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

APTAC SPRING 2015
MEMBERSHIP AND TRAINING EVENT
MARCH 15-19, 2015
DENVER
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
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!
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.

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

FedBizOpps.gov
Why the Increase?

Myth Busting Memos 1 & 2

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

May 7, 2012

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 ACQUISITION OFFICERS
SENIOR PROCUREMENT EXECUTIVES
CHIEF INFORMATION OFFICERS

FROM: Daniel I. Gordon
Administrator for Federal Procurement Policy

SUBJECT: “Myth-Busting”: Addressing Misconceptions to Improve Communication with Industry during the Acquisition Process
### Sample at FBO.gov

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

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

Source: [http://www.acquisition.gov/far](http://www.acquisition.gov/far)
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 FAQs

“Sources Sought: A synopsized 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

Sources Sought Notice and Request for Information (RFI)
Are often used interchangeably
Now You Are Savvy

- Take time to review these opportunities
- Identify those that are a good fit
- Respond accordingly
Sharp business people use these notices to:

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

- 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
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 and courtesy copy 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

- 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
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

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

- Small Business
- Contracting and Acquisition
- Program Managers and End Users
How to Position After

Engage with appropriate messaging, relating to the decision-makers needs
This is a perfect time to determine if the opportunity is appropriate for a sole source contract.
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.

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.
**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.”

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

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

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

*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.
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