KB	Public	Sep 11, 2023
SEWP VI DRFP 80TECH23R0001.pdf	25 MB	Public	Sep 08, 2023
Enclosure 1- SEWP VI Providers.pdf	4 MB	Public	Sep 08, 2023
Exhibit 1- Relevant Experience Project Table.pdf	85 KB	Public	Sep 08, 2023
Exhibit 2-PastPerfQues-SEWP VI.pdf	2 MB	Public	Sep 08, 2023

Document	File Size	Access	Updated Date
ATTACHMENT A- SEWP Statement of Work Scope Category Description.pdf	271 KB	Public	Sep 08, 2023
ATTACHMENT B- SEWP PROGRAM PERFORMANCE.pdf	439 KB	Public	Sep 08, 2023
ATTACHMENT C- SEWP Contractor Holder User Manual.pdf	881 KB	Public	Sep 08, 2023
ATTACHMENT D- IN SCOPE SEWP VI UNSPSC CODES.pdf	914 KB	Public	Sep 08, 2023
ATTACHMENT F- Diversity Equity Inclusion and Accessibility DEIA Plan DRD.pdf	185 KB	Public	Sep 08, 2023
ATTACHMENT H- AbilityOne Data Reporting Data Requirements Description (DRD).pdf	174 KB	Public	Sep 08, 2023

Do Not Read a Solicitation Like a Book, From Beginning to End

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

- Seek sections that have familiar functions:
  - Instructions (A, L) – what you need to do and submit
  - Evaluation Criteria (M) – how your proposal will be judged
  - Statement of Work (C or J) – what work you will need to do once awarded
  - Other: B (pricing), H (special contract requirements), etc. - additional information that could affect your proposal
- Example: In a traditional FAR-dictated RFP, start reading with the order above first (A, L, M, C (J) or equivalents), and only then read the rest

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

Module 3 Exercise: Navigate a Classic Alphabetical RFP with Sections A-M

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*Walk through the RFP handout to identify each of the sections and information offered in them; Use Word file: **Modules 3-13 Exercise - RFP***

- A – standard offer form (the form that becomes cover of the contract once countersigned by the government)
- 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 4

Identifying RFX Requirements for Outlining

Find the Requirements Easily

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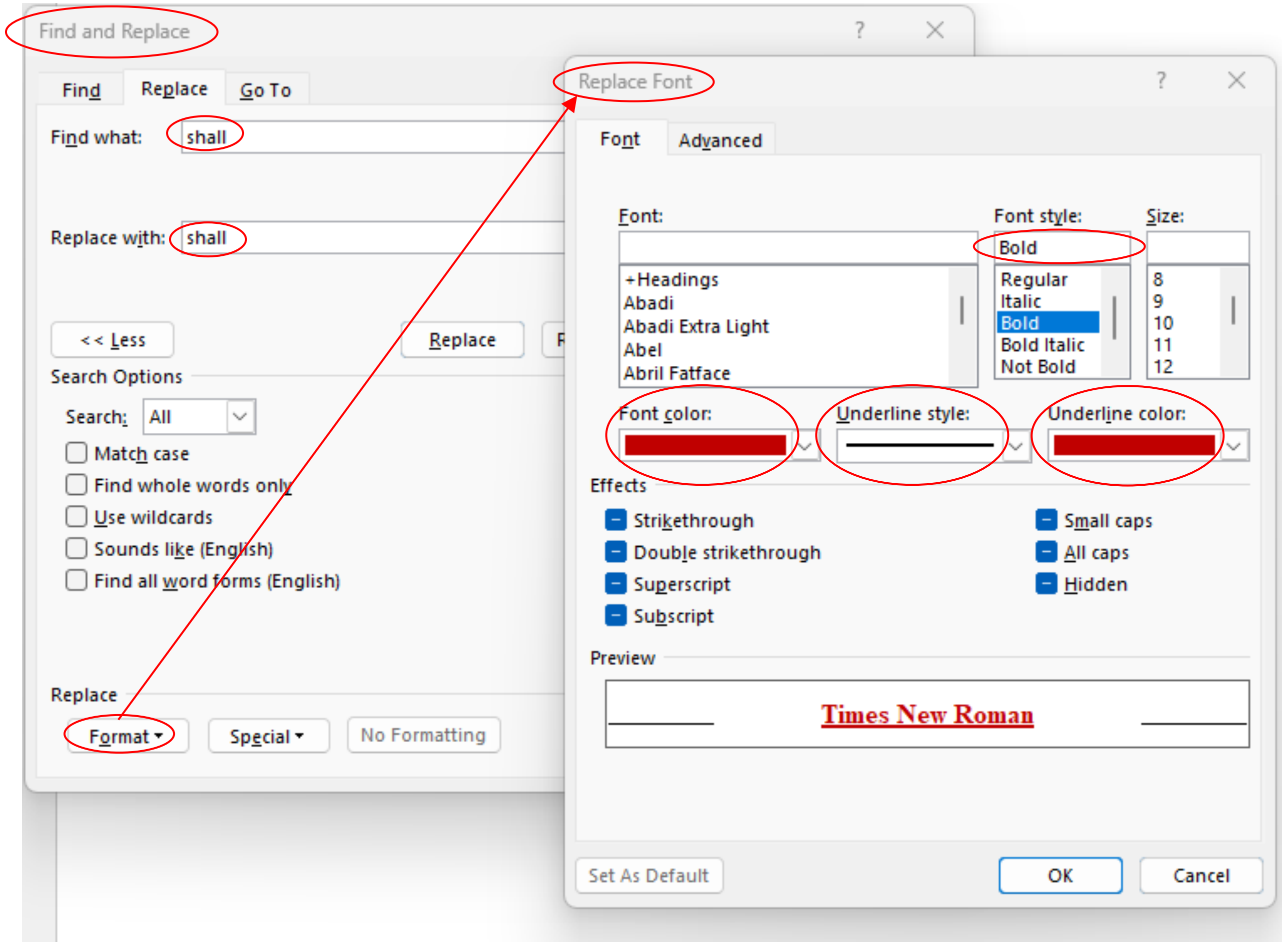
Highlighting key requirement words may help draw your eye to the requirements and help highlight the difference between INFORMATION and REQUIREMENT



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

What Instructions Typically Include

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- **Proposal Format and Organization:**
  - **Structure:** Clear guidance on organizing your proposal into distinct volumes or sections, such as technical, management, past performance, and price.
  - **Page Limits:** Specific limitations on the length of each section and instructions on page formatting (margins, font type, font size).
  - **Tables and Figures:** Directions on the inclusion of tables, figures, and appendices, and how they count towards page limits.
- **Content Requirements By Proposal Volume or Section – Examples of Typical Proposal Parts.**
  - **Executive Summary:** Instructions for preparing an executive summary that captures the essence of the proposal.
  - **Technical Approach:** Detailed requirements for describing the technical solution, innovation, and compliance with the Statement of Work (SOW).
  - **Management Plan:** Outline of the management structure, staffing plan, and quality assurance processes.
  - **Past Performance:** Specifications for documenting relevant past projects and references.
  - **Cost Volume:** What the customer wants in the cost/price volume.
- **Submission Details:**
  - **Deadlines:** Exact due dates and times for proposal submission, including any milestones for draft proposal submissions.
  - **Delivery Method:** Instructions for electronic submission portals, email addresses, or physical mailing addresses for hard copies.
  - **Point of Contact:** Designated agency representatives for submitting questions and clarifications, and deadline.

What Evaluation Criteria Typically Include

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- Each acquisition's evaluation factors are unique and focus on aspects critical to that particular procurement.
- All evaluation criteria and their importance must be clearly stated in the solicitation.
- Evaluation Type:
  - Lowest Price, Technically Acceptable (LPTA). Award will be made to the offeror whose price is lowest among all proposals that were deemed to be technically acceptable.
  - Best Value/Tradeoff. The tradeoff method is used when it is in the Government's best interest to consider award to other than lowest priced offeror, or to other than the offeror given the highest ratings for technical, management, past performance, or other non-cost/price factors. Under the tradeoff approach, the Government evaluates both cost/price and other performance factors.
- Evaluation factors show key areas of importance in your proposal and are a tool to compare the proposals.
- Price or cost is evaluated in all selections, with some exceptions for certain DoD, NASA, and Coast Guard contracts and multiple award contracts.
- Quality is assessed via non-cost factors like past performance and technical excellence.
- Past Performance is evaluated in acquisitions exceeding the simplified acquisition threshold.
- A factor for assessing small business participation goals in subcontracting normally applicable to full and open contracts.
- The solicitation must indicate relative importance: state if non-cost factors are more, less, or equally important as cost or price.

Various Scope Section Types

- SOW – lists tasks and subtasks of the work scope (WHAT the contractor needs to do and sometimes the HOW – preferred methods or processes)
- Performance Work Statement (PWS) – adds performance standards and metrics to the work scope; it's up to bidder to propose the best way to meet those standards and metrics
- Statement of Objectives (SOO) – lists the desired outcomes and goals but requires the bidders to create their own PWS or SOW with methods to achieve the objectives; signals need for innovations
- Design Specifications – contains detailed engineering requirements that may list precise measurements, materials, and procedures
- Level of Effort (LOE) – Effort-focused – specifies the amount of effort and nature of the work for R&D contracts; or lists Time & Materials – labor hours and materials required
- Program Description, Project Description, Scope of Project, or Funding Opportunity Description – describes grant program and priorities, as well as impacts, research topics, or programmatic activities; lists details of available funding, budget restrictions, and cost-sharing or matching requirements

What Statement of Work (SOW) Typically Includes (1)

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Introduction or Background:

- Describes the customer, purpose of the project and its significance.
- Provides context and sets the stage for the specific tasks.
- Serves as fodder for Introduction/Executive Summary.

Objectives:

- States the goals the project seeks to achieve.
- Provides a clear picture of the desired end state or outcomes.
- Serves as fodder for Intro sections and Exec Summary.

Scope of Work/Tasks and Subtasks:

- Outlines the breadth of work, including the tasks and subtasks to be performed.
- Details specific tasks, deliverables, and responsibilities.
- The part that's used in outlining.

Performance Standards:

- Specifies the quality and performance metrics required.
- Provides standards for acceptable deliverables.
- Called out in the outline wherever pertinent.

Deliverables:

- Lists tangible items or services to be delivered, including reports, plans, documentation, and physical products.
- Details delivery schedules, format, and content.
- Called out in the outline wherever pertinent.

Place of Performance:

- Identifies where the work will be performed, which can be at the government's site, the contractor's facilities, or other locations.
- Taken into consideration in the approach.

What Statement of Work (SOW) Typically Includes (2)

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Period of Performance:

- Specifies the start date, end date, and any key milestones.
- Includes deadlines for each phase of the project.

Reporting Requirements:

- Outlines the reporting structure, frequency, and content.
- Details any briefings or updates to be provided to the government.
- May be combined with deliverables.

Standards and Testing:

- Details any industry standards or testing protocols that apply to the work or deliverables.
- Describes inspection and acceptance criteria.
- Applicable only to certain types of work.

Government-Furnished Property/Information (GFP/GFI):

- Lists any property, facilities, or information provided by the government for use in the project.
- Describes the handling, use, and return of such items.

Security Requirements:

- Outlines any security clearances required and procedures for handling classified or sensitive information.

Travel and Personnel:

- Specifies requirements for travel or personnel qualifications necessary to complete the work.

Other Direct Costs:

- Identifies any other costs expected to be incurred, such as materials, communication expenses, or special equipment.

What Section H Typically Includes

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- Unique administrative, management, or legal stipulations that are not covered elsewhere in the standard contract clauses – often many of these items are already included in the scope of work.
- Pertinent to Outlining a Proposal:
  - Key Personnel – positions that are must-have and tough to replace that may need to be addressed in your technical/management approach and Resume section.
- Pertinent to Formulating the Technical/Management Approach:
  - Travel and Level of Effort – requirements for travel or level of effort that might impact your staffing, management, and pricing.
  - Reporting Requirements and Security Requirements integrated into your management approach.
  - Data Rights and Intellectual Property developed under the contract, influencing technical approach and collaboration strategies.
  - Equipment and Property (GFE or facilities), impacting logistics and operations in the technical plan and pricing.
  - Environmental and Safety standards a contractor must adhere to, which may affect the technical approach and project management plans.
  - Subcontracting Restrictions or Requirements with guidance on the use of subcontractors, which must be considered in your management approach.
  - Details the quality assurance measures that the contractor is expected to follow, informing the technical approach and quality management plan.

Additional Solicitation Items to Check

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- Is there any mention of any kind of documents or a resource library that presents additional knowledge about the project?
- What does Section B say about the way you are supposed to present pricing and break it into Contract Line Item Numbers (CLIN), which may impact your management approach?
- Always scan the attachments
  - Do they offer a separate section called Contract Deliverable Requirements List (CDRL) to address where needed and include in the schedule?
  - Are there forms or templates to fill out such as the past performance table(s), pricing table, resume/CV format, or certifications you are supposed to provide?
  - Are there additional drawings, technical specifications, reports, or data relevant to the project?

Not Every "Shall" or Other Requirement is Needed for Outlining

- Remember that the RFX for contracts (not grants) is mostly the contract for the future work – lots of requirements it contains are contractual specifications, terms, and conditions
- Sections important to outlining:
  - Everything that instructions dictate to include in the proposal
  - Everything that will be evaluated
  - The actual "tasks" section in the statement of work
  - Specifications and standards
  - Deliverables
- The main goal is to address every bit of instructions and evaluation criteria
- Solutions that address scope could be presented at a higher level if proposal is severely page-limited, without having to reference every item
- Statement of Work sections that are only important to contract execution and would **make proposal overly bureaucratic and take up valuable space**
  - Should be informing your approach but don't need to appear in the text: Ex: Work hours, travel clearance, Common Access Cards, etc.

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

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“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

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- 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

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

Module 4 Exercise: Identify Sections Pertinent to Outlining

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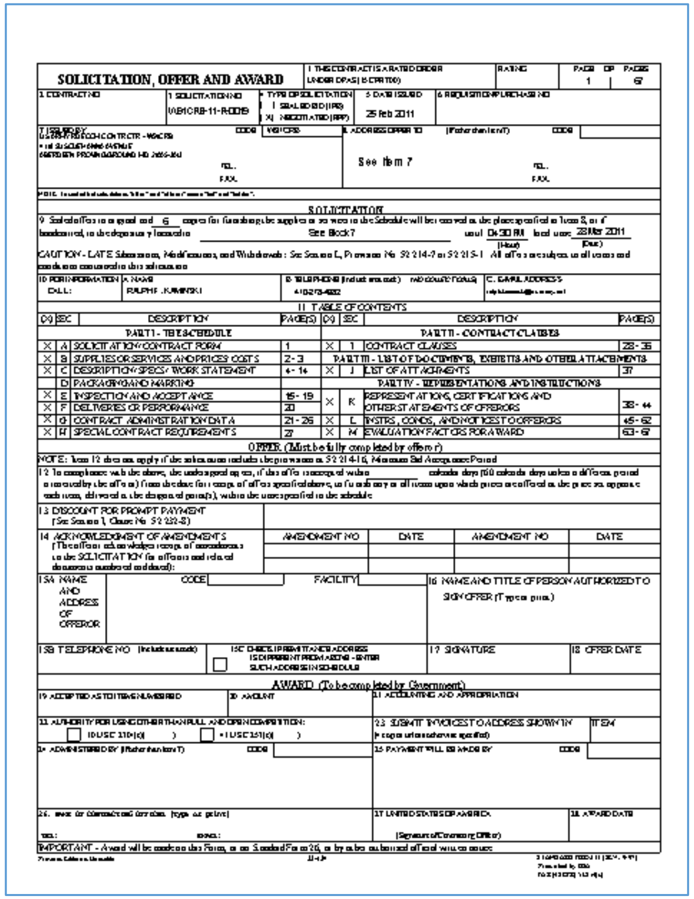
1. Identify sections and information important to know when outlining the proposal
2. Identify sections that would not make it into the outline but are important to take into consideration as they inform your solution development
3. Identify sections and information that are important for contract execution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

Use the Word file: **Modules 3-13 Exercise - RFP**



SOLICITATION, OFFER AND AWARD

SOLICITATION

11. TABLE OF CONTENTS

PART I - THE SCHEDULE

PART II - CONTRACT CLAUSES

PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS

PART IV - REPRESENTATIONS AND INSTRUCTIONS

OFFER (Must be fully completed by offeror)

AWARD (To be completed by Government)

Module 5

Set Up Your Proposal Template

Set Up Template and Styles Compliant with the RFP

Professionals set up their compliant templates from the outset, so that you can judge where you are lengthwise, and not forget about some small compliance item at submission time

- Margins
- Page size
- Fonts for text, tables, graphics (and other sizing limitations)
- 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 name or logo on proposal document pages)
- Color restrictions (ex: black font on white pages)
- Page numbering (consecutive, by section, etc.)
- Tabulation
- What's included or excluded from the page count
- "Front matter": Table of Contents, Table of Figures, Table of Tables, Acronyms, Cross-Reference Matrix, Signature, etc.
- Other

Set Up Cover and Title Page

- Carefully review what must be included in the title/cover requirements, and set up the page (even if the image will be generated later)
- In electronic submissions cover and title page are the usually same
- In hard copy submissions, cover and title page are not always synonymous 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

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.

Customer-centric image
Yours or Team's Logo(s)
(Don't use customer's logo without permission)

Solicitation Title (usually found at the top of the SOW)

Proposal due date (and possibly time)

Solicitation number

Volume number and title

Submitted by (company name, address, and contact name, title, and info)

Submitted to (agency, address, and contact name, title, and info)

Legal disclaimer

Other possible items: CAGE code, UEI, GSA schedule, IDIQs, small business/socioeconomic type, signature, original/copy, etc.

Table of Contents and Other References

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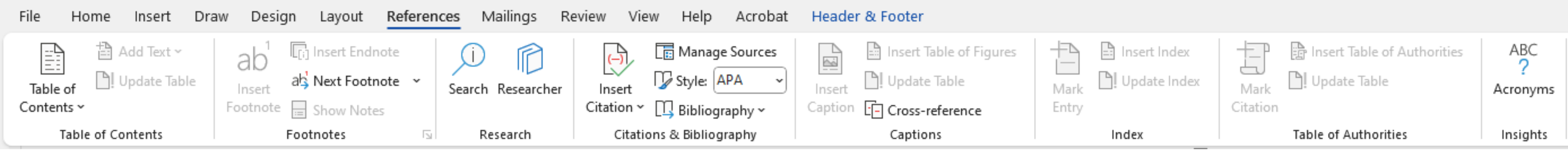
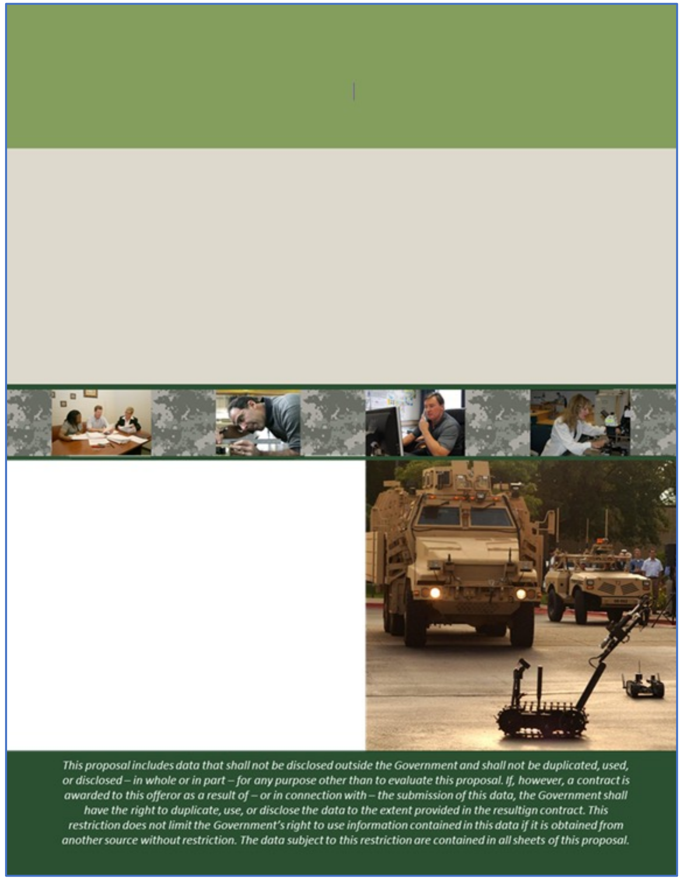
- Insert a section break after the cover (Layout -> Breaks -> Section Breaks -> Next Page)
- Consult the solicitation – does the page count allow for inserting the table of contents, does it require specific tables, or does it specify the format and level of detail for the Table of Contents? How should the page numbering appear?
- Insert a Table of Contents (References -> Table of Contents) or other reference tables (Table of Figures, Table of Tables)
- Does the RFP distinguish between Figures and Tables or can you reference Exhibits (Tables and Figures together)?
- Follow with the section break
- See if a Glossary of Acronyms is required and add a placeholder, follow with another section break
- In the Footer, adjust page number format to lower case roman numerals for the front matter and set Different First Page to ensure there is no page number on the cover sheet. Ensure the page numbers aggregate correctly.



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

Module 5 Exercise: Set Up Your Title Sheet and Proposal Template

- Set up a compliant proposal template
- Start with the cover/title sheet using the provided Word file: **Module 5 Exercise – Proposal Cover** and **Modules 3-13 Exercise - RFP**
- Locate RFP customer and title that usually appears in the statement of work (also in the SAM or another 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 6

Structuring Proposal Outlines

Annotated Outline Development Process

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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 ready 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

Outlining is more of an art than a craft

- The more the RFP is open to interpretation, the more decision-making is involved
- Picture the best way to present information so that it is easy to evaluate:
  - It follows the instructions and the levels of importance given to each evaluation factor
  - It works in SOW task information logically where it fits in the order that instructions and evaluation criteria require you to reference it, not necessarily the order in the SOW
  - Section headings and inline headings are labeled with solicitation references – the evaluator doesn’t have to guess or hunt and peck to find where requirements are addressed
  - The outline considers the story: it presents information from general (big picture) to specific (details), and introduces information logically so that an evaluator doesn’t have to jump around to understand the story
  - It is not repetitive
  - It is not over-numbered, over-partitioned, and overly bureaucratic, wasting space on items that don’t matter during the evaluation

Color Code Requirements As You Outline (and Include a Legend)

- *Blue:* Proposal Instructions (L)
- *Red:* Evaluation Criteria (M)
- *Green:* Statement of Work (C, J)
- *Purple:* Performance Metrics
- *Brown:* Deliverables
- Black: Proposal Manager's comments and instructions
- Yellow highlights over the requirements are there to point out the important parts

Requirements Journey in the Outline

1. Pasted into the Word document so that the writer could digest all of them together and respond.

2. Upon addressing each one thoroughly, moved into comments that attach to that section's heading. Moving into comments helps retain requirements for compliance checks but allow for accurate page count estimation.

3. Delete after the last compliance check (around the Red Team).

Read Each Requirements Phrase Carefully to Understand the Intent

Note that there are several key phrases and ways to combine them to outline the section.

- Each requirement may contain several key phrases – dissect each sentence carefully to catch every requirement that may appear hidden until you read closely.
- Example from the practice RFP:
  - 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.
- Dissect it into requirements phrases:
  - 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.

Ability to provide an adequate amount of personnel

- Is this about showing them how many people should be in each labor category (presented in a table with the labor mix below)? Or is it about making sure one has proper recruiting or candidates for each slot?

Appropriate labor mix

- What is the best format to present this information? Is it required anywhere else in the proposal so we could build on that format?

Fulfill the requirements set forth in the SOW

- How do we ensure that we pick the right areas of the SOW or how do we allocate the whole SOW if it's about everyone bid on the project?

Look for Correlated Other Requirements: Section M

- M.4 Rating System, Evaluation Criteria, Standards, and Factors
- M.4.1.1.1 Excellent – Proposal demonstrates a thorough understanding of requirements and an approach that exceeds the minimum performance requirements in a way significantly beneficial to the government. The offeror's proposal demonstrates a thorough understanding of the requirements and how these requirements will be executed. The technical approach is clearly and completely described and represents a feasible approach for meeting the ManTech and Technology Transition (T2) requirements. The offeror's proposal provides evidence of significant knowledge and expertise in ManTech and T2 support services.
- M.5.2 Technical Approach
- M.5.2.1 The Government will evaluate the offeror's proposed technical approach which the offeror demonstrates ability to provide manpower support services to the Government as detailed in the SOW. Each evaluator will make an independent evaluation and assign an adjectival rating to each of the factors, based upon an integrated assessment of the individual elements. The factor rating shall be supported by narrative comments citing significant strengths, strengths, weaknesses, significant weaknesses, deficiencies, and other special considerations made by the evaluation board members
- M.5.2.2 Adjectival Rating/Definition – Technical Approach
- M.5.2.2.1 Excellent (E) Proposal significantly exceeds the Government's requirements. Numerous strengths are identified which will significantly benefit the Government. No deficiencies or weaknesses are identified. The proposal represents a low risk.
- M.5.2.3.1 Significant Strength: An aspect of a proposal that, when judged against a stated evaluation criteria, appreciably enhances the merit of the proposal or significantly increases the probability of successful performance of the contract.
- M.4.1.2.1 Low Risk (LR) Offeror's proposal provides essentially no doubt that the Offeror will successfully perform the required effort.

Adding Section M Insights

- *Ability to provide an adequate amount of personnel*
  - ***Understanding:*** ***What is tough about*** making sure one has proper recruiting or candidates for each slot? ***What are the critical factors in the*** *ability to provide manpower support services to the Government as detailed in the SOW?*
  - ***Approach:*** ensure we show how we ***exceed*** *the minimum performance requirements and significant* ***benefits*** *to the government*
  - ***Proof:*** *Evidence of significant knowledge and expertise in ManTech and Technology Transition (T2) requirements (we are* ***low risk****)*
- *Labor mix*
- *Fulfill the requirements set forth in the SOW*

Adding SOW Insights

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- *Ability to provide an adequate amount of personnel* ***to fulfill the requirements set forth in the SOW***
  - ***Understanding:*** ***What is tough about*** making sure one has proper recruiting or candidates for each slot? ***What are the critical factors in the*** *ability to provide manpower support services to the Government as detailed in the SOW?*
    - **Objectives (SOW 1.0):** Show how your staffing objectives are in line with facilitating the RDECOM's execution of the Army ManTech Program.
    - **Background Information (Section 2.0):** Describe the current state of affairs versus the goals of the ManTech Program, including technology transition and technical processes – ghost the incumbent.

    Approach: *ensure we show how we* ***exceed*** *the minimum performance requirements and significant* ***benefits*** *to the government*
    - **Scope of Work (Section 3.0):** Address how proper staffing will help address the tasks listed in the SOW:
    - **ManTech Program Support (3.1):** Joint service integration (3.1.1), program execution (3.1.2), and various support tasks mentioned like the Defense Manufacturing Conference (3.1.1.2).
    - **Technology Transition Program Support (3.2):** Support of T2 functions, including coordination, briefing materials, and interactions with Army Legal Council related to CRADAs and PLAs (3.2.1).
    - **Technical Process Support (3.2.3):** Facilitation of HQ planning, coordination, and management of TFT/SID activities (3.2.3.1) and support of business process and policy development (3.2.3.3).
  - ***Proof:*** *Evidence of significant knowledge and expertise in ManTech and Technology Transition (T2) requirements (****we are low risk****)*

Note that SOW is not here as full text; but you normally would include it; sometimes you may want to include full text in comments

- *Labor mix*
  - **Estimated Work Requirements (Section 3.3):** Include projections for manpower including the roles and hours estimated for the performance of the contract. Show you can meet and exceed these estimated work requirements with qualified personnel.
  - **Security Requirements (Section 6.0):** Show that all personnel has the right security clearance levels.

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

Module 6 Exercise: Decide on How to Structure the Proposal Outline

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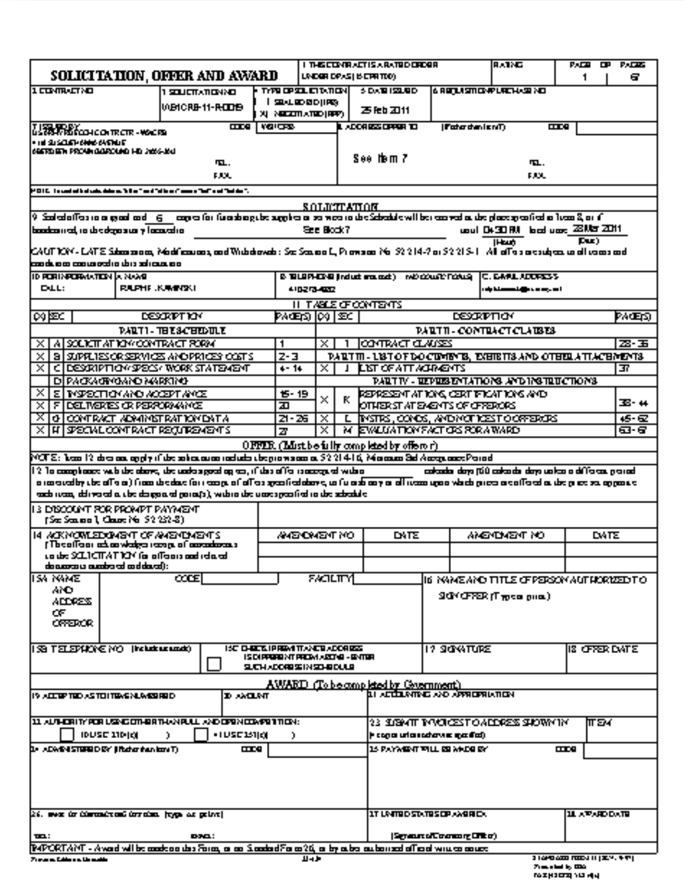
1. Build the skeleton outline first (volumes, sections, subsections, etc…).
   - Follow the instructions first.
   - Then map the evaluation criteria and SOW.
   - Then, decide how you will map other instructions into your outline:
     - Performance Requirements
     - Deliverables
     - Format for staffing matrix
2. Debrief on how you decided to structure your outline and why.

Create a blank Word document and get the requirements from the Word file: **Modules 3-13 Exercise - RFP**



SOLICITATION, OFFER AND AWARD

SOLICITATION

11. TABLE OF CONTENTS

(X)	SEC	DESCRIPTION	PAGE(S)	(X)	SEC	DESCRIPTION	PAGE(S)
		PART I - THE SCHEDULE				PART II - CONTRACT CLAUSES	
X	A	SOLICITATION/CONTRACT FORM	1	X	I	CONTRACT CLAUSES	28 - 36
X	B	SUPPLIES OR SERVICES AND PRICES/COSTS	2 - 3			PART III - LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS	
X	C	DESCRIPTION/SPECS/WORK STATEMENT	4 - 14	X	J	LIST OF ATTACHMENTS	37
	D	PACKAGING AND MARKING				PART IV - REPRESENTATIONS AND INSTRUCTIONS	
X	E	INSPECTION AND ACCEPTANCE	15 - 19	X	K	REPRESENTATIONS, CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS	38 - 44
X	F	DELIVERIES OR PERFORMANCE	20				
X	G	CONTRACT ADMINISTRATION DATA	21 - 26	X	L	INSTRS., CONDS., AND NOTICES TO OFFERORS	45 - 62
X	H	SPECIAL CONTRACT REQUIREMENTS	27	X	M	EVALUATION FACTORS FOR AWARD	63 - 67

OFFER (Must be fully completed by offeror)

AWARD (To be completed by Government)

Module 7

Properly Titling and Numbering Proposal Sections

Proposal Level Section Flow

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

1.0 - Overall Top Level Summary or Introduction/Overview Section
Example: Technical Solution or Management Approach Intro

1.1 – First Topic

1.1.1 - Detail*

1.1.2 - Detail

1.2 – Second Topic

1.2.1 - Detail

1.2.2 - Detail

1.2.3 - Detail

FLOW

- Blue: Evaluator that doesn't have expertise in the field (usually the Contracting Officer)
- Grey: Evaluator with some expertise (usually the COR/COTR, Program Manager, other evaluators that are not as familiar with the program)
- Red: Subject Matter Expert Reader (SETA contractors, etc.)

Naming and Numbering Your Sections

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Emulate your customer's section naming 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 adjustments for brevity
- Always explicitly explain how you are deviating from the solicitation order, if you select to do so for highly compelling reasons

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

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Yes, *you can assign your own numbers to the outline, and track compliance to the solicitation numbering in brackets in each section's 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 unless the solicitation leaves you no choice**
  - Use bold inline headings to drill down further than four levels
- **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**
- **Subdivide sections only 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 Sections' Headings

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- 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 7** Prior to Listening to the Next Module

Module 7 Exercise: Transfer Your Outline to the Proposal Template and Add RFP Requirements

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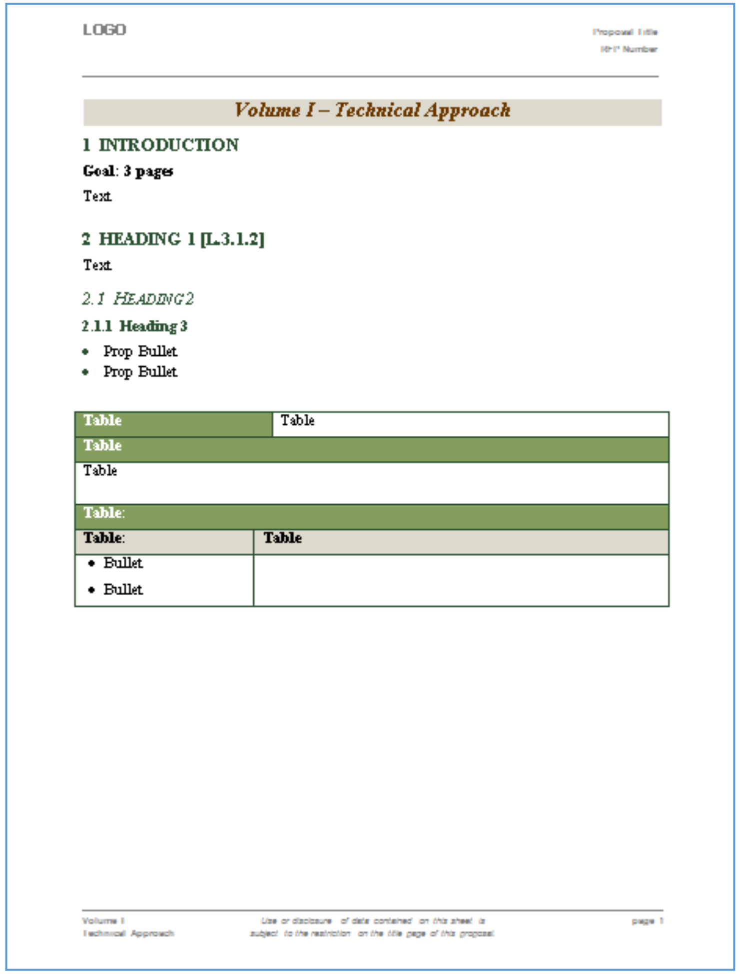
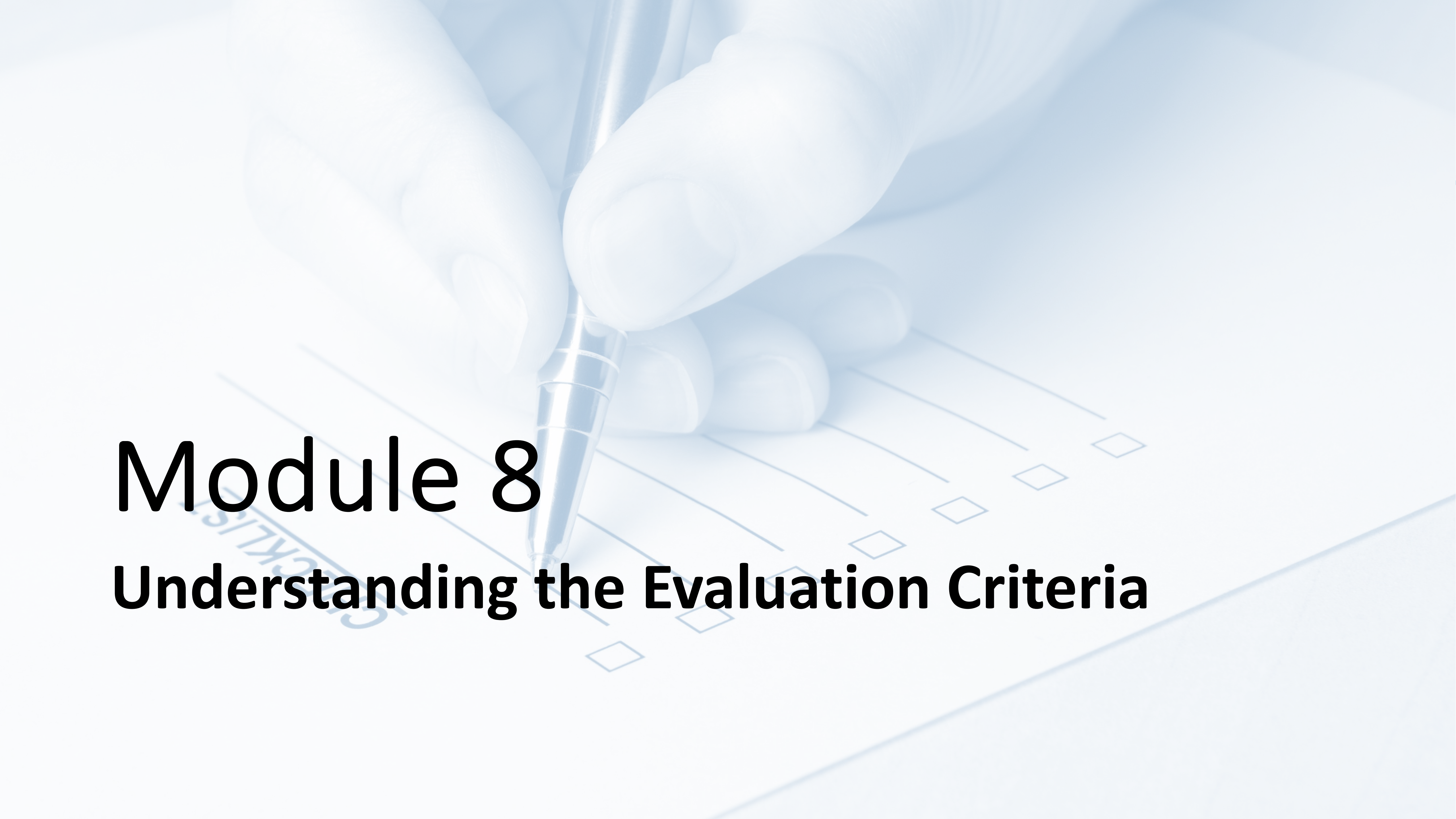
- Use *Paste Special, Unformatted Text*
- Assign the right heading levels to the outline using styles or format painter
- Start inserting RFP text (instructions, evaluation, SOW) into the Technical Approach section
- Use RFP reference information in section headings so that the evaluators can cross-reference your proposal with the RFP
    - 2.1.2 Personnel Recruitment Plan [SOW 3.1.2]
- Add authors' names (fictional) and page count allocations in a different color to the headings as if you were assigning the sections to writers
- Build the entire outline before you begin annotations
- Use the Word file: **Module 7 Exercise - Proposal Template** and the **Modules 3-13 Exercise - RFP**





Module 8

Understanding the Evaluation Criteria

Importance of Evaluation Criteria

- Evaluation Criteria are the standards used to evaluate proposals.
- Define what the customer values the most, guiding your areas of differentiation and strengths.
- Must be clearly defined in the RFP.
- Tell you what will be scored and how.
- Shows you what information doesn’t contribute to evaluation scores and may get less ‘real estate’ or be extraneous.
- May include additional instructions on what to include in the proposal.
- Helps determine where to best allocate page count, time, and resources in the proposal process.

What Happens Behind the Closed Doors

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1. Evaluators get "just-in-time training" on the evaluation process
2. Proposals may or may not be split into sections or volumes assigned by specialty; cost is nearly always separately evaluated per FAR
3. Scan the pile of proposals. *An average evaluator spends 20 seconds on a page of text, 40 seconds on a graphic*
4. Throw out the non-responsive proposals and document the decision – to cut down the evaluation process
5. Read the remainder of proposals more closely
6. Document findings in a scorecard, a form, or a freeform memo
7. Scrutinize the proposal; talk to other evaluators to make sure it makes sense
8. Decide to conduct discussions; make determination of a competitive range
9. Conduct pre-award debriefings, ask questions, request clarifications, discuss, ask for final offers
10. Recommend the decision to the SSA (if CO is not the SSA)
11. SSA Signs the Award Justification Memo and other activities including notifying the bidders
12. Evaluators keep their fingers crossed to make sure there is no protest within 10 days of award or 5 days of debrief(s)

What Evaluation Approach Will Your Agency Use?

Understanding the evaluation approach will help you determine the best proposal planning strategy

- Best Value is the greatest overall benefit in response to the requirement, even if higher price
- Best Value/Tradeoff or Lowest Price Technically Acceptable is not a black-and-white distinction
- Best value is actually a continuum with "lowest price technically acceptable" process on one end and Tradeoff process on the other end
- Best value is obtained through one or more source selection approaches: LPTA, Performance Price Tradeoff, or Full Tradeoff
- Evaluation criteria defines which process will be used
  - Always seek to influence the evaluation criteria during capture
  - Read the section M (evaluation criteria) carefully during the proposal
- Best value/tradeoff means that you could win as the high technical, high price; but don't go over the budget ceiling

Understand the Best Value Continuum in Proposal Evaluation

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FAR Parts 13-14 | FAR Parts 8 and 12

Simplified and sealed bids

LPTA where the customer only reads the lowest-priced proposal; cost factors are most important

LPTA where the customer reads all the proposals and it is possible to influence the perception of what's technically acceptable; cost factors significantly more important

Best Value Continuum

Performance/Price Trade-off (PPT) – once the proposal is deemed technically acceptable, the customer decides between price and performance; cost and non-cost factors are equally as important

Bidder A	Bidder B	Bidder C
5 Strengths	3 Strengths	6 Strengths
2 Weaknesses	No Weaknesses	1 Weakness
$52M	$51M	$65M

Full trade-off analysis between the cost and non-cost factors; non-cost factors are more important than price

Typical Evaluation Factors

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The more experience the evaluator has, the less important is the price factor; Technical approach, past performance, and price are the most used factors

- **Five "mandatory" evaluation factors:**
  - Price or cost to the Government
  - Quality (can be evaluated under other factors as a proxy)
  - Past performance (can be waived but is increasingly more important)
  - Small disadvantaged business participation (don't apply to SBs)
  - Small business subcontracting (don't apply to SBs)
- **Minimal evaluation factors:**
  - Acceptability of the offer (where the offeror accepts the terms, proposes adequate small disadvantaged business participation, and is eligible for the award)
  - Risk
  - Price (or cost+fee)
  - OCI
- Evaluation factors are often cut-and-pasted from old solicitations

M

Gather Enough Strengths and Reduce Risk

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Color	Adjectival Rating	Definitions DOD Source Selection Procedure
Blue	Outstanding	Proposal indicates an exceptional approach and understanding of the requirements and contains **multiple strengths**, and **risk of unsuccessful performance** is low.
Purple	Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one **strength**, and **risk of unsuccessful performance** is low to moderate.
Green	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements, and **risk** of unsuccessful performance is no worse than moderate.
Yellow	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements, and/or **risk** of unsuccessful performance is high.
Red	Unacceptable	Proposal does not meet requirements of the solicitation, and thus, contains one or more **deficiencies**, and/or **risk** of unsuccessful performance is unacceptable. Proposal is unawardable.

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

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

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

- **Proposal** — 50 pages
  - **Mission Support** — 25 pages
    - **Factor 1 Tech Approach** — 28 pages ~~10~~ pages
    - **Factor 2 Management** — 10 pages
    - **Factor 3 Quality Control** — 5 pages
  - **Price** — Not in this volume's page count
  - **Past Performance** — 7 pages ~~25~~ pages — 3 references, 2 pages each

Evaluators are Trained to Follow the RFP

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- Evaluation is based on the proposal alone, and NOT:
  - Knowledge of your capabilities by the Government missing from your proposal
  - Relationships
  - Great things you have done in the past
- Even if evaluators love you, you may still lose a proposal because:
  - Source selection process has many checks and balances
  - Process is transparent in its documentation
  - Government is afraid of protests and associated "discovery"
- If it is not in the RFP, even if you were told it was important, use caution when responding
- If it is not in the RFP, it cannot be evaluated; the impact is purely emotional
- Protest ambiguity prior to proposal submission

Example of Evaluator's Scorecard

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Individual Technical Evaluation Document - Ratings Summary Page

Vendor: Evaluator:

Category	Evaluation Sub Factor	Rating
Management Approach and Technical Capabilities	1. Understanding of the work, including creativity and thoroughness shown in understanding the objectives of the SOW and specific tasks, and planned execution of the project.	
	2. Evidence of specific methods and techniques for completing each discrete task, to include such items as quality assurance, and customer-service.	
	3. Ability to address anticipated potential problem areas, and creativity and feasibility of solutions to problems and future integration of new processes and technology enhancements.	
	4. Degree to which the offerors proposal demonstrates an understanding of logistics, schedule, and any other issues the Government should be aware of.	
	5. Quality and effectiveness of the allocation of personnel and resources.	
	Overall Management Approach and Technical Capabilities	
Personnel Qualifications	1. The currency, quality and depth of experience of individual personnel in working on similar projects. Similar projects must convey similarity in topic, dollar value, workload, duration, and complexity.	
	2. Quality and depth of education and experience on other projects which may not be similar enough to include in response to #1. (Immediately above) but may be relevant.	
	3. The currency, quality and depth of how the Project Director will supervise and coordinate the workforce.	
	Overall Personnel Qualifications	
Organizational Experience	1. Evidence that the organization has current capabilities; and for assuring performance of this requirement. Evidence of supporting subcontractors, consultants and business partners will be considered.	
	2. Appropriate mix and balance of education and training of team members.	
	Overall Organizational Experience	
Past Performance	1. The organizations history of successful completion of projects; history of producing high-quality reports and other deliverables; history of staying on schedule and within budget.	
	2. The quality of cooperation (with each other) of key individuals within your organization, and quality of cooperation and performance between your organization and its clients.	
	3. The organization's specific past performance on prior similar efforts specified within this SOW.	
	Overall Past Performance	
Summary	**Overall Technical Rating (Moderate Risk)**	

Vendor Name: **Evaluator Name:**

Management Approach and Technical Capabilities		
Evaluation Sub Factors		
1. Understanding of the work, including creativity and thoroughness shown in understanding the objectives of the SOW and specific tasks, and planned execution of the project.	Strengths	
	Weaknesses	
	Deficiencies	
2. Evidence of specific methods and techniques for completing each discrete task, to include such items as quality assurance, and customer-service.	Strength	
	Weaknesses	
	Deficiencies	
3. Ability to address anticipated potential problem areas; and creativity and feasibility of solutions to problems and future integration of new processes and technology enhancements.	Strengths	
	Weaknesses	
	Deficiencies	
4. Degree to which the offerors proposal demonstrates an understanding of logistics, schedule, and any other issues the Government should be aware of.	Strengths	
	Weaknesses	
	Deficiencies	
5. Quality and effectiveness of the allocation of personnel and resources.	Strengths	
	Weaknesses	
	Deficiencies	

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

Module 8 Exercise: Create a Scoring Tree and Assign Page Counts

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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 3-13 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 9

Ensuring Compliance Throughout the Proposal Development Process

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

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

Cross-Reference Matrix

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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

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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

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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

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- 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

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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. Concisenessis 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 <u>travel expenses</u> (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 <u>not</u> 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. <u>The offeror agrees to hold the prices in its offer firm for a 90 calendar days from the date specified for receipt of offers.</u>

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 9** Prior to Listening to the Next Module

Module 9 Exercise: Create the Initial Outline and Cross-Reference Matrix

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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 10

Transforming the Topical Proposal Outline into an Annotated Outline

Annotated Outline Development

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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

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*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

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 10** Prior to Listening to the Next Module

Module 10 Exercise: Create Useful Annotations to Guide the Authors

- 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 11

Developing Past Performance Template

Building a Past Performance Template

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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

Agency:	Contract Dollar Amount:	Contract Type:	Period of Performance:
DISA	$34,567,000	FFP	01/14/2009-01/14/2010
Contracting Officer:			
Name: James Smith **Phone:** 202-555-1212 **Email:** jsmith@disa.mil **Fax:** 202-555-1234			
Project Summary:			
[Brief description of the project]			
How This Project is Relevant to the RFP:			
[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]			

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

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

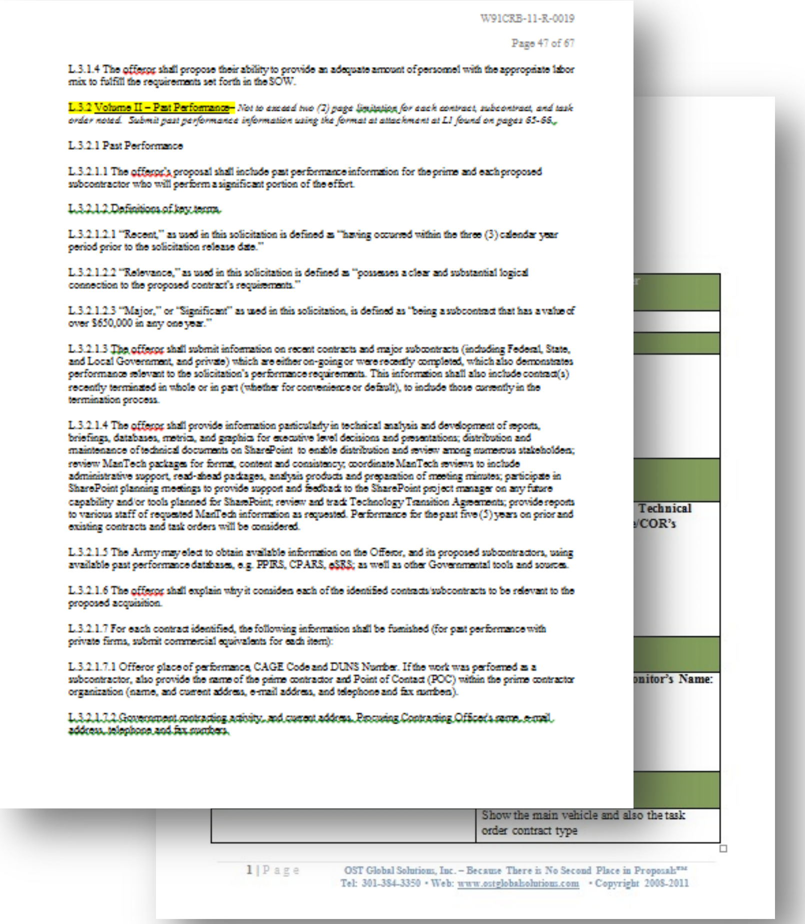
- Showcase:
  - Technical, program management skills
  - Unique capabilities, facilities, products
  - Resourcefulness
  - Improvements that resolved problems
- Use direct quotes from award fee letters, awards, commendations, and customer emails
- Include such graphics as Award Fee Improvement Curve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

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

Module 11 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 in the **Modules 3-13 Exercise - RFP**
- Use the table format in MS Word or draw by hand
- Do not miss any requirements



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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.

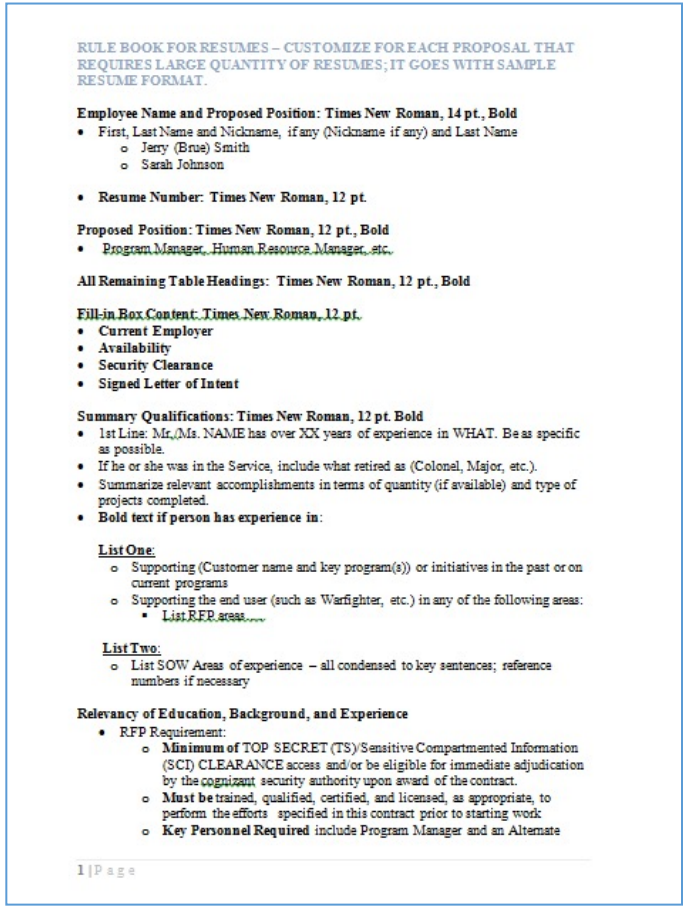
Module 12

Developing Resume Templates

Important Resume Tips

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

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 **Month 200x to Present**
Title: xxxxx

- xxxxxxx

Company: xxx **Month 200x to Month 200x**
Title: xxxxx

Resume Template with Detailed Instructions

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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

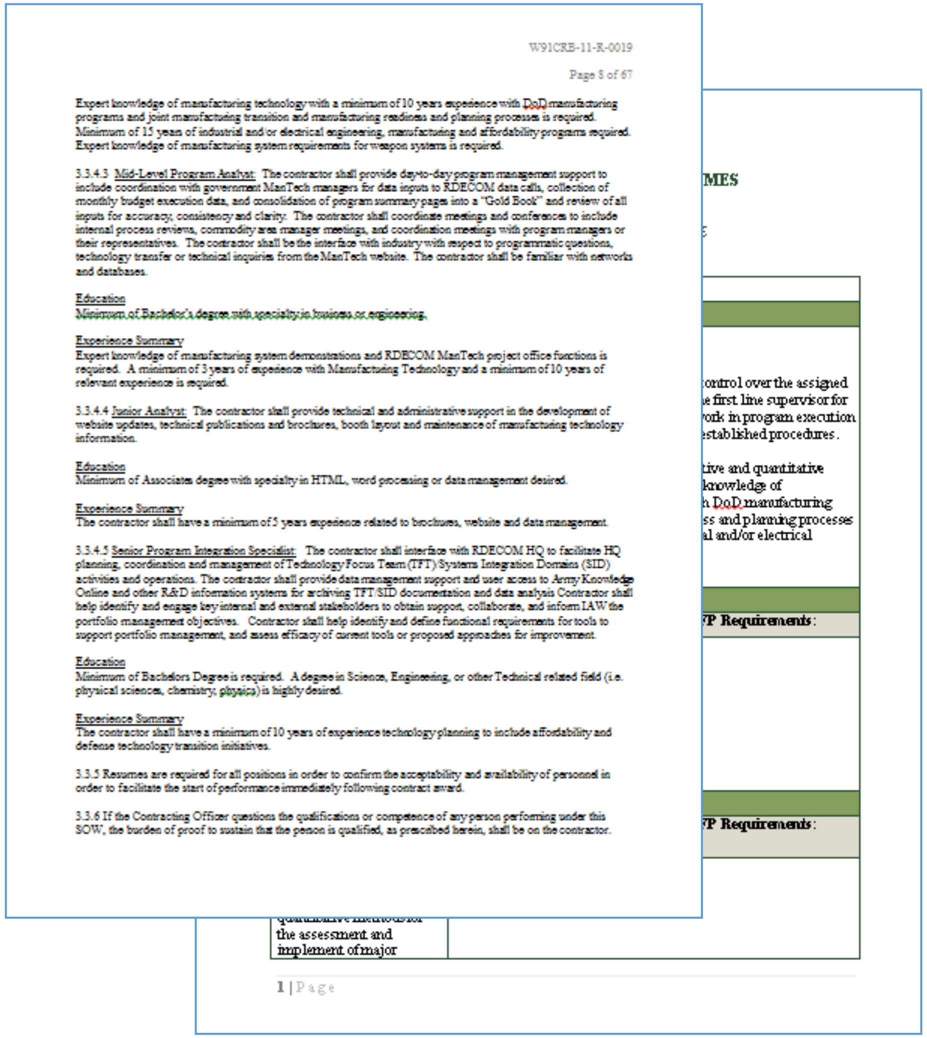
RFP Requirement	How Our Candidate Meets the RFP Requirement
RFP Requirement: Management experience to facilitate _______(customer)'s mission in (pick top relevant category [from List One in Rule Book] for this employee: Strategic and operational intelligence; Operations; Research; Technical Analysis; 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 12** Prior to Listening to the Next Module

Module 12 Exercise: Design Resume Template for Your Practice Section

- 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 12 - Resumes template example** and **Modules 3-13 Exercise - RFP**



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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 13

Developing Cost Proposal Templates

Don’t Skip the Cost Proposal Outline

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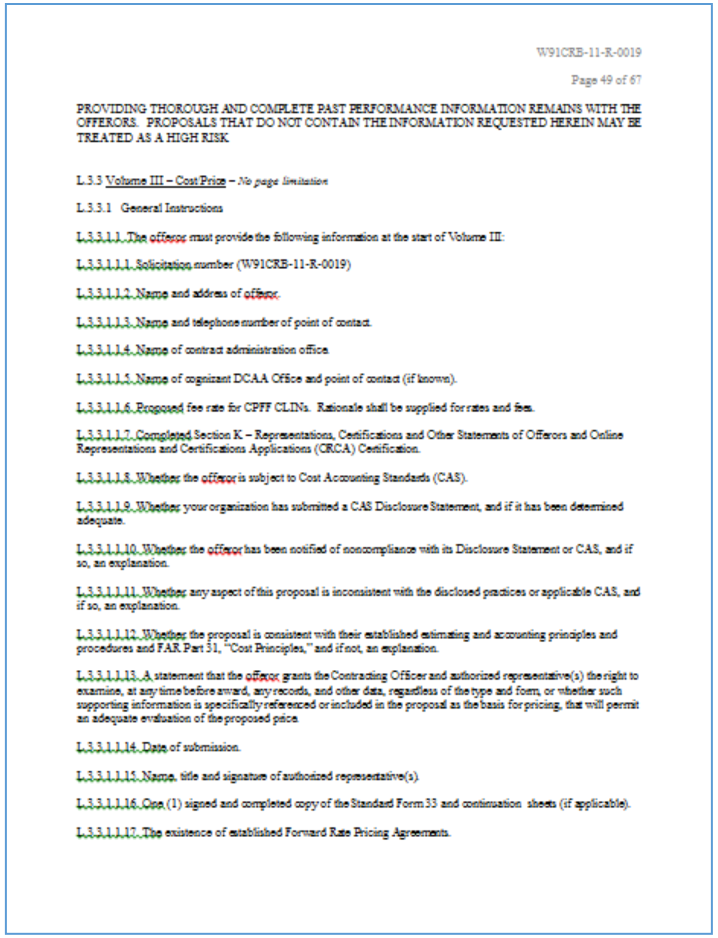
- Often if you don’t drive the cost proposal outline development, the cost team may leave it to the end
- Cutting and pasting may take you out of compliance
- Ensure that you drive the process and track the cost proposal development the same as the rest of the proposal
- Make sure you coordinate closely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

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

Module 13 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



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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 14

Creating Proposal Storyboards and Work Packages

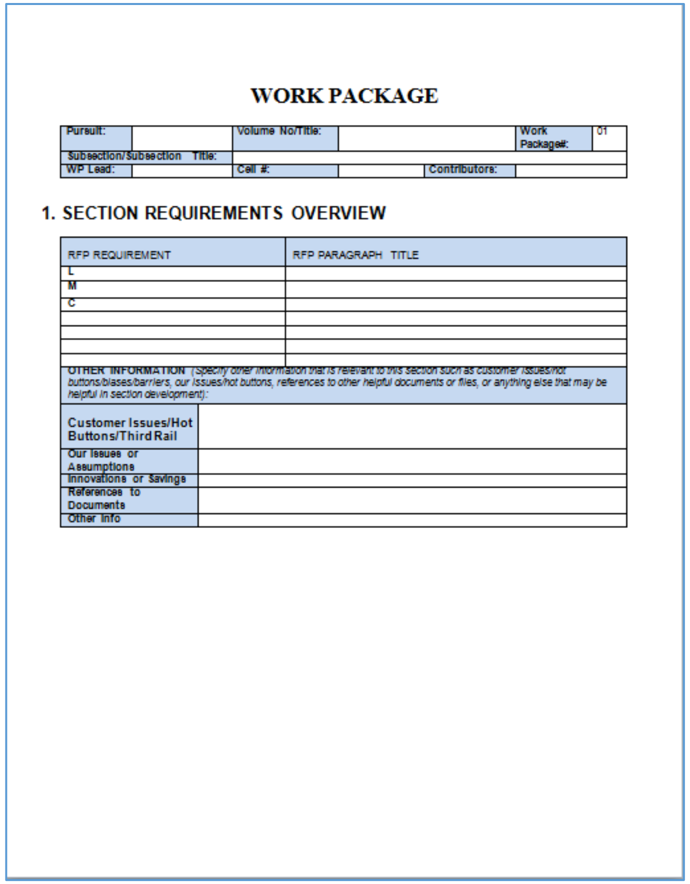
Split Annotated Outline Into Assignments

- "Cut" the annotated outline into sections to allow easier document configuration control and navigation
- Resave the document with a section number and author's name in the file name
- Delete the front matter and portions of the outline that don't apply to that author
- Conduct Pink Team on the multiple sections, but combine the sections into one document in time for the Red Team
- This creates precise "work packages" for the authors

1.1_Executive Summary_Jenn_C
1.2_Technical Intro_and_1.2.2-
1.2.4_Design_and_Construction_John_M
1.2.5_Design_Reviews_Ranita_H
2.0_Management_Intro_and_2.1-
2.2_Organization_Quality_Assurance_Tariq_S

When to Use Standard Work Packages/Storyboards 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	

Traditional Storyboards Pitfalls

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- 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

Standard Work Packages: Part 1

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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					

See **Module 14 – Work Package Example**

Standard Work Packages – Part 2

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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?*

Standard Work Packages – Part 3

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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.**

Standard Work Packages – Part 3 cont.

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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.)

Standard Work Packages – Part 4

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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

Please, Complete an Assignment or Quiz for **Module 14** Prior to Listening to the Next Module

Module 14 Quiz

1. When is it appropriate to use storyboards (or storyboard-like standard work packages) in the proposal process?
   a) When the proposal effort is small and straightforward.
   b) When the proposal is large and complex, potentially spanning hundreds or thousands of pages.
   c) Only when the proposal is under ten pages.
   d) Whenever the proposal requires less detailed instructions.
2. True or False: Work packages created from the sections of the annotated outline allow authors to focus, find their sections faster, and keep easier configuration control.
3. Describe the impact of not having enough time to create an annotated outline on the proposal development process and the potential benefits of opting for work packages in this scenario.

Module 15

Work With Q&A and Amendments

How to Work with Q&A

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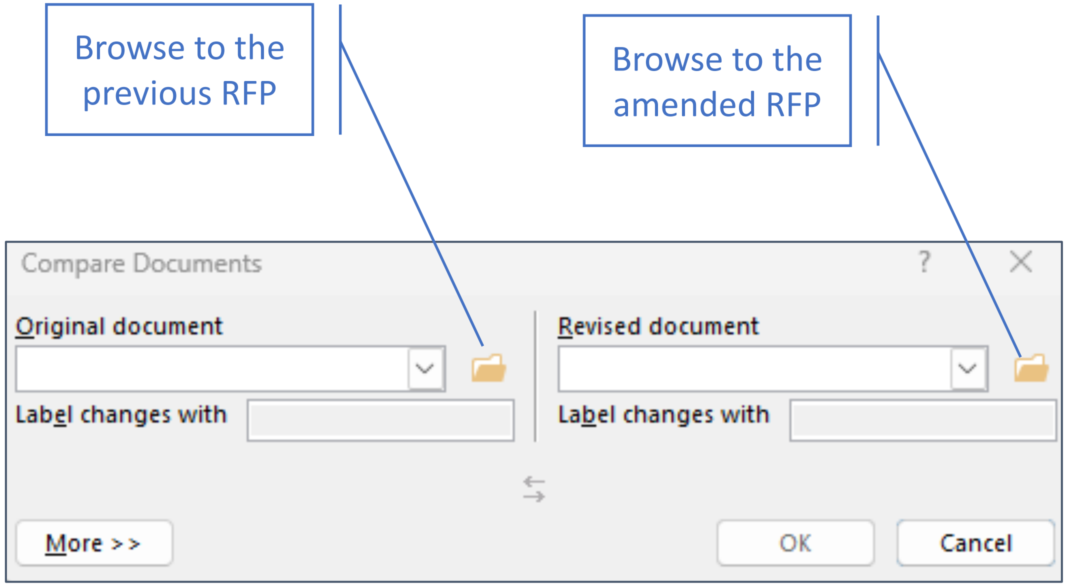
- General rule is: if changes introduced in the Q&A are not incorporated in the conformed RFP, technically the unchanged RFP prevails
  - However, many Contracting Officers have not updated the RFP
  - Always ask the question if the RFP will be updated to be sure you are compliant, and check with the Government if it forgot to add the intended change to the RFP or issue a formal Amendment
- Some Q&As take hours to get through
- Fast navigation techniques:
  - Scan through the answers instead of reading in order (Question – Answer) – often the answer is the same and speeds up the reading
  - Use Search function to find relevant changes first – e.g. “font” or “past performance”
  - Use AI to analyze the document
- Check who may have asked a certain question and why (even though questions must be anonymized)– it may provide insight into a number of competitors, their level of preparation, and identity
- Ask a follow up question if the Government misunderstood or willfully provided a vague or a non-answer to your question (even if it is past the deadline, clarifications are allowed)

Work with an Amendment

- Check the Amendment for changes right away:
  - Some summarize the changes upfront
  - Others may provide the redlines
  - Least helpful ones provide an updated “conformed” solicitation or no solicitation and just the Q&A and Amendment that references the Q&A
- If no summary or redlines are provided, create your own document comparison
  - Export the solicitation from PDF into Word format, if needed
  - Review -> Compare (Compare Two Versions of a Document – Legal Blackline)
- After opening a redlined new document, which may be slow, *uncheck* Formatting redlines for ease of navigation and visibility into changes (go to Review -> Show Markup -> Formatting
- Assess/summarize what changes need to be made to the proposal
- Update the outline and compliance matrix
- Communicate your findings to the proposal team and see if they saw something you may have missed



Please, Complete an Assignment or Quiz for **Module 15** Prior to Listening to the Next Module

Module 15 Quiz

1. What should you do if you notice that changes mentioned in the Q&A are not reflected in the updated RFP?
   a) Assume the Q&A is correct and ignore the unmodified RFP.
   b) Incorporate the changes Q&A introduced and ask if the RFP will be conformed to incorporate the changes via a formal Amendment.
   c) Incorporate the changes Q&A introduced and wait for other competitors to ask for clarification.
   d) Proceed with the original RFP as is, without considering the Q&A, until and if an Amendment is issued.
2. If the government provides a vague or non-answer to a question, what is the suggested course of action?
   a) Accept the vague answer and proceed without further action or changes.
   b) Use the broader team and AI to read into the Government's intent and interpret the answer.
   c) Ask a follow-up question for clarification, even if the original Q&A deadline has passed and a new one was not set.
   d) Try to guess the government's intention and proceed accordingly.
3. If an amendment does not provide a summary of changes or redlines, what is a recommended next step?
   a) Guess the changes based on the most recent Q&A and highlight each one manually.
   b) Ignore the amendment if it does not have a summary.
   c) Ask for another amendment that includes the summary of changes or redlines.
   d) Create your own document comparison to identify changes.

Module 16

Checking Compliance During Reviews

Checking for Instructional Compliance (1)

- Double-check – is the company qualified to bid in the business size standard, business type, and NAICS codes, past performance, key personnel, possession of certain certifications, and other RFP requirements that limit the types of bidders that could bid.
- Start with looking at the proposal table of contents. Check if all the sections that are supposed to be there, are there per the proposal instructions (Section L) – same order, titling, numbering, etc. Did the authors introduce sections that are extraneous and are not supposed to be in the outline? The proposal may need restructuring at an outline level.
- Review evaluation criteria (Section M), and make sure that you can match evaluation factors to proposal sections where they apply. Specifically, identify Section M information that contains instructions or requirements not previously mentioned in proposal instructions (Section L) and check if those are included in the outline and/or are clearly referenced content.
- Check if Section C (SOW/Performance Work Statement (PWS)) requirements are added and mapped back to the RFP where they logically should occur.
- Review all other RFP sections for information that must be included.
- Check compliance with the formatting requirements such as page count, margins, font size/family, shrunken graphics, information required on the title page, front matter, appendixes/placeholders, text in header/footer, proposal due date if there was an extension, etc.

Checking for Instructional Compliance (2)

- Do word searches in the proposal and each section to ensure you didn't miss the compliance words.
- Pay attention to "buried" requirements. The government sometimes require a supporting piece of evidence and point to a subdocument that you must fill out, such as a past performance questionnaire, or a Transition Plan, or a Program Management Plan, or an Attachment providing additional detail. That document may not be listed in RFP instructions that often have a table with a list of all the documents to submit, or as a separate item in the submission requirements summary.
- Flag obscure attachment requests that don't make sense so our brains tend to dismiss them. For example, "include this attachment in PDF and Word formats" – and it's signed teaming agreements.
- Put the requirement in the text comment bubble to show what's missing and what's supposed to be addressed.
- Indicate in your comments if there are redundancies and unnecessary duplication of information.

Reviewer Feedback and Compliance Check: Pink

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Ref	Content	Yo	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

Evaluating Technical Compliance is the Toughest

- Dive deeper into the proposal content to judge technical compliance at a level of "responsiveness" to ensure the proposal doesn't simply regurgitate the RFP
- For example, if per the instructions, the big three narrative elements for management and operations are:
  - Understanding of the Requirements
  - Approach/Methodologies
  - Demonstrated Capability
- Your first test is – did the section include all three? Then, move in deeper.
  - In the Understanding of the Requirement discussion, did the proposal highlight customer knowledge, focus on customer's pain points and weaknesses, and convincingly articulate their vision for their mission?
  - In the Approach/Methodologies, did the section answer everything that's required in the RFP instructions (Section L) in enough detail?
- Walk through the RFP requirements in the SOW/PWS and check if the technical solution meets all SOW/PWS elements and it goes beyond WHAT will be done. Review the proposal and ensure it answered the other "W" questions? Why, Who, How, When, Where, and Wow?
- In the HOW, did the section specifically discuss what processes and tools will be used, and any innovative processes or technologies that benefit the customer?
- Did the proposal use the RFP language? If not, and the narrative is unconvincing, it is probably not responsive.
- Where it comes to Demonstrated Capability, did the proposal show how the company successfully applied their approach on similar past projects? To what good results? Is the success quantifiable in hard statistics? Are customer satisfaction ratings or Excellent CPARS touted? Are customer kudos cited? Are there other quantified statistics, or is that discussion missing?

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

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Check for Administrative Compliance

- Administrative Compliance Check may happen before the Gold team or at Production/White Glove and Final Compliance Check.
- Are all the forms and attachments/appendices included, with original/copy signatures?
- Is everything filled out correctly?
- Review Representations and Certifications (Section K) requirements and fill-ins or substituted SAM compliance statement if allowed.
- Were all the amendments that were issued referenced in the proposal? Are they all acknowledged in the way that the RFP requires (via signed copies, SF 1449 form, and/or text response)?
- Check the requirements for Cover or Transmittal Letter and ensure it contains the right information and is signed.
- Check all Section J Attachments and ensure that all required forms such as DD-254 are completed/signed.
- Make sure the files are the right type and size and are named per the RFP instructions, and open.
- Make sure original is there and copies are numbered correctly on proposal cover pages in a physical submission.
- Manually count to double-check that page counts aggregate correctly.

Final Compliance Check

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- 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" to check again after you feel that it is completely unnecessary and you feel stupid for checking

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 16 - Proposal_Production Checklist Example

Please, Complete an Assignment or Quiz for **Module 16** Prior to Listening to the Next Module

Module 16 Quiz

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1. Fill in the Blank:
   a) Checking for _________ compliance often involves ensuring that the proposal does not simply repeat RFP language but provides a substantive response.
   b) During the final compliance check, it is important to create a _________ checklist to ensure nothing is missed before submission.
2. True or False? Administrative compliance checks should only be conducted during the Pink Team review phase.
3. What is the result of not addressing 'buried' requirements in a proposal?
   a) The proposal may be seen as more innovative.
   b) The proposal may be disqualified for non-compliance.
   c) The proposal will likely receive extra points for brevity.
   d) The proposal will automatically pass to the final round of evaluations.
4. What is the purpose of the "quadruple-check" mentioned in the Final Compliance Check?

Recap

- What are the three types of proposal compliance?
- 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 standardized work packages or storyboards?
- What is your biggest takeaway from this class?

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