

READY
&
WILLING
ABLE...
TEXAS
HUBS!

2011 Procurement Connection Seminar & Expo

How to Write a Winning Proposal

Introduction of the Panel

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Procurement Thresholds

- **Purchases up to \$5,000 - Non-competitive (Informal)**
 - Agencies are not required to solicit for bids.
- **Purchases \$5,000.01 to \$25,000 - Competitive (Informal)**
 - Agencies are required to obtain a bid from a minimum of three (3) vendors registered on the Centralized Master Bidders List (CMBL). Two (2) of the vendors must be Texas certified HUBs.
 - Solicitations for bid may be requested by phone, fax or e-mail.
- **Purchases over \$ 25,000 - Competitive (Formal)**
 - Agencies shall solicit bids or proposals from all eligible vendors on the CMBL serving an agency's particular geographic region.
 - Solicitation will specify terms and conditions.
 - Solicitation will indicate due date and time (typically referred to as the bid opening date).
 - Solicitation is posted to the Electronic State Business Daily (ESBD).

Types of Solicitations

- **Invitation for Bid (IFB)**
 - An IFB is a formal solicitation of sealed bids typically used to procure commodities when there are clear specifications and sufficient competition in the marketplace.
- **Request For Qualification (RFQ)**
 - A RFQ is a solicitation document requesting submittal of qualifications or specialized expertise in response to the scope of professional and consulting services (e.g. accounting, medicine, professional engineering). Price is not considered until qualification has been confirmed.
- **Request For Proposal (RFP)**
 - A RFP is used to procure complex commodities and services when competitive sealed bidding and informal competitive bidding are not practical or advantageous to the state.

Three Phases in Writing a Winning Proposal



Research & Networking



Compiling Essential Information



Sign, Seal, & Deliver

Research & Networking

- Identify your potential customers and learn their procurement procedures (e.g. for state government, research the Texas Comptroller of Public Accounts website at www.window.state.tx.us/procurement and www.texas4hubs.org)
- Understand the source of your potential customers funding because that will dictate their procurement procedures. (e.g. state universities have multiple funding sources, and therefore they are exempt from some state guidelines.)

Research & Networking

- You are the best voice for company; therefore, take every opportunity to network.
- Ask prospective clients where they advertise their solicitations and ensure that you check their postings often (e.g. state agencies post solicitations valued at over \$25,000 on the Electronic State Business Daily (ESBD)) .
- Build allies and partnerships prior to solicitations being advertised.
- Have a clear understanding of your industry and your company's capabilities.

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- Read the solicitation thoroughly to ensure that you are clear on all the requirements (e.g. Scope of Work, Qualifications, Schedule of Events).
- Contact the Purchaser or authorized point of contact for questions or clarification.
- Questions should be as specific as possible; cite the specific section to which the question refers.

Compiling Essential Information

- Assess your company's capabilities to determine if you are able to respond to the solicitation.
- Attend the pre-bid or pre-proposal conference (*especially* if it is mandatory).
- Organize your response as outlined in the solicitation.

Compiling Essential Information

- Make sure that you respond to specification/requirement that is listed in the solicitation.
- Write your response in a clear concise manner, and ensure that you clearly explain how your company is able to fulfill all the specifications/requirements specified of the published solicitation. Clearly identify ANY exceptions.
- Pay close attention to the language of the solicitation, especially when Must, Shall, and May are used.

Three Phases in Writing a Winning Proposal



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Sign, Seal, & Deliver

Sign, Seal, & Deliver

- Sign all relevant documents, including all addendums.
- HUB Subcontracting Plan (HSP) – Regardless of whether you are a non-HUB vendor or a HUB vendor - if the solicitation requires an HSP, you must:
 1. Comply with the instructions outlined in the HSP,
 2. Complete and sign the HSP, and
 3. Include the HSP with your bid response.
- Check, Double Check, Triple Check, all spellings, figures, and that all attachments are included.
- Submit your response on time and in manner indicated in the solicitation.

Additional Tips

- Be available for any questions the customer may have.
- Be prepared to validate your response .
- Be ready to fulfill the contract as you have indicated in your response.
- Ask for the solicitation tabulation after the evaluation and award.
- Ask for a debriefing if you were not awarded the contract.
- If you are able to respond, respond.

Any Questions

