

Pre-Solicitation and Market Research

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Agenda

- Market Research
- System for Award Management
- Request for Proposal
- Request for Quote (RFQ)
- Invitation for Bid (IFB)
- Closing Remarks/Questions



Market Research

- Definition: Collect and analyze information about capabilities within the market to satisfy agency needs. Purpose of market research is to:
 - Determine if sources capable of satisfying the agency's requirements exist.
 - Shape and support the development of acquisition requirements such as a strategy and acquisition plan.
 - Provide information on how to structure contracts.
 - Assess small business availability.
 - Evaluate changes in industry.



Market Research Tools

- Utilize all tools available to you to register your business.
 - Sources Sought (FedBizOpps)
 - Ensure to fill out all requested information and provide details to ensure that we capture all your capabilities.
 - <https://www.fbo.gov>
 - Small Business Administration (Dynamic Search)
 - Ensure to provide detail answers to all questions.
 - http://dsbs.sba.gov/dsbs/search/dsp_dsbs.cfm
 - Networking
 - Industry days, trade fairs, networking luncheons, and professional organizations.



System for Award Management (SAM)

- SAM (<https://www.sam.gov>) is a Federal Government owned and operated free web site that consolidates the capabilities in Central Contractor Registration (CCR)/FedReg, Online Representations and Certifications Applications (ORCA) and the Excluded Parties List System (EPLS).
- You must have an active registration in SAM to do business with the Federal Government.
- In SAM, your company/business/organization is now referred to as an “Entity.”



SAM Registration

- Create an individual user account and log into SAM to register your entity. To register in SAM, at a minimum, you will need the following information (for U.S. registrants):
 - Your DUNS Number, Legal Business Name, and Physical Address from your Dun & Bradstreet (D&B) record.
 - If you do not already have a DUNS Number, you can request one for free from D&B at <http://fedgov.dnb.com/webform>.



SAM Registration (Continued)

- Your Taxpayer Identification Number (TIN) and Taxpayer Name associated with your TIN.
- Review your tax documents from the IRS (such as a 1099 or W-2 form) to find your Taxpayer Name.
- Your bank's routing number, your bank account number, and your bank account type, i.e. checking or savings, to set up Electronic Funds Transfer (EFT).
- Reregister when needed.



Common Errors

- Some of the Common SAM registration errors included the following:
 - The NAICS codes are not specific.
 - Examples: Using only 236220 – Construction. If you have experience in 237310- Highways and Roads, annotate that also.
 - Capabilities are not specific or not correct.
 - Information on the Continuation Page is not complete.
 - Company address is missing or has changed.
 - Ensure all data fields are filled out completely .
 - Incorrect Registration in Dynamic Small Business Search.
 - POC information is not listed.
 - Expiring or not renewing your SAM registration.



Successful SAM Registration

- The following information is required for successful SAM registration:
 - Organizational structure.
 - Electronic Funds Transfer (EFT) information.
 - NAICS codes and PSC codes.
 - Size metrics - total receipts / avg. # of employees.
 - Disaster relief, including geographic area served.
 - POC information.
 - Primary Government Business and Electronic Business POC information.
 - Dun & Bradstreet legal business name and address.



Successful SAM Registration (Continued)

- Taxpayer name and Taxpayer Identification Number (TIN).
- Highest company and employee security level.
- Answer all the representation and certification questions (there are 31).
- Determine whether your business has been certified as a Department of Transportation Business Enterprise.
- Choose three security questions and provide the appropriate answers.
- Identification of all appropriate socio-economic categories.
- Identification of the Automated Clearing House (ACH) department for your financial institution.



Request for Proposal (RFP), Request for Quote (RFQ), and Invitation for Bid (IFB)

- Items to consider:
 - CAREFULLY read the Scope/PWS/SOO.
 - Eliminate any fluff and/or extraneous information.
 - Be clear and concise in the proposal.
 - Prepare proposal, quotes, and bids early on to avoid late submission.
 - Ensure totals per line on the schedule are accurate (check your math).
 - Communicate questions/issues on specs in detail early on.



RFP, RFQ, and IFB Continued

- Ask questions concerning the Government's intent in a scope/RFP/evaluation criteria
- Proofread the proposal for grammar (make sure the correct words are used and information is correct).
- Assumptions are often a pitfall and result in an unsuccessful proposal.



Conclusion

- Market research is the foundation for all government acquisitions.
- Ensure your company responds thoroughly and accurately to market research questions and surveys.
- Review information in SAM to ensure it is up to date and accurate.
- Review all information in the RFP/RFQ/IFB that you are responding to.



Conclusion (Continued)

- Be clear and concise when preparing your quote or proposal.
- If you have questions, contact the contracting POCs referenced in the solicitations.



Questions

