

#### SPECIAL OPERATIONS FORCES INDUSTRY CONFERENCE

# Tips for Writing Successful Proposals

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### Agenda

- Pre-Solicitation Phase
  - Missed Opportunities
  - Step 1: Early Requirement Analysis
- Solicitation Phase
  - Missed Opportunities
  - Step 2: Review the Solicitation Thoroughly
- Proposal Development & Submittal
  - Missed Opportunities
  - Step 3: Identify Source Selection Process & Technique
  - Step 4: Follow the Instructions and Timely Submit the Required Material

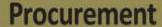
# Pre-Solicitation Phase Missed Opportunities

- Accessing the SBA & OSBP website
  - http://www.sba.gov/
  - http://www.acq.osd.mil/osbp/sb/dod.shtml
- Familiarity with the Federal Business Opportunity (FedBizOps) webpage and requesting explicit access
  - https://www.fbo.gov/
- System for Award Management (SAM)
  - > CCR, FedReg, EPLS, ORCA Migration
  - http://www.sam.gov/
- Responding properly to sources sought notices or requests for information
- Reviewing Pre-Solicitation Notices
- DCAA Info for Contractors- Price Proposals
  - http://www.dcaa.mil/audit process overview.html



### Step 1: Early Requirement Analysis

- Access SBA, DCAA, and other Government Resources
- Access and Register in FedBizOps
  - "Favorites" and "Watch List" features
  - Explicit Access/Export Control
- SAM
  - > Annual update
- Respond to Market Survey
  - ➤ Demonstrate/Discuss capability (FAR 9.104)
  - Acquisition Strategy
- Analyze Pre-Solicitation Notice for Key Elements
  - ➤ Quantity, delivery, acquisition strategy, Industry Day/ Pre-Solicitation or Pre-Proposal Conferences/ Qualification Requirements
- Technical Industrial Liaison Office (TILO)



# Solicitation Phase Missed Opportunities

- Asking timely and relevant questions
- Following the solicitation instructions
  - Proposal is untimely and/or not in the correct medium
  - Proposal contains extraneous information and/or fails to include the requested information
  - ➤ Proposal is incomplete, whereas "fill-ins" representations, certifications, matrices are incomplete, especially in identifying Government Rights to Technical Data (DFAR 252.227-7017)



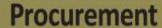
### Step 2: Solicitation Review

- Know Government Point of Contact: Contracting Office
- Uniform Contract Format
  - I The Schedule: A H
    - A: Solicitation/Contract Form
    - B: Supplies 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
  - II Contract Clauses: I
  - III List of Documents, Exhibits & Other Attachments: J
  - IV Representations and Instructions: K, L & M



# Proposal Development & Submittal Missed Opportunities

- Recognizing and Understanding Basis for Award and Evaluation Criteria
- Submitting the Correct Information/Material
  - > Technical Area
    - Recognizing the Go/No-Go requirements
    - Demonstrating compliance
    - Working product sample
    - Supporting assertions with test data
  - > Past Performance Area
    - Determining Relevant and Recent Data
  - > Cost/Price Area
    - Supporting Documentation
    - http://www.dcaa.mil/audit process overview.html
- Being Aware of Updates in FedBizOps



#### Screen Shot: DCAA Public Web page – Information for Contractors





# Preparing for potential DCAA audit as part of solicitation requirements

- RFP Instructions request offeror to complete DCAA preaward accounting system checklist
  - http://www.dcaa.mil/preaward accounting system a dequacy checklist.html



Example of completed pre-award accounting system checklist



Example A



Example C

#### Screen Shot: DCAA Pre-Award Accounting System Checklist

Preaward Survey of Prospective Contractor Accounting System Checklist

[FAR 16.301-3 states that a cost-reimbursement type contract may be used only when the contractor's accounting system is adequate for determining costs applicable to the contract. If no information is available in the files to make this determination, a Preaward Survey of Prospective Contractor's Accounting System (SF1408) can be requested from DCAA. Before requesting such an audit, it is a good idea to send this checklist to prospective contractor's for completion to ensure they understand the requirements of the SF1408, and to ensure they are ready for DCAA to come in and perform an audit].

#### Instructions:

- 1. Mark "X" in the appropriate column.
- On Page 2, provide a narrative describing how the current accounting system supports your response to each item. Be as descriptive as necessary

Contractor Name:					
Point of Contact (Name/Ph #/Email):					
CAGE Code:					
READY FOR AUDIT (YES) / (NO):					
	Yes	No	N/A	Note	
Is the accounting system in accord with generally accepted accounting principles?				1	
2. ACCOUNTING SYSTEM PROVIDES FOR:					
<ol> <li>Proper segregation of direct costs from indirect costs.</li> </ol>				<u>2</u>	
<ul> <li>Identification and accumulation of direct costs by contract.</li> </ul>				<u>3</u>	
c. A logical and consistent method for the allocation of indirect costs to intermed WS_FTP LE (3) l cost objectives. (A contract is					

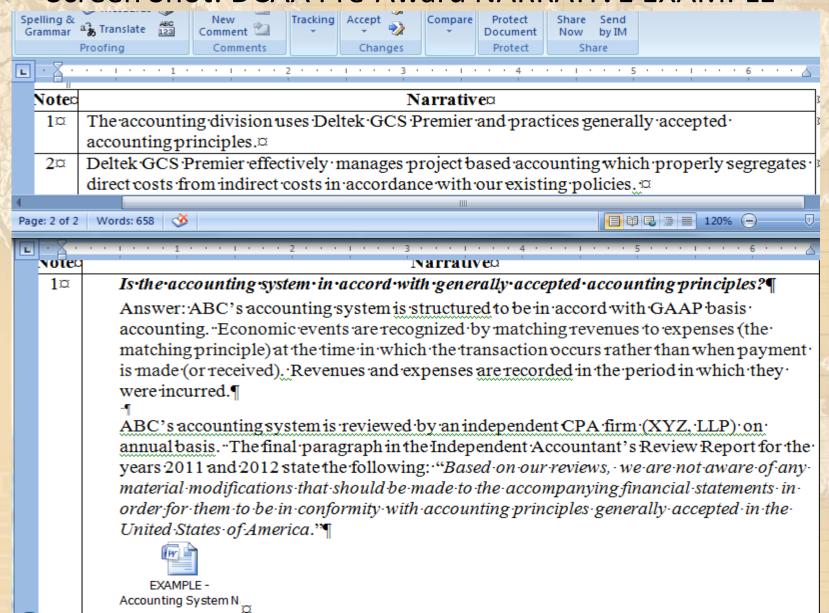
#### Screen Shot: DCAA Pre-Award Accounting System Checklist

Instruction: Use this section to explain how the current accounting system supports your response to each item. If a response is N/A provide further explanation. Use as much space as needed. Provide references to current policies and procedures if applicable.

Note	Narrative
1	
2	
3	
4	
4	

#### **Procurement**

#### Screen Shot: DCAA Pre-Award NARRATIVE EXAMPLE





# Proposal Development & Submittal Missed Opportunities

- Recognizing and Understanding Basis for Award and Evaluation Criteria
- Submitting the Correct Information/Material
  - > Technical Area
    - Recognizing the Go/No-Go requirements
    - Demonstrating compliance
    - Working product sample
    - Supporting assertions with test data
  - > Past Performance Area
    - Determining Relevant and Recent Data
  - **Cost/Price Area** ➤ Cost/Price Area
    - Supporting Documentation
    - http://www.dcaa.mil/audit process overview.html
- Being Aware of Updates in FedBizOps



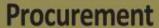
# Step 3: Identify Source Selection Process and Technique

#### **DoD Source Selection Procedures 2011**

 http://www.acq.osd.mil/dpap/policy/policyva ult/USA007183-10-DPAP.pdf

#### **Section M/FAR 52.212-2**

- Basis for Award
  - Lowest Price Technically Acceptable
  - Best Value
- Evaluation Criteria





Step 4: Follow the Instructions and Timely Submit the Required Material

Section L

**Section M** 

or

FAR

52.212-1

or FAR 52.212-2

#### **Instructions to Offerors**

Identifies for offerors what they are required to submit

#### **Evaluation Criteria**

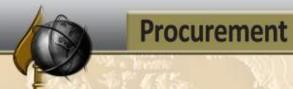
Identifies to offerors how the Government is going to evaluate what we have asked offerors to submit

Conduct an Independent Evaluation of your Intended Proposal



# **Analysis Checklist**

- Early Requirement Analysis
- Thorough Solicitation Review
- Identify the Source Selection Process & Techniques
- Follow the Instructions, Conduct an Independent Evaluation, and Timely Submit the Required Material





# Questions



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