RFP Proposal Response Process
Defining Compliance –
What is Compliance?
Compliance covers many aspects of the RFP and the response process

• Section L (Preparation Instructions)
• Section M (Evaluation Criteria)
• SOW/PWS (Performance Requirements)
• Other RFP (Additional Requirements)

Responsiveness covers how well you address all requirements

• Not Parroting SOW/PWS
• Fully Meeting Evaluation Criteria
Common Compliance Problems

- Lack of Full Dissection and Attention to All Section L and M Statements
- Missing Production Requirements
- Over-Compliance – Trying to Repeat Back Every Word of the RFP
- Developing a Response Solely Around the PWS/SOW
- Assumptions Made Where Clarifications are Required Before It is Too Late
How Much of the “Other RFP” Items To Cover

This is tough for many people. Some people do not cover enough, some over-cover leaving room for the critical information required.

• The rule of thumb is simple: Arrange your response by Section L and M and address key information in the right areas and write to the SOW/PWS in technical approach. But what about all of the other RFP sections?
• Do you cover everything in the RFP? The RFP is the document that will become your contract- it is not necessary to cover all items. You must comply with those terms (unless exceptions are taken) when you submit your proposal.
• Ensure you cover items where an approach that encompasses the topic is required:
  – Management Approach Requirements
  – Key Personnel
  – Security
• You would not for instance cover FAR clauses, or other details of contractual terms
The Compliance Model

- Final RFP and Amendments
  - Your Basis of Compliance

- Master Compliance Matrix
  - First Matches L and M, then PWS and Other RFP
  - Use as the Basis of Volume Builds, Section Numbers, and Page Counts

- Volume and Section Outlines
  - Taking the Compliance to the Next Level
  - Strategically Tie in Win Themes, Discriminators in the Right Places

- Review Checklist
  - Turns the Compliance Matrix into a Review Document Source

- Compliance Matrix for Proposal
  - Guides Evaluators to Where Each Required Element Is Within Your Response
Starting Your Proposal

• Instructional Outline Template
• Storyboards or Writing Templates
• Compliance Matrix or RIM
• Proposal Schedule
• Roles and Responsibilities
• Review Team Dates and Participants
### Compliance Matrix Example

<table>
<thead>
<tr>
<th>Section L</th>
<th>Section M</th>
<th>PWS</th>
<th>Other RFP</th>
<th>Vol</th>
<th>Section</th>
<th>Page Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>L.1</td>
<td>M.3.1</td>
<td>3.1</td>
<td>H-1</td>
<td>I</td>
<td>1.0</td>
<td>55</td>
</tr>
<tr>
<td>Provide the Management Approach to Perform All Tasks to Include</td>
<td>Factor A- Management Approach.</td>
<td>Qualifications of Key Personnel</td>
<td>Mgmt. Approach</td>
<td>Key Personnel</td>
<td>Factor A- Management Approach</td>
<td>Total</td>
</tr>
<tr>
<td>- A) Org Structure</td>
<td>The offeror will be evaluated on the completeness of the management approach to include an effective management reporting structure, effective ability to hire and maintain qualified personnel, management control systems to manage financials and technical reports, and experience and availability of key personnel.</td>
<td>H-7 Key Personnel</td>
<td>I</td>
<td>1.0 Factor A-Management Approach</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>- B) Recruiting and Retention</td>
<td>- C) Systems</td>
<td>- D) Key Personnel</td>
<td>1.1 Management Reporting Structure</td>
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<td>10</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>1.2 Recruitment and Retention</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>1.3 Management Control Systems</td>
<td></td>
<td>20</td>
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<td></td>
<td></td>
<td></td>
<td>1.4 Key Personnel</td>
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</tbody>
</table>
The Instructional Outline

Taking each section as defined in the compliance matrix and making it an outline, but including best practices in proposal development. Example of one section:

1.1 Management Reporting Structure (L.1A, M.3.1)

**Understanding the Requirements**
Provide an understanding of why the management reporting structure is important to this customer.

**Approach (PWS 3.1, H-1, H-7)**
Provide a graphic of your management reporting structure. Suggest the creation of a table showing the roles and responsibilities of the management team. Describe the approach to the reporting structure. Why was is the team organized this way?

**Benefits and Proofs**
How will the Government benefit from the management structure you have proposed? Can you show that you have operated under a similar structure in the past.
Proposal Schedule

Purpose: Used for Setting Milestones, Identifying Bottlenecks, and Planning Review Dates

Completing a Proposal Schedule:
  • The proposal schedule should be completed within 24-48 hours of RFP release
  • Review dates should be set with little or no movement expected from the set dates
  • Apply resources to the schedule and determine where resource gaps exist
## Roles and Responsibilities

<table>
<thead>
<tr>
<th>ROLE/VOLUME</th>
<th>LEAD</th>
<th>SUPPORT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capture Manager</td>
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<tr>
<td>Proposal Manager</td>
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<tr>
<td>Program Manager</td>
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<tr>
<td>Management Volume Lead</td>
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<tr>
<td>Technical Volume Lead</td>
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<td>Past Performance Section Lead</td>
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<td>Cost Proposal Volume Lead</td>
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<tr>
<td>Contracts Lead</td>
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<tr>
<td>Subcontracts Lead</td>
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<tr>
<td>Data Calls</td>
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<tr>
<td>Graphics, Editing, etc.</td>
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<td></td>
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<tr>
<td>Production Lead</td>
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</table>
Common Types of Review Teams

- Blue Team – Proposal Strategy Review
- Black Hat – Competitive Strategy Exercise
- Pink Team – Storyboard Review or 80% Solution
- Red Team – 95-98% Solution
- Gold Team – Final Review
- White Glove – Final Review of Printed Material
Questions?