



Tips for Writing Successful Proposals

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Agenda

- **Pre-Solicitation Phase**
 - Missed Opportunities
 - Step 1: Early Requirement Analysis
- **Solicitation Phase**
 - Missed Opportunities
 - Step 2: Review the Solicitation Thoroughly
- **Proposal Development & Submittal**
 - Missed Opportunities
 - Step 3: Identify Source Selection Process & Technique
 - Step 4: Follow the Instructions and Timely Submit the Required Material

Pre-Solicitation Phase Missed Opportunities

- **Accessing the SBA & OSBP website**
 - <http://www.sba.gov/>
 - <http://www.acq.osd.mil/osbp/sb/dod.shtml>
- **Familiarity with the Federal Business Opportunity (FedBizOps) webpage and requesting explicit access**
 - <https://www.fbo.gov/>
- **System for Award Management (SAM)**
 - CCR, FedReg, EPLS, ORCA Migration
 - <http://www.sam.gov/>
- **Responding properly to sources sought notices or requests for information**
- **Reviewing Pre-Solicitation Notices**
- **DCAA Info for Contractors- Price Proposals**
 - http://www.dcaa.mil/audit_process_overview.html

Step 1: Early Requirement Analysis

- **Access SBA, DCAA, and other Government Resources**
- **Access and Register in FedBizOps**
 - “Favorites” and “Watch List” features
 - Explicit Access/Export Control
- **SAM**
 - Annual update
- **Respond to Market Survey**
 - Demonstrate/Discuss capability (FAR 9.104)
 - Acquisition Strategy
- **Analyze Pre-Solicitation Notice for Key Elements**
 - Quantity, delivery, acquisition strategy, Industry Day/
Pre-Solicitation or Pre-Proposal Conferences/
Qualification Requirements
- **Technical Industrial Liaison Office (TILO)**

Solicitation Phase Missed Opportunities

- **Asking timely and relevant questions**
- **Following the solicitation instructions**
 - Proposal is untimely and/or not in the correct medium
 - Proposal contains extraneous information and/or fails to include the requested information
 - Proposal is incomplete, whereas “fill-ins” representations, certifications, matrices are incomplete, especially in identifying Government Rights to Technical Data (DFAR 252.227-7017)

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Step 2: Solicitation Review

- **Know Government Point of Contact: Contracting Office**
- **Uniform Contract Format**

I - The Schedule: A – H

A: Solicitation/Contract Form

B: Supplies or services and prices/costs

C: Description/specifications/statement of work

D: Packaging and marking

E: Inspection and acceptance

F: Deliveries or performance

G: Contract Administration Data

H: Special contract requirements

II - Contract Clauses: I

III - List of Documents, Exhibits & Other Attachments: J

IV - Representations and Instructions: K, L & M

Proposal Development & Submittal

Missed Opportunities

- **Recognizing and Understanding Basis for Award and Evaluation Criteria**
- **Submitting the Correct Information/Material**
 - **Technical Area**
 - Recognizing the Go/No-Go requirements
 - Demonstrating compliance
 - Working product sample
 - Supporting assertions with test data
 - **Past Performance Area**
 - Determining Relevant and Recent Data
 - **Cost/Price Area**
 - Supporting Documentation
 - http://www.dcaa.mil/audit_process_overview.html
- **Being Aware of Updates in FedBizOps**

Screen Shot: DCAA Public Web page – Information for Contractors



DCAA - Audit Process Overview

CAREERS f

DCAA
DEFENSE CONTRACT AUDIT AGENCY

ABOUT DCAA GUIDANCE CHECKLISTS AND TOOLS LOCATOR CONTACT US

Request An Audit

- [Request An Audit](#)
- [Audit Process Overview – Information For Contractors](#)
- [Directory Of Audit Programs](#)
- [CAM – Contract Audit Manual](#)
- [MRDs – Audit Guidance Memos](#)
- [CAS – Cost Accounting Standards](#)
- [FAR – Federal Acquisition Regulation](#)
- [FAR Cost Principles Guide](#)
- [DFARS – Defense Federal Acquisition Regulation Supplement](#)
- [GAGAS/Yellow Book – Generally Accepted Government Auditing Standards](#)
- [FAQs](#)

AUDIT PROCESS OVERVIEW – INFORMATION FOR CONTRACTORS

A helpful guide that provides an overview of the types of audits DCAA conducts, links to checklists, and what you can expect in a DCAA audit.

Audit Process Overview – Information for Contractors



Preparing for potential DCAA audit as part of solicitation requirements

- RFP Instructions request offeror to complete DCAA pre-award accounting system checklist
 - http://www.dcaa.mil/preaward_accounting_system_a_dequacy_checklist.html



Pre-award
Accounting Checklist

- Example of completed pre-award accounting system checklist



Example A



Example C

Screen Shot: DCAA Pre-Award Accounting System Checklist

Preaward Survey of Prospective Contractor Accounting System Checklist

[FAR 16.301-3 states that a cost-reimbursement type contract may be used only when the contractor's accounting system is adequate for determining costs applicable to the contract. If no information is available in the files to make this determination, a Preaward Survey of Prospective Contractor's Accounting System (SF1408) can be requested from DCAA. Before requesting such an audit, it is a good idea to send this checklist to prospective contractor's for completion to ensure they understand the requirements of the SF1408, and to ensure they are ready for DCAA to come in and perform an audit].

Instructions:

1. Mark "X" in the appropriate column.
2. On Page 2, provide a narrative describing how the current accounting system supports your response to each item. Be as descriptive as necessary

Contractor Name:				
Point of Contact (Name/Ph #/Email):				
CAGE Code:				
READY FOR AUDIT (YES) / (NO):				
	Yes	No	N/A	Note
1. Is the accounting system in accord with generally accepted accounting principles?				<u>1</u>
2. ACCOUNTING SYSTEM PROVIDES FOR:				
a. Proper segregation of direct costs from indirect costs.				<u>2</u>
b. Identification and accumulation of direct costs by contract.				<u>3</u>
c. A logical and consistent method for the allocation of indirect costs to intermed[WS_FTP LE (3)]l cost objectives. (A contract is				

Screen Shot: DCAA Pre-Award Accounting System Checklist

Instruction: Use this section to explain how the current accounting system supports your response to each item. If a response is N/A provide further explanation. Use as much space as needed. Provide references to current policies and procedures if applicable.

Note	Narrative
1	
2	
3	
4	

Screen Shot: DCAA Pre-Award NARRATIVE EXAMPLE

Spelling & Grammar | Translate | ABC 123 | New Comment | Tracking | Accept | Compare | Protect Document | Share Now | Send by IM


Proofing | Comments | Changes | Protect | Share

1 2 3 4 5 6

Notes	Narrative
1	The accounting division uses Deltek GCS Premier and practices generally accepted accounting principles.
2	Deltek GCS Premier effectively manages project based accounting which properly segregates direct costs from indirect costs in accordance with our existing policies.

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1 2 3 4 5 6

Notes	Narrative
1	<p><i>Is the accounting system in accord with generally accepted accounting principles?</i></p> <p>Answer: ABC's accounting system is structured to be in accord with GAAP basis accounting. Economic events are recognized by matching revenues to expenses (the matching principle) at the time in which the transaction occurs rather than when payment is made (or received). Revenues and expenses are recorded in the period in which they were incurred.</p> <p>ABC's accounting system is reviewed by an independent CPA firm (XYZ, LLP) on annual basis. The final paragraph in the Independent Accountant's Review Report for the years 2011 and 2012 state the following: "Based on our reviews, we are not aware of any material modifications that should be made to the accompanying financial statements in order for them to be in conformity with accounting principles generally accepted in the United States of America."</p> <p> EXAMPLE - Accounting System N</p>

Proposal Development & Submittal

Missed Opportunities

- **Recognizing and Understanding Basis for Award and Evaluation Criteria**
- **Submitting the Correct Information/Material**
 - **Technical Area**
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 - Demonstrating compliance
 - Working product sample
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 - **Past Performance Area**
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 - Supporting Documentation
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- **Being Aware of Updates in FedBizOps**

Step 3: Identify Source Selection Process and Technique

DoD Source Selection Procedures 2011

- <http://www.acq.osd.mil/dpap/policy/policyvault/USA007183-10-DPAP.pdf>

Section M/FAR 52.212-2

- **Basis for Award**
 - Lowest Price Technically Acceptable
 - Best Value
- **Evaluation Criteria**

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Step 4: Follow the Instructions and Timely Submit the Required Material

Section L

or

FAR

52.212-1

Instructions to Offerors

Identifies for offerors
what they are required
to submit



Section M

or

FAR

52.212-2

Evaluation Criteria

Identifies to offerors how the
Government is going to
evaluate what we have asked
offerors to submit

**Conduct an Independent Evaluation
of your Intended Proposal**

Analysis Checklist

- **Early Requirement Analysis**
- **Thorough Solicitation Review**
- **Identify the Source Selection Process & Techniques**
- **Follow the Instructions, Conduct an Independent Evaluation, and Timely Submit the Required Material**

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Questions



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