

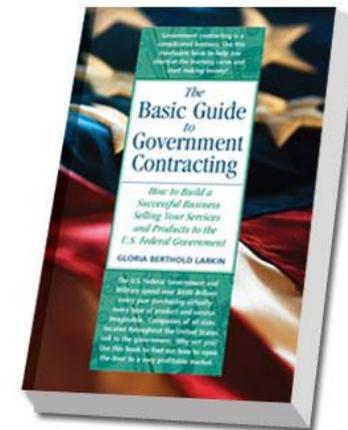
# Why and How to Use Sources Sought Notices and RFIs as a Business Advantage



- Consultant & Trainer
- Author of *The Basic Guide to Government Contracting*
- Nationally recognized federal contracting business development expert
- Clients have won billions in federal contracts
- Quoted in Wall Street Journal, Washington Post, INC Magazine, Bloomberg
- Educational Foundation Board Chair for WIPP.org



**Gloria Larkin**  
**President**



# In for the Win!

## *Purpose:*

During this session we will discuss **Why** and **How** to respond to a Sources Sought Notice (SSN) or Request For Information (RFI) that *will better position your client's company to win contracts!*

# Are Contractors Watching?

Are Contractors Watching?

Many Sources Sought Notices go

**unnoticed**

by the businesses to whom the Federal Government would like to award contracts.

# ***FLOOD Alert***

Federal agencies have posted an unprecedented **FLOOD** of new Sources Sought Notices on FedBizOpps.

★ [FEDBIZOPPS.GOV](http://FEDBIZOPPS.GOV)

*– Over 1,700 new Sources Sought opportunities  
in the last 30 days!*

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# Why the Increase?

## Myth Busting Memos 1 & 2



OFFICE OF FEDERAL  
PROCUREMENT POLICY

EXECUTIVE OFFICE OF THE PRESIDENT  
OFFICE OF MANAGEMENT AND BUDGET  
WASHINGTON, D.C. 20503

May 7, 2012

EXECUTIVE  
OFFICE

MEMORANDUM FOR CHIEF ACQUISITION OFFICERS  
SENIOR PROCUREMENT EXECUTIVES  
CHIEF INFORMATION OFFICERS

FROM:

Lesley A. Field

Acting Administrator for Federal Procurement Policy

SUBJECT:

“Myth-Busting 2”: Addressing Misconceptions and Further Improving  
Communication During the Acquisition Process

MEMORANDUM FOR CHIEF AC  
SENIOR I  
CHIEF IN

FROM:

Daniel I. Gordon

Administrator for Federal Procurement Policy

SUBJECT:

“Myth-Busting”: Addressing Misconceptions to Improve Communication  
with Industry during the Acquisition Process



OFFICE OF FEDERAL  
PROCUREMENT POLICY

# Sample at FBO.gov

1 - 20 of 1752

Sort By  Showing  per page [1](#) | [2](#) | [3](#) | [4](#) | [5](#) | [6](#) | [7](#) » [\[88\]](#)

Opportunity	Agency/Office/Location ▼	Type ▼ / Set-aside ▼	Posted On ▲
<p> <a href="#">70--Channel signal capture box for real time interfacing with human physiological monitoring devices.</a>                      MB-15-10642883                      70 -- General purpose information technology equipment</p>	<p>Department of the Army                      U.S. Army Medical Research Acquisition Activity                      U.S. Army Medical Research Acquisition Activity</p>	Sources Sought	Mar 14, 2015
<p> <a href="#">66--NucleoCounter / Cell Counter</a>                      MB-15-10611954                      66 -- Instruments &amp; laboratory equipment</p>	<p>Department of the Army                      U.S. Army Medical Research Acquisition Activity                      U.S. Army Medical Research Acquisition Activity</p>	Sources Sought / Total Small Business	Mar 14, 2015
<p> <a href="#">MMAC Environmental Architect and Engineering Services</a>                      DTFAAC-15-R-02523                      C -- Architect and engineering services</p>	<p>Department of Transportation                      Federal Aviation Administration (FAA)                      Mike Monroney Aeronautical CTR</p>	Sources Sought (Modified)	Mar 13, 2015
<p> <a href="#">D--Project Management Automated Information System (P2) Operations and Maintenance</a>                      W9128A-15-Z-0006                      D -- Information technology services, including telecommunications services</p>	<p>Department of the Army                      U.S. Army Corps of Engineers                      USACE District, Honolulu</p>	Sources Sought	Mar 13, 2015
<p> <a href="#">Optical Floating Zone Furnace</a>                      SLAC_250430                      66 -- Instruments &amp; laboratory equipment</p>	<p>Department of Energy                      SLAC National Accelerator Lab                      SLAC National Accelerator Lab</p>	Sources Sought	Mar 13, 2015
<p> <a href="#">INDUSTRY DAY - Building 3 Renovation at NIST in Boulder, Colorado 80305</a>                      NB194000-15-XX99                      Z -- Maintenance, repair, and alteration of real property</p>	<p>Department of Commerce                      National Institute of Standards and Technology (NIST)                      Acquisition Management Division</p>	Sources Sought (Modified)	Mar 13, 2015

# *Confused?*

*confused*

What is the difference between a  
**Sources Sought Notice** and a  
**Request for Information (RFI)**?

*Sources Sought*

# FAR to the Rescue! --RFI

- **FAR Part 15.201(e)** "RFIs may be used when the Government does not presently intend to award a contract, but wants to obtain price, delivery, other market information, or capabilities for planning purposes."
- RFIs are also mentioned at **FAR 10.002(b)(2)(iii)** as a technique of conducting market research.

Source: <http://www.acquisition.gov/far>

# FAR to the Rescue!

## Sources Sought Notices

- **FAR 5.201(c):** "...the primary purposes of the synopses notices are to **"improve small business access to acquisition information and enhance competition** by identifying contracting and subcontracting opportunities."
- **FAR 19.501(c)** states: "The contracting officer shall review acquisitions to determine if they can be set aside for small business, giving consideration to the recommendations of agency personnel having cognizance of the agency's small business programs. The contracting officer shall perform market research and document why a small business set-aside is inappropriate when an acquisition is not set aside for small business."

# FBO to the Rescue! Sources Sought

“The Sources Sought notice is a synopsis posted by a government agency that states they are seeking possible sources for a project. It is not a solicitation for work, nor is it a request for proposal. Reference the FAR, Subpart 7.3 and OMB Circular A-76.” Source: [www.fbo.gov](http://www.fbo.gov) FAQs

“**Sources Sought:** A synopsis notice to businesses to collect and analyze information about interest and capabilities within the market to satisfy agency needs.”

Source: DHS Market Research Guide

# DHS to the Rescue!



- **Sources Sought Notice:** The primary purposes of the notice are to improve small business access to acquisition information and enhance competition by identifying contracting and subcontracting opportunities.
- Published in [www.FedBizOpps.gov](http://www.FedBizOpps.gov) requesting vendors to identify themselves if they are interested in providing a particular product or service.
- Vendors responding to the notice usually describe their capabilities, similar projects they have conducted as a prime or subcontractor, central contractor registry information, GSA schedule information, current federal contract work and current socio-economic status

Source: Department of Homeland Security Acquisition Manual

*Results*

*Results*

**Sources Sought Notice and**

**Request for Information (RFI)**

Are often used Interchangeably

*Sources Sought*

# *Now You Are Savvy*

*NOW YOU ARE SAVVY*

- Take time to review these opportunities
- Identify those that are a good fit
- Respond accordingly

# *In the know*

IN THE KNOW

Sharp business people use these notices to:

- create set-aside contracts
- start agency-focused marketing campaigns
- create single source awards.

# *What is the Purpose?*

## *What is the Purpose?*

- Determine if industry can provide the agency with the required services or products
- Determine if small business can participate
- Support the Rule of Two (FAR 19.502-2(b) for set-asides

# *What is the Value of Responding?*

## *What is the Value of Responding?*

- Very good chance of resulting in a set-aside for small business
- Timing allows for marketing to agency and decision-makers
- Often used as a down-select – meaning only respondents receive RFP

# *It Seems to have Disappeared*

*It seems to have disappeared*

Did the opportunity get cancelled?

- Most often– NO!
- Most often: it resulted in a sole source contract

# How to Respond?

## *Answer the mail!*

- Every Notice is different
- Example: Interested sources shall indicate that they are capable of providing the required services and must provide:
  - (1) Full name and address of the firm;
  - (2) DUNs number; and
  - (3) Size status (i.e., small business, 8(a), HUBZone, service disabled veteran owned small business (SDVOSB)).
  - No other information is required at this time. **DO NOT SUBMIT A NARRATIVE, PROPOSAL, BROCHURES OR ANY ADDITIONAL INFORMATION AT THIS TIME.**

# How to Respond?

2. **How to Respond:** Capability Statements are due on March 20, 2015 by 3:00 pm MST via email to [sandra.sims@us.af.mil](mailto:sandra.sims@us.af.mil) and courtesy copy [christian.freire@us.af.mil](mailto:christian.freire@us.af.mil). Interested offerors shall provide the following information:

a. Contact Info

- Name of company
- Business title
- Institution or organization affiliation
- Email address and Phone number
- Company's business size; and
- Cage code and DUNS number

b. Capability statement expressing interest and the ability to meet the requirements. Your response is limited to 10 pages, and should address the following:

- Complete the attached checklist,
- Describe how your company will meet all the requirements described in the checklists?
- If Small Business, can your company meet the requirements specified in FAR 52.219-14, Limitations on Subcontracting?
- Would you need a transition period? If yes, how long? e.g.: 30 days / 60 days

# *Common Mistakes*

## COMMON MISTAKES

- Do respond exactly as required, not the time to get creative or stay generic
- Do NOT attach a marketing document like a generic Capability Statement
- Do not forget to ask for a specific set-aside
- Do not forget to cc: the small business representative

# *Down-select Low Down*

DOWN-SELECT LOW DOWN

Many agencies are using the response process as a way to limit the numbers of companies who actually receive the RFP

# *How to Position Before*

## HOW TO POSITION BEFORE

Identify all decision-makers for on-going company marketing efforts

- Small Business
- Contracting and Acquisition
- Program Managers and End Users

# *How to Position After*

HOW TO POSITION AFTER

Engage with appropriate messaging, relating to the decision-makers needs

# *The Single Award Flip*

## *The Single Award Flip*

This is a perfect time to determine if the opportunity is appropriate for a sole source contract.

# *Follow Up Counts*

## *Follow up counts*

- Engage in company-wide marketing
- Ask for a Capability Briefing with decision-makers
- Continuously market, build relationships
- Attend vendor meetings

# Using FedBizOpps (FBO) to find Sources Sought Notices

## **Step 1: Set up a username on FedBizOpps**

Setting up a username on FedBizOpps allows the user to customize their FBO experience and receive the exact results they want. TargetGov recommends that each person using FBO have their own username instead of one name shared by the entire company.

# Using FedBizOpps (FBO) to find Sources Sought Notices

To set up a username, click on the “Register Now” button in the Vendors/Citizens box on FBO’s homepage.



**Vendors / Citizens**  
Vendors and citizens may search, monitor, and retrieve opportunities.

Username

Password

- ▶ [Find Opportunities](#)  
No login is required to view opportunities.
- ▶ [Register Now](#)
- ▶ [Password Reminder](#)
- ▶ [Recovery FAQs](#)

Then follow the directions on the subsequent pages.

Once you have the username set up, login using this box whenever you are on the FBO website.

# Using FedBizOpps (FBO) to find Sources Sought Notices

## Step 2: Using Advanced Searches

FedBizOpps is used by many agencies to advertise upcoming opportunities, revisions to contracts, events, and various other bits of information that may or may not be useful to any given firm. Because of this, it is important to utilize “Advanced Searches.”

### Quicklinks

 [View Watched List](#)

 [View Saved Searches](#)

 [Find Opportunities](#)

To access Advanced Searches, click on “Find Opportunities” from the My FBO page (you land on this page after logging in).

# Using FedBizOpps (FBO) to find Sources Sought Notices

After selecting “Find Opportunities” a list of all opportunities posted in the last 90 days will appear. From here, you must select “Advanced Search” from the tabs across the top.



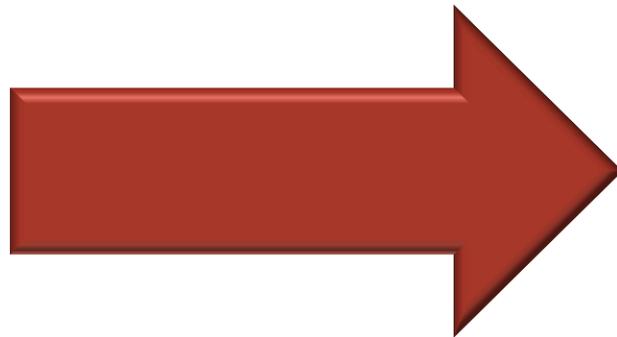
The screenshot shows a navigation bar with six tabs: "Opportunities List", "Advanced Search", "Watched", "Search Agents", "Bids/Responses", and "Archives". Below the tabs is a search tip box with a lightbulb icon. The tip text reads: "Search Tip: Use the [Advanced Search Form](#) for a wide array of search fields. To view opportunities by agency, go to the [Agencies](#) section. A quick search can be conducted using the fields below."

*An Advanced Search allows you to determine the criteria by which opportunities show up in an FBO Search.*

# Using FedBizOpps (FBO) to find Sources Sought Notices

## Step 3: Finding Sources Sought Notices

In the Advanced Search Tab, set the Posted Date on the opportunities to be *within the last 30 days*. This is because of the high turnaround time on Sources Sought Notices, and sorting by the last 30 days will bring up the most relevant opportunities.



Posted Date:

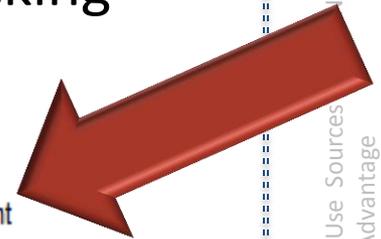
Last 30 Days ▼

# Using FedBizOpps (FBO) to find Sources Sought Notices

Next, set the Opportunity/Procurement Type by checking the “Sources Sought” box.

## Opportunity/Procurement Type:

- |   |   |   |
|---|---|---|
| <input type="checkbox"/> Presolicitation                            | <input type="checkbox"/> Combined Synopsis/Solicitation                   | <input checked="" type="checkbox"/> Sources Sought        |
| <input type="checkbox"/> Modification/Amendment/Cancel              | <input type="checkbox"/> Sale of Surplus Property                         | <input type="checkbox"/> Special Notice                   |
| <input type="checkbox"/> Foreign Government Standard                | <input type="checkbox"/> Award Notice                                     | <input type="checkbox"/> Justification and Approval (J&A) |
| <input type="checkbox"/> Intent to Bundle Requirements (DoD-Funded) | <input type="checkbox"/> Fair Opportunity / Limited Sources Justification |   |



Here you decide how to best filter out the results you want.

- Filter by Keywords, NAICS Codes, or Classification Codes\*.

*We recommend filtering by your company's current NAICS Codes listed on your SAM Profile.*

# Using FedBizOpps (FBO) to find Sources Sought Notices

## NAICS Code:

Use the search box to find NAICS Codes and mark one or more checkboxes to add to your selection.

Note: Changing your search criteria does not remove items from your selection.

NAICS Code	Description
<input type="checkbox"/>	111 -- Crop Production
<input type="checkbox"/>	111110 -- Soybean Farming
<input type="checkbox"/>	111120 -- Oilseed (except Soybean) Farming
<input type="checkbox"/>	111130 -- Dry Pea and Bean Farming
<input type="checkbox"/>	111140 -- Wheat Farming
<input type="checkbox"/>	111150 -- Corn Farming
<input type="checkbox"/>	111160 -- Rice Farming
<input type="checkbox"/>	111191 -- Oilseed and Grain Combination Farming
<input type="checkbox"/>	111199 -- All Other Grain Farming

0 of 1353 selected [ show selected ] [ show all ]

\*Classification Codes are used by FBO and provide a broad range of product and service types. After you have selected the desired parameters for your Sources Sought Notices, select the “Search” button at the bottom of the page.

[Search](#) [Clear](#) [Return To Opportunities List](#)



# Using FedBizOpps (FBO) to find Sources Sought Notices

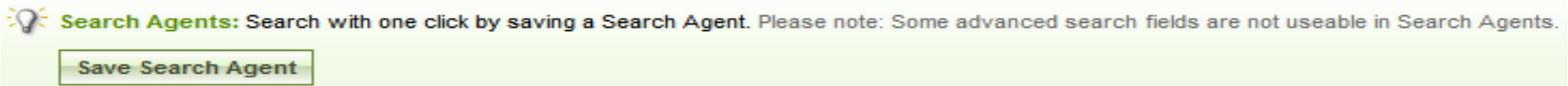
## Step 4: Saving Searches

You have run your search and can see the Sources Sought Notices that are filtered by your chosen criteria. However, if you were to leave this page the search would be gone forever, requiring you to go back through and select the same options.

*If you are satisfied with the results of your search, we recommend saving it to your FBO Profile. This will enable you to run the search every time you log back in.*

➤ *Select “Save Search Agent” to save a search to your FBO Profile.*

# Using FedBizOpps (FBO) to find Sources Sought Notices

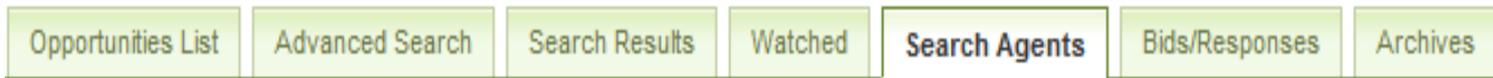


- Once a search has been saved, you can come back at any time and run, edit, or update the search as you please.
- Your Saved Search Agents will appear in the “Search Agents” tab when you search for opportunities.

# Using FedBizOpps (FBO) to find Sources Sought Notices

## Step 5: Setting up Reoccurring Emails

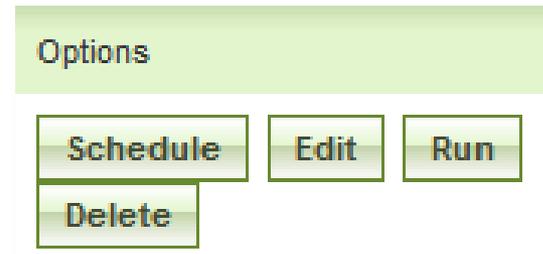
Now that we have Saved a Search Agent and are able to run the search whenever we want to, we can set it up so that the search will be automatically run and then provide you with the new opportunities that have been posted to FedBizOpps since the last time the search was run. This ensures that every email only shows the latest and most up to date opportunities.



To set up a scheduled search, click on the “Search Agents” tab on the top of the Opportunities page.

# Using FedBizOpps (FBO) to find Sources Sought Notices

Then find the Search Agent you previously saved in the list below, and click on “Schedule.”



Select the period you would like your search to be run (on a daily, weekly, or monthly basis) and how frequent that search is run. Example: To run a search every third day, set the period to “Day” and the Multiple to “3.” To run a search once a week, set the period to “Week” and the Multiple to “1”.

# Review

- ✓ The FAR-stated purpose of these notices
- ✓ The value of responding to these notices
- ✓ Differences between Sources Sought Notice (SSN) and Request For Information (RFI)
- ✓ Why some opportunities disappear after being listed as a SSN or RFI
- ✓ How to respond to a SSN or an RFI
- ✓ The down-select result
- ✓ Common mistakes made, and what to avoid in responses
- ✓ How to position a firm before and after responding
- ✓ How to flip it to a sole source award
- ✓ Follow up steps after responding

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**Download all docs here:**

- <https://www.targetgov.com/APTAC>
- Password: APTAC



**Gloria Larkin**  
**President**

