

EXORCIZE YOUR PROPOSAL DEMONS!

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The “Irrelevant Past Performance” Demon

Generally speaking, contracts cited in a proposal as past performance can be evaluated based on the:

- Offerors’ performance in those contracts, drawn from client feedback
- Relevancy of these contracts to the proposed contract in terms of having similar work scope.

It is a simple proposition: if offerors have performed well in relevant contracts, it is reasonable to believe they have the capability to perform the proposed contract.

However, there is a relevant problem that can affect this proposition. It is caused by the Irrelevant Past Performance Demon, which leads to the use of past performance contracts that are not so relevant or, if they are relevant, are not sufficiently substantiated as such.

To make this demon irrelevant, the Proposal Exorcist offers the following tips to improve the past performance parts of your proposals with emphasis on choosing the right contracts and then providing the right data about those contracts to show their relevancy.

- **Use a past performance archive**—Maintain archived descriptions of past and current contracts that can be used as a starting point for past performance write-ups. Regularly (at least semi-annually), update the descriptions to reflect the technical and management progress and administrative/contractual changes of those contracts. Have the program/project manager or other key personnel assigned to the contracts make these updates. Even with regular updating, expect that the archived data will need tailoring based on the requirements of RFP you are responding to, especially about how the contract is relevant to the

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proposed contract. This tailoring is not just a “word-smithing” exercise you can dole out to contract technical or proposal writers to perform on their own. Have technical or management personnel who are (or were) assigned to the contract help with this tailoring.

- **Start the process early**—Start developing the past performance section/volume before RFP release. If you are awaiting the imminent release of an RFP with or without a draft RFP in hand, you should have a good idea about your contracts that are relevant to the proposed contract. Select these contracts, and begin collecting data about them—and do not forget your past performance archive. If you have already selected subcontractors for the proposed contract, have them choose past performance contracts and begin their contract data collection.

- **Pick the right contracts**—

Select past performance contracts (for your company and subcontractors) that:

- Will get positive feedback from the reference clients about your performance
 - Meet the RFP requirements for contract selection, such as the period of performance (e.g., performed within the last three years), number of contracts (e.g., a minimum, maximum, or unlimited number), or the need to cite subcontractor past performance
 - Are relevant to the technical, management, schedule, contractual, and cost tasks/requirements of the proposed contract, and are relevant to RFP-specified experience factors/criteria.
- **Effectively display the contract write-ups**—If the RFP requires you to use a form for providing the contract data, use it. Even if it does not, use your own tabular form based on the RFP-requested data. Using such a form can promote consistency in the scope of the detail you provide and the visual appearance of

that data from one contract to another in the proposal. The table’s display of the data can also help evaluators skim the table to more easily glean pertinent contract data (compared to them having to read narrative text). Also, use bulleted lists within the table to help the evaluators skim for key points.

- **Think relevancy and past performance in the contract write-ups**—For the cited contracts, clearly describe their relevancy to the proposed contract and your proven performance in them.

- Take a macro and micro view to identify relevancy features. If the proposed contract is for a widget production program, a macro view would be to highlight that you produced the same widgets in the cited contract. A micro view would be to describe the relevancy of specific technical, management, schedule, cost, or contractual tasks/requirements of the cited contract to those of the proposed contract. Good sources of the proposed contract tasks/requirements are the SOW and relevancy factors/criteria in the proposal instructions and evaluation criteria sections of the RFP.

It is a simple proposition:

if offerors have performed well in relevant contracts, it is reasonable to believe they have the capability to perform the proposed contract.

- Amplify details about the cited contract’s relevant tasks/requirements, describing the who, what, when, where, how, and why of the contract and how these features are relevant to the proposed contract.
- For subcontractors that will support you in the proposed contract, describe your company’s working relationships with them in the cited contracts, showing that these relationships will facilitate your coordination and communication with them in the proposed contract.
- For those employees who will be assigned to the proposed contract, identify them by name and describe their roles in the cited contracts, showing that their experience and skills will be transferred to the proposed contract.
- Describe kudos, letters/certificates of appreciation, and awards from customers for your quality performance in the cited contracts, and consider including testimonial quotes and copies/photos of the letters, certificates, and awards in the proposal.

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- If you had performance problems in the cited contracts, explain what caused the problems, what you did to overcome them and then ensured that they did not reoccur, and how these lessons learned will be applied to the proposed contract.
- Provide photos showing the products or services of the cited contracts.
- **Use an intro/summary**—Preceding the contract write-ups, include an intro/summary to digest your cited contracts and describe any relevant contract or personnel past performance that you did not—or could not—include in the contract write-ups. Here are some ideas for this intro/summary:
 - Summarize the services and business history of your company and subcontractors and your experience working together.
 - List each cited contract with a brief description of its work scope, period of performance, contract value, and customer, listing the contracts in the order that their write-ups appear in the proposal.
 - Make summary statements about how the cited contracts comply with the RFP requirements for inclusion, why they were selected, and what they show about your (and the subcontractors’) ability to perform the proposed contract. For example, you might state that the contracts represent performance within the last three years as required by the RFP, all contracts were (or are being) performed within schedule and budget, three of the four contracts were performed for the prospective customer, and all the subcontractors were involved in at least one of your cited contracts.
 - Describe other relevant contracts that were not cited in the contract write-ups because of RFP requirements for contract selection or proposal page limitations.
 - Use a relevancy cross-reference matrix that shows the applicability of specific tasks/requirements of the proposed contract to those of the cited contracts. List the contracts in the header row, and in the far left column, list key tasks/requirements for the proposed contract. Use an “x” to cross-reference these tasks/requirements to the cited contract. You do not have to have an “x” for each task/requirement for each contract; your goal should be to have least one “x” for each task/requirement for at least one of the contracts and that all contracts have a good share of “x”s.
- **Cite past performance in other proposal sections**—Find places in the technical and management sections to give examples of your proven performance as described in the past performance contract write-ups. This will allow you to not only describe your proposed management and technical solutions but to substantiate your ability to provide them based on your past performance.
- **Submit early, but not at the expense of past performance content**—The RFP may ask, not require, that the past performance section/volume be submitted before the proposal is due. Do so if the early delivery does not pressure you into delivering a less-than-quality submittal.
- **Track the status of client survey forms**—The RFP may require you to send performance survey forms to your past performance clients so they can provide feedback about your company’s contract performance. If so, ensure that the forms and the instructions for completing and submitting them are sent to the clients well before the deadline for delivering the completed survey to the prospective customer. (This deadline is typically the same as the proposal delivery deadline.) Set a target date for survey delivery to the customer—preferably several days before the due date. Confirm that completed surveys are received by the prospective customer by the target date, giving you time to resolve the issue if they are not.

The preceding tips are all well and good; but what can you do if your company does not have relevant past performance?

If your company is a new one—or old one, for that matter—without relevant corporate experience, consider citing the relevant experience of your personnel from their prior employment. If your company has legacy relevant experience from work performed when it was another business entity, cite that experience.

If your company does not have relevant experience—personnel, legacy, or otherwise—it might be best to no bid. If you no bid for this reason, do not blame the Irrelevant Past Performance Demon.