Doing Business with the US Government

By Thomas A. Gerke
PTAC Regional Manager

Francene Bielik
Logistics Specialties (LSI)
The How and Why
Business to Government Overview (B2G)

- The United States Government is the world’s largest purchaser of goods and services
- Defense spending in the US is huge
- Business to Government selling has its own unique set of rules
- Knowing these rules is a differentiator
- When dealing with a risk-adverse client, it is a best practice to physically be there
- Know your customer
Business to Government Selling

• B2G selling is a business decision
• There are a variety of sources for obtaining contracts
• One strategic advantage many government contractors have is the General Service Administration (GSA) Schedule
  • U.S. companies must comply with the basic requirements
Why Business to Government (B2G)

• The United States Federal Government is the largest purchaser of goods and services in the WORLD
• $3.67 Trillion
• $600 Billion annually on Defense alone

Defense Spending in $Millions
## US Federal Industry Leaders 2019

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Dollars Obligated (Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Lockheed Martin</td>
<td>$48,666</td>
</tr>
<tr>
<td>2.</td>
<td>Boeing Company</td>
<td>$28,029</td>
</tr>
<tr>
<td>3.</td>
<td>General Dynamics Corp</td>
<td>$20,961</td>
</tr>
<tr>
<td>4.</td>
<td>Raytheon Company</td>
<td>$16,351</td>
</tr>
<tr>
<td>5.</td>
<td>Northrop Grumman Corp</td>
<td>$16,101</td>
</tr>
<tr>
<td>6.</td>
<td>McKesson Corp</td>
<td>$9,640</td>
</tr>
<tr>
<td>7.</td>
<td>United Technologies Corp</td>
<td>$8,849</td>
</tr>
<tr>
<td>8.</td>
<td>Huntington Ingalls Industries</td>
<td>$7,617</td>
</tr>
<tr>
<td>9.</td>
<td>Leidos Holdings Inc</td>
<td>$7,272</td>
</tr>
<tr>
<td>10.</td>
<td>L3 Harris Technologies</td>
<td>$6,878</td>
</tr>
</tbody>
</table>
Who are Your Potential Customers

- The USG buys goods and services
  - Toothbrushes to tanks and everything in between
- More than half of the US budget goes to military

GCI Proprietary Information
Contract Vehicles – Multiple Award

- GSA Schedules
  - MAS Consolidated Schedule (formerly 24 individual schedules)
  - 9 individual VA FSS GSA Schedules (Medical)
- GSA Government Wide Acquisition Contract (GWAC)
  - STARSII, Alliant, Vets 2, Polaris
- Agency Multiple Award (MA) Indefinite Delivery/Indefinite Quantity (IDIQ)
  - Clinical Acquisition for Support Services (CLASS) program
    - Air Force Medical Service (AFMS)
  - CDID contact for professional, scientific and technical services and support
    - United States Army Military Intelligence Center of Excellence (USAICoE), Capabilities Development and Integration Directorate (CDID), Fort Huachuca, Arizona
- Federal procurement through MACs totaled $115 billion in 2014, more than a quarter of all prime contract spending
When do they Buy

• Fiscal year runs from October 1 to September 30
• Typically peaks at end of fourth quarter, however; there is a push at some federal agencies to obligate the money well before Sep 30.
• “Use it or lose it”
Where do They Advertise

beta.sam.gov

- beta.Sam.gov is the single government point-of-entry (GPE) for federal government procurement opportunities over $25,000.

- Government buyers publicize their business opportunities by posting information directly beta.Sam.gov via the internet.

- It also lists possible future federal contract opportunities. All General Services Administration solicitations are listed on beta.sam
  - GSA MAS Schedule solicitations are listed on eBuy which is only open to GSA Schedule holders
Strategic Positioning

• Search for and understand your competition
• Market Research - Determine which agencies may be better suited and equipped to purchase your solutions than others
• Narrow your target client to the top three agencies best aligned for your product/service
  • Their budget
  • Your budget
  • Your contacts within the agency
The Basic Rules

• The Federal Acquisition Regulations System is established for the codification and publication of uniform policies and procedures for acquisition by all executive agencies. The Federal Acquisition Regulations System consists of the Federal Acquisition Regulation (FAR), which is the primary document, and agency acquisition regulations that implement or supplement the FAR. The FAR System does not include internal agency guidance of the type described in 1.301(a)(2).

• Part 1.301(a)(2) Subject to the authorities in paragraph (c) of this section and other statutory authority, an agency head may issue or authorize the issuance of internal agency guidance at any organizational level (e.g., designations and delegations of authority, assignments of responsibilities, work-flow procedures, and internal reporting requirements).
# FAR Supplements

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title, Department/Agency</th>
</tr>
</thead>
</table>
| 1: FAR  | Federal Acquisition Regulation  
U.S. Government |
| 2: DFARS| Defense Federal Acquisition Regulation Supplement  
Department of Defense |
| 3: HHSAR| Health and Human Services Acquisition Regulation  
Department of Health and Human Services |
| 4: AGAR | Agriculture Acquisition Regulation  
Department of Agriculture |
| 5: GSAR | General Services Acquisition Regulation  
General Services Administration |
| 6: DOSAR| Department of State Acquisition Regulation  
Department of State |
| 7: AIDAR| Agency for International Development Acquisition Regulation  
Agency for International Development |
| 8: VAAR | Veterans Affairs Acquisition Regulation  
Department of Veterans Affairs |
| 9: DEAR | Department of Energy Acquisition Regulation  
Department of Energy |
| 10: DTAR| Department of the Treasury Acquisition Regulation  
Department of the Treasury |
# FAR Supplements (con’t)

<table>
<thead>
<tr>
<th>Supplement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>12: TAR</strong></td>
<td>Department of Transportation Acquisition Regulation&lt;br&gt;Department of Transportation</td>
</tr>
<tr>
<td><strong>13: CAR</strong></td>
<td>Department of Commerce Acquisition Regulation&lt;br&gt;Department of Commerce</td>
</tr>
<tr>
<td><strong>14: DIAR</strong></td>
<td>Department of the Interior Acquisition Regulation&lt;br&gt;Department of the Interior</td>
</tr>
<tr>
<td><strong>15: EPAAR</strong></td>
<td>Environmental Protection Agency Acquisition Regulation&lt;br&gt;Environmental Protection Agency</td>
</tr>
<tr>
<td><strong>16: FEHBAR</strong></td>
<td>Federal Employees Health Benefits Acquisition Regulation&lt;br&gt;Office of Personnel Management</td>
</tr>
<tr>
<td><strong>18: NFS</strong></td>
<td>NASA FAR Supplement&lt;br&gt;National Aeronautics and Space Administration</td>
</tr>
<tr>
<td><strong>19: IAAR</strong></td>
<td>Broadcasting Board of Governors Acquisition Regulation&lt;br&gt;Broadcasting Board of Governors (was U.S. Information Agency)</td>
</tr>
<tr>
<td><strong>20: NRCAR</strong></td>
<td>Nuclear Regulatory Commission Acquisition Regulation&lt;br&gt;Nuclear Regulatory Commission</td>
</tr>
</tbody>
</table>
## FAR Supplements (con’t)

<table>
<thead>
<tr>
<th>Number</th>
<th>Supplement</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>21: LIFAR</td>
<td>Federal Employees’ Group Life Insurance Federal Acquisition Regulation</td>
<td>Office of Personnel Management</td>
</tr>
<tr>
<td>24: HUDAR</td>
<td>Department of Housing and Urban Development Acquisition Regulation</td>
<td>Department of Housing and Urban Development</td>
</tr>
<tr>
<td>28: JAR</td>
<td>Department of Justice Acquisition Regulation</td>
<td>Department of Justice</td>
</tr>
<tr>
<td>29: DOLAR</td>
<td>Department of Labor Acquisition Regulation</td>
<td>Department of Labor</td>
</tr>
<tr>
<td>30: HSAR</td>
<td>Department of Homeland Security Acquisition Regulation</td>
<td>Department of Homeland Security</td>
</tr>
<tr>
<td>34: EDAR</td>
<td>Department of Education Acquisition Regulation</td>
<td>Department of Education</td>
</tr>
<tr>
<td>51: AFARS</td>
<td>Army Federal Acquisition Regulation Supplement</td>
<td>U.S. Army</td>
</tr>
</tbody>
</table>
## FAR Supplements (con’t)

<table>
<thead>
<tr>
<th>FAR Supplement Code</th>
<th>Description</th>
</tr>
</thead>
</table>
| 52: NMCARS          | Navy Marine Corps Acquisition Regulation Supplement  
                      | U.S. Navy Marine Corps |
| 53: AFFARS          | Air Force Federal Acquisition Regulation Supplement  
                      | U.S. Air Force |
| 53: AFMCFARS        | Air Force Materiel Command FAR Supplement  
                      | U.S. Air Force |
| 53: AFSPCFARS       | Air Force Space Command Supplement  
                      | U.S. Air Force |
| 54: DLAD            | Defense Logistics Acquisition Directive  
                      | Defense Logistics Agency |
| 55: TRANSFARS       | U.S. Transportation Command Acquisition Regulation Supplement  
                      | U.S. Transportation Command |
| 56: SOFARS          | U.S. Special Operations Command Federal Acquisition Regulation Supplement  
                      | U.S. Special Operations Command |
The Procurement Process

• Pre Solicitation
  • Request for Information
  • Sources Sought
  • Phase One - Opt-in
  • Industry Days

• Solicitation
  • A solicitation is a request to submit offers or quotes to the USG
  • “Offer” means a response to a solicitation that, if accepted, would bind the offeror to perform on the resultant contract
  • There are different kinds of solicitations
Solicitations Types

- Request for Quotes (RFQs)
  - Solicitations under Simplified Acquisition Procedures
- Request for Proposals (RFPs)
  - Solicitations under competitive or negotiated procedures
  - Negotiated acquisitions
    - Will describe the government's requirements, terms and conditions, information required in the proposal, and evaluation factors.
- Invitation for Bid (IFB)
  - Sealed bid procedures
    - There are typically no discussions or negotiations with the government buying office. Price is key consideration.
The Solicitation
Solicitation Forms

- FAR Subpart 53.200
- Scope of subpart.

This subpart prescribes standard forms and references optional forms and agency-prescribed forms for use in acquisition. Consistent with the approach used in Subpart 52.2, this subpart is arranged by subject matter, in the same order as, and keyed to, the parts of the FAR in which the form usage requirements are addressed. For example, forms addressed in FAR Part 14, Sealed Bidding, are treated in this subpart in section 53.214, Sealed Bidding; forms addressed in FAR Part 43, Contract Modifications, are treated in this subpart in section 53.243, Contract modifications. The following example illustrates how the subjects are keyed to the parts in which they are addressed:

- FAR 53.212 Acquisition of commercial items.
- SF 1449 (Rev. 2/2012), Solicitation/Contract/Order for Commercial Items. SF 1449 is prescribed for use in solicitations and contracts for commercial items. Agencies may prescribe additional detailed instructions for use of the form.
- FAR 53.213 Simplified acquisition procedures (SF’s 18, 30, 44, 1165, 1449, and OF’s 336, 347, and 348).
Acquisition of commercial items (FAR 53.212)

- SF 1449 (Rev. 2/2012), Solicitation/Contract/Order for Commercial Items.
- SF 1449 is prescribed for use in solicitations and contracts for commercial items. Agencies may prescribe additional detailed instructions for use of the form.
Simplified acquisition procedures
(SF’s 18, 30, 44, 1165, 1449, and OF’s 336, 347, and 348)
(FAR 53.213)

- SF 18 (Rev. 6/95), Request for Quotations, or SF 1449 (Rev. 2/2012)
- SF 30 (Rev. 10/83), Amendment of Solicitation/ Modification of Contract
- SF 44 (Rev. 10/83), Purchase Order Invoice Voucher
- SF 1165 (6/83 Ed.), Receipt for Cash-Sub-voucher
- OF 336 (4/86 Ed.), Continuation Sheet. OF 336
- SF 1449 (Rev. 2/2012) Solicitation/Contract/Order for Commercial Items
Contracting by Negotiation (FAR 53.215)

- SF 26 (Rev. 3/2013), Award/Contract
- SF 30 (Rev. 10/83), Amendment of Solicitation/Modification of Contract.
- SF 33 (Rev. 9/97), Solicitation, Offer and Award
- OF 17 (Rev. 12/93), Offer Label
- OF 308 (Rev. 9/97), Solicitation and Offer-Negotiated Acquisition
- OF 309 (Rev. 9/97), Amendment of Solicitation.
Representative Contract Forms

- SF 1449 (Rev. 2/2012), Solicitation/Contract/Order for Commercial Items. SF 1449 is prescribed for use in solicitations and contracts for commercial items. Agencies may prescribe additional detailed instructions for use of the form.
- SF 33 (Rev. 9/97), Solicitation, Offer and Award.
- SF 33, prescribed in 53.214(c), may be used in connection with the solicitation and award of negotiated contracts. Award of such contracts may be made by either OF 307, SF 33, or SF 26, as specified in 53.214(c) and 15.509.
- Contract modifications (SF 30).
- SF 30 (Rev. 10/83), Amendment of Solicitation/ Modification of Contract. SF 30 is prescribed for use in amending invitation for bids, as specified in 14.208; modifying purchase and delivery orders, as specified in 13.302-3; and modifying contracts, as specified in 42.1203(h), 43.301, 49.602-5, and elsewhere in this regulation. The form may also be used to amend solicitations for negotiated contracts, as specified in 15.210(b)
The Solicitation – Standard Form (SF) 1449
Standard Form (SF) 1449

• When using the SF 1449, the contracting representative must complete solicitation blocks 1, 5, 6, 7a&b, 8, 9, 10, 11, 13a&b, 14, 15, 19-22, 27a, 28, and part (b)
• The offeror must complete blocks, 12, 17, 23, 24, and 30
Page number is usually in the form of “X of XX” pages
Block 2 – Contract Number

- A contract number is referred to as a procurement instrument identification (PII) number and is assigned IAW DFARS 204.70
- The number consists of 13 alpha-numeric characters grouped to convey certain information.
- Positions 1 - 6. Identify the department/agency and office issuing the instrument using the DoD Activity Address Code (DoDAAC)
- Positions 7-8 are the last two digits of the fiscal year of issuance
- Position 9 is the type of instrument
- Position 10-13 is the serial number
Block 3 – Award/Effective Date

This will be on or after the date the Contracting Officer signs the contract or purchase order.
Block 4 – Order No

Used when making a purchase under a Blanket Ordering Agreement (BPA)
Note: A BPA is not a contract
Block 5 – Solicitation Number

- This is assigned IAW DFARS 204.70
- The number consists of 13 alphanumeric characters grouped to convey certain information.
- Positions 1 - 6. Identify the department/agency and office issuing the instrument using the DoD Activity Address Code (DoDAAC)
- Positions 7-8 are the last two digits of the fiscal year of issuance
- Position 9 is the type of instrument
- Position 10-13 is the serial number
Block 6 Issue Date

Block 6 Issue date is self explanatory.

Block 8 The due date is show using the local time of the contracting officer.
Block 7a & b – Name and Telephone Number

- Both blocks 7a and 7b are completed as part of the solicitation.
- Normally block a is either the buyer or the contracting officer.
Block 8 Due Date

• Local Time is also included in the due date
• Offers are date and time stamped upon receipt at the contracting office
• Late proposals are not evaluated
Block 9 – Issued By and Code

- Name
- Buyer code
- Address
- DoDACC (address code)
Block 10 - This Acq. is ....

- FAR Subpart 19.5-Set-Aside for Small Business
  (a) The purpose of small business set-asides is to award certain acquisitions exclusively to small business concerns. A "set-aside for small business" is the reserving of an acquisition exclusively for participation by small business concerns. A small business set-aside may be open to all small businesses. A small business set-aside of a single acquisition or a class of acquisitions may be total or partial.
Block 11 – Delivery for FOB

- This will almost always be left blank
- Additional delivery instructions will be in the continuation sheets
15 CFR 700.3 - Priority ratings and rated orders.

(a) Rated orders are identified by a priority rating and a program identification symbol. Rated orders take precedence over all unrated orders as necessary to meet required delivery dates. Among rated orders, DX rated orders take precedence over DO rated orders. Program identification symbols indicate which approved program is attributed to the rated order.

(b) Persons receiving rated orders must give them preferential treatment as required by this part.

(c) All rated orders must be scheduled to the extent possible to ensure delivery by the required delivery date.

(d) Persons who receive rated orders must in turn place rated orders with their suppliers for the items they need to fill the orders. This provision ensures that suppliers will give priority treatment to rated orders from contractor to subcontractor to suppliers throughout the procurement chain.

(e) Persons may place a priority rating on orders only when they are in receipt of a rated order, have been explicitly authorized to do so by the Department of Commerce or a Delegate Agency, or are otherwise permitted to do so by this part.
Block 14 – Method of Solicitation

- Request for Quote
- Invitation for Bid
- Request for Proposal
Block 15 – Delivery Address

The Contracting Office inserts the place of delivery and, in the “Code” box, the AAC/DoDAAC for the receiving activity.

Note: Might also refer you to the schedule
Block 19-22

For each contract line item established and numbered in accordance with the criteria in DFARS 204.7103, insert the line item number, description of supply and/or service sought, quantity, and unit of issue.

Note: Might also refer you to the schedule
Blocks 27 a and b can be checked if these FAR items are incorporated.

- 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1. 52.212-4. FAR 52.212-3. 52.212-5 ARE ATTACHED.
- 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED.
Block 28

• Block 28 is checked if:

CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN TO THE ISSUING OFFICE. With copies
Instrument Codes
Position 9 – Type of Instrument

<table>
<thead>
<tr>
<th>Position 9</th>
<th>Type of Instrument</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>Blanket purchase agreements</td>
</tr>
<tr>
<td>B</td>
<td>Invitations for bids</td>
</tr>
<tr>
<td>C</td>
<td>Contracts of all types except indefinite-delivery contracts, sales contracts, and short form research contracts. Do not use this code for contracts or agreements with provisions for orders or calls</td>
</tr>
<tr>
<td>D</td>
<td>Indefinite delivery contracts</td>
</tr>
<tr>
<td>E</td>
<td>Reserved</td>
</tr>
<tr>
<td>F</td>
<td>Calls against blanket purchase agreements and orders under contracts (including Federal Supply Schedules, Government wide acquisition contracts, and multi-agency contracts) and basic ordering agreements issued by departments or agencies outside DoD. Do not use the ‘F’ designation on DoD-issued purchase orders, contracts, agreements, or orders placed under DoD-issued contracts or agreements</td>
</tr>
</tbody>
</table>
Position 9 – Type of Instrument (con’t)

<table>
<thead>
<tr>
<th>Position</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>G</td>
<td>Basic ordering agreements</td>
</tr>
<tr>
<td>H</td>
<td>Agreements, including basic agreements and loan agreements, but excluding blanket purchase agreements, basic ordering agreements, and leases. Do not use this code for contracts or agreements with provisions for orders or calls</td>
</tr>
<tr>
<td>I</td>
<td>Do not use</td>
</tr>
<tr>
<td>J</td>
<td>Reserved</td>
</tr>
<tr>
<td>K</td>
<td>Short form research contract</td>
</tr>
<tr>
<td>L</td>
<td>Lease agreement</td>
</tr>
<tr>
<td>M</td>
<td>Purchase orders--manual (assign W when numbering capacity of M is exhausted during the fiscal year)</td>
</tr>
<tr>
<td>N</td>
<td>Notice of intent to purchase</td>
</tr>
<tr>
<td>O</td>
<td>Do not use</td>
</tr>
</tbody>
</table>
Position 9 – Type of Instrument (con’t)

<table>
<thead>
<tr>
<th>Position</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>P</td>
<td>Purchase order--automated (assign V when numbering capacity of P is exhausted during a fiscal year)</td>
</tr>
<tr>
<td>Q</td>
<td>Request for quotation--manual</td>
</tr>
<tr>
<td>R</td>
<td>Request for proposal</td>
</tr>
<tr>
<td>S</td>
<td>Request for proposal</td>
</tr>
<tr>
<td>T</td>
<td>Request for quotation--automated (assign U when numbering capacity of T is exhausted during a fiscal year)</td>
</tr>
<tr>
<td>U</td>
<td>See T</td>
</tr>
<tr>
<td>V</td>
<td>See P</td>
</tr>
<tr>
<td>W</td>
<td>See M</td>
</tr>
<tr>
<td>X</td>
<td>Reserved for departmental use</td>
</tr>
<tr>
<td>Y</td>
<td>Imprest fund</td>
</tr>
<tr>
<td>Z</td>
<td>Reserved for departmental use</td>
</tr>
</tbody>
</table>
Standard Form 33
The Standard Form 33 (SF33), Solicitation, Offer and Award, is used in soliciting bids and awarding contracts that result from the bids, and with the solicitation for proposals and award of negotiated contracts.
Major Parts of the SF33

The SF 33 is divided into four major parts:

• **Blocks 1-8**: The first part contains basic information about the solicitation and is filled in by the government buying office. (Block 2, the contract number, is not filled in by the government until award is made.)

• **Blocks 9-11**: The second part is the Solicitation area. Block 11, Table of Contents, is very important. The sections of Block 11, *when taken together*, make up the whole solicitation and resulting contract. For example, it contains specific information about the solicitation, and the place where you will enter your bid price.

• **Blocks 12-18**: The third part is the Offer area and is filled in and signed by the bidder before returning the offer to the buying office.

• **Blocks 19-28**: The fourth part is the Award area and is completed and signed by the government when award is made.
Block 1 will note if the requirement is a rated order

Block 2 will contain the number assigned by the buying activity at the time of contract award. It will look the same as the one in Block 3, Solicitation Number, but it will have a “C” instead of an “R” or “Q” in the number.

Block 4 will identify if this is a sealed bid/invitation for bid (IFB) or a Request for Proposal (RFP)

Block 5 is the issue date and starts the clock

Block 6 is an internal tracking number

Block 7 identifies the buying office

Block 8 gives you the address of where to send the offer
Blocks 9 through 11
Solicitation Instructions

• **Block 9** – This block tells you the number of additional copies needed. Where to bring the offer if you chose to hand carry it. And it will tell you when you need to deliver the bid, “**time and date**”

• **Block 10** - identifies the person that you will contact for information on this specific bid/proposal and their phone number and email address, if given.

• **Block 11** – This is the area that will tell you what Sections apply to this solicitation and on what page the section begins. The sections that apply have an “**X**” in the first column.
Blocks 12 through 18
The Offer

- **Block 12** – Gives you the opportunity to mark how long your bid is good for. It defaults to 60 days.

- **Block 13** – This allows you the opportunity to provide a prompt payment discount. Note that it is not used in evaluating offers.

- **Block 14** – Here you let the buyer know that you have received all the amendments. If there are three amendments and you only list two, you can be found non-responsive.

- **Block 15** – Your name and address, your phone number, your CAGE code, and your “facility code” if needed. If you have a separate remittance address it goes in Block 15c. (Since the USG only pays by Electronic Funds Transfer this is OBE)

- **Block 16** – Make sure that whoever signs the offer is listed in SAM as an “authorized signer”

- **Block 17** – Don’t forget to sign the offer

- **Block 18** – and date the offer
Blocks 19-28 / Award

- Block 19 - The contract line items you have been awarded
- Block 20 - Dollar amount of the contract
- Block 21 - Agency accounting information
- Block 22 - Government use for justifying other than full and open competition
- Block 23 - Where to submit your invoices
- Block 24 - The Administering Contracting Office (ACO) might be different than the buying office (POC)
- Block 25 - What office will be paying your invoices
- Block 26 - The Procurement Contracting Officer (PCO)
- Block 27 - Where the PCO signs the contract
- Block 28 - The actual award date
Uniform Contract Format
Part I  The Schedule

- A  Solicitation/Contract Form
- B  Supplies or Services & Prices or Costs
- C  Specification/SOW/SOO/ORD
- D  Packaging & Marking
- E  Inspection & Acceptance
- F  Deliveries or Performance
- G  Contract Administration Data
- H  Special Contract Requirements
Section A – Solicitation/Contract Form

- Section A Contains one of the following Standard Forms:
  - Standard Form 33 (SF 33)- Solicitation and Award is used in conjunction with the solicitation and award of negotiated contracts.
  - Standard Form 26 (SF 26) – Award/Contract is used when entering into negotiated contracts when the prospective Contractor has amended their offer, unless:
    - A). The contract is for the construction, alteration, or repair of buildings, bridges, roads, or other real property
    - B) the acquisition is one for which the FAR prescribes special contract forms, or
    - C) Use of a purchase order is appropriate
  - Standard Form 1147 (SF 1447) – Solicitation/Contract is used in connection with negotiated acquisitions that use the simplified contract format and may be used in lieu of SF26 and SF33 for other acquisitions.
  - Standard Form 18 (SF 18) – Request for Quotation (RFQ) is used to solicit quotations from Contractors. RFQ is informational in character. It is not an offer and cannot be accepted by the Government to create a binding contract.
  - Standard Form 1449 (SF 1449) – Solicitation/Contract/Order for Commercial Items, shall be used by the Contracting Officer when issuing written solicitations and awarding contracts and placing orders for commercial items.
Section B – Supplies or Services and Prices/Cost

- Section B contains a listing of all supplies, data, and services to be acquired
  - This is the Government’s order form
  - Type of contract
  - What the contract is for (i.e., services, supplies)
  - Contract length
  - Minimum and maximum contract amounts
  - Travel expenses
  - Covers special notices to bidders on how to structure the contract price, pricing of options, pricing for additional services and other pricing specifications
  - Where the offeror records its bid price
Section C – Statement of Work

A Statement of Work (SOW) is a portion of a contract which establishes and defines all non-specification requirements for contractor's efforts either directly or with the use of specific cited documents.

The standard format for the SOW is as follows (subject to variations specified in MIL-HDBK-245D Section 4 for specific types of SOWs):

<table>
<thead>
<tr>
<th>SOW Section</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Scope</td>
</tr>
<tr>
<td>2</td>
<td>Applicable Documents</td>
</tr>
<tr>
<td>3</td>
<td>Requirements</td>
</tr>
</tbody>
</table>
Section C – Performance Work Statement

• **A Performance Work Statement (PWS)** is a statement of work for performance-based acquisitions that describes the required results in clear, specific and objective terms with measurable outcomes.

• When a contract is awarded, the PWS is legally binding upon the contractor and the U.S. Government. It provides an objective measure so that both the U.S. Government and the contractor will know when increments of work are completed and payments are justified.
Section C – Statement of Objectives

• **A Statement of Objectives (SOO)** is a Government-prepared document incorporated into the solicitation that states the overall performance objectives. It is used in solicitations when the Government intends to provide the maximum flexibility to each offeror to propose an innovative approach. The portion of a contract that establishes a broad description of the government’s required performance objectives.

• The SOO is an alternative to a Performance Work Statement (PWS). It is a summary of key agency goals, outcomes, or both, that is incorporated into performance-based service acquisitions which allows competitors to propose their solutions, including a technical approach, performance standards, and a quality assurance surveillance plan based upon commercial business practices.
Section D – Packaging and Marking

- Section D describes the packaging, preservation, and packing requirements for the solicitation. It includes information on how bidders submit forms and reports and who is responsible for associated shipping fees. Associated costs can exceed the cost of the item (be sure to include these costs in the proposal).

- MIL-STD-129 standard is used for maintaining uniformity while marking military equipment and supplies that are transported through ships.
- ASTM D3951-90, Commercial Packaging, can be specified for the marking of commercially packaged items/materiel.
- MIL-STD-130, "Identification Marking of U.S. Military Property," is a specification commonly used for giving directions on how to mark items sold to the Department of Defense, including the recent addition, in about 2005, of UID [IUID|UID] unique identifier data matrix machine-readable information (MRI) requirements.
Section E – Inspection and Acceptance

- Section E of the Schedule specifies the place where the government will inspect and accept each Contract Line Item Number (CLIN) of the contract. This is usually for supplies. It includes workmanship and materials furnished/utilized. This can include inspection and testing of the item. The place of inspection can either be at Origin or at Destination; the contract will specify.
Section F – Deliveries or Performance

- Section F describes the time, place and method for delivering the procured items.
- Delivery schedules for hardware and services may be described in terms of calendar dates or in specified periods of time from contract award date. The delivery destination for supplies will be specified.
- This section can also describe performance - i.e. the contractor’s facility must be fully operational and ready for performance within a certain period after contract award. It can also identify the place of performance.
- Free-on-board (FOB) Origin contract requires the government to pay shipping costs and assume the risk of loss or damage to the goods en-route.
- Free-on-board (FOB) Destination makes shipping the contractor’s responsibility
Section G – Contract Administration Data

- Section G data supplements the information found in Section A. Section G describes accounting and appropriation data and contract administration information or instructions. This may include designation of one or more Administrative Contracting Officers (ACO's), Contracting Officer’s Technical Representative (COTR's) and directions/instructions regarding payments and billing/invoicing.
Section H – Special Contract Requirements

• Section H contains any special provisions, terms and conditions not included in Section I Contract Clauses i.e., Change in key personnel, contract performance such as who to contact for a change in place of performance. Other special provisions can include:
  • Option Terms
  • Economic price adjustment provisions
  • Government-furnished property of facilities
  • Foreign sources
  • Multiyear provisions
  • Limitations on Federal government obligations
  • Payment of incentive fees
Part II Contract Clauses
Section I – Contract Clauses

• Section I contains the clauses required by law or by the FAR regulation and any additional clauses expected to be included in any resulting contract. See https://www.acquisition.gov/browse/index/far for the full text of the clauses that can be incorporated into this section. These laws or regulations are commonly referred to as "Boilerplate clauses". The contracting officer has little or no leeway in preparing this section. Each clause derives its authority from the FAR or from a public law, statute or executive order.
Part III List of Documents, Exhibits, & Other Attachments

J List of Attachments
Section J – List of Attachments

• The applicable specifications identified in Section C can typically be bulky and it is common for contract personnel to include such documents as attachments to the contract. Section J simply identifies a list of such attachments. Documents, which might be identified:
  • Specifications
  • Architectural Drawings
  • Exhibits
  • Technical or engineering data
  • Statement of work
  • Statement of objectives
  • Training Systems Requirements Document
  • Training System Functional Description
  • List of Addresses for CDRL Exhibits
  • DD Form 254, Contract Security Classification Specification
Part IV Representations and Instructions

• K Representations, Certifications, & Other Statements
• L Instructions, Conditions, & Notices to Offerors or Quoters
• M Evaluation Factors for Award
Section K – Representations, Certifications and Other Statements of Offerors

• Section K includes solicitation provisions that require representations, certifications or the submission of other information by offerors. The appropriate regulation clauses from the Federal Acquisition Regulations, the Defense Federal Acquisition Regulations or other regulations will be cited in this section. These are fill in blanks. Examples include:

  • Is the offeror a small business
  • Is the offeror an 8(a) firm
  • Is the offeror a HubZone firm
Section L – Instructions, Conditions, and Notices to Offerors or Respondents

• This section identifies solicitation provisions, information and instructions in preparing proposals and responses i.e.:
  • Specific proposal format
  • Organization/Arrangement of proposal
  • General instructions: i.e. number of copies to be submitted
  • What is to be submitted
  • Instructions for oral presentations
  • Pre-Proposal conference
  • Post award conference
• This section will also identify whether the RFP is a set-aside for small business, the product classification and the small business size standard, any requirements for submitting financial information, the type of contract expected to result from the RFP, whether progress payment will be authorized and any other instructions and notices.
Section M – Evaluation Factors for Award

- Explains exactly how the government will evaluate the proposals and determine the winning offer. Also explains the technical and managerial factors that will be considered along with cost and relative weights each factor will receive in the evaluation process. Some of the significant factors that will be considered in awarding the contract i.e.:
  - Past Performance
  - Experience
  - Professional Staff
  - Technical Understanding
  - Quality Control
Evaluating the Requirement

- Section M
- Section L
- Section C
- SOW/PWS Section 3
- SOW/PWS Section 1
Take Away Tips for Solicitation Response

1. **Read the solicitation and attachments carefully:** make sure you fully understand them.

2. **Ask questions:** if needed, ask questions in writing. Note the cut off date for questions.

3. **Review the evaluation criteria:** know the evaluation criteria and the order of importance

4. **Know the deadlines:** check closing date and time when offers are due. Do not be late.

5. **Follow instructions:** follow instructions exactly to ensure your bid is not disqualified.

6. **Respond appropriately:** bid all elements of the solicitation, provide everything requested.

7. **Align your proposal with the Government’s needs:** articulate ability to fulfill these needs.

8. **Pricing:** offer pricing that is both fair and competitive.
SF 30 Amendment/Modification
The Standard Form 30 (SF30), Amendment of Solicitation/Modification of Contract, is prescribed for use in amending invitation for bids, amend solicitations, modifying purchase and delivery orders, and modifying contracts.
Block 1 through 11 / SF 30

Block 1  the contract type identification code
Block 2  the amendment or modification number
Block 3, the effective date of the amendment or modification
Block 4  the purchase request number
Block 5  this is usually blank, unless there is a project number assigned
Block 6  the name and address of the issuing office.

Block 7 will identify the administration point of contact if different than Block 6
Block 8  is the name and address of the contractor
Block 9  Solicitation Number and date
Block 10  Contract Number and date
Block 11 is only used for solicitations. Identifies if the solicitation offer date and time has or has not been extended, and number of copies of the amendment the contractor must sign and return
Block 12 lists the Accounting and Appropriation Data

Block 13 indicates the type of modification and the regulatory authority which allows for the modification. It also indicates if the contractor is required to sign and how may copies of the modification to return

Block 14 Description of Amendment or Modification.

Block 15 is the typed or printed name and title of the signer and the signature block and date block

Block 16 is the typed or printed name and title of the Contracting Officer and the signature block
FAR Part 15.206(a) When, either before or after receipt of proposals, the Government changes its requirements or terms and conditions, the contracting officer shall amend the solicitation.

FAR Part 15.206(g) At a minimum, the following information should be included in each amendment:
(1) Name and address of issuing activity.
(2) Solicitation number and date.
(3) Amendment number and date.
(4) Number of pages.
(5) Description of the change being made.
(6) Government point of contact and phone number (and electronic or facsimile address, if appropriate).
(7) Revision to solicitation closing date, if applicable.
Conclusion

If you are new to Government contracting and proposal writing, keep the following in mind:

1. Seek contract opportunities that make sense or that justify spending the time and resources it takes to prepare contract proposals. Do not waste time and money responding to solicitations that do not make sense for your company.

2. A competitive proposal must demonstrate a thorough understanding of the RFP and present a clear, compelling narrative as to how your company can provide the best possible solution to the customer’s needs with fair and competitive pricing.

3. Don’t be discouraged, proposal preparation techniques will improve with practice. Continue to respond to appropriate RFPs and solicitations even if the first several do not result in an award. Request a debriefing regardless of the outcome to get feedback on the strengths and weaknesses of your proposal, which can help you to make future proposals stronger.
Procurement Technical Assistance Center (PTAC)

Your PTAC Regional Manager can help you navigate even the most difficult solicitation package. They are your source for technical assistance and guidance when preparing solicitation documents for all types of government requirements, including RFP, RFQ, IFB and GSA Schedules, at no cost to your company.

PTAC is your Official Source for Government Contracting Assistance. For more information, please visit https://www.business.utah.gov/PTAC or email: ptac@utah.gov, or contact the PTAC Regional Manager listed for your county.
PTAC Regional Managers

1: Mark Alexander
mark.cbrc@btech.edu
435-750-3261

2: Joshua Wiggins
jcwiggins@utah.gov
801-593-2242

3: Paula Kramer
pkramer@utah.gov
801-538-8756

4: Alex Quayson-Sackey
aquayson@utah.gov
801-957-5357

5: Thomas Gerke
tgerke@utah.gov
801-863-8713

6: Jack Schons
jschons@utah.gov
435-613-5198

7: Joni Anderson
andersonjoni@suu.edu
435-586-8883

8: Cam Findlay
findlay@utah.gov
435-652-7754
Questions?