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Evaluation Committee
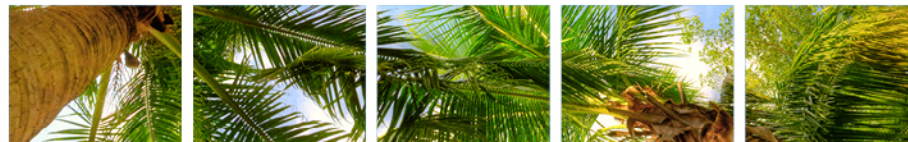## Thinking Like an Evaluator When Developing Proposals

Morgan Barker, Senior Proposal Manager, All Native Group

2

Agenda

- What is the purpose of the evaluation committee?
- Who sits on the evaluation committee?
- What does the evaluation committee look for?
- Deconstruct evaluator euphemisms

- Exercise – We'll pretend to be the evaluation committee and evaluate some sample proposals

- Questions??

What is the purpose of the evaluation committee?

- The evaluation committee reviews proposals received in response to an RFP.

- They score proposals based on previously established criteria found in the M, the Evaluation Section of the RFP

- Make awards to competent contractors and reduce risk to the Government / customer

Committee members

- Current employees/people on the program
- Consultants or subject matter experts
- Chief Information Officer
- Management
- CO/COTR/COR
- Possibly others!
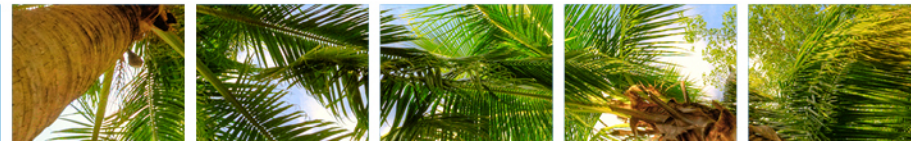
Other Possible Roles

- **Source Selection Authority (SSA)** – individual designated to make the best-value decision (usually the CO)
- **Contracting Officer (CO)** – responsible for coordinating with the Activity Manager to define acquisition requirements, entering into, administering, and terminating direct contracts in accordance with the limitations to their delegated authority, policy directives, and required procedures
- **Technical Evaluation Committee Chairperson -** responsible for the overall management of the TEC, can be an evaluator, act as the TEC's interface to the CO. Ensures the adequacy of documentation and the team's evaluation of the proposal's received.
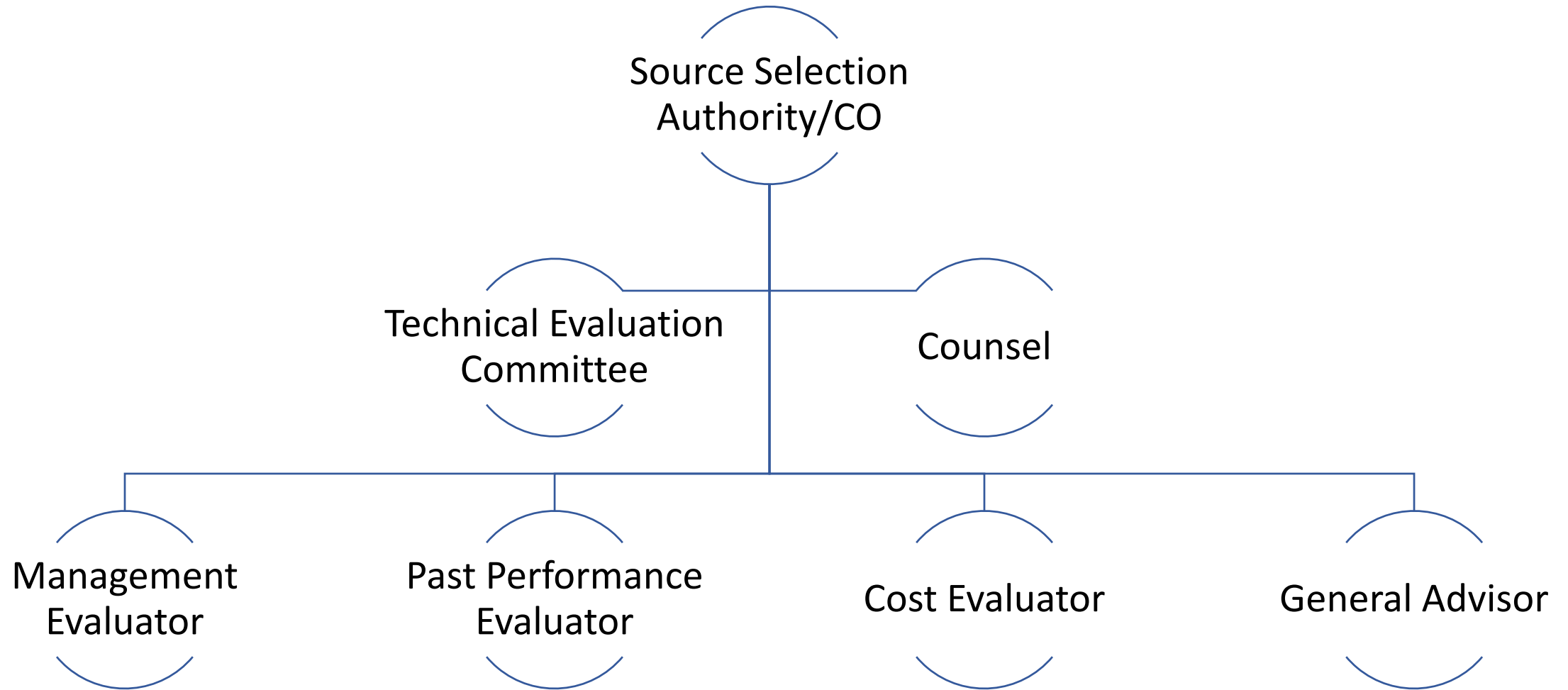
Roles

- **Contracting Officer's Representative (COR) –** designated by the CO and is responsible for the technical oversight and administration of the activity during the contract performance

- **Contract Review Board (CRB) –** comprised of Contracting Officers, members of the evaluation and Policy offices and when required representative of the General Counsel. The CRB is responsible for reviewing documentation for acquisition actions (pre-solicitation, competitive range determination, and pre-award) .

- **General Counsel (GC)** – responsible for advising the CO and TEC on legal issues relating to source selection process

Possible organization structure for an Evaluation Committee

Source Selection Authority/CO

Technical Evaluation Committee

Counsel

Management Evaluator

Past Performance Evaluator

Cost Evaluator

General Advisor

What are they looking for?

- ORIGINALITY
- COMPLIANCE
- COMPETENCY
- EXPERIENCE
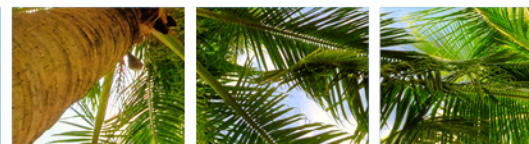- PRICE
- (Not necessarily in that order)

ORIGINALITY

- Do not merely reiterate the SOW/PWS
- You also have to clearly present a solution. Don't just parrot back "we will…do the requirements." Tell them how you will do it and why you offer the best value.

COMPLIANCE

I eat non-compliant proposals for dinner!

- Compliance is the golden rule of proposals – you have to follow all the rules set forth by the agency in the procurement to be deemed compliant. Then, they will review your proposal.

- Non-compliant proposals are typically thrown out.

- The evaluators aren't being mean, they just have a lot of proposals to get through in limited time. So, if you don't follow the rules, that's one less proposal they have to read.

I ♥ Trash

COMPETENCY

A strong proposal must demonstrate clear competency in the areas the agency is looking for.

- Technical
- Management
- Staffing
- Other Sections (Quality Assurance Plan, Sample Problem, etc.)

TECHNICAL VOLUMES

- A technical volume must demonstrate a clear understanding of the challenges faced by the customer.

- Technical must provide clear approaches, methodologies, and solutions.

- Technical volumes have to be clear and concise – someone who is not a SME should be able to read the tech volume and understand it.

- They are looking for the *right* solution. If the customer said they wanted a cloud solution, don't give them a physical data center.

# You don't want to leave evaluators confused!
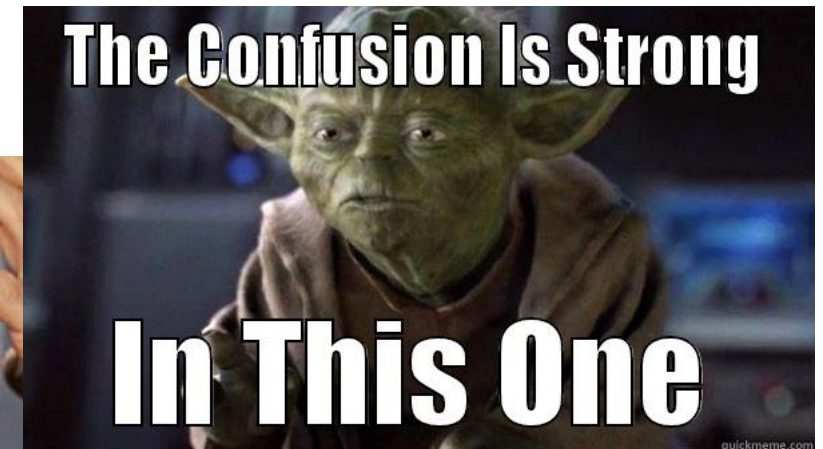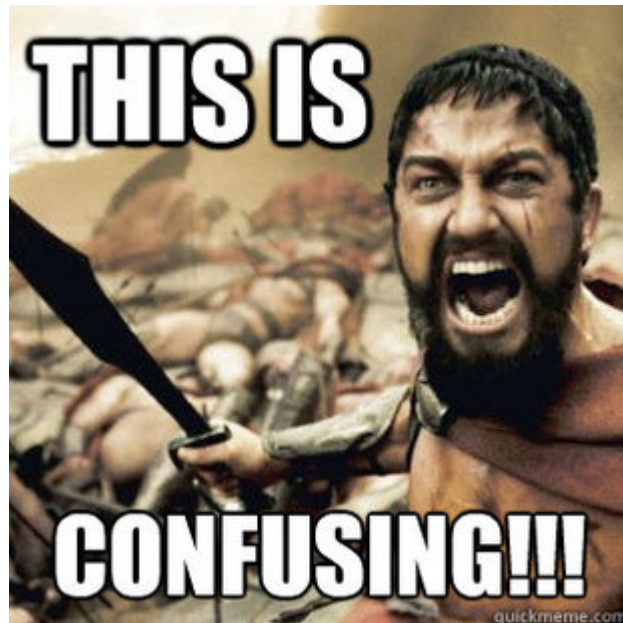
Management Volumes

- Does it present a sound management approach?

- Do I feel comfortable giving this company the business?

- Is the management approach appropriate for the size, scope, and complexity of the project?

- Is anything unique about the management approach? Does it provide a added value?

- Does the management approach use industry best practices?

How to make a proposal easy to evaluate

- Documents Are Neat, Well Organized, Easy to Read, and Evaluate
- Responsive to the RFP Requirements With Specific References Showing How the Proposed Project Will Achieve Program Goals and Objectives
- Provides Fresh Insight Into an Important Problem
- Writing Communicates Enthusiasm and Commitment
- Shows Evidence that the Bidder Knows the Work
- Has Convincing Data and a Feasible Work Plan Supported by Appropriate Cost Data
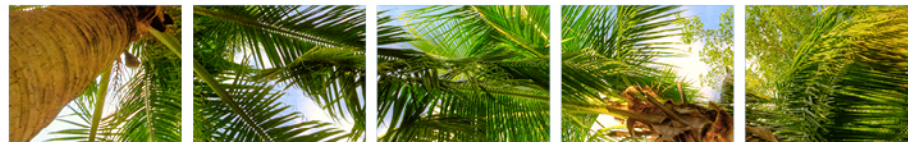
Evaluator complaints

- Poor Writing
- Lack of Program Understanding
- Proposal Organization/Structure/Ease of Evaluation
- Graphics Issues
- Difficult to read
- Who are these people and why do they think they know us?

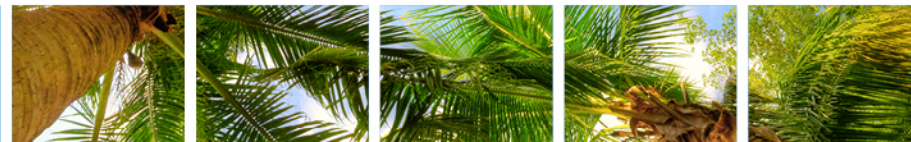# Evaluator Euphemisms

What the evaluator really means…

What they said:

- Thank you for taking the time to respond to our RFP. In the future, please reach out to our 'doing business with us office' / 'small business office' prior to submitting a proposal.

What they really meant:

- We've never met you, why would we give you money? Get to know us first next time!

What they said:

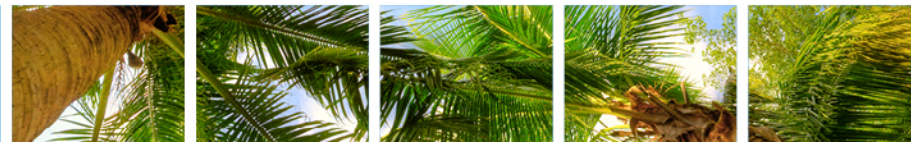While the proposal provided a comprehensive solution, it did not meet the requirements set forth in the PWS.

What they really meant:

Answer the ***expletive*** RFP requirements.

What they said:

- The proposal provided to the Government appeared generic and did not respond to this specific RFP.

What they really meant:

- I know you sent me boilerplate. You do not pass go or collect $200.

What they said:

- The first evaluation item was technical. The first ten pages of the technical solution were evaluated, however it was clear that the contractor did not understand A, B, and C. Deficiencies were noted on pages 1, 2, 3, and 4. Consequently, the management and price volume were not evaluated.

What they really meant:

- You weren't even close, but thanks for making it easy to eliminate you.
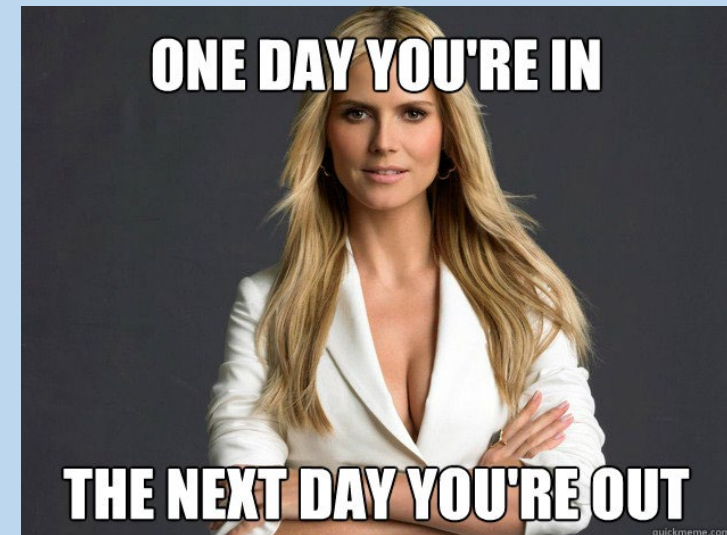
What they said:

- While the technical and management volumes were rated exceptional, the price was 20% over the next highest rated bidder.

What they really meant:

- We're Maxxinistas. You're Bloomingdales.

#maxxinista4life

What are some specific challenges evaluators may face?

Let's do an activity to find out and start thinking like evaluators!

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Congrats team! You've all been appointed to serve on an evaluation committee for the USAID. You've been appointed because each of you bring expertise to help evaluate the proposals we received in response to an RFP.
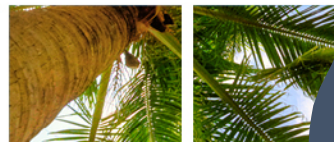
First, let's review what we put in the solicitation

- Solicitation #8675309

- Agency: USAID

- Title: Web Development Project for "Let Girls Learn"

About Us (the evaluators) – what we do and why!

62 MILLION GIRLS AROUND THE WORLD ARE NOT IN SCHOOL.

The *Let Girls Learn* initiative will help break down barriers to girls' education so they can build healthier families, stronger communities, and a brighter future.
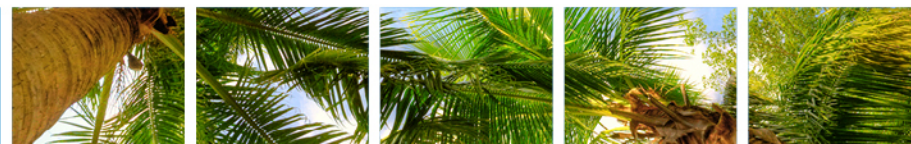
#LetGirlsLearn

WH.gov/LetGirlsLearn

What do we need?

- Let Girls Learn needs a public facing website for the general public and potential donors. This website will provide information about our work and enable individuals to connect and work with us. Additionally, it will house blogs for current USAID workers, who are working on Let Girls Learn programs.

- Web Development Requirements:
  - Since the website is intended to be accessed in both the United States and in countries where our volunteers serve, it must be adaptable to low bandwidth environments and viewable on any type of screen (laptop, tablet, phone, etc.)
  - The website shall be developed using Open Source tools.
  - The website shall include a landing page with information and ways to get involved and a blogger platform.
  - The website needs community tools such as the ability to rate, comment, and tag others' content on the blog platform.

Section L:

- **Section L: Instructions, Conditions, and Notices to Offerors**

- *L.1:* Formatting Requirements: Paper submission. 8.5x11. 12-point font. Times New Roman. Tables and Graphics with 8-point font in the Arial Family. (Screenshots of existing websites are excluded from font requirements.)

- *L.2:* The proposal shall be limited to 3 pages (excluding cover page) and include:

- Cover Letter

- Section 1: Technical Approach, Methodology, and Design Ideas

- Section 2: Management Approach

- Section 3: Past Performance

- Section 4: Pricing

Section M:

- **Section M: Evaluation Factors for Award**

- *M.1:* Proposals shall be ranked in two phases. In Phase 1, proposals will be evaluated based on Go/No Go Requirements. Proposals that are NOT complete and compliant will receive a "No Go" rating and will not proceed to Phase 2. Proposals that are complete and compliant will receive a "Go" rating and will proceed to Phase 2.

- *M.2:* Proposals that make it to Phase 2 will be evaluated to determine which proposal demonstrates best value. In evaluating, Technical Approach, Methodology, and Design Ideas will be considered most important. Pricing is the second most important. Management Approach and Past Performance are third most important.

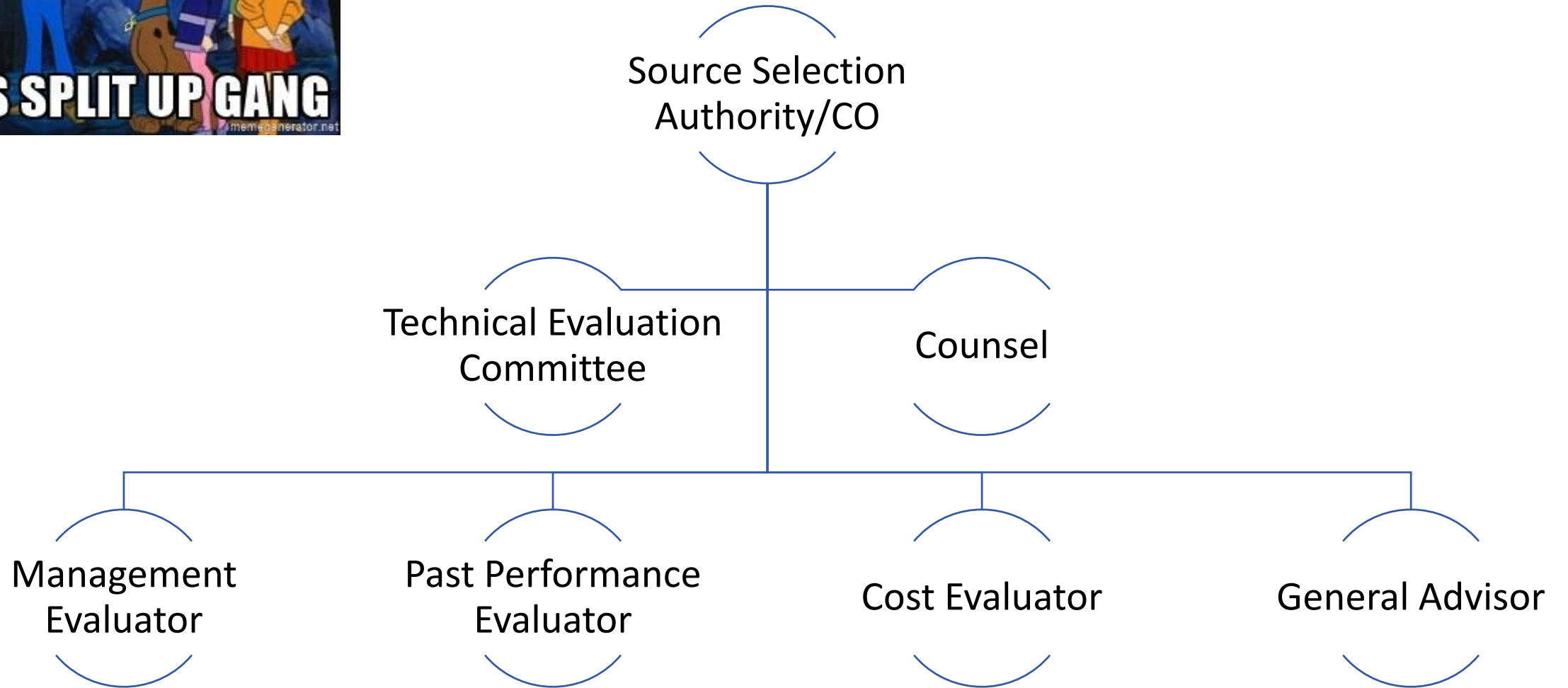- *M3.* USAID will use the following ratings to evaluate each volume.

Rating:	Technical and Management	Past Performance
Outstanding	A comprehensive and thorough proposal of exceptional merit that exhibits an extremely high probability of success.	Based on the offeror's past performance record, no doubt exists that the offeror will successfully perform the required effort.
Acceptable	The Proposal meets the Government's requirements and exhibits a probability of success.	Based on the Offeror's performance record, little doubt exists that the Offeror will successfully perform the required effort.
Unacceptable	The proposal fails to recognize, address or consider the Government's requirements.	Based on the Offeror's performance record, doubt exists that the Offeror will successfully perform the required effort.

*No past performance will receive a neutral rating.
***M4*. Pricing is rated based on reasonableness.**

LET'S SPLIT UP GANG

```
                    Source Selection
                     Authority/CO
                          |
          ┌───────────────┼───────────────┐
   Technical Evaluation    |            Counsel
       Committee           |
          |                |
  ┌───────┴───────┬────────┼────────┬──────────────┐
Management      Past Performance  Cost Evaluator   General Advisor
Evaluator        Evaluator
```

Let's Evaluate the Proposals We Received!

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Proposal Received from Acme Corp
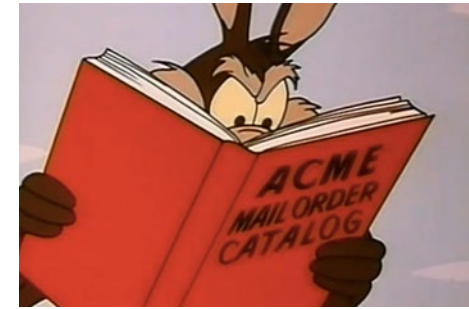
Cover Letter:

- Acme Corp is pleased to present our response to Solicitation #8675309. For the past fifty years, we have proudly provided large anvils to our CONUS and OCONUS customers. Our biggest customer, Looney Tunes said, "No one provides anvils quite like Acme." We are breaking into the internet business and are pleased to present our solution to USAID's need for a dynamic Let Girls Learn website.

Section 1: Technical Approach, Methodology, and Design Ideas

- **Technical Approach:**

- We propose using Drupal, an open source content management system, to develop the Let Girls Learn website. Drupal is a global community of developers, who work to create modules, themes, and APIs. It is well suited to developing a user facing site such as the one USAID needs to reach potential partners and donors. Additionally, there is a content management component that can be accessed by USAID volunteers globally for blog posts.

- **Methodology**

- We use an agile development methodology to create websites that are responsive to user needs. Our agile approach focuses on development sprints to develop site content. There is testing after each iteration and small releases made over time. We feel this is the best approach to match USAID' needs.

- **Design Ideas**

- By using existing Drupal themes, Acme Corp can quickly provide multiple options for website design.
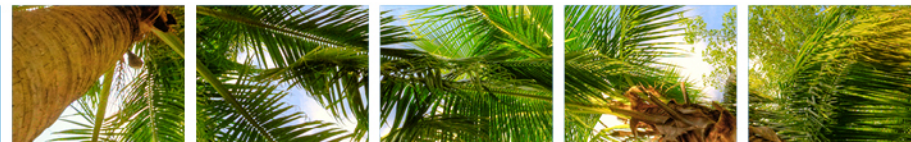
Proposal Received From ACME Corp

Section 2: Management Approach

- Our PM, Bugs Bunny, has extensive experience in program management. He has managed teams as large as 100 people and as small as 10. He is a PMP certified Program Manager. Our customer, Loony Tunes, gave him an award for his performance. ACME Corp uses industry best practices for program management.

Section 3: Past Performance

- Acme Corp does not have past performance in website development.

Section 4: Pricing

- $$$$$ Suspiciously low. $$$$$$

Evaluation Score for Proposal 1 / Acme Corporation

- Go No/ Go – Yes (answered all sections and compliant)

- Evaluation Rating for Technical and Management – Acceptable

- Evaluation Rating for Past Performance – Neutral

- Price – Not Reasonable

Proposal Received From Wayne Enterprises

Cover Letter: Wayne Enterprises provides Information Technology Services to customers across the globe. Our website development practice is award winning. In 2015, we won a Gartner Magic Quadrant Award for Web Content Management. We have provided services to our federal customers for the over 30 years and received a special accommodation award from the White House for our redesign of www.whitehouse.gov.

- Additionally, Wayne Enterprises is committed to giving back to the community. We are located in Gotham and for years we have worked with city leaders to reduce homelessness and improve educational opportunities for youth and adults. We will bring this same commitment to community service to USAID and the Let Girls Learn Program.

Section 1: Technical Approach, Methodology, and Design Ideas
  - **Technical Approach**

- We propose using Drupal, an open source content management system, to develop the Let Girls Learn website. Drupal is a global community of developers, who work to create modules, themes, and APIs. It is well suited to developing a user facing site such as the one USAID needs to reach potential partners and donors. Additionally, there is a content management component that can be accessed by USAID volunteers globally for blog posts.

- We have successfully used Drupal on websites for our other customers, the United Nations, Inter-American Development Bank, and World Bank. Their websites are accessed globally. These customers face similar concerns about operating in low-bandwidth environments.

Wayne Enterprises (cont.)

Methodology

- We use a hybrid agile-waterfall methodology for web development. We use the flexibility of Agile with the Waterfall phases of development. The stages of waterfall are Initiation, Analysis, Implementation, Testing and Maintenance. We incorporate the flexibility of agile into our approach. Our experience shows that this is a good methodology for large web deployments.
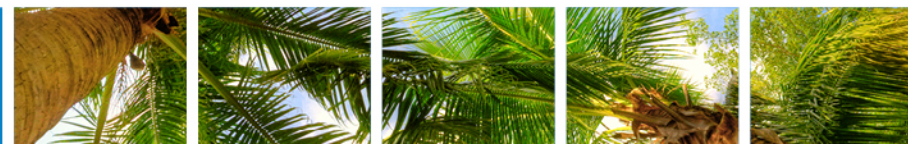
Design Ideas

- We have a team of dedicated Drupal developers and web designers, who contribute to the Drupal community. Our developers have contributed 100 separate themes to the community, which could be used by USAID. Our web designers will work with the USAID stake holders to fill out a design phase document. This document includes descriptions of content needs and desired style.

- Our web developers have already designed some options based on the needs of Let Girls Learn:

Joynur's Joy: Reading to Lead   LEARN MORE →

Long-term, sustainable development will only be possible when women and men enjoy equal opportunity to rise to their potential. Equal access to quality education has been shown to create pathways for greater economic growth, improved health outcomes, sustained democratic governance, and more peaceful and resilient societies.

Figure 1-1 Concept for Website

Wayne Enterprises (cont.)

Section 2: Management Approach

- Our proposed Program Manager, Bruce Wayne, brings 20 years of experience as a leader of large and small teams. He has his PMP and has been the Program Manager on the past performances referenced below.

Section 3: Past Performance

- Wayne Enterprises gives us real examples of websites they've designed with URLs.

Section 4: Pricing

- $$$$$ Totally reasonable. $$$$$$

Evaluation Score for Proposal 2 / Wayne Enterprises

- Go / No Go – Yes, answered all sections and compliant

- Evaluation Rating for Technical and Management – Outstanding

- Evaluation Rating for Past Performance – Outstanding

- Price - Reasonable

Proposal Received From Umbrella Corp

Cover Letter: Umbrella Corp is totally not dedicated to destruction. We have no intention of turning USAID volunteers into zombies. That will definitely not happen if you award Umbrella Corp the Let Girls Learn Web Development Contract. We are happy to present this proposal for evaluation.

Section 1: Technical Approach, Methodology, and Design Ideas

• Put Text Here (note to writer – come up with a technical approach, methodology, and design ideas)

Section 2: Management Approach

• We like to manage by force. Sometimes we let the T-virus out and see what happens.
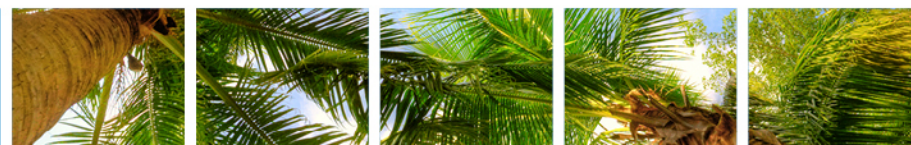
Umbrella Corp (cont.)

Section 3: Past Performance

• Check out this cool website we made!

It was made using open source tools.

Pricing:

• $$$$$$$$ Reasonable $$$$$$$$

Evaluation Score for Proposal 3 / Umbrella Corp

- Go / No Go – No, did not answer all the technical / management

- Evaluation Rating for Technical and Management – Unacceptable

- Evaluation Rating for Past Performance – Acceptable

- Price - Reasonable

And the winner is...

| Proposal # / Company	Go/No Go	Evaluation Rating for Technical and Management	Evaluation Rating for Past Performance	Price
Proposal 1 – ACME	Yes (answered all sections and compliant)	Acceptable	Neutral	Not reasonable
Proposal 2 – Wayne Enterprises	Yes (answered all sections and compliant)	Outstanding	Outstanding	Reasonable
Proposal 3 – Umbrella Corp	No – did not answer to the technical / management	Unacceptable	Acceptable	Reasonable

After a loss notice...
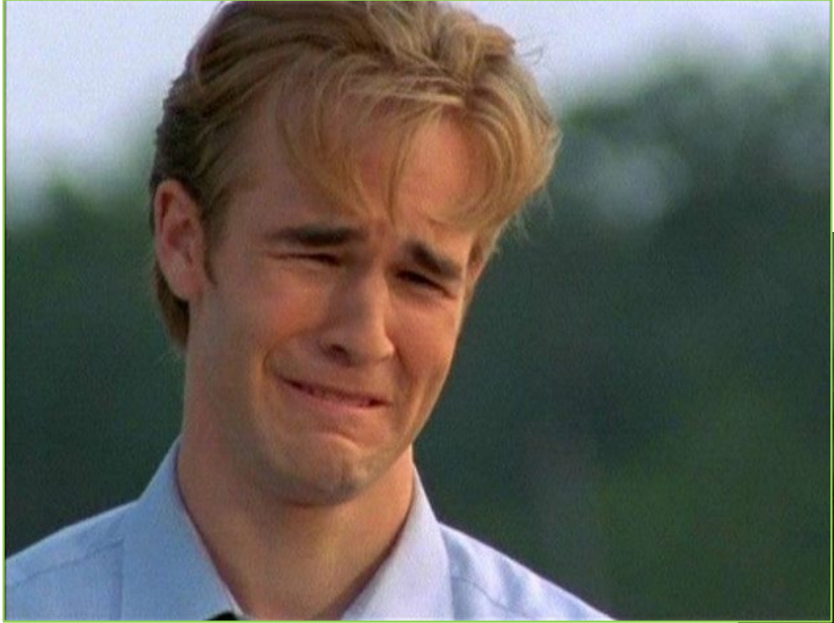
Lessons Learned for Acme Corp
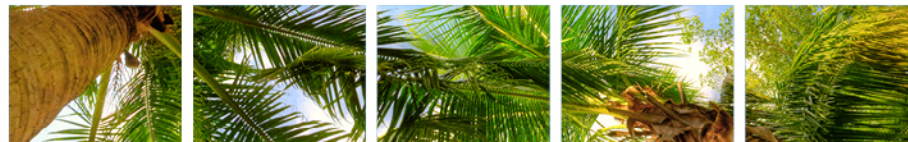
USAID Debrief:

- The approach provided for technical and management was rated acceptable. It met the criteria of the RFP, however the proposal would've been strengthened by website concept images.

- The past performance was rated neutral as there was no past performance to be evaluated.

- The price was unreasonable. Acme Corp provided a total estimated price of $1M while the winner provided a total estimated price of $500K.

Lessons Learned:

- We received positive feedback on our approach and methodology for technical and management, but examples would help. In the future, we'll provide some wireframe website concepts. For management, we could incorporate some case studies with quotes from other customers.

- The Business Development Team needs to add some web development subcontractor opportunities to the pipeline, so we can begin to develop some past performance. Maybe we could reach out to some of our current programs to see if there's a way to offer web development to a current customer.

- Pricing department needs to start from scratch on the pricing exercise to determine how Wayne Enterprises provided a 50% lower price.
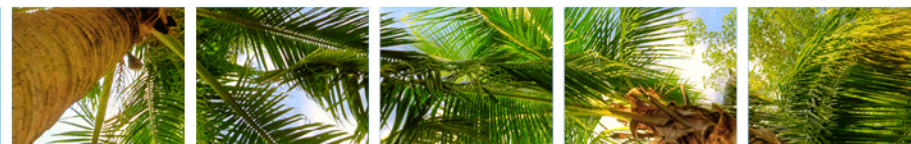
Winners should also hold a lessons learned where the go over the debrief as well. A winning proposal is not necessarily a flawless proposal.

Key Takeaways

- Know WHO you're talking to. Be sure not to fall into their common complaints file.

- Always be compliant, answer the RFP, and make it easy for the evaluator to view your proposal favorably.

- Showcase your company / your solution in a customer focused way.

- Win or Lose, learn from your mistakes. Hold lessons learned after debriefs to discuss what went wrong and how the issue could be alleviated in the future.

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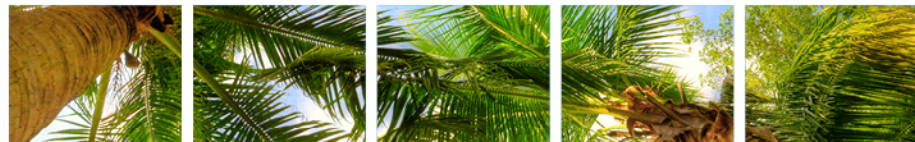2019
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Questions?

Thanks for attending!

*** I do not own any of these images***

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(while it's fresh in your mind!)

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