



Strategies on How to Respond to Opportunities

Getting the Evaluator to Say “Yes”

Presentation Takeaways

- Effective tips to address quick turn-around on RFPs
- Tools to help manage the volume of RFP requests
- Solicitation trends

Highlights of the Buying Season

- Multiple solicitations issued on single day
- Short response time
- Personnel requirements
 - Citizenship
 - Security Clearance
- Place of Performance requirements

Prepare Now

- Begin selecting content that can be used now
 - Past Performance write ups
 - Executive Summaries
 - Management Plans
 - Staffing Plans
 - Security Plans
- Make sure your registration in SAM is up to date
 - Effective July 1 2018 you can now download a copy of your Reps & Certs FAR Report and FAR/DFAR Report to include in the solicitation response.

Data Confirmation

- Confirm that your data is available in CPARS
 - Ask for a copy of the CPARS submission
 - If time permits, request corrections if needed
- Confirm that your data is correct in FPDS (applies to primes)
 - NAICS Codes
 - PSC Codes
 - Period of performance

Update and Plan Now

- Begin making any updates or changes to the GWACs or schedules used by your organization
 - Administrative Point of contact
 - Additional labor categories
- Plan for surge support
 - Reviewers
 - Book Boss
 - Coordinators
 - Graphic artists

Pivot the Process

- **Analyze the available time to determine the windows for review, time for formatting, time for input**
 - Begin by making a plan that attempts to find time for each of the reviews. Backward plan from the delivery of the proposal. Initially, try to target having the proposal done the day before it is due. This step automatically builds in a buffer of 12 to 24 hours. Also allow only a half day, 4-6 hours for review, including an hour for preparing the debrief and then an hour for the outbrief.
 - Recovery should begin immediately after the outbrief with the goal that recovery should take no more than 6-12 hours. After recovery is complete the team should then work on preparing the document for the next level review. This prep should 18-36 hours. .
 - Using this guide, work back toward a kickoff meeting. This approach may allow you to take a small quick turn proposal.

Developing Content Options

- **Get the outline out quickly and the more detailed the better**
 - If there is information available from previous proposals or other client assets that is relevant, the putting this information in also helps jump start the process by prompting writers and SMEs to begin inputs or gathering information.
- **Determine when key information is needed; rolling assembling (assembly line) development**
 - Some information may not be needed or even available until later in the process of assembling the proposal. Putting information in when it is needed and ready allows review time to focus on “real” inputs.

Alternate Review Approaches

- **Blend reviews**
 - A simple approach is to blend reviews. For example, doing a Blue/Pink or a Pink/Red depending on the time and information available allows you to accomplish the purposes of the reviews but saves significant time.
- **Staggered reviews**
 - This approach is to review sections of the proposal as they are ready and not wait for all sections to achieve the same levels of maturity.
- **Rolling reviews**
 - Similar to staggered reviews, rolling reviews eliminate stopping the development of the document or section and allow reviewers to look at snapshots of the document or section. This approach is particularly effective if the same reviewers work with the document from beginning to end since it allows direct follow up on action to comments and edits.

Create Flexibility

- **Be flexible on formatting and editing**
 - Try to put out some basic guidelines to minimize the effort required at the end. For example, if the RFP calls for Times New Roman 12, then tell the writers that and tell them to use that. If there is accepted color scheme or table or figure format and numbering system, tell them.
 - Graphics usually require the most lead time. While they don't need to be put into the document until toward the end, they do need to be submitted early so that the graphic artist can have time to do the work and they can be review early enough to catch any errors.

WHAT'S TRENDING?

(SOURCE: PUBLIC SPEND FORUM, FEB 2019)

Five Trends

- The Modernizing Government Technology Act (MGT) of 2017 will influence IT procurement.
- Audit services will be in demand.
- Department of Defense’s use of “Other Transaction Authority” will continue to increase.
- Mid-Tier companies will continue to make progress and grow in number.
- Best-in-class contracts will transform category management.

Trend 1

- **The Modernizing Government Technology Act (MGT) of 2017 Will Influence IT Procurement**
- Part of the 2018 National Defense Authorization Act has the goal of improving federal technology by providing technical expertise and financial resources to agencies. The [MGT](#) will allow agencies to invest in modern technology solutions to save taxpayer dollars, secure sensitive data and systems, and improve service delivery to the public. There are two primary provisions to address these needs:
 - The authorization of all CFO Act agencies to establish IT Working Capital Funds (WCF)
 - Establishing a centralized Technology Modernization Fund (TMF) and Technology Modernization Board (TMB)
 - The priorities for spending will be on IT services and products that reduce risks, improve efficiency, cut costs and remove duplicate programs.
 - Contractors offering the following services should see more opportunity, as they will likely be emphasized:
 - Shared Services
 - Cybersecurity
 - Data Center Consolidation
 - Cloud Migration
 - Agile Development
 - Commercial off-the-shelf software
 - Contractors that can that supplement innovative yet underfunded programs or that upgrade legacy systems are ideal candidates to earn modernization monies.
 - Additional flexibility is gained by offering additional funds for long-term investments and allowing three years to put the money on contracts for both the individual agencies and the General Services Administration (GSA).
 - This allows agencies to save money across years for the services and products that will work best for the agency rather than being forced to spend the dollars within the fiscal year. The three-year dollars could result in a spending surge for IT after three years rather than an annual Q4 spending spree.

Trend 2

- **Trend 5. Heightened Efforts to Achieve IT Modernization** – Several billion dollars are devoted to information technologies to address pervasive and cross-cutting challenges for all of Government. Cybersecurity, shared services, agile development, commercial off-the-shelf software, cloud migration, data-center consolidation, big data, block chain, artificial intelligence, and the Internet of Things are opening new business opportunities for Government contractors.
- **Trend 6. Increased Use of Innovative Contracting Mechanisms** – The Defense Department is experimenting with a type of simplified acquisition process known as Other Transactional Authority (OTA). An underlying purpose of OTA is to encourage nontraditional defense contractors to develop innovative technologies, though more traditional defense contractors also participate. Observers expect OTAs to gain footholds in other agencies as DoD fine tunes processes to expedite acquisition of contracts for products and services.

Trend 3

- **Department of Defense’s Use of “Other Transaction Authority” will Continue to Increase**
- [“Other Transaction Authority”](#) (OTA) refers to the streamlined procedures that agencies utilize to procure innovative prototypes or research, without the typical constraints of a standard contract. It allows for flexibility, speed, and accessibility in executing prototype and research programs. In 2017, the DOD spent a record high of \$412 million on OTA contracting. That surge is significant compared to the \$3.5 million spent in 2013.
- OTAs are often used by the military to work with a variety of consortia set up to encourage nontraditional defense contracts to develop innovative technology. The threshold for use of OTA is raised from \$250 million to \$500 million through several provisions in The National Defense Authorization Act for fiscal 2018. With a lack of the many safeguards establishing in traditional contracts, there is some risk with utilizing OTA, but short of any major setbacks, we should expect to see an increase in spending here in the coming years.

Trend 4

- **Mid-Tier Companies Will Continue Make Progress and Grow in Number**
- For mid-tier companies with annual revenue between \$25 million and \$500 million, expect to see their influence and number expand as they continue to make progress with policy issues on Capitol Hill.
- If they can overcome issues of structural procurement barriers like teaming restrictions and size standard calculations it can lead to continued gains on key contract vehicles and growth markets. Fiscal 2017 saw the highest total spending, at \$138 billion, since 2012. This is a reverse of several years of decline. The largest portion of obligations to mid-tier companies was through technological and professional services multiple-award contracts. Vehicles like General Services Administration's IT Schedule 70 and NASA's Solutions for Enterprise-Wide Procurement V are most likely to continue to propel mid-tier performance.
- One major challenge mid-tiers will face compared to official small sized businesses, is their struggle against competing with large, deep-pocketed competitors, will small businesses status and preferences enable them to grow very large on important contracts in key government markets.

Trend 5

- **Best-In-Class Contracts Will Transform Category Management**
- Agencies face increased pressure optimize efficiencies out of tight budgets, and BIC will continue to gain momentum.
- [Best-in-class](#) means that something has been designated by the Office of Management and Budget (OMB) as a preferred governmentwide solution that:
 - Supports a governmentwide move to solutions that are market-proven and mature;
 - Aids in the optimization of spending, within the government category management framework;
 - Allows acquisition experts to take advantage of governmentwide, pre-vetted solutions;
 - and
 - Increases the available transactional data available for analysis of buying behavior at an agency and governmentwide level.

Category Management

- Category Management is alive and well and seems to be thriving.
- The “Best In Class” title means the contract is officially preferred by OMB because it provides robust, pre-vetted solutions applicable across federal agencies, according to GSA. It also means that the contract also adheres to Category Management regulations.
- The Government Contracting community, primarily Small Businesses, seem to be concerned over the speed of trajectory of Category Management. The main point of concern is the identified BIC’s which contain a majority of “large business-focused” vehicles with extended periods of performance and no opportunity to on-ramp.

Current List of Best in Class

- **Alliant Small Business**
- **Alliant**
- **AutoChoice For Vehicle Purchasing**
- **BMO (Building Maintenance & Operations FSSI)**
- **City Pair Program**
- **EIS**
- **FedRooms**
- **GSA Fleet for Vehicle Leasing**
- **GSA SmartPay 2**
- **HCaTS**
- **IPS BPA: Identity Protection Services Multiple Award BPA**
- **JanSan (Janitorial & Sanitation Supplies FSSI)**
- **MRO: Maintenance, Repair & Operations FSSI**
- **Networx**
- **OASIS SB**
- **OASIS**
- **OS3 (Office Supplies FSSI)**
- **Schedule 48: (Civilian Employee Relocation Homesale Solution - SINs 653-1 and 653-5)**
- **Schedule 70: Hardware & Software SINs including Governmentwide Strategic Solutions (GSS)**
- **VETS 2: Governmentwide Acquisition Contract (GWAC)**
- **Wireless BPAs: (FSSI - Federal Strategic Sourcing Initiative)**

Purchasing: Current & Future State

HOW TO ADJUST TO CATEGORY MANAGEMENT AS A GOVERNMENT CONTRACTOR

Current State of Purchasing:

- Lack of coordination across agencies
- Duplicated efforts
- Many agencies; no leveraged buying power

Future State of Purchasing:

- Synchronized procurement across government
- Industry involvement in developing best category strategies
- Core competencies leveraged to match customer needs
- One common management framework



Managing the Initiative

- A few suggestions on how to remain responsive to this initiative while still bringing in revenue:
 - **Begin** a dialogue with your primary contracting offices to learn about the potential impacts and if your contracts meet the criteria.
 - **Leverage** and market your GSA Schedules during the last two quarters of this fiscal year. A majority of the BIC GWACs and BPAs have locked on-ramp periods so contracting offices will be looking for additional options.
 - **If you are not on a GSA Schedule** - start the process now. If you are having a hard time deciding which ones to target, consider Schedule 70 or the Professional Services Schedule (Schedule PSS).
 - **If you are in the services industry**, identify competitive Category Management opportunities and bid on the RFP when it becomes available.

Questions?



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