



Massachusetts APEX ACCELERATOR (formerly PTAC)
NCMA Boston Workshop
Winning Proposal Presentation
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an APEX Accelerator!

APEX Accelerator (PTAC) Services



- **APEX Accelerator/PTACs** assist business firms with:
 - Assessing the viability of government markets for your product or service
 - ✓ By using a variety of databases to find past buys and target agencies (federal)
 - ✓ Assisting with marketing strategies (including pre-matchmaker preparation)
 - Registration assistance
 - ✓ System for Award Management (**SAM**) and Dynamic Small Business Search (**DSBS**)
 - Bid matching services
 - ✓ A free subscription service provided to qualified clients that automates solicitation searches (PTACs may charge a minimum fee for this – MA PTAC does not)
 - Pre- and Post-Award contracting assistance
 - ✓ Federal Acquisition Regulations (**FARs**), Defense Federal Acquisition Regulations (**DFARs**), and Wide Area Workflow (**WAWF**)
 - ✓ Including Cybersecurity requirements for doing work with DoD & DoD Primes

APEX Accelerator (PTAC) Massachusetts Statewide Locations

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■ Satellite Office Locations

- Boston
- Central Massachusetts (Worcester)
- Greater Lowell (Merrimack Valley/Northshore)
- Southeastern Massachusetts & the Islands
- Western Massachusetts

To register for client services: www.massptac.org/rfc

To find your APEX Accelerator if not headquartered in Massachusetts: www.aptac-us.org

Before Selling to the Government

- Two or more years in a successful business
- Internet access and computer skills/knowledge
- Potential to sell to the government
 - identifiable products/services that govt buys
- Knowledge of competition and how they succeeded
- The 3 P's:
 - patience, persistence & perseverance

Fundamentals about Federal Acquisitions

Winning proposals start with proper preparation:

- Understanding the Federal Acquisition Process
- Proposal Trends and Critical Success Factors
- Understanding and Ensuring Proposal Compliance
- Effective Proposal Process
- Conducting Reviews for Optimal Results

Timeline / Milestones for Acquisitions

- Market Research (RFI or Sources Sought)
- Acquisition Strategy Defined
- Industry Day
- Draft Request for Proposal (RFP)
- Final RFP
- RFP Due Date
- Source Selection
- Final Proposal Revisions
- Contract Award

Timeline / Milestones for Acquisitions (cont.)

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TIP:

- A Sources Sought response is critical for the Government to determine available sources for set asides. Always respond!

Proposals

- ***What are they? They are what you are offering the Government in a way they want to see it***
- ***Should clearly explain how you are going to do what the Government is proposing, what you bring to the table, defined features and benefits, and proof and experience that reduces Government risk***

Every Proposal Should

- Have a definitive solution of what you propose to do
- Illustrate an understanding of the Government problem you are solving
- Have a specific approach on how you will do the work
- Base it on Features and Benefits with Proof to Validate the Government's claims
- Present Costs that Support your Approach

Every Proposal Should (cont.)

TIP:

- Technical Solution & Approach
- Management Solution
- Past Performance
- Cost

What to Include in Proposal

- Every proposal will have Proposal Instructions outlining what is required in the proposal
- Give them exactly what they want to ensure 100% compliance
- Every proposal will also have a section on Evaluation Criteria outlining how the proposal will be evaluated

What to Include in Proposal (cont.)



TIP:

- Always put in EXACTLY what the Government is asking for! No more, no less!
- Read the Evaluation Criteria and make yourself a checklist of these items to ensure you get the highest scores!

What Happens When the Proposal is Submitted?

- Evaluated by a Source Selection Evaluation Committee
- Evaluation Criteria will state how evaluators will score
- Evaluators will have a scoring sheet and mark each section, then tally the scores
- Evaluators will decide on each company's proposal and rank them
- Low scores may be received for not giving them the best information that reflects the best solution of all proposals received

What Happens When the Proposal is Submitted? (cont.)

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RATINGS:

- Combined Technical/Risk Ratings:
 - Outstanding
 - Good
 - Fair
 - Poor

What Happens When the Proposal is Submitted? (cont.)

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RATINGS:

- Past Performance Ratings:
 - Very relevant
 - Relevant
 - Somewhat Relevant
 - Not Relevant

What Happens When the Proposal is Submitted? (cont.)



TIP:

- Make sure to present your material in the order the Evaluator will be reviewing!

Why Would a Proposal Get Thrown Out?

Compliance:

- Incorrect fonts
- Inaccurate page count
- Required section(s) missing
- Late submission

Low Evaluation Score Examples



Proposal would not get thrown out but would get low scores:

- Not enough personnel proposed
- Not enough experience desired
- Ineffective management organization
- Insufficient quality approach
- Inadequate technical approach

Can Proposals Be Changed?

“Competitive Range”

- Evaluation Notice (EN)
- Final Proposal Revision (FPR)

TIPS

- Read Proposal Instructions and Evaluation Criteria –
OVER AND OVER AGAIN!
- Base everything on these sections first and then move
on to the Statement of Work (SOW)!

TIPS

- Make sure you can do all the work required of you in the SOW
- Make sure you are not precluded from bidding per the clauses (usually the FAR) or any regulation that may be in the solicitation
- Make sure you can provide the right amount of personnel and have the Past Performance the Government is looking for

What is a Solicitation?

It is a draft contract with proposal instructions and evaluation criteria sprinkled in

- Sections for Proposal Team
- Sections for Contracts/Legal Team

TIPS

DO NOT:

- Turn every “shall” into a “will”
- Write about something that the Evaluation Criteria won't be applied to

Other Parts of the RFP

RFP can include requirements buried throughout the solicitation:

- Deep scrub
- Don't cover FAR clauses included
- Only include critical information

RFP Questions

Questions should be:

- Asked within the timeframe given
- Clear, concise and respectful, using excerpts from RFP
- Questions & Answers (Q&A's) could lead to an Amendment

Pitfalls

- Inadequate draft or final RFP due to lack of government resources, training or experience
- Ignoring other sections and favoring the SOW
- Forgetting the “other stuff” like not placing your response in the right “place”, and “hidden” requirements, such as a management plan that is to be submitted with the proposal

TIP

Manage every proposal like a project:

- Set a realistic schedule
- Include time for review
- Add plenty of time for final production

Amendments

- The Government often makes Amendments in various ways or formats
- It is essential to capture the Amendments in your Proposal outline
- Document comparisons between Amendments and original solicitation because Amendments may be unclear

Next Steps

- Hold a kick-off meeting and start writing only if your solution is solid
- Capture Management (outside the scope of this presentation)
- Schedule reviews with non-writers
- Do not leave Administrative and Pricing actions for the last minute

Reviews

Reviews should be built into the original Proposal schedule:

- Non-writers should always be part of the review team
- Allow time for adequate reviews
- Ensure review documents are formatted and edited so reviewers can focus on the content

Submission

- Review and edits should be complete at least 2 days before submission
- Final review by Proposal Manager
- If applicable, make sure you are registered in the submission website well before Proposal is due
- Keep your SAM.gov registration up to date
- Keep your contact info up to date

Winning Tip

- Focus everything on Evaluation Criteria!
- Focus on Proposal Instructions! (as to be compliant)

Winning Plan

For all Evaluation Criteria:

- UNDERSTANDING
- APPROACH/SOLUTION
- FEATURES/BENEFITS
- PROOF POINTS
- DISCRIMINATORS

Winning Plan

UNDERSTANDING:

- Customer needs: needs that drive the requirement
- Cannot simply state that you understand
- Show that you understand the nature of the work and what it will take to be successful
- Show in-depth expertise
- Example: Government **REQUIRES** locks.
Government **NEED** is for security.

Which is better?

Option 1

We understand your needs in the SOW. We understand we are required to mow weekly. We understand we are to remove the waste and clippings. We understand the standards.

Option 2

The Army Corp requires a contractor with established procedures, quality control methods, and accurate scheduling for ongoing maintenance of its community lawns. Further, The Army Corp wants to ensure its selected contractor will adhere to all performance standards of this contract with minimal supervision and oversight. Our solution is based upon this foundational understanding.

Winning Plan

APPROACH/SOLUTION:

- Approach should answer how the work will be performed
- Approach should be specific: using steps and procedures as much as possible
- Approach is not vague
- Approach does not introduce risk to the Evaluator

Which is better?

Option 1

We will mow the grass weekly and will use a back-up company if any of our people are out sick or otherwise unavailable. We lease machines locally. If any machinery is not available, we have back-up plans in place. Should there be rain, we will reschedule.

Option 2

Jorden Industries takes great pride in ensuring your contract requirements are met and exceeded every step of the way. Beginning with our on-site supervisor, we arrive at your site each Tuesday at 9 am and apply the following procedures:

- *Equipment check.*
- *Identification of any unique issues on the property.*
- *Communication of approach to your POC.*
- *Work completion within 4 hours of start time.*
- *Clean-up, quality control, and POC sign-off.*

We keep in continuous contact with your POC. In the event of rain/rescheduling, the rescheduled date will be set the same day of the interrupted scheduled maintenance day.

Winning Plan

FEATURES/BENEFITS:

- What you will bring in your approach to meet their needs
- How your approach will benefit the Government

Which is better?

Option 1

We have several years of experience doing this same work for a variety of customers. With our unparalleled experience, we are able to ensure your service center will operate at its best. We have the best tools and methods in the industry.

Option 2

Your customer needs are the basis of our tailored approach to servicing your call center. With 21 years of call service experience, we have implemented more than 10 industry technology improvements in the last five years. Of those, we successfully implemented four similar operations for customers, resulting in the 2011 “Regional Call Center Service Award.”

Winning Plan

PROOF POINTS:

- Substantiate
- Prove you can do what you propose

Winning Plan

DISCRIMINATORS:

- Things you can bring that no one else can

Winning Tips

- Know your Evaluator!
- Score yourself by using the Evaluator's criteria
- Make sure your proposal is clear and easy to understand
- Make sure your proposal doesn't read like it was written by 9 different people!

Winning Tips



- Grammar!
- Acronyms
- Spelling!
- Capitals

QUESTIONS?

