

Developing a Proposal Outline

Presented on 8.24.2021 by
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Why create a proposal outline?

- It is crucial to create a well-organized outline because:
 - Much of the subsequent proposal development work stems from the initial outline.
 - The outline helps writers and contributors see where their task fits in relation to the entire proposal.
 - Getting the outline out quickly (and the more detailed the better) accelerates the ability to start reviewing. Such action shows urgency and is actually the first step in the review process.
 - By following customers' instructions in the proposal outline, you demonstrate that you listen to your customers.

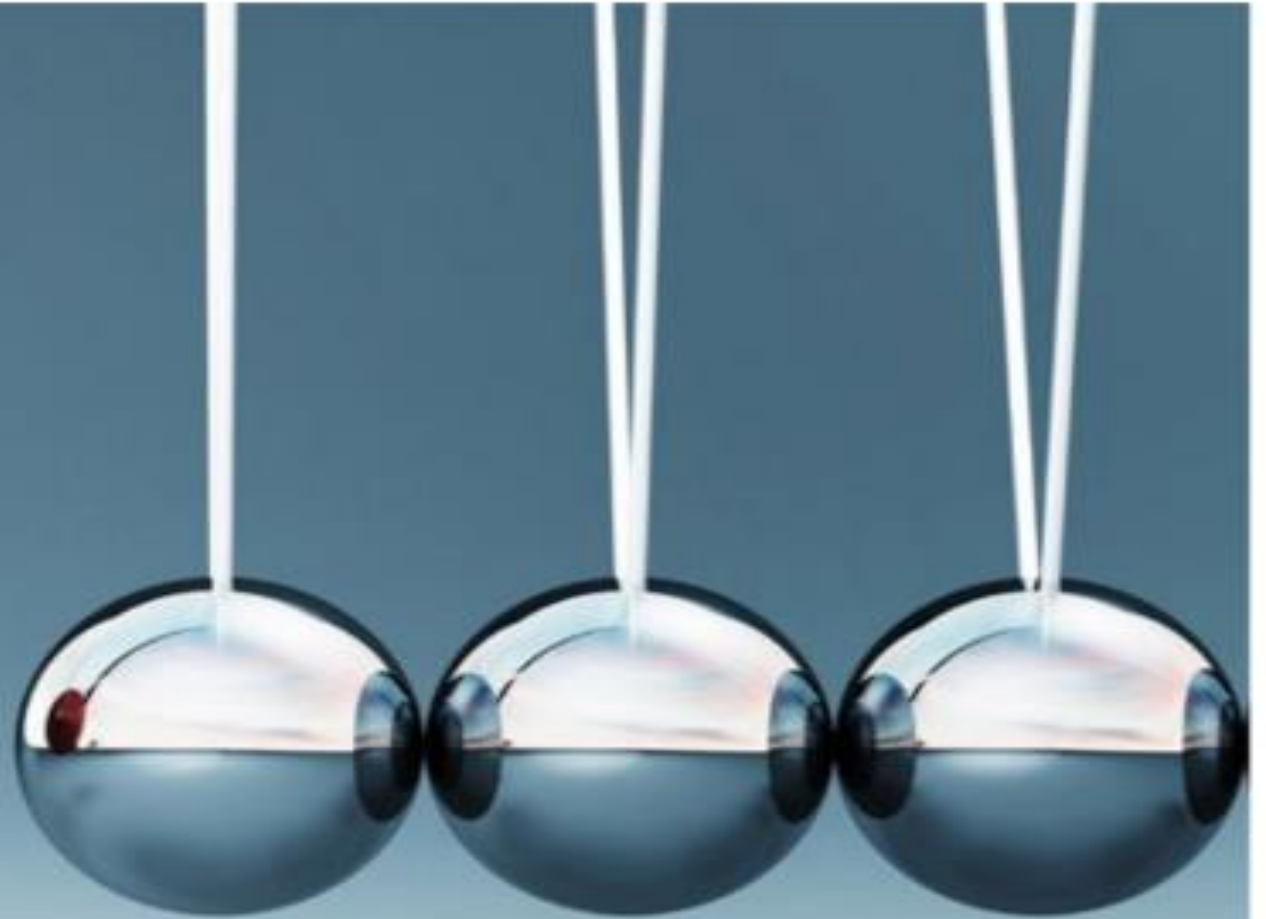
Solicitation sections that impact an outline

- Instructions
 - Factors to consider
 - Type of submission
 - Deadline to submit response
 - Deadline to submit questions
 - Format of response
 - **Font, file submission format**
 - **Page allocation**
- Evaluation Factors
 - Factors to consider
 - Ranking of evaluation factors
 - **Can be used for page allocation**
 - Evaluation rating
- What type of solicitation?
 - Full and open
 - Set aside
- When is it due?
- What type of submission?
 - **Electronic**
 - **Hard copy**
- What is required?
 - Specialized personnel
 - Contract Clauses and Deliverables
 - Place of Performance

Solicitation elements covered in an outline

- Scope of Work
 - Pricing
 - Base year
 - Option Year(s)
 - Personnel
 - Key personnel
 - Education and certification requirements
 - Security requirements
 - Place of performance
 - Contractor site
 - Government Site
 - Furnished equipment
 - By contractor
 - By agency

Poll #1



Tips to developing a proposal outline

- Develop your proposal outline exactly as the customer suggests.
- Prepare a top level outline that follows the customer's organizational priority:
 - Mimic the numbering system, naming conventions, and order listed in the solicitation
 - Assign or allocate all other response requirements within the outline.
 - Use informative headings (not just single words) at sub-section levels.
 - Allocate pages according to the relative importance of the topic to the customer (this can be helpful to contributors).
 - Annotate outlines, as needed, to guide writers.

Outline Steps

- Instructions
 - Font
 - Line spacing
 - Number of Volumes
 - Page allocation
 - Use of graphics, tables, and charts
 - Font size requirements
- Evaluation Criteria
- Scope of Work
- Consider
 - Introduction or Executive Summary
 - Resumes
 - Table of contents

Outlining Guidelines:

- Follow RFP's instructions
- Mirror numbering system
- Use customer's language
- Resist unsolicited topics

Allocate Pages by Topic Importance

Estimated Weights and Initial Page Allocation					
<i>Factor</i>	<i>Weight</i>	<i>Proposal Section</i>	<i>Initial Allocation</i>		
Technical	50			50	
		1. System Hardware	14		
		2. System and Network Software	28		
		3. Training	8		
Management	30	4. Project Management		30	
Cost	20	5. Cost		20	
				Total	100

Adjusted Allocations			
#	Proposal Section	Pages	Comments
ES	Executive Summary	6	Approximately 5 to 10 percent of total
1	System Hardware	12	Reduced; not a discriminator
2	System and Network Software	27	Equal to weight less executive summary
3	Training	10	Increased; hot button of key evaluator
4	Project Management	32	Increased; discriminator for us
5	Cost	8	Decreased; use tables extensively
		Total	95
		Contingency	5
		Page Limit per RFP	100

Storyboards

- Disseminates information and instructions
- Can be used by new or experienced proposal writers
 - Supports logical section development
- Can help writer focus on section(s) assigned to them
 - Builds coherent strategy into proposal
 - Facilitates coordination between sections
- Can aid with addressing
 - Customer requirements
 - Win themes
 - Discriminators
 - Graphics
 - Feature/benefit of solution
 - Relevant Experience

Proposal Manager	Proposal Title	Solicitation Number	Customer	Contracting Office	Contract Type	Value	Period of Performance	RFP Release Date	Proposal Due Date	Award Date	B&P #

Understanding the Task: Relevant Proposal Information

Proposal:	
Section No.:	
Section Topic:	
No. of Pages:	
No. of Visuals:	
Author:	

Understanding the Task: Relevant RFP Locations

Instructions (L#):	
Evaluation Criteria (M#):	
Statement of Work (C#):	
Deliverables (F#):	
Attachments:	
Other:	

Analyzing the RFP: Section Compliance Checklist

RFP Paragraph	Compliance Requirements

Section Outline (Based On Instructions/Requirements)

Defining Your Offer:

Major Issues

Approach (Technical/Management/Other)

Features and Benefits of Your Solution	
Features	Benefits

Risk Management	
Risk Element	Mitigation Approach

Relevant Experience

--

Past Performance

--

Developing Your Strategy

Section Discriminators

Us	Them

Relevant Proposal Strategy/Volume Strategy

--

Section Strategy

--

Section Theme Statement

--

Creating Key Visuals

Copy and Paste Graphics from other documents below

--

Figure Number

--

Figure Title

--

Action Caption

TEAM CONTACT LIST					
Name	Phone	Mobile	Home	Email	Location
Doe, Jane					

Welcome to eMaryland Marketplace Advantage (eMMA)



eMMA is Maryland's new online procurement platform used to connect the vendor community with contracting opportunities from state, county, and local government entities. Registered vendors will receive notices of bid opportunities, can submit bid responses online, and may obtain bid results online.

Qualified vendors may also complete the self-certification process for the Small Business Reserve (SBR) Program and Veteran-owned Small Business Enterprise (VSBE) Program.

eMMA facilitates an open, transparent, and efficient procurement process. We look forward to doing business with you!

Additional information can be found in the [Frequently Asked Questions](#) and [Quick Reference Guides](#). Any questions please contact the eMMA Help Desk at eMMA.helpdesk@maryland.gov.

<https://emma.maryland.gov>

New / Updated Solicitation: Consultant To Implement A Process For Collecting Parent Data

External

Inbox x



eMaryland Marketplace Advantage (eMMA) <no-reply.emma@maryland.gov>
to PATTERSON

Sun, Aug 1, 6:23 PM (9 days ago)



You are invited to respond to the solicitation listed below. Please [CLICK HERE](#) to access the solicitation in eMaryland Marketplace Advantage (eMMA). <https://emma.maryland.gov>

It is important that you read all the documents within the solicitation thoroughly and carefully. If this is Round 2 or greater, you MUST advance your response from the previous round (update if necessary) and resubmit.

A new web link is created and shared in the email each time a solicitation round is updated. Be sure to update your bookmarks to the new web link as the old link will not contain the new round(s).

- RFX name: Consultant To Implement A Process For Collecting Parent Data
- RFX id: 36519
- Main commodity: Education and Training Services
- Lot #: 1
- Round #: 1
- End date: 9/6/2021
- Issuing Agency: Maryland State Department of Education - Administration

Solicitation number in eMMA

Solicitation + number of amendments

Solicitation due date

We look forward to hearing from you,

Regards,

Regina Gachuhi



This e-mail has been generated automatically, please do not reply to it.

Poll # 2



Win Themes

- Win themes are higher level features and benefits that transcend the entire proposal.
 - **Features** are characteristics or elements of your solution that satisfy or exceed the requirements of the RFP. They may be **software, hardware, methodologies, processes, performance levels**, and the **number of key personnel**, to use a few examples. They are the means to your end, not the end itself.
 - **Benefits** are advantages that solve the customer's problem or address a major concern. They may include such elements as **higher performance levels, increased efficiency, reduced risk**, and/or a **solution to the customer's problem**.

Win Theme development

- Effective proposals usually have *no more than one or two win themes* that are focused on what customers care about the most – typically low cost, low risk, proven solutions, innovation, or performance-based accountability.
- Win theme components:
 - It links customer **benefits** to your solution **features**.
 - It supports the solution.
 - It contains specific information.
 - It provides reasons and proof that evaluators need to select you.

Executive Summary or Introduction

- **Executive Summary**

- a brief section at the beginning that summarizes the document. People who read only the executive summary should get the essence of the document without fine details.

- **Introduction**

- introduces the document- it explains what the document is about. It may include background information, an outline of central points.

Questions to Consider for the Executive Summary

- *Why should the customer select you?*
- *How does your proposal align to the customer's evaluation criteria?*
- *How will the customer benefit from what you propose?*
- *How will the project help the customer achieve their strategic goals?*
- *How do the features of your proposed solution align with challenges the customer faces?*
- *What sets you apart from your competition (discriminator)?*
- *Have you described all your capabilities and how they may benefit the customer?*
- *How does your corporate culture and values map to the needs of the project?*
- *Can you provide any references or testimonials?*
- *Has your company won any awards that are relevant?*
- *Has your company had any articles published that are relevant?*

Poll #3



Management Approach

- Lines of authority/clear organizational structure
- Project/cost controls
- Subcontractor management
- Problem resolution/risk mitigation
- Start-up plan or transition
- Team facilities -- emphasize unique capabilities
- Should be tailored to customer's needs and benefits and not be a boilerplate/generic answer

Staffing/Personnel Plan

- How does your organization plan to allocate staff and resources to the project?
- What resources are available (including their experience)?
- What is the approach to...
 - Recruitment?
 - Training?
 - Incumbent staff?
- Key Personnel - Resumes, Letters of Commitment / Letters of Intent

Past Performance

- How it can be used in the proposal:
 - Use recent experience – typically past 3 years
 - Tailored descriptions
 - Emphasize applicability to program being proposed
 - Tie to solicitation scope of work sections
 - Explain any shortcomings
 - Identify benefits and accomplishments



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Contact us

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