

# SubCon

TRAINING WORKSHOPS  
MARCH 30-31, 2017 • DULLES, VA



# Best Practices for Reading & Responding to RFPs

March 30, 2017, 10:30-12:00

Presenters:

Melanie Burgess, CPA, CPCCM, Fellow

Robert E. Jones, CPA, CPCCM, Fellow

# Learning Objectives

- Overview of RFP structure
- Understand importance of information provided
- Learning how to read and respond to RFPs
- Have fun working with others on RFP analysis

# General RFP Structure

- Part I: Sections A thru H
- Part II: Section I
- Part III: Section J
- Part IV: Sections K thru M

# Section A: General Information

- Often consists of a single-page solicitation form (e.g. Form 33)
- Provides basic information such as:
  - Solicitation Number
  - Type of Contract
  - Where and When to Submit Your Bid
  - Contact Information

# Section B: Supplies/Services and Prices

- Summary description of the contract requirements
- Often bulk of RFP in terms of pages
- All requirements listed as CLINs
- Includes other billable items such as travel and ODCs

# Section C: Description/Spec/SOW

- Detailed description of the work to be performed
- Heart of the proposal: what the agency needs
- Describe how you'll fulfill the contract – be certain your solution meets all specs
- May include specific labor category requirements

# Section D: Packaging & Marking

- Contains packaging, packing, preservation, and marking instructions
- Products may require UID labels
- Many shipments require MIL-SPEC packaging that resists water or sand



# Section E: Inspection & Acceptance

- Identifies inspection and acceptance requirements
- Inspection may occur during manufacturing, before shipment, or after delivery
- Acceptance may occur after delivery and testing
- Acceptance can impact revenue recognition

# Section F: Deliveries or Performance

- Identifies the “where” and “how” delivery requirements
- Product may be shipped to multiple locations, in different quantities, or by different methods

# Section G: Contract Administration Data

- May include:
  - Status reporting
  - Accounting and appropriation data
  - Contact information for key agency personnel
- Some tasks or functions may be delegated

# Section H: Special Contract Requirements

- Requirements not addressed elsewhere
- Often contains very important information

# Section I: Contract Clauses

- Clauses that will be included in any resulting contract
- Clauses in full text
- Clauses incorporated by reference
- FAR, agency supplements, and local clauses

# Section J: List of Attachments

- RFPs and contracts are not single documents
- May include:
  - Drawings
  - Specifications
  - Statements of Work

# Section K: Reps & Certs

- You are affirming your compliance or ability to receive a contract
- Required even if SAM registration is current

# Section L: Proposal Prep Instructions

- Format items:
  - Font
  - Margins
  - Page length
- Organization:
  - Volumes (Technical, Cost, Management)
  - Indexes
- Proposal Adequacy Checklist



# Section M: Evaluation Factors for Award

- How your proposal will be graded
- Main factors for consideration
- Importance of each factor
- May include:
  - Lowest-price, technically acceptable (LPTA)
  - Tradeoff
  - Best value

# Common Pitfalls

- Not asking questions to clarify ambiguities
- Not following the prescribed format or making it easy to trace between the RFP and the proposal
- Failing to complete a compliance matrix and then performing QA of proposal against the matrix
- Insisting on telling the Government what YOU want told instead of responding with answers THEY want to hear

# Activity

- Review the RFP & discuss with your group the approach to responding
- Examples of items to consider
  - Identify ambiguous or unclear requirements
  - Determine questions to ask
  - Identify any provisions or clauses that should be removed
  - What requirements would you flow to the subcontractor
  - General plan to respond to the RFP
  - Any concerns with being compliant
- Present your findings and Engage in discussions

# Contact Information

- Melanie Burgess

[Melanie@BurgessConsulting-LLC.com](mailto:Melanie@BurgessConsulting-LLC.com)

(720) 526-6935



- Robert E. Jones

[Robert@LeftBrainPro.com](mailto:Robert@LeftBrainPro.com)

(614) 556-4415

