

“Simplify Your Proposal Process to Increase Wins”



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**Speaker: Michele Atkinson,
Managing Partner/Proposal Writer**

SAFETY FIRST!

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SILENCE PLEASE!

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The slide features four decorative corner elements, each consisting of a cluster of blue stars of varying sizes, arranged in a starburst pattern. These elements are located in the top-left, top-right, bottom-left, and bottom-right corners of the slide.

“When I grow up...
I want to be a federal proposal writer!”

– no child ever.

The most important part of any proposal is...



Your audience!

Focus on the Outcome, Not the Process



More complex does not always mean better.



LEARNING OBJECTIVES

1. Use the Basis of Award to frame your approach
2. Gain proposal development tools that can be used immediately.
3. Learn how to use the RFP to develop a simple proposal outline.
4. Improve capture strategies for small businesses.

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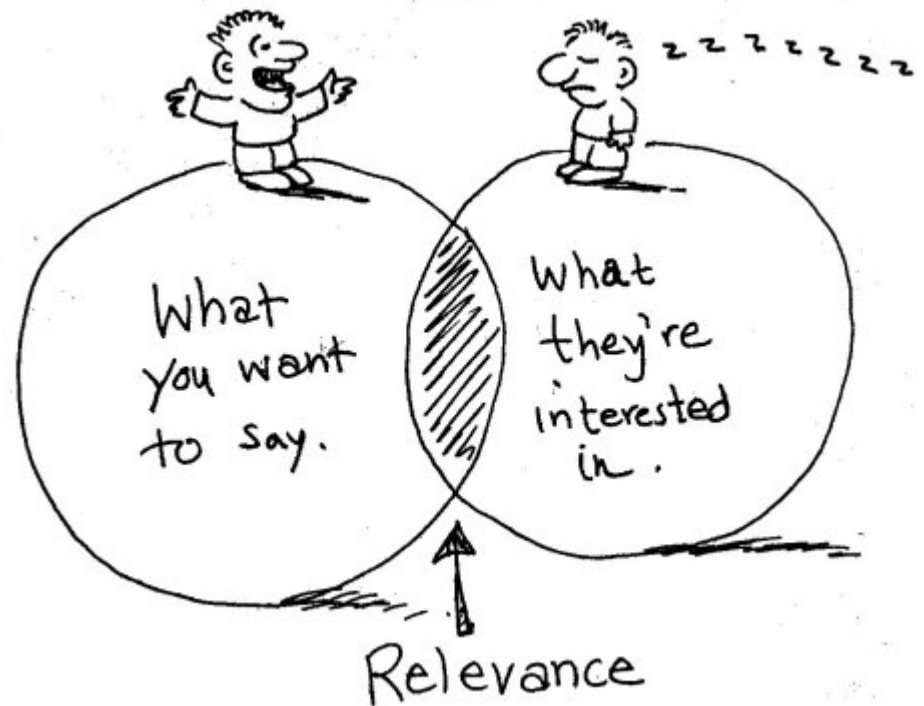
LEARNING OBJECTIVE 1:

Use the Basis of Award to frame your approach.

- Know your audience
- Know the evaluation criteria
- Learn how to predict your technical rating

Know Your Audience and **SPEAK TO THEM**

- What do they want?
- What do you have that meets their needs?
- Use their own language.
- Tell them what they want to hear.

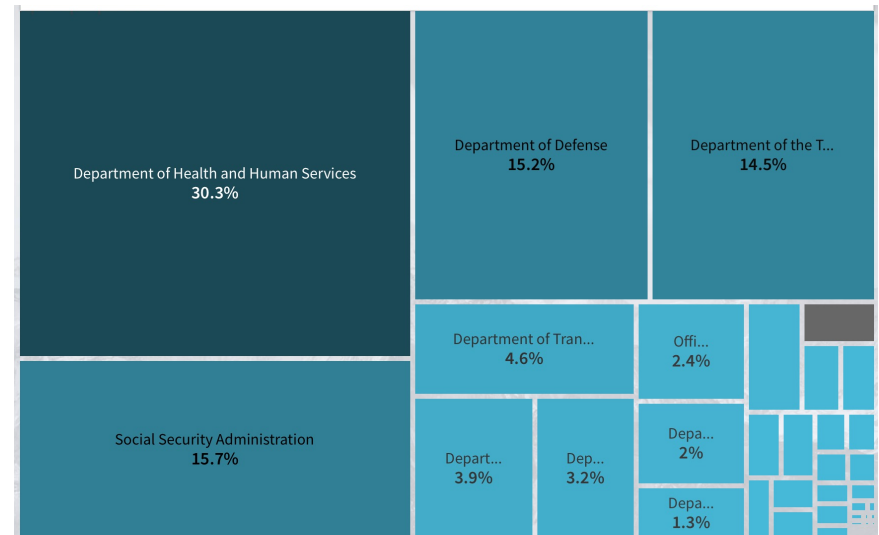


Basis of Award Determines Your Approach

LPTA	Best Value
Price is most important	Technical is most important
Aim for “Acceptable”	Aim for “Outstanding”
Meet all RFP requirements	Exceed all RFP requirements
“Above & beyond” not necessary	“Above & beyond” desired
Criteria is black & white	Criteria can be interpreted

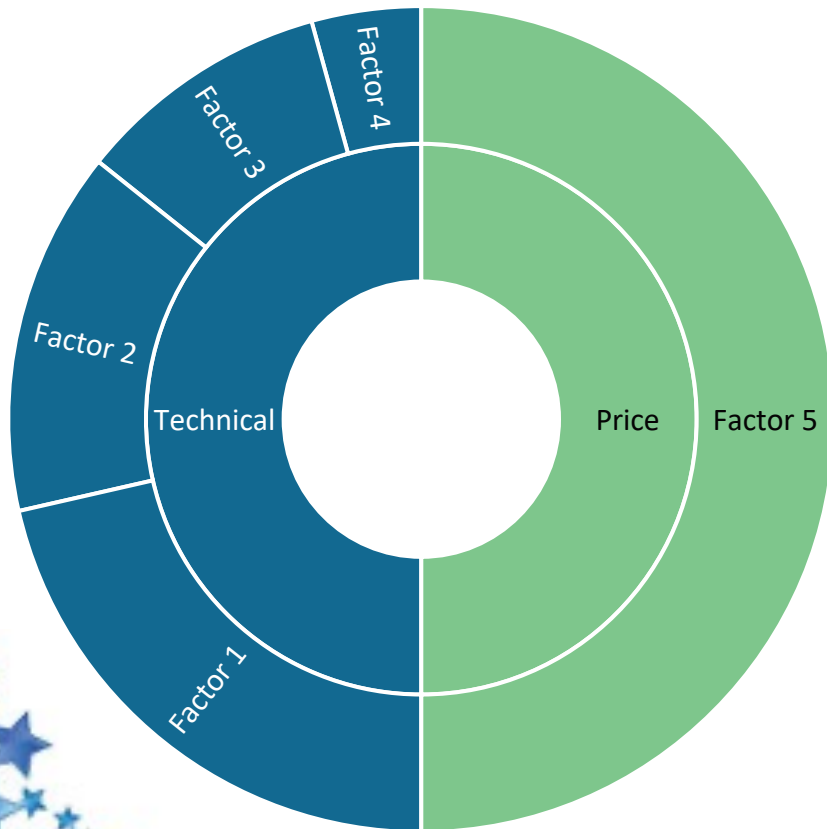
Best Value: Visualize the Basis of Award

- Understand what is most important
- Visualize the ranking of factors



Ranking of Factors in Best Value

All evaluation factors, when combined, are considered approximately equal to price.



All evaluation factors, when combined, are considered significantly more important than price.



Best Value: Predict Your Past Performance Relevancy Rating

Past Performance Relevancy Ratings	
Rating	Definition
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires.
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

Best Value: Predict Your Performance Confidence Rating

Performance Confidence Assessments	
Rating	Definition
Substantial Confidence	Based on the offeror's recent/relevant performance record, the Government has a high expectation that the offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the offeror's recent/relevant performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort.
Limited Confidence	Based on the offeror's recent/relevant performance record, the Government has a low expectation that the offeror will successfully perform the required effort.
No Confidence	Based on the offeror's recent/relevant performance record, the Government has no expectation that the offeror will successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available or the offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. The offeror may not be evaluated favorably or unfavorably on the factor of past performance.

Best Value: Know How to Write an “Outstanding” Proposal

Technical Assessment Ratings	
Adjectival Rating	Definition
Outstanding	Proposal indicates an exceptional approach and understanding of the requirements and contains multiple strengths, and risk of unsuccessful performance is low.
Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength, and risk of unsuccessful performance is low to moderate.
Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements, and risk of unsuccessful performance is no worse than moderate.
Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements and/or risk of unsuccessful performance is high.
Unacceptable	Proposal does not meet requirements of the solicitation, and thus, contains one or more deficiencies, and/or risk of unsuccessful performance is unacceptable. Proposal is unawardable.

Lowest Price Technically Acceptable

You either Pass, or you Fail

Rating	Definition
Acceptable	Proposal clearly meets the minimum requirements of the solicitation.
Unacceptable	Proposal does not clearly meet the minimum requirements of the solicitation.

Keywords: “clearly meets”

Lowest Price + Clearly Meets Technical Requirements = Winning Proposal

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LEARNING OBJECTIVE 2:

Gain proposal development tools that can be used immediately

- Project Relevancy
- Resumes
- Proposal Schedules
- Asking RFIs

Relevancy Matrix

- Handouts:
www.cavalryconsulting.com/sbs/
- Use Matrix at kickoff to identify the best projects to use in the proposal
- Use exact criteria for evaluation, incorporate key words from RFP sections L and M

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02 Proposal Tools
Use RFP language to create a complex relevancy matrix.

Relevancy Table Showing All Projects

This version illustrates your ability to perform a variety of building types and sizes.

It also demonstrates how you can showcase your additional strengths based on the evaluation criteria.

General Building Type Projects	New Construction	X	X
	Renovation		X
	Alteration		X
	Demolition	X	X
	Repair Work		X
Relevant Facility Types	Industrial		X
	Airfield		X
	Utility Infrastructure	X	X
	Administrative	X	X
	Training		X
	Dormitory		X
	Community Support	X	X
Value	\$3M or Greater	X	X
	\$10M or Greater	X	
Completion Type	Within Last 5 Years	X	X
	Single TO-Project	X	X
STRENGTHS			
Experience Working with Proposed Design Firm			X
Design-Build Experience			X
Experience with Sustainable Features	X		
Experience self-performing relevant features of work	X		X

Relevancy for Project Sheets

• Illustration of relevancy in multiple columns

Relevancy to this Design-Build II

<i>Building Types</i>	<i>Facility Types</i>
✓ New Construction	✓ Airfield
✓ Renovation	✓ Utility Infrastructure
✓ Alteration	✓ Administrative
✓ Demolition	✓ Training
✓ Repair Work	✓ Dormitory
✓ Industrial	✓ Community Support

Additional Strengths:

- ✓ Previous experience working with our design partner
- ✓ Design-Build project experience
- ✓ Self-Performed Relevant Features of Work
- ✓ With our other four projects, demonstrates experience in both new construction and renovation, large and small projects, and a variety of building types with utility infrastructure and civil work

according to the RFP Evaluation Factors:

- Magnitude & Recency*
- ✓ Value of \$3M or greater
 - ✓ Completed within the last 5 years
 - ✓ Single Project

10. Provide a detailed description of what work your firm self-performed on this project:

Resumes

- Standard company resumes should be used as a starting point (not submitted)
- Tailor each to match the exact requirements of the RFP
- Set up resume so evaluators do not need to make any assumptions or do any math
- Show total months of experience for each project
- Provide sum of experience shown in total months/years if necessary
- Never assume that the Owner knows your firm or personnel, include every detail
- Aim for ease of evaluation

Resume Example

• Handout

General Project Manager

Proposed Dates/Function for this Project: General Project Manager
Affiliation with Offeror and Years Affiliated with Offeror: Employed at [REDACTED]
Months/Years of Experience performing duties/functions as proposed for this project: Over 25 years.
Education – School attended, Degree, Certification, Year, and Specialization: Louisiana State University, Master of Science, Mechanical Engineering, [REDACTED] Louisiana State University, Bachelor of Science, Engineering Sciences, [REDACTED]

Active Registrations (Professional or Technical Licenses/Certifications):

- Secret Level Clearance
- Anti-Terrorism
- USACE CQCM Certified

Training:

- OSHA 30-Hour course
- First Aid/CPR/AED
- Confined Space Training
- Fall Protection
- Asbestos Awareness
- Trench & Excavations
- Aerial Boom
- Rigging Safety
- Storm Water & Drainage
- Sanitary Sewer Collection System
- Water Distribution
- LEAN Construction
- Pull Planning

Qualifications

Project General Manager must meet one:

- ✓ Baccalaureate degree in engineering, architecture, or construction management and ten years of experience as a General Project Manager or Project Manager simultaneously managing multiple construction projects,

OR

Fifteen years of experience as a General Project Manager or Project Manager simultaneously managing multiple construction projects.

Describe Specific Qualifications for this project and how they meet the required qualifications: This project requires 15 years' experience as a General Project Manager or Project Manager simultaneously managing multiple construction projects. [REDACTED] meets this requirement with a career in the engineering and construction industry that spans 40 years. During this time, he has performed the roles of Project Manager for 30 years as a General Project Manager for 20 years, [REDACTED] Program and Project Manager with [REDACTED] years of experience in engineering, contract management, project management, quality control, operations, design, and logistics. While earning his Bachelor Degree in Engineering Sciences, [REDACTED] structural engineering, then went on to acquire his Masters Degree in Mechanical Engineering, [REDACTED] stellar reputation for communications with subcontractors, co-workers, and employees alike.

Qualification: Experience in projects that include Anti-Terrorism and Force Protection. [REDACTED] worked with Tiger Team implementations of FP measurements development following 911 in the Middle East as well as current day implementation of ATPF regulations on US bases, in particular SOF Signal Batt Ops HD, Ft Bragg and The Pentagon).

Qualification: [REDACTED] had Advanced Training (MSME) and a Secret US Government Clearance.

Qualification: As shown in the listing below, [REDACTED] a high degree of experience with Renovation/Repair projects.

Qualification: Experience with historical buildings (i. e., Pentagon, Fayetteville, NC VA Hospital, Richmond, VA Old Courthouse, GSA IDIQ renovation work [REDACTED] worked on projects that included the renovation of quarters for Homeland Security FLETC on the Navy Base in Charleston, SC, as well as a USACE tidal monitoring facility in Duck, North Carolina.

Qualification: Experience with Leadership in Energy and Environmental Design (LEED), Low Impact Development (LID), Energy Independence and Security Act (EISA), Energy Policy Act (EPAct). To date, Mr. [REDACTED] led multiple projects that achieved LEED (Silver) achievements. In addition, he attended a 3-day LEED implementation training class in North Carolina in 2010.

Relevant experience managing multiple \$50K-\$2.5M renovation/repair projects concurrently: As demonstrated below, [REDACTED] project experience, he has performed multiple projects in the range of \$50K to \$2.5M, all of which he had managed concurrently with other projects. Of these, the majority were renovation/repair projects similar to the task orders that will be issued under this SATOC. Most of these projects also included ATPF and energy efficiency requirements.

Project Experience:

Company Oper: [REDACTED] Assigned 13 Months (simultaneous with other projects)

Date of project: [REDACTED] Assigned 13 Months (simultaneous with other projects)

Name of firm performing the project (and employing this individual): [REDACTED]

Renovation/Repair Project: [REDACTED] value \$50K-\$2.5M Managed Other Projects Concurrently: [REDACTED]

ATPF: [REDACTED] Complexity: Low [REDACTED] High [REDACTED] LEED: [REDACTED] LID: [REDACTED] EISA: [REDACTED] EPAct: [REDACTED]

Brief description of project, to include site, scope, and Complexity (be sure to identify relevancy to the work to be ordered under this resultant contract, if applicable): This project [REDACTED]

The building envelope consists of builtup roofing, 16 inches of rigid insulation, continuous waterproof membrane and pre-finished metal roofing panels providing an overall R-73 value; exterior walls, 6-inch metal studs with batt insulation, 3/4-inch rigid polyiso insulation and 6-inch pre-finished insulated metal panels for an overall R-57 value and flooring; hydronic heated 6-inch floor slab with 2-inch rigid foam insulation for an overall R-12 value.

The scope of work also included an 8' high masonry windcoat at the lower portion of the exterior walls provides both ATPF and built up snow and ice protection. Site utilities included storm, sewer, water, steam, condensate, power and communications were constructed under the Fort Wainwright utilities privatization requirements. Site work includes a concrete and asphalt paved parking areas, extensive landscaping with plants selected for their ability to survive in the harsh near-arctic climate, site furniture, security gates and bollards to meet ATPF requirements.

Duties/Functions: General Project Manager. As General Project Manager, [REDACTED] oversaw the construction project. He played a key role in project planning, budgeting, and identification of resources needed. In addition, he was responsible for all project accounting functions including managing the budget, tracking of team expenses and minimizing exposure and risk in the project.

He led all personnel involved with construction activities and served as a key link with the client. He managed the efforts of all parties involved in the project, including the architects, consultants, contractors, sub-contractors and laborers. He also monitored the progress of the construction.

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03

Proposed Tools
 Use RFP language to create a tailored resume.



REQUIRED RESUME FORMAT:

- Name and Title
- Proposed Duties Function for this project
- Affiliation with Offeror and Years Affiliated with Offeror
- Months/Years of Experience performing duties/functions as proposed for this project
- Education – School attended, Degree, Certification, Year, and Specialization
- List Active Registrations (Professional or Technical Licenses/Certifications)
- Describe Specific Qualifications for this project and how they meet the required qualifications
- List Projects worked on to include:
 - Project Title and Location
 - Date of project (month/year project began and ended)
 - Name of firm performing the project (and employing this individual)
 - Brief description of project, to include size, scope, and Complexity (be sure to identify relevancy to the work to be ordered under this resultant Contract, if applicable)
 - Duties/Functions
 - Current Point of Contact for the firm performing the project and employing this individual. If unavailable, indicate why.

Evaluation Method:

The Government will review the resumes to determine whether or not the proposed individuals meet or exceed the minimum qualifications. Offerors are advised to provide sufficient information for the Government to make this determination. The failure of an Offeror to identify Key Personnel for the above five positions who do not all meet the MINIMUM criteria listed for that position will result in a rating of Unacceptable for this factor. Offerors will be evaluated on the extent to which they can demonstrate key personnel who exceed the minimum requirements through the following:

- Advanced degrees (Masters and above).
- Additional years of experience.
- Advanced training and/or additional professional certifications.
- A high degree of experience with renovation/repair projects.
- Experience in projects that include Anti-Terrorism and Force Protection (ATPF).
- Experience with historical building renovations.
- Experience with Leadership in Energy and Environmental Design (LEED), Low Impact Development (LID), Energy Independence and Security Act (EISA), Energy Policy Act (EPAct).
- The Government is specifically interested in Key Personnel that demonstrate relevant experience managing multiple renovation/repair projects at the same time that individually fall within the dollar value range of orders anticipated for execution under the resulting Contract. Accordingly, for Key Personnel that demonstrate this capability, the higher the rating that may be assigned during evaluations.

Offerors will also be evaluated on the extent to which they can provide a Project General Manager(s), Project Manager(s), Corporate Safety Manager(s), and On-Site Quality Control Manager(s) with experience simultaneously managing multiple construction projects.

Offerors will also be evaluated on the extent to which they can provide multiple Project Managers, On-Site Quality Control Managers and On-Site Construction Superintendents that meet or exceed the minimum requirements described in this factor.

Proposal Schedules

- Work backwards from the deadline, starting with delivery.
- Plan final review a few days prior with time to get in edits and print.
- Put critical items in schedule, like bid bond.
- Create a shared calendar for the proposal and add all deadlines on it, so everyone has them on their calendar too.
- Include all deadlines for reviews, RFIs, meetings, etc.

Asking RFIs

Comment Classification: **Unclassified\\For Official Use Only (U\\FOUO)**

Under 7.0, the RFP includes instructions on how to include teaming partner and subcontractor experience in the proposal, including a sample Letter of Commitment.

This section states "if an offeror wishes to receive credit for the experience or past performance of a subcontractor or teaming partner, the offeror must submit a letter of commitment to use the proposed firm on the project.."

Regarding this in 7.0, can the government please review the language in Factor 1 to verify that all instructions are asking for the same information? Currently it states on page 23: "The offeror shall submit five (5) similar projects that have been completed by the offeror in the last (7) seven years and at least a \$1.0 million in magnitude."

On page 25 it states "the Government will evaluate the extent of recent/related experience of the prime contractor and/or proposed team as relevant to their role on this project.."

It appears that projects from both the prime contractor and subcontractors/teaming members are allowed as long as a teaming agreement is signed for each affiliated firm, and the projects submitted demonstrate their performance in the role proposed. Please confirm if this is the intention of Factor 1.

On: Aug 11 2017.

	Government Response. . Sample projects may be submitted by the prime and/or the teaming partner that satisfy the requirements in Factor 1. On: Aug 15 2017
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	Current Request Status: Request Closed
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LEARNING OBJECTIVE 3:

Learn how to use the RFP to develop a simple proposal outline.

- Your outline should be the **MOST** simple part of your proposal, it's already been set up for you!

Example: Breaking out Subheadings

The proposal should demonstrate how the offeror plans for use of its home office resources, construction team participation and the construction activities problem avoidance, schedule delay avoidance, mitigation techniques, quality control, safety processes and customer interface shall also be demonstrated. It shall describe how communications within the organization and with the Corps of Engineers and the User will be conducted.

Subheadings:

- Home Office Resources
- Construction Team Participation
- Construction Activities Problem Avoidance
- Schedule Delay Avoidance
- Mitigation Techniques, etc...

Don't Go Overboard on Design

3.1. Offerors submitting proposals for this solicitation should limit submissions to data essential for evaluation of proposals so that a minimum of time and monies will have been expended in preparing information required herein. Elaborate artwork, expensive paper and bindings, and expensive/extensive visual and other presentation aids are unnecessary. The Government is specifically interested in the substance of an offeror's response.

Hint: Better qualifications increase your chances of winning, not prettier proposals. You don't want to look like you are trying to overcompensate for lacking credentials. (The SSEB sees through that!)



LEARNING OBJECTIVE 4:

Improve capture strategies for small businesses

- By the time you say YES to an opportunity, you should be confident you can *win* it; not just that you *want* it.
- If it's not simple and easy to match your qualifications to an RFP, you first need to reevaluate your capture process.

Capture Tools – CRM Example

REPORT											
All Opportunities in Pipeline											
STAGE ↓	OPPORTUNITY NAME	SUBMITTAL ↑	SET-ASIDE	BOND	AMOUNT	MINIMUM TASK ORDER VALUE	MAXIMUM TASK ORDER VALUE	CRITERIA	TYPE OF PROPOSAL	TYPE	AGENCY
Presolicitation (11 records)	Presolicitation Notice for Design-Build services for the new US Courthouse, Anniston, AL	11/30/2017 10:00 AM	Full and Open	Bond TBD	\$35,000,000.00	-	-	Qualifications	2 Phase Ph. 1	Single Project	General Services Administration
	AEC FRONT RANGE PAVING IDIQ (FRP)	11/30/2017 10:00 AM	8(a)	Bond TBD	\$200,000,000.00	\$5,000	\$200,000,000	Best Value	Single Phase	IDIQ Contract	Air Force Space Command
	AEC JOINT BASE SAN ANTONIO PAINTING IDIQ	11/30/2017 10:00 AM	WOSB	Bond TBD	\$10,000,000.00	-	\$10,000,000	TBD	Single Phase	IDIQ Contract	Air Education & Training Command
	AEC ALTER REPAIR IRISH HILL BUILDING 1624	12/31/2017 10:00 AM	WOSB	Bond TBD	\$750,000.00	-	\$750,000	Price Only	Single Phase	Single Project	Air Force Materiel Command
	VELA MACC	12/31/2017 10:00 AM	8(a)	Bond TBD	\$275,000,000.00	\$2,000	\$10,000,000	Best Value	Single Phase	IDIQ Contract	Air Force Space Command
	AEC Multiple Award Construction Contract MACC for Activities	12/31/2017 10:00 AM	8(a)	Bid Bond; Bond Letter	\$95,000,000.00	\$150,000	\$7,000,000	Best Value	-	IDIQ Contract	NAVFAC - Mid-Atlantic

Final Thoughts

- Always get a debrief, and learn from them
- Always submit responses to sources sought, and make sure you are tailoring them like your proposals. Submit with a teaming partner if necessary to qualify.
- Ask lots of questions!

Get out from behind the screen - Proposal writers/managers should be in the industry, at SAME events learning first-hand what owners want.

Thank You

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Q&A & FEEDBACK

Please speak up when asking questions.

