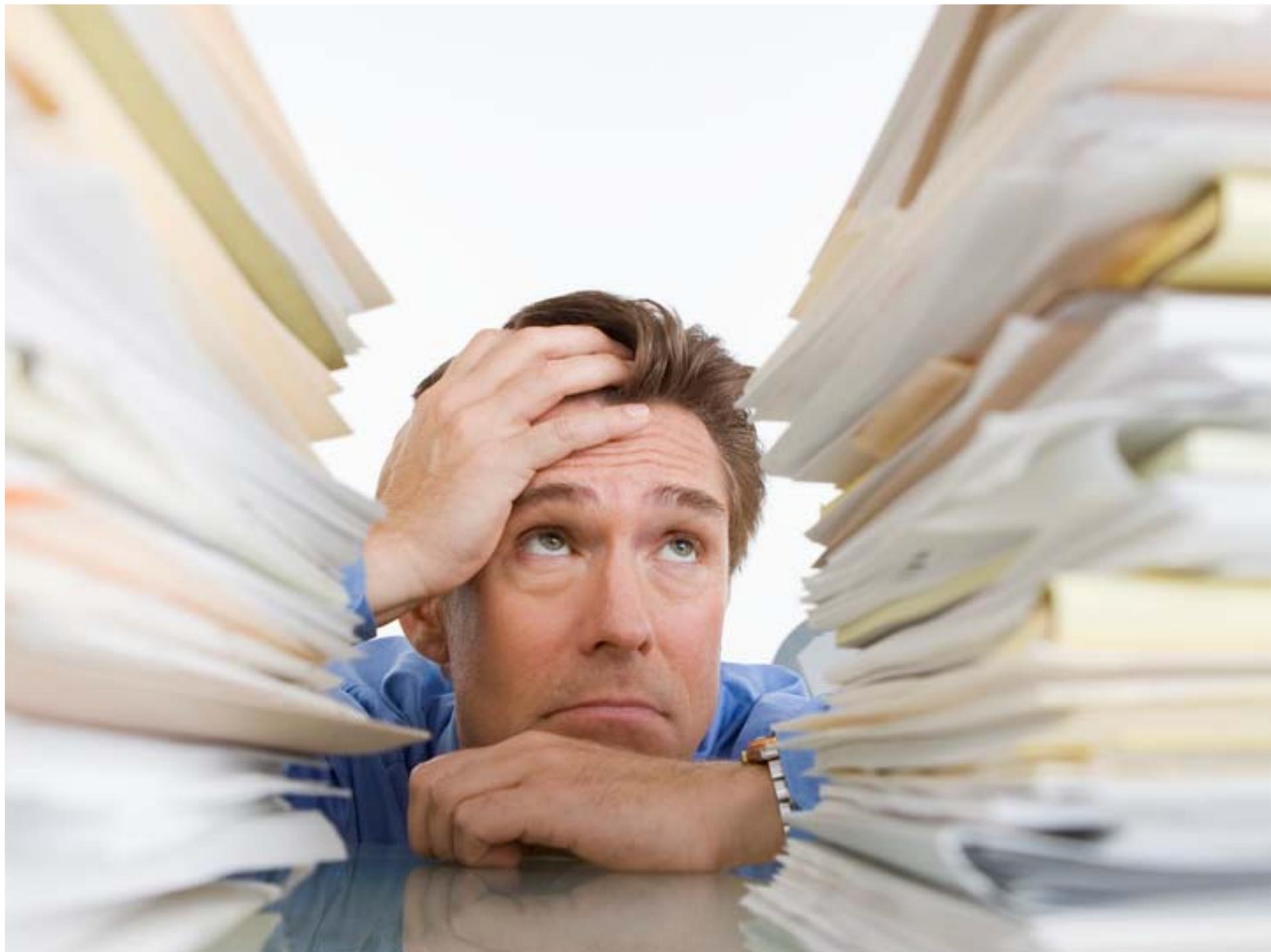


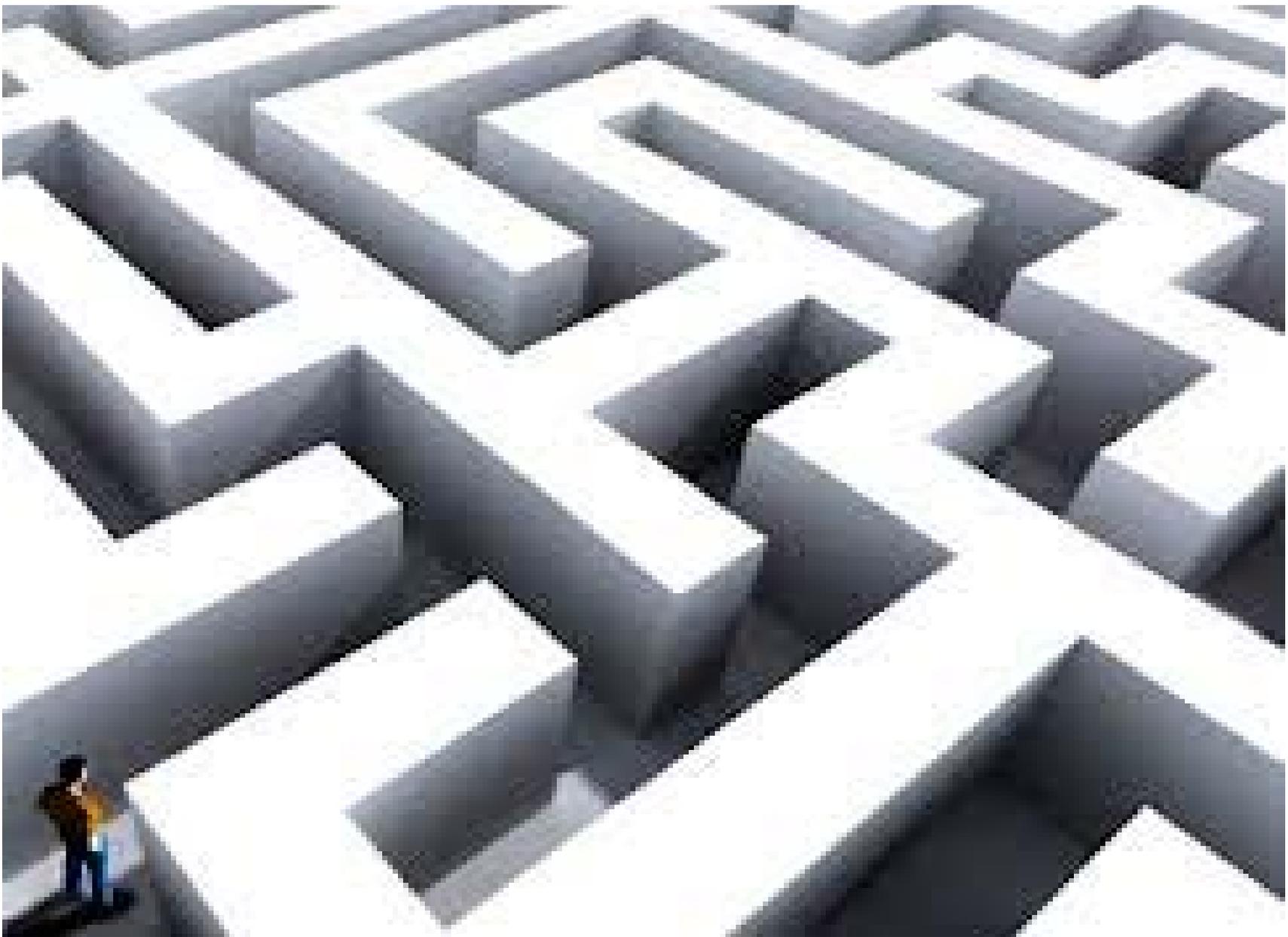


# Understanding Government Solicitations & Writing Your Bid Proposal

PTAC Symposium  
October 22, 2013

Chuck Spence  
Deputy Director, PTAC

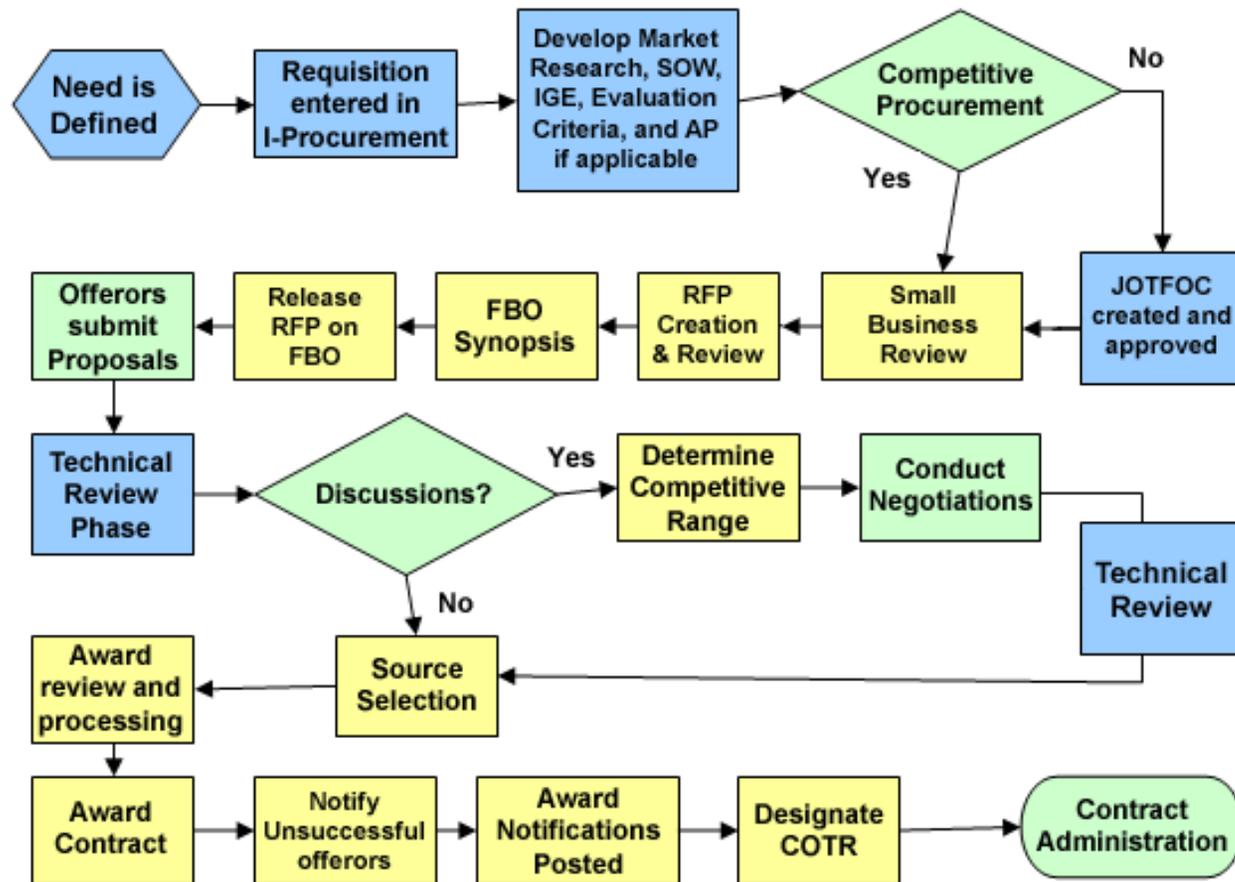




**MAKING  
SENSE OF IT  
ALL**



# Steps of a Formal Acquisition



# Acronyms Used in Gov't Procurement

- BAFO
- BPA
- COTR
- D&B
- EEO
- EPA
- EPLS
- FAR
- FBO
- RFQ
- SBIR
- SIN
- T&C
- WAWF
- DUNS
- BOA
- CO
- CPARS
- DBA
- EEOC
- EPEAT
- EISA
- FAS
- FFATA
- SAM
- SCA
- SOW
- USC
- ACO
- EDI
- FSC
- GSA
- IDIQ
- LEED
- MFC
- NAICS
- ORCA
- PSC
- RFI
- eSRS
- ISR
- NIB
- PCO
- UNICOR
- FSS
- GWAC
- JWAD
- MAS
- MOBIS
- OMB
- OSDBU
- PWS
- RFP
- FEMP
- MAS
- NISH
- PTAC
- PCR



**MAKING  
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ALL**



# Uniform Contract Format = Table of Contents

- **Part I – The Schedule**
- A - Solicitation/Contract Form
- B - Products or Services and Prices/Costs
- C - Description/Specifications/Statement of Work
- D - Packaging and Marking
- E - Inspection and Acceptance
- F - Deliveries or Performance
- G - Contract Administration Data
- H - Special Contract Requirements
- **Part II - Contract Clauses**
- I - Contract Clauses
- **Part III - List of Documents, Exhibits, and Other Attachments**
- J - List of Attachments
- **Part IV – Representations and Instructions**
- K - Representations and Certifications, and Other Statements of Offerors
- L - Instructions, Conditions, and Notice to Offerors (Provisions)
- M - Evaluation Factors for Award

# WHAT A SOLICITATION LOOKS LIKE

- A. Contract Form
- B. Price/Costs for Services/Supplies
- C. Statement of Work
- D. Packaging
- E. Inspection & Acceptance
- F. Deliveries or Performance
- G. Contract Admin Data
- H. Special Contract Requirements
- I. Contract Clauses
- J. Attachments
- K. Reps & Certs
- L. Instructions
- M. Evaluation Factors for Award

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<b>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS</b> <i>OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, &amp; 30</i>				1. REQUISITION NUMBER	PAGE 1 OF
2. CONTRACT NO.	3. AWARD/EFFECTIVE DATE	4. ORDER NUMBER	5. SOLICITATION NUMBER	6. SOLICITATION ISSUE DATE	
7. FOR SOLICITATION INFORMATION CALL:		a. NAME	b. TELEPHONE NUMBER (No collect calls)	8. OFFER DUE DATE/ LOCAL TIME	
9. ISSUED BY		CODE	10. THIS ACQUISITION IS <input type="checkbox"/> UNRESTRICTED OR <input type="checkbox"/> SET ASIDE: _____ % FOR: <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM NAICS: <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> EDWOSB <input type="checkbox"/> 8 (A) SIZE STANDARD:		
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS		13b. RATING	
15. DELIVER TO		CODE	16. ADMINISTERED BY		CODE
17a. CONTRACTOR/OFFEROR		CODE	FACILITY CODE	18a. PAYMENT WILL BE MADE BY	
TELEPHONE NO.		17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER <input type="checkbox"/>		18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM	
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES		21. QUANTITY	22. UNIT PRICE	23. UNIT PRICE
					24. AMOUNT
<i>(Use Reverse and/or Attach Additional Sheets as Necessary)</i>					
25. ACCOUNTING AND APPROPRIATION DATA			26. TOTAL AWARD AMOUNT (For Govt. Use Only)		
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4, FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA			<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED		
<input type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4, FAR 52.212-5 IS ATTACHED. ADDENDA			<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED		
<input type="checkbox"/> 28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND			<input type="checkbox"/> 29. AWARD OF CONTRACT: REF. _____ OFFER DATED _____ YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:		
DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED					
30. SIGNATURE OF OFFEROR/CONTRACTOR			31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)		
30b. NAME AND TITLE OF SIGNER (Type or print)		30c. DATE SIGNED	31b. NAME OF CONTRACTING OFFICER (Type or print)		31c. DATE SIGNED

## Section B. Products/Services & Prices/Costs = Summary of Items Purchased & Price

- Usually a list with blanks to fill in the Price Per Unit and Total for each product or service purchased
- Acts like a summary of your pricing
- Pay attention to CLINs (Contract Line Item Numbers)

<u>Item #</u>	<u>DESCRIPTION</u>	<u>Qty</u>	<u>Unit</u>	<u>Price/Unit</u>	<u>Total</u>
0001	(PA640 Lightbar and siren controller, siren speaker with bracket, headlight flasher and controller	2	ea	\$_____	\$_____
0002	425-6137 Console for 2013 Dodge Challenger	2	ea	\$_____	\$_____
0003	(5081) Push Bumper	2	ea	\$_____	\$_____

# Section C. Schedule of Supplies/Statement of Work = What they're buying

- Defines the requirement
  - List or Narrative
  - May be a separate attachment
  - Skim Document for:
    - "Schedule of Supplies",  
"Statement of Work",
    - "Descriptions & Specifications"
    - "Description of Services"
    - "Performance Work Statement"
    - Or Other
- PWS Example: Hill AFB – Snow Removal
    - 1. The Contractor shall:
      - a. Provide the equipment, service parts, and manpower to operate and repair Contractors own equipment (temporary lighting, generators, snow blowers, loaders, trucks, cutting edges, and etc.) needed for expedient snow removal.
      - b. Shall be on call, or on report on an as-needed basis.
      - c. Contractor shall provide equipment used and man-hours ticket(s) to the Project Manager for tracking hours.
      - d. Shall arrive on the work site within one hour of notification by the Project Manager for the Snow Removal contract. (*The Pavements/Snow barn Supervisor will notify the Project Manger at cell # (801) 430-6192*).
      - e. Remove snow from the areas designated by the Contracting Officer's representative at Hill Air Force Base, Utah. Snow is not to be plowed against docking areas, dumpsters, fire hydrants, fences, or as to block driveways or sidewalks. During a heavy snowfall it may required for snow to be loaded on trucks and deposited at a site designated by the Contracting Officer's representative at Civil Engineering.
      - f. Contractor shall provide service to the following priority areas for the 309th parking concerns:
        - 1. 849 parking lot
        - 2. Lot 1
        - 3. Bldg 100 West lot
        - 4. Southgate Ave West parking lot
        - 5. Bldg 238 Southside parking lot
        - 6. Bldg 847 parking lot

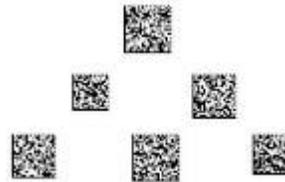
## Section C. Schedule of Supplies/Statement of Work = What they're buying

- Is this something I make/do?
- **Quantity**=> is the opportunity too big? too small?
- **Due Date**=> is there enough time to do/make what they want?
- **Drawings**=> are they available?
- **Set-aside**=> is this me?
- Material Needs
- Personnel Needs
- Pricing Factors
- Packaging Requirements\*
- Shipping Time Required\*
- Hints of Preference
- [i.e. "Travel expenses not allowable." or "Local presence required."]
- \*May be in other sections.



## Section D. Packaging and Marking

- Is RFID required?
- Is UID required?
- Mil-Spec Packaging required?
- Do you need to outsource packaging? If so, who will you call?



## Section E. Inspection and Acceptance

- First Article Inspection Required?
- DCMA audit required?
- Inspection on-site or off-site?
- Inspection and Acceptance **WILL** affect pricing. This is a **MAJOR** mistake a lot of contractors make!



## Section F. Delivery or Performance

- BEFORE responding, make sure to consider WHEN and WHERE the product or service must be delivered or performed.
- Are travel expenses allowed?
- These factors WILL affect PRICE!

# Section G. Contract Administration Data

- How to manage the contract (the paperwork, not the work)
- Does the client have the right ACCOUNTING SYSTEMS in place?
- Does the client have the right FILING SYSTEM in place? \*\*Keep government files separate from others whenever possible!\*\*
- Allowable Expenses
- Tracking Direct and Indirect Costs



# Section H. Special Contract Requirements

- Could be anything!
- Miss these and your proposal is going straight into the "round file"

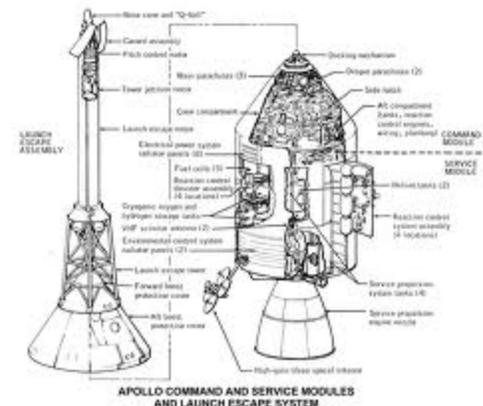


# Section I. Contract Clauses

- Laws/statutes that apply to the contract action
- Can be confused with provisions (found in Section L), which require information/response from the Offeror
- Set-asides
- Subcontracting rules
- FOB origin? destination?
- WARNING! This is the stuff contractors try to skip over & it gets them into BIG trouble!

# Section J. Attachments (i.e. Technical Specs, Drawings, etc)

- Provide technical information about the requirement:
  - Measurements
  - Scientific Data
  - Drawings
  - Tolerances
- Usually a separate attachment



## Section K. Reps & Certs – (ORCA)

- Must verify that ORCA is complete or answer the ORCA questions now.
- There are questions specific to the contract that don't appear in ORCA. These must be answered or the proposal goes into the round file!

# Section L. Instructions, Conditions & Notices to Offerors

- Often confused with Clauses (found in Section I), but these require information/response from the Offeror
- Read Clauses & Provisions early. They may affect pricing.
- INSTRUCTIONS TO OFFEROR
  - type of paper
  - size of font
  - page restrictions
  - where to submit proposal
  - number of copies and originals

# Section M. Evaluation Factors for Award

- READ CAREFULLY!
- Evaluation factors will tell you if the buyer is more interested in PRICE, TECHNICAL CAPABILITY or SOMETHING ELSE.
- Write the proposal with a focus on the factors the buyer considers valuable
- COMPARE the Scope of Work with the Evaluation Factors to make sure you don't miss anything.



# Components of a Proposal

- Past Performance
- Past Experience
- Key Personnel
- Technical Approach
- Management Approach
- Small Business Subcontracting Plan/Approach
- Programs (i.e. Safety Program or QA Program)
- Price
  
- (See your PTAC Counselor for details)

# Proposal Writing Tips

- READ
- READ
- READ

Contracting Officers say most mistakes are made because contractors didn't **READ** the full solicitation

# Proposal Writing Tips

- Highlight Important Information
- Read Again and Using a Colored Pen, Underline Proposal Actions Which Require You to Respond to
  - (Hint: look for language like “Offeror will” “Offeror Shall” “Contractor must” etc.
- Bid/No Bid Decision

# Proposal Writing Tips

- Consider “win” themes and “distinguishers” that set you apart from your competitors
- Address Risk Factors and your approach to mitigating those risks
- Highlight experience and performance success stories throughout proposal to demonstrate key points
- Notify clients if you have submitted them as references and explain their responsibilities and timelines

# Proposal Writing Tips

- Create a proposal “Depository”
  - Resumes – keep current
  - Organization Chart
  - Previous proposal documents as a general template
  - Have all teaming partners information in your depository (e.g., subcontractors, suppliers, etc.)
  - Stay on top of personnel training requirements
  - Maintain your company information

# Proposal Writing Tips

- Check for ALL Amendments to the solicitation
- Package according to solicitation instructions (typically Price Volume is packaged separately from Technical Volume)
- Confirm the shipping address in solicitation
- Call to confirm CO has physically received package(s)

# Proposal Writing Tips

- Complete Forms (if required)
- Write It! (first draft is always the hardest to write)
- Be sure to include answers to everything asked and in as many places as necessary.
- Respond (write) in the sequence/order that is asked for AND, write with the evaluation factors in mind (Section M)

THE END

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Questions