



THE WINNING SCORE: MAXIMIZING PROPOSAL EVALUATION SCORES TO GROW YOUR COMPANY

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CohnReznick LLP



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MEET THE PRESENTERS



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AGENDA

- Overall Procurement Environment
- Understanding of Competitive Proposal Evaluation Teams and Their Processes
- Capture Planning Process
- Relationship Building
- Breaking Down an RFP
- Proposal Writing
- Corporate Compliance Requirements

The background of the slide features a large American flag waving in the foreground, with the United States Capitol building visible in the background under a warm, orange-hued sky. The text 'OVERALL PROCUREMENT ENVIRONMENT' is overlaid in the center-right of the image.

OVERALL PROCUREMENT ENVIRONMENT

The background of the slide features a large American flag waving in the foreground, with the United States Capitol building visible in the background under a warm, orange-toned sky.

UNDERSTANDING OF COMPETITIVE PROPOSAL EVALUATION TEAMS AND THEIR PROCESSES



FAR DIRECTION ON SOURCE SELECTION

15.302 - Source selection objective

- “The objective of source selection is to select the proposal that represents the best value.”
- This does not preclude LPTA hence why we still see it (LPTA still exists despite recent updates to its usage)



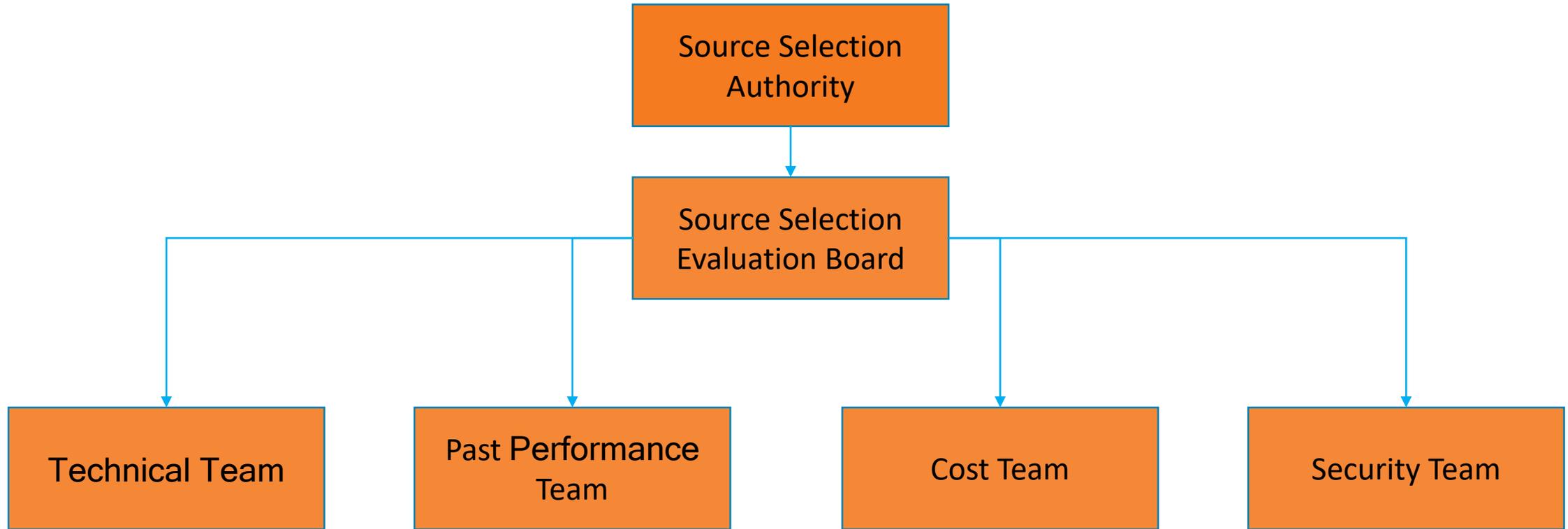
THE SOURCE SELECTION TEAM

Source Selection Authority (SSA) shall:

- Establish evaluation teams
- Approve source selection strategy
- Ensure consistency among requirements, notices, proposal preparation instructions, evaluation factors, solicitation provisions, and data requirements
- Ensure proposals are evaluated solely on factors in the solicitation
- Consider recommendations of advisory boards/panels
- Make source selection



THE SOURCE SELECTION TEAM





HOW THE GOVERNMENT EVALUATES A PROPOSAL

What Evaluators Should/Should NOT be Doing:

- They should NOT evaluate or compare proposals against one another during the initial evaluation. They must be evaluated individually against the evaluation factors in the contract.
- They SHOULD ensure that it is clear how your comment relates to the evaluation factor.
- They should NOT make assumptions.
- Evaluate the text in the proposal. (Don't rely on personal experience or hearsay from others)



HOW THE GOVERNMENT EVALUATES A PROPOSAL

What Evaluators Should/Should NOT be Doing (cont.):

- They SHOULD look carefully at the text in the proposal that may include statements and/or assumptions that could indicate increased cost/price and/or risk to the Government.
- They SHOULD give each proposal the same consideration up front.
- The name of the offeror should NOT influence (positively or negatively) the evaluator's comments or ratings, except when evaluating past performance.
- They SHOULD document your reasoning for any potential increased risk to the Government on the evaluation form for the Contracting Officer's review.



WHAT HAPPENS NEXT?

Clarifications

- Communications prior to competitive range determination
- NOT to be used to correct deficiencies/revise proposal
- May address adverse past performance
- Explain ambiguities

Competitive Range

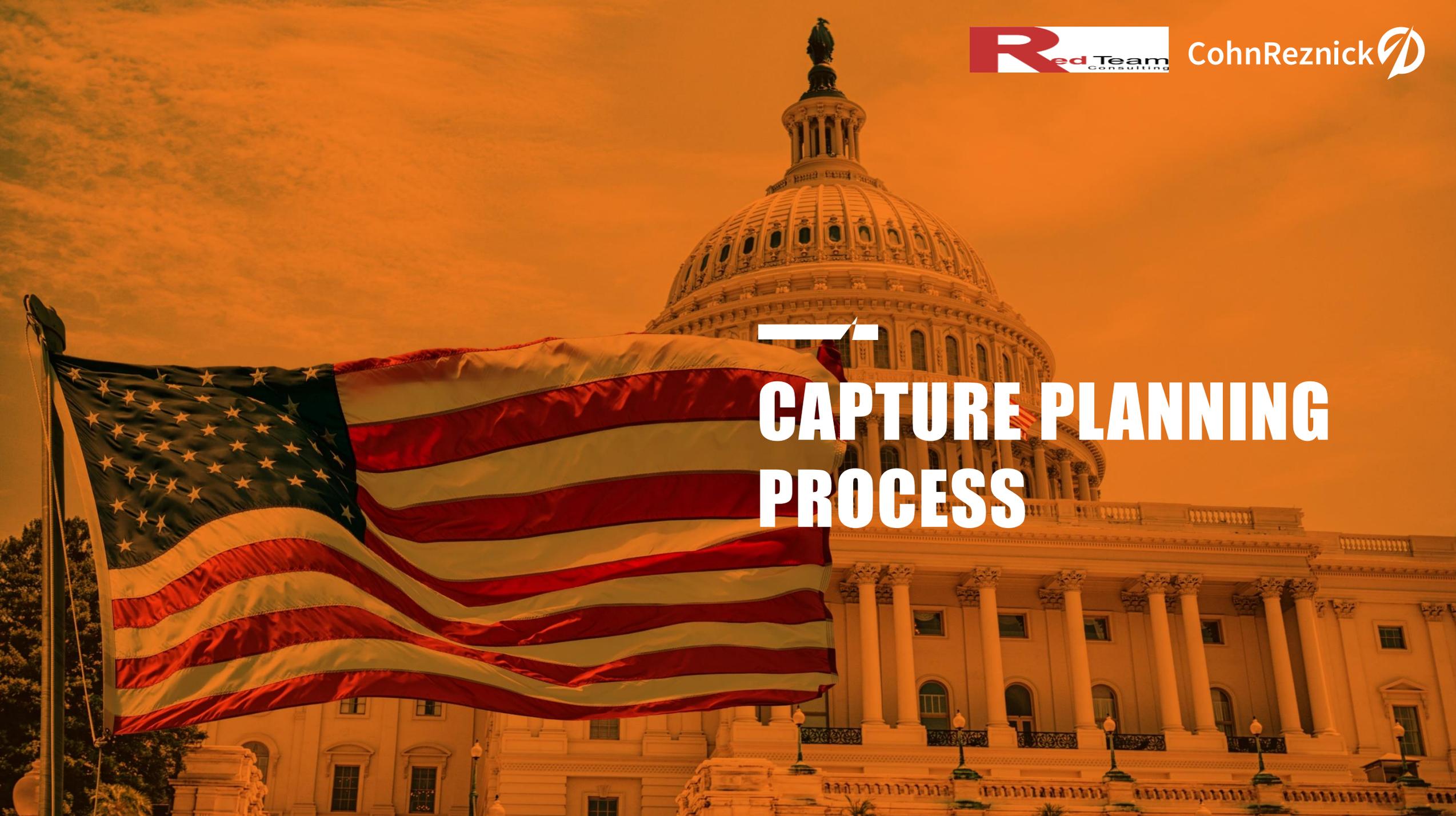
- Exchanges after competitive range determination
- Negotiations/Discussions
- Corrections of deficiencies/revision of proposal (BAFO)





FAR 15.3 – SOURCE SELECTION

Offeror	Technical	Small Business Participation	Past Performance	Proposed Price	Evaluated Price
[REDACTED]	Acceptable	Acceptable	Substantial Confidence	\$250,831,287	\$270,551,185
[REDACTED]	Acceptable	Acceptable	Neutral		\$253,582,776
[REDACTED]	Acceptable	Acceptable	Substantial Confidence		\$257,097,548

The background of the slide features a large American flag waving in the foreground, with the United States Capitol dome visible in the background under a warm, orange-hued sky. The text 'CAPTURE PLANNING PROCESS' is overlaid in white, bold, sans-serif font, with a white horizontal line above the word 'CAPTURE'.

CAPTURE PLANNING PROCESS



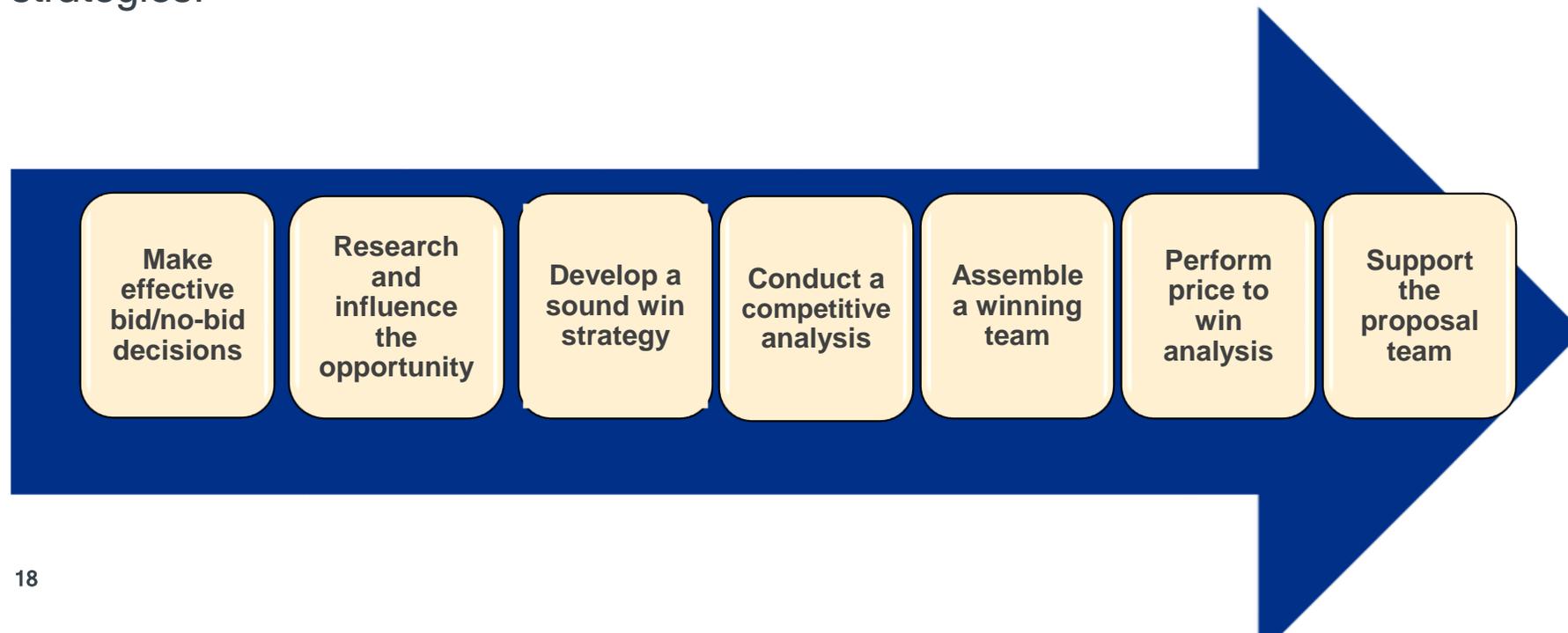
BUSINESS DEVELOPMENT LIFECYCLE





CAPTURE MANAGEMENT ACTIVITIES

- Capture management activities should commence as early as possible and continue past RFP release.
- Capture management strategies should be refined as competitive intelligence is improved.
- A failure of any given strategy should result in compensation through refinement of other strategies.





DEVELOP A SOUND STRATEGY

- The Process defines the question:

“Why Will We Win?”

- Defines what the customer wants
- How our solution is mapped to the customer needs
- May involve some element of customer intimacy
- Answers the ultimate question:

“Why Would the Customer Choose Us?”



STUDY THE COMPETITION

- Used to verify that your strengths and win themes are valid and more substantive than your competitors.
- Highlights weaknesses of competitors that you may be able to exploit
- Identifies weaknesses and gaps in your approach that may have otherwise gone unknown
- Provides context to the proposal team on key themes to emphasize



BUILD A WINNING TEAM

- Consider all RFP requirements when selecting subcontractors (evaluation criteria, instructions, socio-economic requirements, past performance, etc.).
- Broaden your perspective on teaming - do not keep targeting the same companies!
- Avoid teaming based on:
 - Purely personal relationships
 - Small Businesses that do not bring any verifiable experience or past performance
 - Companies that do not address any evaluation criteria
 - Companies that merely supplement your offering and nothing else

The background of the slide features a photograph of the United States Capitol building in Washington, D.C., with its iconic dome and neoclassical architecture. In the foreground, a large American flag is waving. The entire image is bathed in a warm, golden-orange light, suggesting a sunset or sunrise. A white horizontal bar with a diagonal slash is positioned above the main title text.

RELATIONSHIP BUILDING



Your *customer intelligence* and your *perceived value* is only as strong as the relationship you have.





RELATIONSHIPS DRIVE DECISIONS

- Your ability to influence a customer or opportunity is based on the level of depth of your relationship
- Companies will have a greater chance to find and grow organic and inorganic business opportunities simply by focusing on the relationship
- Relationships and trust are formed early in the business development process - be honest and genuine upfront



LEARN DIFFERENT WAYS TO ENGAGE

- First, the customer must know you. Create the awareness through attendance at events, participation in associations, and reaching out directly to the customer.
 - Networking through events and face to face interactions
 - Virtual or remote interaction
- Marketing initiatives
- Warm outreach



**BREAKING DOWN AN
RFP**



RFP'S ARE MORE THAN JUST A STATEMENT OF WORK

- Section A - Solicitation/Contract Form
- Section B - Supplies and Services and Prices/Costs
- **Section C - Statement of Work**
- Section D - Packaging and Marking
- Section E - Inspection and Acceptance
- Section F - Deliveries or Performance
- Section G - Contract Administration
- Section H - Special Contract Requirements
- Section I - Contract Clauses
- Section J - List of Attachments
- Section K - Reps/Certs
- **Section L - Instructions, Conditions and Notices to Offerors**
- **Section M - Evaluation Factors for Award**



START WITH THE END IN MIND

How will I win this thing?

- Read Section M
 - Is it best value/trade off? LPTA?
 - How will the technical volume, personnel, past performances and cost be evaluated? Are these all treated equally or not?
 - Within the technical volume, where are the **points** that can be scored? How will they be scored?
 - Are there certain items required within the RFP that if unfulfilled or not met rule you out immediately? (accounting system, past performance of a certain size/type)
 - How will price be evaluated? Will the government perform a realism and reasonableness assessment?



SECTION L

- If not required by the RFP itself, once you decide to proceed with proposing, create a compliance checklist. Section L is the source of nearly all items that belong on this checklist.
- They include:
 - Instructions of what to include in each volume, what the page limitations are, what fonts can be used...anything missed can potentially get you disqualified!
 - All the must haves/provides and should haves/provides
 - If you don't have a "must have" you're likely going to be disqualified (e.g., acceptable accounting system, access to a manufacturing facility capable of a certain level of output, cleared personnel)
 - References and instructions regarding attachments that must be submitted along with the proposal. (Please note: do NOT edit government provided template formats unless explicitly instructed that you are able to do so)



SECTIONS H&I

Don't sleep on these!!

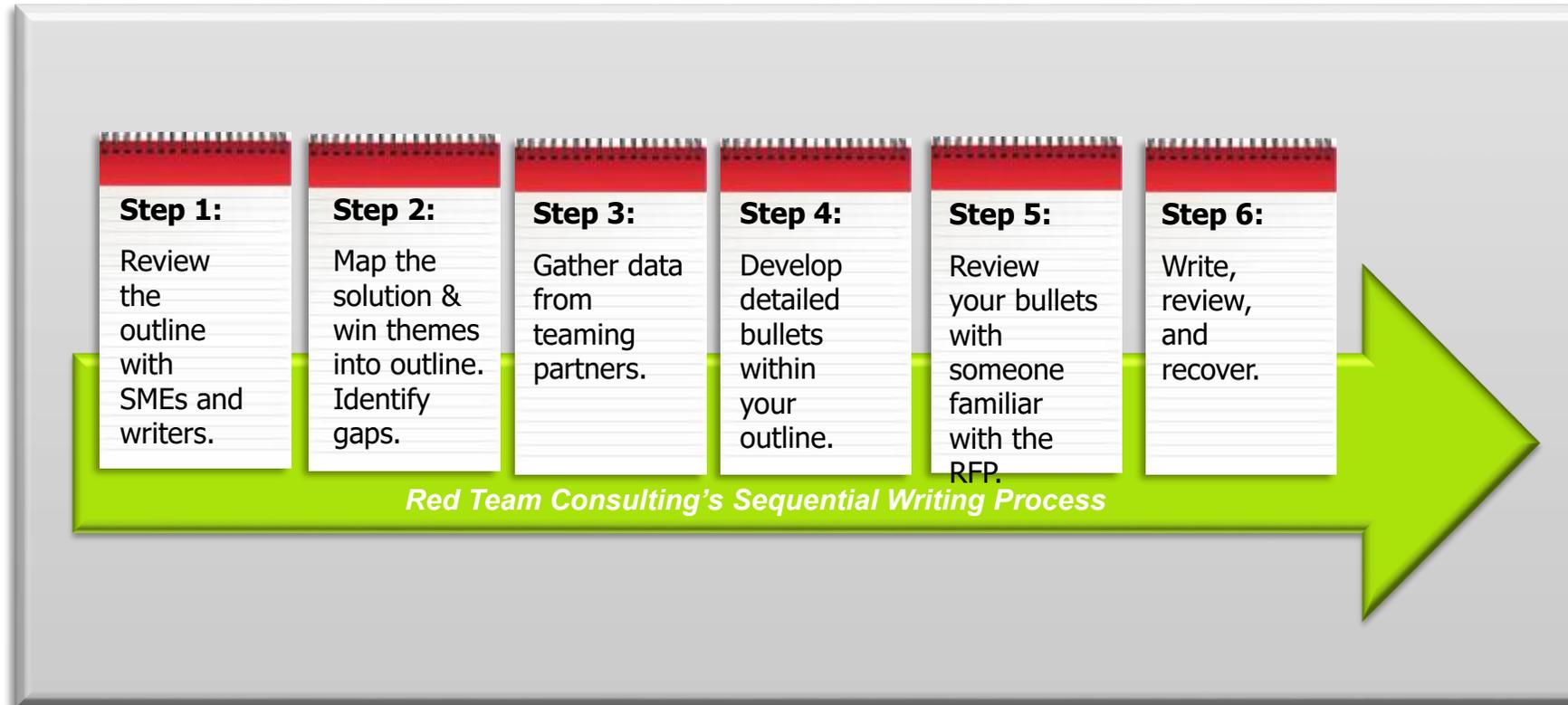
- Could include other requirements that aren't spelled out in Section L or other parts of the RFP
 - Could include business systems, reporting requirements, NIST/CMMC/Cyber requirements, restrictions within supply chain or overtime or other areas

The background of the slide features a photograph of the United States Capitol building in Washington, D.C., with its iconic dome and neoclassical architecture. In the foreground, a large American flag is waving. The entire image is overlaid with a warm, golden-orange color filter. The text 'PROPOSAL WRITING' is centered in the middle of the image in a bold, white, sans-serif font, with a white horizontal line above it.

PROPOSAL WRITING



FOLLOW A SEQUENTIAL WRITING PROCESS





DOCUMENT BULLETS IN THE OUTLINE

- Begin all writing in the proposal with BULLETS
- The bullets should come from the solution that was developed by the SMEs
- The bullets should include information gathered from the teaming partners
- Include the “what”, “who”, “when” of the solution
- Bullets should provide statistics and applicable facts (or indicate where they are needed)
- Identify potential areas for graphics and ideas for graphics
- Insert win themes and discriminators into the appropriate sections



WRITING BEST PRACTICES

In addition to following explicit instructions, the flow of writing should be consistent. For example:

- 1. Convey Understanding.** Describe why the requirement is important to the customer. This is a good place to convey “hot buttons”.
- 2. Affirm compliance.** Many evaluators are looking for you to state that you will meet (or exceed) the requirement.
- 3. Provide Your Approach/Plan.** Describe what the company will do or what the solution is.
- 4. Provide Your Capabilities.** What capabilities does the company have in terms of resources, partners, tools, etc.
- 5. Demonstrate Feasibility.** Substantiate the claims you have made with proof and examples of success.

We understand.... We will... Here's how... We can because... As proof...





COST VOLUME WRITING

- Follow RFP Section L instructions (use a crosswalk if necessary!)
- Be consistent with your pricing practices and identify any deviations explicitly along with rationale
- May need to do your own pricing separate from the provided RFP pricing template. If so, make sure you do full reconciliations to ensure it's right.
- If you are capping any rates, purposely not passing on certain costs, engaging in fee sharing with team members, be VERY explicit (and ensure this is compliant with RFP terms). Be repetitive if necessary as you want to avoid any realism adjustments that may throw you out of the competitive range/award.

The background of the slide features a large American flag waving in the foreground, with the United States Capitol building visible in the background under a warm, orange-hued sky. The text 'CORPORATE COMPLIANCE REQUIREMENTS' is overlaid in large, white, bold, sans-serif capital letters. A small white horizontal bar with a diagonal slash is positioned above the text.

CORPORATE COMPLIANCE REQUIREMENTS



WHAT DO THESE INCLUDE?

- DFARS (or DFARS benchmarked) Business Systems (252.242-7005)
 - Accounting/Estimating/Purchasing/Material Management/Property/EVMS
- Cybersecurity
 - CMMC, various NIST standards, NSA standards
- Corporate certifications
 - CMMI, ISO, FedRamp
- Security Clearances
 - Facilities and personnel clearances at the right level



THESE ARE QUICK AND EASY TO IMPLEMENT, RIGHT?

Accounting
System: weeks -
months

WRONG!

Estimating System: 1-2
months to implement
Another 6-12 to be auditable

Purchasing System: 1-3
months to implement
Another 6-12 to be auditable



HOW ABOUT THE OTHERS?

Proper CMMC level can take months to implement and the assessment would take at least a few weeks but most firms have some procedures already in place

CMMI and ISO are significant corporate commitments and can take many months to implement and certify

Security Clearances - certainly not available off the shelf



QUESTIONS? CONTACT US



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The word 'BACKUP' is written in a large, bold, white, sans-serif font. Above the first few letters of the word is a white horizontal line that is broken in the middle, with a small white lightning bolt symbol integrated into the gap.



BUDGETARY AND CONTRACTING TRENDS - BACKUP

Operating Context

- Congress has agreed to a 2021 budget resolution, currently in the reconciliation process
- Resolution includes target outlays of \$6.1 trillion (or net deficit of \$3.8 trillion) for FY 2021
- FY 2021 budget priorities remain primarily intact, including:
 - Military and Defense Spending
 - Veterans Affairs (VA)
 - Space Investments (NASA)
 - Emerging Information Technology (IT)
 - IT Modernization and Consolidation

Near-Term Challenges

- Near-term challenges will be to address policy changes in several areas; including COVID-19 response, Economic Recovery, National Security, Immigration, and Climate Change
- Reshaping majority of the IT, acquisition, and process initiatives from the previous administration to align with current Biden administration goals and priorities
- Seeing significant changes in agency appointed and SES-level leadership, including CIOs, impacting near-term progress on agency-level IT priorities and investments



FEDERAL CONTRACTING TRENDS - BACKUP

1. The volatility of the Federal budget is driving much of the decision-making in federal contracting.
2. Agencies are consolidating enterprise-wide requirements for greater buying leverage (i.e. Category Management and Strategic Sourcing).
3. Agencies are using more creative ways to compete and evaluate companies.
4. The ability to interact with Government has been increasingly more difficult due to issues such as protests.
 - There is a continually shrinking acquisition workforce - it is taking longer to compete and award federal contracts.
 - The number of senior government executives leaving the market has increased dramatically over the last several years.
5. The market has become significantly more competitive over the last five years.
6. Barriers breaking down to allow more commercial company entry



CAPTURE STARTS WITH RESEARCH - BACKUP

- What do you know about the customer?
 - Technical requirements, internal environment, challenges, objectives and goals, decision makers and their preferences, their contracting history preferences, certification expectations, small business goals, key personnel interests, etc.
- What does the customer know about you?
 - Key personnel, past performance, capabilities and experience, innovative solutions, financial capability, commitment to their mission, ideas to support their programs, etc.
- How will the evaluator make their decision?
 - Technical, management, past performance, price, key personnel and staffing, quality management, risk management, technical prototype, orals demonstration, etc.



UNDERSTAND THE HOT BUTTONS - BACKUP

- Identifying the customer's challenges and goals are critical to capture
- List the top challenges as a starting point. The more specific the more effective they are.
- Used as a basis for developing a win strategy and win themes later in the capture
- Ensures that all contributors are on the same page with the customer's key objectives



WITH THE RELATIONSHIP, COMES THE INFLUENCE - BACKUP

- Determine the requirements
 - Ask specific questions around existing or prior requirements
- Confirm their preferences
 - Identify their objectives, goals, and hot buttons (internal delays, issues with approvals, etc.)
- Focus on developing their need or helping them realize the need as opposed to pitching your solution or approach
 - Conversations should be a collaborative discussion to try and identify challenges and brainstorm solutions
- Participate in working groups or associations that allow for more broad inputs