

## Proposal Preparation: Secrets and Ideas

### Proposal Preparation Insider Secret # 1 – Pricing Document Preparation

The secret to preparing effective pricing documents quickly and at a minimal cost, is to have discussions with the estimators about the level of detail they need.



### Proposal Preparation Insider Secret # 2 – Sales

Preparing Federal Government Design-Build proposals are similar to what Real Estate developers do – **SELLING an IDEA.**



### Proposal Preparation Insider Secret # 3 – Sales

Customers buy on impulse or emotion and justify their purchase on facts presented. Federal Design Build Proposal Evaluation Committees are no different.



### Proposal Preparation Insider Secret # 4 – Marketing

Marketing is nothing more than attracting customers to your business so they can buy what you sell. Considering this,

- Do you know who your customers are?
- Do you know what your customers do?
- Do you know what your customers' biggest problems are?
- Do you know where to find your customers?



### Proposal Preparation Insider Secret # 5 – Sales

You are more effective when you can answer “YES” to the following questions:

- *Scope of work/services* – Have you effectively communicated with your customers what you are selling?
- *Contracts* – Is it easy to buy from you?
- *Schedule* - Is your delivery schedule acceptable?
- *Price* – Is your product or service priced right so your customer can see its value?
- *Reputation* – Finally, do you have the reputation to deliver on your promises above?



**Proposal Preparation Insider Secret # 6 – Is the Project Funded Correctly?**

Before getting involved with preparing a Federal Design-Build Proposal, this simple mathematical equation can be used to check if the government’s expectations are sound.

**Scope of work** (the project size expressed in square feet)

**X**

The **quality of construction** they describe translated into \$/sq.ft.

**X**

The **Schedule Factor** – using their time expectations (normal schedule = 1, accelerate schedule or phased = greater than 1.0)

**X**

General Condition factor of 10%

= **\$ Project Budget**



**How close is this number to what was published?**

**Proposal Preparation Insider Secret # 7**

To understand **HOW** to win a Federal Design Build project is to understand **WHY** it is a project. Check the Project’s Budget Request document DD form 1391.

**Proposal Preparation Insider Secret # 8 - Proposal Organization**

Provide all requested information in your proposal in the space required. The Proposal reviewer **WILL NOT** search though your proposal. Do **NOT** get Creative!



**Proposal Preparation Insider Secret # 9 - Design Assistance**

A design team effort to during the proposal phase can be reduced if the General Contractor is aligned with subcontractors that can assist with the design.



**Proposal Preparation Insider Secret # 10 - Base Bid**

Your base bid must be the building described in the Request for Proposal, **NO EXCEPTIONS!** If you have a better idea it needs to be included as a second solution called a Priced Betterment.



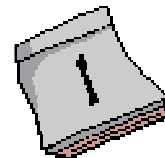
**Proposal Preparation Insider Secret # 11 - Technical Proposals**

**ALWAYS** explain the system you are going to provide and why this is the best choice for them. **SELL IT!**



**Proposal Preparation Insider Secret # 12 - Betterments, Preferences, & Desirables**

The government will list in the **RFP Betterments, Preferences and Desirables** Requirements they would like to have. One of the first things to be done is search the **Scope-of-Work Section** for these and discuss if these optional requirements are to be included in your base bid.



**Proposal Preparation Insider Secret - # 13 - Cross your T's and Dot your I's!**

The government will do what they can to eliminate proposals if they do not like or accept the proposals they do. Don't give them a technical reason to eliminate your proposal.



**Proposal Preparation Insider Secret # 14 – Check Award rules First**

A good place to start reading a Federal Government RFP is the rules around how they will award the project. Is the award based on “best value” or the “lowest price that is technically acceptable”? If they publish a price published is it a not-to-exceed or a suggested price they want to pay? Base bid must be no more than the published budget, priced betterments can exceed it.



**Proposal Preparation Insider Secret # 15 – Design Fees**

The secret to preparing a design fee is to use the check list of the Design Team Scope of Services. Here is a check list of requirements to look for in the RFP.

- Execution of the Design Quality Control Plan
- Design Package Preparation (plans, specs, design analysis)
- 1354 preparation.
- Renderings
- Shipping.
- Number of Trips to be taken
- LEED Compliance
- Construction Administration
- Site Information, Surveys and Geotechnical Studies
- As-built Drawings
- Determine the Extensions of Designs



**Proposal Preparation Insider Secret # 16 - Discussions or “No Thank You” Letter**

If the government is interested in your proposal they will:

1. send you a letter to participate in discussions
2. organize their issues as clarifications, weakness, and deficiencies
3. Instruct you to fix your deficiencies or your proposals will be eliminated.



If they are not interested they will send you a “No Thank You” letter (the bureaucratic equivalent of a “Dear John” letter).

Attend the Debriefing meeting to learn why for future reference.

## **Proposal Preparation Insider Secret # 17 – How to read the RFP**

The secret to preparing a winning proposal is having experience to expeditiously gather the information you need to prepare your proposal effectively.

**Section A - Information to Offerors** - where to find the due date

**Section B - Supplies or Services and Price/Cost** – Instruction on how to format your price – CLINs

**Section C - Statement of Work** – it describes what they want to purchase.

**Section D - Packaging and Marking** – Instructions on shipping reports and materials. These instructions may effect cost and logistic issues

**Section E - Inspection and Acceptance** – Outline how the Government will officially accept deliverables and what to do if work is not accepted.

**Section F - Delivery or Performance** - Definition of how the Government will control the work performed. Also there will be instructions on the delivery of certain contract terms.

**Section G - Contract Administration Data** – How the Government and the offeror will interact. Also there is direction for performance and prompt payment.

**Section H - Special Contract Requirements** - contract requirements that are important to the procurement. These may include change management, Government furnished equipment or property rules.

**Section I - Contract Clauses/General Provisions** – Contract clauses that may have been referenced elsewhere in the RFP. You are not allowed to negotiate these terms and conditions.

**Section J - Attachments, Exhibits** – This is where the Government includes items such as Floor Plans, Design Guides, Geotechnical reports, etc. All these items need to be considered and are complimentary to the statement of work.

**Section K - Representation/Certifications and Statements of Offerors** – All these forms for the offerors representation and certifications need to be completed and submitted with the proposal.

**Section L - Proposal Preparation Instruction and Other** - formatting, organizing and submitting – Look for page count, page layout, media, submission method, and outline/content

**Section M - evaluation criteria** – Look for scoring method, score weighting, evaluation process, past performance approach, and “best value” definition.

