GOVERNMENT & COMMERCIAL PROPOSALS

PROPOSAL BEST PRACTICES

PROPOSAL INDUSTRY NEWS

PROPOSAL TIPS, TRICKS, & SECRETS

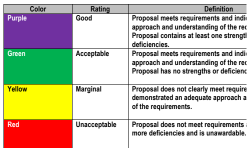
NATIONAL CAPITAL AREA

EXECUTIVE summary

Spring/Summer 2017 | Volume 24, Issue 2

This Issue's Theme: **Thinking Like an Evaluator**

Inside:



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A Publication of the Association of Proposal Management Professionals (APMP) National Capital Area (NCA) Chapter

President's Corner

Highlight Your Strengths

by Lisa Pafe, APMP-NCA President, CPP APMP Fellow & PMI PMP

We all know the adage: features tell, but benefits sell. This tired old adage of how to sell is true, but in the Federal space, strengths result in the win.

Government evaluators typically review your proposal using a scoresheet. In accordance with Federal Acquisition Regulations (FAR,) they must evaluate the bid based solely on the evaluation factors and subfactors as well as their relative importance. To do so, they must document strengths, weaknesses, deficiencies, and risks. Government evaluators search your proposal for information they need to document findings properly.

Evaluators treat your proposal like an encyclopedia to search for potential strengths, weaknesses, deficiencies, and risks. Typically, evaluators review and score specific proposal sections rather than the entire bid. They do NOT read the proposal like a novel from page one to the end. Often, they do not bother to read sections that are not scored such as the transmittal letter or Executive Summary.

The bidder with the best—and possibly the most—strengths, no significant weaknesses or risks, and no deficiencies, is likely to win. If all bidders are equal in perceived strengths, then price likely emerges as the deciding factor.

How do you achieve a strength? A strength is a feature you propose with an associated proven benefit that:

- Exceeds a contract requirement in a way beneficial to the customer (they would be willing to pay for it)
- Increases the likelihood of successful contract performance (technical, schedule, cost, quality)
- Increases the likelihood of successful mission accomplishment (agency mission, safety, lethality, etc.)
- Mitigates mission or contract risk
- Ideally is not neutralized by other bidders; in other words, it becomes a discriminator for your bid

To achieve a designation of strength, you must understand what the customer values. Well before RFP release, smart bidders vet potential strengths and corresponding proofs with the customers most likely to comprise the Source Selection Evaluation Board (SSEB) and with the Source Selection Authority (SSA). Guessing at strengths is a losing battle; you must understand what the customers comprising the SSEB value and what proof points will resonate with them.

Once you have vetted and affirmed the features you expect to be designated strengths during capture, make sure that the evaluator can find them in the proposal. Do not let them infer or conclude that a feature/benefit/proof is a strength. Highlight each strength with strong statements, icons, graphics, action captions, and more. Repeat important strengths across sections in case evaluators are reading only assigned sections.

Focus your efforts primarily on the sections of the proposal that will be scored. Establish a strengths real estate budget based on evaluator factor and subfactor relative importance. In other words, make sure the most important proposal sections have the best and possibly the most strengths.

After each bid, compare strengths bid to strengths observed by the Government evaluators. If the ratio does not achieve 1:1, determine why. Did you fail to understand what strengths the customer values? Did you fail to present strengths in a manner that made them easy to understand and score? Based on debriefs, develop an action plan to continue to enhance your strengths.

For Government evaluators, benefits may sell, but benefits must achieve the level of strengths to win the contract.

Lisa Pafe, Vice President at Lohfeld Consulting Group, is a CPP APMP Fellow and PMI PMP with more than 25 years of project, capture, and proposal management experience for small to large companies serving civilian and defense agencies. She is the President of the APMP-NCA Chapter, and she previously served as Vice President and Speaker Series Chair for two years as each, respectively. Her prior experience includes: Vice President of Corporate Development at Ace Info Solutions, Inc.; President of Vision Consulting, Inc. Vice President of Business Development for GovConnect, Inc.; and Director of Marketing for MAXIMUS, Inc. She holds a BA from Yale University, MPP from Harvard University, and MIS from The George Washington University.

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Proposal Innovations

Thinking Like an Evaluator

by Hélène Courard, APMP-NCA Vice President, JD, CF APMPP

What does it mean to "think like an evaluator?" In simplest terms, it means being client-focused and highlighting what the evaluators will want to see in our proposals that will resonate with them, persuading them to select our firm to provide the goods and/or services we offer. But why is this important? This is important because the better we understand what rules the evaluator is bound by, as well as the role they have been asked to fill and their interpretation of that role based on their individual background and point-of-view, the better we can present our offer in the most advantageous light to earn the award.

Let's use a sports analogy to demonstrate: in an NBA basketball game, the objective is two teams facing off by trying to accumulate the greatest number of points by shooting and making baskets while preventing the other team from doing the same. This is like the SOW/PWS of an RFP – the 'what' of the competition. Each team must appear with at least five players, each in the regulation team uniform, in compliance with all the rules on the game – i.e., 'how,' similar to the RFP instructions. But points are given only when baskets are made – i.e., 'how many points are awarded,' just like an RFP's evaluation criteria. We do not get any points for showing up with five players in uniform, but if we show up with fewer players and/or they are not wearing a regulation uniform, we don't get the opportunity to play the game or make any baskets.

The number of points for a basket are defined in the rules (evaluation criteria); e.g., a standard lay-up is worth two points, a basket from the foul line is worth one point, and a basket made from further down the court delineated by the three-point-line is, obviously, worth three points. The instructions and evaluation criteria for how to score and how much each basket is worth is defined by the rules of the game.

How these rules are applied, however, depends on the perspective of each referee. The referee determines if a foul has been made and if that foul justifies a foul shot (as opposed to a possession change or other option). The referee determines if a player was in or out of bounds when shooting a basket, and their perspective is central to whether or not the shot was made inside or outside of the three-point line. Depending on the point-of-view of the referee and their interpretation of where the players were when they shot the ball, we may or may not get credit for the baskets made.

In the game of proposals, the referee is the evaluator. The evaluator uses the instructions and evaluation criteria to interpret what our proposal should address, in what manner it should be presented, and what to focus on to score our offer; but this is all filtered through the individual evaluator's perspective. So, how does one "think like an evaluator?"

In U.S. Federal procurements the Government client tells us specifically—

- What they are looking for in the proposal submission via Section L, the Instructions, and
- What matters to them – how (or against what criteria) they will score our responses via Section M, the Evaluation Criteria.

As we know, evaluations start with compliance screenings. This means assessing the proposals submitted against the instructions to determine which proposals can be eliminated without looking at the content because they did not follow the rules. More importantly, the evaluation criteria should drive our proposal development–in terms of organization, content flow, and page allocation–as well as how we conduct our color reviews, because this is want the evaluators will be looking at when they score our proposals. We should provide a clear roadmap to checking compliance and finding all evaluation factors so that our proposals map to the checklists or score sheets the evaluators will likely be using, and assessing each element or factor and subfactor. By thinking like an evaluator and developing our proposals with the evaluator's perspective in mind, we make our proposals easier for the evaluator to read, and thus easier to score. A proposal that is easier to score increases our ability maximize our evaluated score… increasing our chance of winning.

In addition to the mechanics of developing a proposal in line with the evaluation elements from Section M, you should get insight from your sales executives on the intangibles that influence your evaluators. This includes environment, mission focus, leadership, and budgetary constraints. The sales team has relationships within the client organizations and thus bring perspective as to the specific issues or concerns that exist within the client environment. For example, it's essential to know if a client has had a series of failures with recent vendors of new technology, and are therefore cautious about innovative ideas that are not concretely proven in the market. Or, maybe the new agency leader comes from a sister agency where they were known as a cost-cutter, so she is expecting to see significant reductions and efficiencies in all new contracts that are awarded. Maybe the morale of our prospective client agency is one of the worst in the Federal Government, with a workforce that is seeking to do the bare minimum, and this drives strict compliance with proposal instructions. Getting this type of insight can help as we assess how the evaluators will look at the proposal requirements and compare that to our responses, thereby influencing our approach on how to address the individual elements of the RFP in our proposal.

By thinking like an evaluator as we develop our proposals, we improve our ability to maximize our evaluated score, which has a significant impact on our likelihood of winning.

With nearly 20 years' experience leading and motivating teams to success, Hélène has been engaged with APMP-NCA since 2007. She has chaired several committees, mentored junior members through the NCA Mentor-Protégé program, and is currently serving as NCA's Vice President. She is the Director of Unisys Corporation's Global Proposal Center, leading a team of more than 30 professionals in the preparation and delivery of winning proposals worldwide for national, state, local, and commercial clients. She holds a BA from Saint Joseph's University, and JD from Santa Clara University School of Law.

APMP-NCA Members!

When was the last time that you logged into apmp.org and updated your profile information? It is easy to do and only takes a few minutes. Log in, and under "My Profile" go to Manage Profile and click on Edit Bio. Update your information and click on the blue "save changes" button at the bottom. It is that easy. Having your correct contact information makes it easier for the NCA Chapter to keep you informed on upcoming events and activities.

Ask the Graphics Guru

How to Depict Government IT Solutions

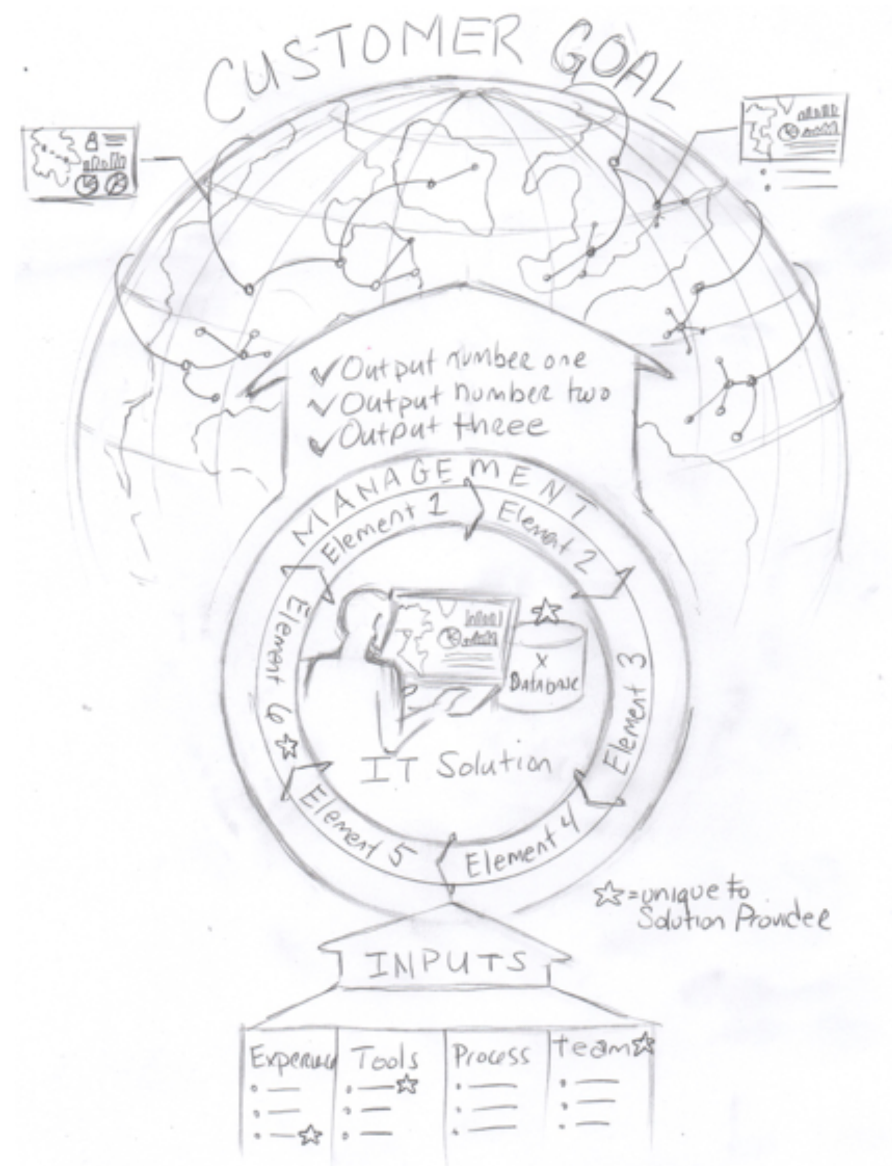
by Mike Parkinson, CPP APMP Fellow

The Government is modernizing its information technology infrastructure. As a result, many RFPs require innovative IT solutions. It can be challenging to pick the best way to show your approach. Network diagrams or screen shots are frequently used because both are relatively easy to create. Unfortunately, if the main reason you include a visual is because it is easy to conceptualize and render, it is most likely a losing graphic.

Choosing a visual representation of an IT solution should not be limited by your artistic proficiency. If that becomes your primary criterion, you will likely lose most of your proposals. Instead, focus on the message. Your message (or takeaway) should drive what you show in your graphics. For example, the Government asks for a high-powered computer solution that processes and helps them review data faster. The message (and resulting graphic) isn't "process and review data faster with our high-powered computer solution." Every company bidding on the RFP can say and show that statement via metrics and charts. The best messages and visuals demonstrate an understanding of the customer's true goal. Why do they want a high-powered computer solution that processes data faster? Your main graphic should connect the dots between what you propose and what they get after they have a high-powered computer solution that processes and reviews data faster. The technology is an enabler. It is a means to an end. The resulting concept may look something like the figure below.

After you establish the big picture, move on to the evidence and details. Provide proof that you can deliver on your promise (your original message). If the user interface plays a role in reviewing data faster, this is where you might want to show an augmented screen shot. Showing a simple image of your software interface is not enough. Point out and explain key features and how they improve data review.

The same is true for a network diagram. If the network architecture improves data processing, say and show it in your graphic. Don't make

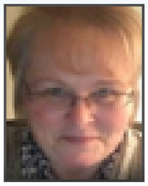


Tips: In between proposals, compile a library of editable graphics you can customize when your timeline is compressed. When working with a limited budget and no funds to hire a designer, consider trading services—graphic design hours for something of value you can offer. If you can't do either, then your message may not stand out against your competitors who use visuals to communicate their content.)

the evaluator figure it out. Their job is not uncovering what your solution is. Their job is evaluating the proposal and helping to decide who has the best solution for their needs. Reviewers are looking for clear, compelling communication that makes it easy for them to do their job. They want to quickly find the answers they seek. For this reason, use visuals for important and complex content.

The next time you respond to an IT-based RFP, determine your message first and then connect the dots between your technical solution and their true goal. Make it clear what your solution is, how it meets their needs and why it's better (or unique) … and show it in a graphic.

Mike Parkinson, Microsoft MVP, CPP APMP Fellow, is an internationally recognized visual communications, solutioning, and proposal expert. He is also a professional trainer and award-winning author. He is a partner at 24 Hour Company (24hrco.com) His Billion Dollar Graphics book and website (BillionDollarGraphics.com) share best practices and helpful tools with professionals. Contact Mike at mike@24hrco.com or call 703-533-7209.



Through Another's Eyes

by Candy Jenkins, APMP CP, PMI PMP

There are multiple organizations, journal articles, blogs, and various other forms of information on how to facilitate color reviews for proposals. There are several schools of thought around how that should be done, and every organization and group should decide what works best for them since there is really no wrong or right way to do it. But facilitating the review (from having a kickoff to gathering and then recovering the comments) is only one part of the task; the other is actually performing the review. It is this part of the process that has, until recently, received a lot less attention than the actual facilitation, but that trend is starting to change.

For Federal procurements, which are regulated by the FAR, there is a very stringent process around how proposals are evaluated. Scoring is performed around strengths, weaknesses, and deficiencies. This process is very different from commercial procurements, which are not governed by the FAR and can be evaluated however the organization letting the procurement would like. These can, and tend to be, more "salesy" in tone and presentation, and proposal writers approach their task with more flexibility and creativity. When responding to a Federal procurement, however, writers—and reviewers—should have a very different and specific focus. Figure 1 offers a typical example of how proposals are rated.

Color	Rating	Definition
Purple	Good	Proposal meets requirements and indicates a thorough approach and understanding of the requirements. Proposal contains at least one strength and no deficiencies.
Green	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements. Proposal has no strengths or deficiencies.
Yellow	Marginal	Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements.
Red	Unacceptable	Proposal does not meet requirements and contains one or more deficiencies and is unawardable.

Figure 1: Color and Adjectival Rating Example

We're being told more and more often that Federal evaluators do not sit and read a proposal cover-to-cover and may never even see that beautiful "story" that we have for so many years tried to craft into our proposals. At a very general, high level, what happens is this: Evaluators are provided with score sheets and a section of our proposal and are asked to score it based on specific criteria coming directly from the RFP. They look to see, first and foremost, whether we are compliant; did we follow all the rules? If not, then they have to go no further; our proposals are simply disqualified and they don't have to deal with our response at all. If we are compliant, then they start looking through our response, comparing it to the evaluation factors set forth in Section M, and determining whether our proposal shows any strengths, weaknesses, or deficiencies. Once that exercise has been completed, they give our proposals a score based on their findings.

Being forearmed with that information, Federal proposal writers need to adjust the way they approach putting together a proposal. Of course, we build our compliance matrix and proposal outline based on Section L and the requirements provided in the RFP, and compliance will always be the first major gate of review that needs to occur; after all, if we are disqualified before they can even score us, it doesn't matter how great our solution is because it won't even be considered. Reviewers need to be trained on what to look for in our proposal so that they are reading it through the eyes of the evaluator.

Traditionally, color reviewers are often sales and other executives who are still of the mindset that we want to tell a great story, and while it is important to have a cohesive, well-written response, these reviewers need to be taught to score it as well as critique it. It is incumbent upon the proposal and capture managers, whose job it is to know the RFP inside and out, to not only understand how to score and evaluate proposals, but to teach their reviewers how to do so as well. Proposal managers should prepare score sheets based on Section M and provide them to the reviewers, who should be trained in advance on how to use them. There are several key areas on which color reviewers should focus:

- Understand what their client perceives as a benefit and read to make sure that the proposal emphasizes those benefits, leaving no question in the mind of the Government evaluator that it exists
- Know how to look for weaknesses and, if possible, offer solutions to either mitigate or avoid the weakness altogether
- Understand the difference between a weakness and deficiency and make sure that any deficiency is given the highest priority in the color review debrief
- Understand how to give the proposal a rating based on the rating information provided in the RFP

ONE OF THESE TABLES WOULD BE CREATED FOR EACH EVALUATION FACTOR/PROPOSAL SECTION:

Sample Evaluation Worksheet

RFP Number:	Insert Name	**Evaluator Name:**	Insert Name	**Offeror:**	Insert Name
RFP References: Evaluation Factor:				**Proposal References:**	
Language from the RFP Section M or other Evaluation factors would go here for the reviewer.				**Part II: Technical Approach** **Factor 1: Technical Approach (Acceptable/Unacceptable)**	

Overall [Insert Name] Evaluation Rating: (circle one)

BLUE	PURPLE	GREEN	YELLOW	RED
Proposal meets requirements and indicates an exceptional approach...multiple strengths and no deficiencies	Proposal meets requirements and indicates a thorough approach...at least one strength and no deficiencies	Proposal meets requirements and indicates an adequate approach...proposal has no strengths or deficiencies	Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements	Proposal does not meet requirements and contains one or more deficiencies and is unawardable.

Supporting Rationale:

1. **Strengths:**
    1.
2. **Weaknesses and/or Deficiencies:**
    1.
3. **Risks:**
    1.

Items Requiring Further Clarifications/Negotiations:
1.

ONCE ALL OF THE ABOVE TABLES WERE COMPLETED, A SUMMARY SCORESHEET WOULD BE COMPILED FROM ALL OF THE REVIEWERS:

Summary Score

Factor/Sub-factor	Strengths	Weaknesses & Deficiencies	Risks	Remarks & Comments
Part II: Technical Proposal				
A: Technical Approach				
Task 1 – Program Management				
Task 2 – Transition				
Task 3 – Maintenance				
B: Key Personnel and Staffing				
B.1 – Key Personnel				
B.2 – Resumes				
C: Similar Experience and Past Performance				
C.1 – Similar Experience				
C.2 – Past Performance				
Total				

Overall Evaluation Rating: (circle one)

BLUE	PURPLE	GREEN	YELLOW	RED
Proposal meets requirements and indicates an exceptional approach...multiple strengths and no deficiencies	Proposal meets requirements and indicates a thorough approach...at least one strength and no deficiencies	Proposal meets requirements and indicates an adequate approach...proposal has no strengths or deficiencies	Proposal does not clearly meet requirements and has not demonstrated an adequate approach and understanding of the requirements	Proposal does not meet requirements and contains one or more deficiencies and is unawardable.

Figure 2: Sample Evaluation Scoresheet

Figure 2 shows one possible way to elicit that information from the reviewer and is based on the evaluation criteria illustrated in Figure 1.

It is never easy to change the perception of a person or an organization. Human nature makes most of us resistant to any kind of change. When it comes to the world of Government procurements and the contractors around the beltway, a vast majority of the people who are writing and reviewing proposals have done so for at least a couple of decades. They are entrenched in the traditional way of performing color reviews by providing comments on the narrative and making sure that the proposal tells their organization's story. While that perspective will always have its benefits and will be a necessary part of the review, we are going to need to make room for a new type of review where we score our proposals through the eyes of an evaluator if we want to continue to grow and win business in the future.

> We're being told more and more often that Federal evaluators do not sit and read a proposal cover-to-cover and may never even see that beautiful "story" that we have for so many years tried to craft into our proposals.

Candy Jenkins, PMP, is an APMP Practitioner-certified proposal professional with more than 20 years' leadership experience in personnel management, team development, and proposal management. She is currently a Senior Proposal Manager for DXC Technology's U.S. Public Sector Region. She is actively involved in the APMP-NCA Chapter, serving on this year's Board of Directors as Marketing and Publicity Chairman. She has previously published articles for APMP-NCA's eZine as well as the APMP Journal.

From Reviewers to Evaluators: Adding Value to the Red Team Review

by Kevin Switaj, CF APMP

Proposal reviews are vital to constructing a high-quality bid. Unfortunately, too many people see them simply as a step mandated by process-focused proposal managers. Proposal professionals can gain increased buy-in through shifting the central proposition of our red team reviews. By focusing on our review teams serving as mock evaluators, proposal managers can get actionable, focused comments that improve the document as well as the evaluation score. This article provides advice on how to prepare teams for this new approach, how to organize red team reviews to get the most effective evaluator-style comments, and tips to begin the recovery cycle.

Preparing Your Teams

Shifting the red team focus from merely reviewing content to serving as mock evaluators requires a shift in mindset. Normally, red team reviewers aim to provide ideas for ways to improve the product. In this approach, they also identify strengths and weaknesses based on the evaluation criteria for the specific opportunity.

To help red team reviewers become mock evaluators, the proposal team must provide basic training on expectations. This training can take place in the proposal kickoff (if the reviewers are included) or in a red team in-brief session. If the organization has a set team of strong reviewers (a "brain trust"), the training can occur outside of the individual review cycle to make sure that evaluators have the right skills across multiple bids.

The review team's understanding of the evaluation instructions forms the foundation for this approach. The proposal manager must work with the capture manager to identify reviewers prior to the kickoff meeting. Next, the proposal manager should ensure that the red team reviewers have the solicitation documents well in advance of the review. He/she also should check in with the reviewers 24-48 hours ahead of the red team document's release to confirm that they have read the solicitation. This can be a very informal conversation, but is imperative to ensure that the review runs smoothly.

The Review Itself

The key to a successful mock evaluation is collecting the information in an easy-to-use, easy-to-disseminate format. I use a color-coded Red Team Evaluator Feedback Form to get this information. The form has four main components:

- **Basic Information:** Includes section number, section name, and reviewer name.
- **Scoring Criteria:** The example Red Team Evaluator Feedback Form enables evaluators to score areas of the proposal using a color-coded scale, ranging from red (unacceptable) to blue (outstanding). Define each color for your particular evaluation, and then provide an area for the reviewer to indicate his or her score. Make sure that the form includes the solicitation's evaluation language (if your proposal does not include evaluation levels, use generic language from Government guidance).
- **"Getting to Blue."** In addition to asking your evaluators to score each element, also ask them to estimate and note the amount of work required to improve the proposal section to a "Blue/Outstanding" rating. This will prove critical to allocating your recovery time for the right tasks. For example, a section may be outstanding in all ways, except that it lacks a minor (PWS) element. In that instance, the evaluator should score the response as "Red"/"Unacceptable." It is easy to make that adjustment, however, so the "Getting to Blue" component should be rated as easy. On the flip side, you may have a proposal section that receives a score of currently "good"/"green" and compliant, but it will take dramatic reworking to get to "Blue/Outstanding." In that case, it may prove more strategic to accept the "Green" and allocate resources elsewhere.
- **Strengths/Weaknesses/Deficiencies:** The evaluators should detail their specific thoughts on why the proposal scores the way

it does, using the Government criteria as the framework for their comments.

On key bids, try to allocate time (at least 30 minutes) for the reviewers of each section to get together and compare notes prior to the debrief. This mimics the Government evaluation process and allows for a clear, consistent message to the writers during the debrief session. In this approach, each section should have its own 30-minute debrief that focuses on the overall score, key strengths/weaknesses/deficiencies, and suggestions for improvement. A single reviewer from each section should brief the writers on the combined inputs from the review board, and the writers should be in "listen only" mode, unless they need clarification on a comment. The proposal manager must keep the debrief moving to ensure that it stays within the 30-minute window.

Red Team Recovery

After the conclusion of the red team review and debrief session, the best way to begin the recovery process is to hold a recovery kickoff. This meeting allows the proposal manager to start the writers off on the same page and to reinforce common themes that emerged during the debrief session.

Each writer should receive the evaluation team's overview documentation, each individual reviewer's form, and the commented document. Providing all the documentation facilitates transparency and helps to ensure that the writer sees the perspectives from all reviewers. Sometimes great points from one or more reviewers may not make it into the combined document; in these cases, having each form enables the writer to address other potential shortcomings or highlight identified strengths.

Conclusion

Red team reviews are often viewed as necessary evils among contributors and reviewers alike. By incorporating the evaluation mindset into the reviews with proper training and explanation, our review teams can focus their comments and improve content by aiming directly at what the client has requested.

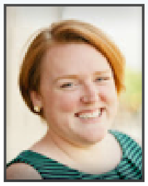
Kevin Switaj is the Director of Proposal Development at Buchanan & Edwards, a mid-sized Federal contractor based in Arlington, VA. A proposal professional for nearly a decade, he has spoken at multiple APMP conferences, writes articles for APMP publications, and regularly blogs at his website, kevinswitaj.com. He has degrees in history from Rutgers University, Villanova University, and Indiana University. Kevin is available on email at kevin@kevinswitaj.com, and on Twitter at @DrSwitaj.

Note From the eZine Chair and Chief Editor, Hannah Bauman

We are always looking to improve the eZine and would love to hear from you!

What did you think of this issue of the Executive Summary? What did you think of specific articles? Have questions, comments or suggestions for the authors or the editors? What articles, and themes would you like to see in future issues of the Executive Summary?

Please drop us a line at ezine@apmpnca.org. We look forward to hearing from you!



The Outsiders: Why Third Party Reviewers Rock at Color Team Reviews

by Erin Green, CF APMP

Like most proposal managers, by the time I get to a color team review I might not know if I've written the best—or the worst—proposal in history. To make sure I have clear goals coming out of color reviews, I bring in... The outsiders.

Bringing in someone to read the proposal like an evaluator is a critical best practice for effective color team reviews. The outsider, or third-party reviewer, can be someone who works in a different division of your company, a consultant, or anyone who can legally read your proposal document (usually not your mother). It's important to make sure that the reviewer hasn't been around during the development of the solution; it could skew how they score.

Giving the third-party reviewer instructions similar to what the evaluator would receive produces a score that can then be analyzed by the proposal management team to gain insight on where the document could be improved to maximize the score. It's also nice to hear where you are doing well. The answers could surprise you!

Bringing in someone to read the proposal like an evaluator is a critical best practice for effective color team reviews.

Another advantage of a third-party reviewer is being able to ask follow-up questions, a rare luxury in the real-life scenario with the buyer. In the outsider scenario, you are able to ask detailed questions about how they thought sections turned out and any improvements they would make to add those extra points. The proposal manager can then take those action items and insights and make recovery plans for sections, or strategy changes before the proposal becomes too set in stone.

While getting an outsider opinion is a best practice for color team content, it can also be useful to obtain their opinion on design and graphic components, and overall proposal organization as these factors can sometimes be left to the wayside when larger content issues arise. An evaluator notices graphical components immediately, and your outsider will tell you if anything was unclear.

If you don't have the time allotted or resources to add a third-party reviewer, it's useful to designate one of your internal reviewers to act as the official evaluator. This designation can help make sure that the message of the proposal is clear, and give you some insight into areas that may have been missed. The designated reviewer should use the exact score sheet (if provided by the buyer) or exact evaluation criteria to score each section.

In prior proposal management projects, I've developed a matrix to aid in reviewing proposals that do not include clear evaluation instructions or predefined score sheets. This matrix allows easy summation scores of each section and allows the strategy team to clearly identify outstanding and under performing sections for recovery.

For proposals of high value, it's worth asking a third-party reviewer for both an early and later review. This can confirm if the recovery efforts aided in getting that ideal score, and allow for strategy shifts early if needed. The idea of having an outsider isn't a new concept for those in APMP. In fact, it's one of our documented best practices in our Body of Knowledge. However, in my experience, being able to see the benefit in practice has made me a believer in the effectiveness and insight this outsider can bring to the inside.

Erin Green, CF APMP, has more than 10 years of experience in Government procurement. She is a Proposal Manager at MAXIMUS, leading large and small efforts in the preparation and delivery of winning proposals worldwide for national, state, and local clients. Erin has been engaged with APMP-NCA since 2011. She is a graduate of the APMP-NCA Mentor-Protégé program, inaugural recipient of the APMP-NCA scholarship, and award-winning author.

Thinking Like an Evaluator

by Shlomo D. Katz, JD

As a bid protest litigator, I often get to see exactly what evaluators were thinking. Unfortunately, I can't tell you detailed war stories. In a protest, the procuring agency shares "Source Selection Information" with the protester's attorney only after that lawyer promises in writing to use the information solely to make arguments in the protest and not to disclose it to anyone, client included. After the protest, we destroy the Source Selection Information we were given. Nevertheless, we can glean generalities from published bid protest decisions about how evaluators think, and how offerors can think like them.

Let's start at the beginning. The Federal Acquisition Regulation (FAR) describes "proposal evaluation" as "an assessment of the proposal and the offeror's ability to perform the prospective contract successfully." Thus, it's fair to assume that evaluators are thinking about whether you have demonstrated your ability to perform the prospective contract successfully.

In a properly conducted procurement, somebody has put together a Source Selection Plan setting out the Government's needs and how the Government will acquire them, including what information proposal evaluators will use to determine whether an offeror has the ability to perform the prospective contract successfully. In a properly conducted procurement, that is the information that the Government will request, primarily via the proposal preparation instructions in Section L and the evaluation criteria in Section M. *(But, don't forget to read and take into account the SOW and the other RFP sections as well.)* Possibly, evaluators will use some kind of checklist to ensure that offerors have satisfactorily addressed each of the things that the Government wants to know. Evaluators will be thinking: have you provided the information that was requested?

Unfortunately for offerors, evaluators have tremendous discretion to decide whether you answered their questions. You may disagree with their conclusions, but the Government Accountability Office (GAO), one of the tribunals that hear bid protests, is likely to dismiss your opinion as "mere disagreement." Offerors downgraded for not discussing topic "x" often will argue, *"But it's on page so-and-so of my proposal!"* Sometimes the offeror is correct and the agency made a mistake. Other times, however, the agency's answer is that you mentioned the topic but did not discuss it. In particular, evaluators will say that you described "what" but not "how." Here's a typical evaluator comment about a proposal (taken from a GAO decision): *"They state they will create a 'strategic roadmap' and 'enterprise level design for [the agency's] environment using our functional and technical* *experience with the technologies outlined in the applications list' but do not provide an approach or methodology of how they will perform this task."* This suggests that offerors are more interested in your attention to detail than in the buzzwords and jargon that all too commonly fill proposals. (Of course, jargon—particularly, technical jargon—has a place if it shows that you truly understand the requirements. Still, make sure you describe how you will accomplish the agency's needs.)

Some offerors assume that evaluators already knows what they have to offer and therefore fail to explain their proposal clearly. Incumbents especially fall into this trap. Just as when you were writing college essays, assuming that the grader knows what you are trying to say is a bad idea. GAO has explained: *"It is an offeror's responsibility to submit a well-written proposal, with adequately detailed information that clearly demonstrates compliance with the solicitation and allows a meaningful review by the procuring agency."* Even if the evaluator wants to award a contract to you, he or she will be hard-pressed to recommend award to you if your proposal did not answer the right questions. *(And, if the agency does award the contract to the non-compliant offeror, don't be surprised if the award is overturned through a protest).*

Here's another thing evaluators are thinking about. Let's say that the RFP asks offerors to commit to meeting certain performance metrics, but your proposal is silent or ambiguous on this point. How should the evaluators evaluate this? Should they assume that you intend to comply? In fact, if the Government awarded you a contract, you would not be legally bound to meet those metrics because they were not in your offer. This is clearly unfair to other offerors who might have lowered their prices if they had known that they could get away without meeting those metrics. On a practical level, since the performance metrics are not part of the contract, the Government would have no way to ensure that it gets the performance it wants. What the evaluators should do, therefore, is find that your proposal is non-compliant. In this scenario, the Government might give you a second chance. But don't count on it, as generally the Government has no obligation to hold discussions or seek clarifications. As noted above, submitting a clear and well-written proposal is the offeror's job. That is how evaluators think!

Shlomo D. Katz is Counsel in the Washington, DC office of the international law firm of Brown Rudnick LLP, a Corporate Sponsor of APMP-NCA, specializing in all aspects of Government contracting. If you have any questions about these or other proposal or contracting issues, please contact Shlomo at 202.536-1753 or skatz@brownrudnick.com.

Proposal Tip...

Hold an internal lessons learned meeting after each proposal to identify reuse material and process improvements.

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