Pre-Solicitation and Market Research

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Agenda

- Market Research
- System for Award Management
- Request for Proposal
- Request for Quote (RFQ)
- Invitation for Bid (IFB)
- Closing Remarks/Questions
Market Research

- Definition: Collect and analyze information about capabilities within the market to satisfy agency needs. Purpose of market research is to:
  - Determine if sources capable of satisfying the agency’s requirements exist.
  - Shape and support the development of acquisition requirements such as a strategy and acquisition plan.
  - Provide information on how to structure contracts.
  - Assess small business availability.
  - Evaluate changes in industry.
Market Research Tools

- Utilize all tools available to you to register your business.
  - Sources Sought (FedBizOpps)
    - Ensure to fill our all requested information and provide details to ensure that we capture all your capabilities.
    - https://www.fbo.gov
  - Small Business Administration (Dynamic Search)
    - Ensure to provide detail answers to all questions.
    - http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm
  - Networking
    - Industry days, trade fairs, networking luncheons, and professional organizations.
System for Award Management (SAM)

- SAM ([https://www.sam.gov](https://www.sam.gov)) is a Federal Government owned and operated free web site that consolidates the capabilities in Central Contractor Registration (CCR)/FedReg, Online Representations and Certifications Applications (ORCA) and the Excluded Parties List System (EPLS).
- You must have an active registration in SAM to do business with the Federal Government.
- In SAM, your company/business/organization is now referred to as an “Entity.”
Create an individual user account and log into SAM to register your entity. To register in SAM, at a minimum, you will need the following information (for U.S. registrants):

- Your DUNS Number, Legal Business Name, and Physical Address from your Dun & Bradstreet (D&B) record.
- If you do not already have a DUNS Number, you can request one for free from D&B at http://fedgov.dnb.com/webform.
SAM Registration (Continued)

- Your Taxpayer Identification Number (TIN) and Taxpayer Name associated with your TIN.
- Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer Name.
- Your bank’s routing number, your bank account number, and your bank account type, i.e. checking or savings, to set up Electronic Funds Transfer (EFT).

- Reregister when needed.
Common Errors

- Some of the Common SAM registration errors included the following:
  - The NAICS codes are not specific.
    - Examples: Using only 236220 – Construction. If you have experience in 237310- Highways and Roads, annotate that also.
  - Capabilities are not specific or not correct.
  - Information on the Continuation Page is not complete.
  - Company address is missing or has changed.
  - Ensure all data fields are filled out completely.
  - Incorrect Registration in Dynamic Small Business Search.
  - POC information is not listed.
- Expiring or not renewing your SAM registration.
Successful SAM Registration

- The following information is required for successful SAM registration:
  - Organizational structure.
  - Electronic Funds Transfer (EFT) information.
  - NAICS codes and PSC codes.
  - Size metrics - total receipts / avg. # of employees.
  - Disaster relief, including geographic area served.
  - POC information.
  - Primary Government Business and Electronic Business POC information.
  - Dun & Bradstreet legal business name and address.
Successful SAM Registration (Continued)

- Taxpayer name and Taxpayer Identification Number (TIN).
- Highest company and employee security level.
- Answer all the representation and certification questions (there are 31).
- Determine whether your business has been certified as a Department of Transportation Business Enterprise.
- Choose three security questions and provide the appropriate answers.
- Identification of all appropriate socio-economic categories.
- Identification of the Automated Clearing House (ACH) department for your financial institution.
Request for Proposal (RFP), Request for Quote (RFQ), and Invitation for Bid (IFB)

- **Items to consider:**
  - CAREFULLY read the Scope/PWS/SOO.
  - Eliminate any fluff and/or extraneous information.
  - Be clear and concise in the proposal.
  - Prepare proposal, quotes, and bids early on to avoid late submission.
  - Ensure totals per line on the schedule are accurate (check your math).
  - Communicate questions/issues on specs in detail early on.
RFP, RFQ, and IFB Continued

- Ask questions concerning the Government's intent in a scope/RFP/evaluation criteria
- Proofread the proposal for grammar (make sure the correct words are used and information is correct).

  - Assumptions are often a pitfall and result in an unsuccessful proposal.
Conclusion

- Market research is the foundation for all government acquisitions.
- Ensure you company responds thoroughly and accurately to market research questions and surveys.
- Review information in SAM to ensure it is up to date and accurate.
- Review all information in the RFP/RFQ/IFB that you are responding to.
Conclusion (Continued)

- Be clear and concise when preparing your quote or proposal.
- If you have questions, contact the contracting POCs referenced in the solicitations.
Questions