How to Create *Effective* Solicitation Responses

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What is a solicitation response?

A solicitation response is a persuasive argument that is used to respond to an agency, foundation, or company requirement.

UNCF Special Programs Corporation (SP) in the past has generally responded to Grants, Funding Opportunity Agreements (FOA), and related awards. A new focus for SP is to diversify to capture opportunities involving different solicitation vehicles, such as government Requests for Quotations (RFQs) and Requests for Proposals (RFPs). A good solicitation response will take complicated data and present it in a simple, convincing manner. The essence of a solicitation response is persuasion.
All too often we hear that “we submitted a great proposal” and were scored low and didn’t win the business. Understand what it takes to win. A compliant technical proposal response – i.e. one that meets all of the procurement/solicitation requirements – is a minimal starting point for winning. Proposed innovative solutions are also a prerequisite to being a contender. To win, our proposal must also sell our message. For example, a winning proposal must answer the questions, “Of what benefit is our innovative solutions to the procurement agency; how does it meet the requirements; and why is it better than a competitor’s solution?”

Understanding how to organize our information around the requirements of the designated evaluator can help improve any type of solicitation response. The focus of this training document is to guide the user through the steps and pitfalls involved in the solicitation response process.

What are our goals?

We are submitting our solicitation response for a reason. What is it?
Are we trying to:

- Persuade or convince someone
- Sell something
- Gain someone's approval for something
- Get selected for something
- Get a foot in the door
- Launch a product or business
- Motivate someone to do something

Whatever our goal is, our entire effort should revolve around it. **Start by asking yourself, what needs to happen to achieve the goal?** Then structure our solicitation response accordingly. Build our outline around achieving the goal and in every sentence we write, try to achieve that goal.

Know our audience

We can't win if we don't give the evaluators what they want

Our solicitation response will win or lose based on someone else's decision. In order to persuade that person, committee, or group, we must understand them. We must know what they want, answer their questions, and convince them. Our solicitation response should **not** be based on what **we** want to say, it should instead be based on what **our audience wants** from our solicitation response.

If we have a written solicitation with evaluation criteria specified we have a good start. However, the evaluation criteria never reflect everything that the person or persons performing the evaluation think are important. Often the evaluation criteria are written by someone other than the evaluators! It may be wise to find out the source of the request. This can oftentimes be accomplished through asking questions of the Contracting Officer.

In order to convince those who will be reading our solicitation response, we must get to know them, before we submit our solicitation response. To get to know them, we must talk to them, ask questions, and understand their motivations. Otherwise it's just a question of luck whether we win or not.

How to give the evaluators what they want

To give the evaluators what they want, first we have to know what that is. To effectively give the evaluators what they want we have to have a real understanding about the client's environment, goals, and agendas.

Ideally a relationship should already be in place with the customer before a solicitation is released. Once the solicitation hits the street if we have not created a relationship then we are a step behind the competition.

Giving evaluators what we want them to have is a recipe for losing. Knowing what they actually want requires insight above and beyond what is in the solicitation. The only way to do that is to understand the client --- what are their goals, what problems do they face, and/or do they have preferences or biases.

Get to know potential customers before solicitation release. Research the organization, build a list of questions and seek out the answers, and attend pre-proposal conferences. When the solicitation is released, we can look for ways to demonstrate our insight and stand out from the pack.

How to develop our solicitation response

There is more to developing a solicitation response than just writing it

We must prepare so that when we begin writing, we remember that the solicitation response is not about what we want to say, but about how we can achieve the required goals of the solicitation. We cannot simply start writing and submit when we're done. Remember, but about achieving the required goals. The response actually starts when the pursuit starts.

Our solicitation response must address the customer's requirements

The customer will accept our solicitation response only if it meets their needs. The first step to meeting their needs is to become aware of what they are.

When examining a written solicitation, make sure to review the Statement of Work (SOW), then we know what those who wrote it think their needs are. Understanding their needs means more than simply asking how we can help them (for them to answer that, they must already know us). We must not only discover what the customer wants, but ***why*** they want it. What is important to them, what are they trying to accomplish, what problems are they having? All of these questions should be detailed in the SOW, if they are not than formulate questions for submission to the funding body. Our solicitation response should not guess at what the evaluators want. An effective response should tell them exactly what we can do for them and why they should want us.

Our solicitation response should answer our customer's questions about us and our offering

To persuade the customer, our solicitation response must anticipate and answer their questions.

Our solicitation response should be laid out to provide clear answers and terms for doing business. This the reason to follow the formatting instructions of the stipulated guidelines presented in the solicitation.

Here is a list of typical questions that will be answered in our solicitation response:

- Who are we?
- Why are we sending them this solicitation response?
- What will the customer get? (products, capabilities, services, deliverables, etc.)
- How will it benefit them?
- How will we manage delivery/fulfillment?
- How long will it take?
- What are the risks (financial and performance) and what will we do to mitigate them?
- Who will work on the project?

- Who will manage the project?
- What experience do we have with similar projects?
- Can we provide references/testimonials?
- How will we ensure quality and customer satisfaction?
- How will we know/measure success?
- What will the customer will have to do or supply?
- What options do they have to choose from?
- What considerations will they have in the future?
- Do we have any other relevant capabilities or resources?
- What assumptions did we make to write the solicitation response?
- How much will it cost?
- What payment terms do we offer?
- Are there any legal/contractual requirements or considerations?

The solicitation response lifecycle helps us plan our efforts

When planning our solicitation response, expect it to go through steps. The actual schedule will depend on how long we have to prepare the solicitation response. SOLICITATIONs usually come with 30 or 60 day deadlines. Here are the major steps that most solicitation responses go through:

1. **Review the Solicitation.** Perform and in-depth solicitation examination, consisting of the entire solicitation, modifications, and attachments. *[Proposal Manager, Capture Manager, & Subject Matter Expert (SME)]*

2. **Determine the Resources.** Decide what expertise is needed to respond to the proposal. *[Proposal Manager & Capture Manager]*

3. **Prepare the Solicitation Cross Reference Matrix.** Determine which solicitation requirements should be addressed in each section. *[Proposal Manager]*

4. **Conduct the Kickoff Meeting.** A structured initial meeting to draw the team together and discuss ideas and strategies driving the solicitation response. *[Proposal Manager, Capture Manager, & Proposal Team]*

5. **Assemble the Detailed Writing Instruction.** Each team member will receive a detailed layout of their pertinent sections based on the kickoff meeting input. *[Proposal Manager]*

6. **Write.** Respond to detailed writing instruction. *[Proposal Manager, Capture Manager, & Proposal Team]*

7. **Conduct the External Review – Pink Team Review**. Examine written sections to make sure the response answers the solicitation requirements (“answers the mail”). *[External Reviewer, & Outside Proposal Manager]*

8. **Write.** Write to address and/or clarify the reviewers’ comments. *[Proposal Manager, Capture Manager, & Proposal Team]*

9. **Conduct the Red Team Review.** Ensure that the key elements of the solicitation are being met. *[Proposal Manager, Capture Manager, SME, & External Reviewer]*

10. **Create the Budget.** Use solicitation response data to determine budget. *[Capture Manager & Finance]*

11. **Write.** Address Red Team reviewer comments. *[Proposal Manager, Capture Manager, & Proposal Team]*

12. **Conduct the Gold Team Review.** Review for final comment. *[Proposal Manager, Capture Manager, Proposal Team, and Upper Management (UM)]*

13. **Make the Final Corrections.** Write to address Gold Team reviewer comments, and provide final formatting and polishing. *[Proposal Manager]*

14. **Production.** Assemble the document in electronic or hard copy format per the solicitation requirement. *[Proposal Manager & Proposal Coordinator]*

15. **Submission.** Submit the solicitation response through the designated submission vehicle (electronic and/or hardcopy). *[Proposal Manager & Proposal Coordinator]*

16. **Award.** Follow-up to determine submission outcome

17. **Post-Award.** Negotiation and implementation prior to project startup.

How to provide our solicitation response

1. Review the Solicitation

Proposal Manager & Capture Manager

When a solicitation is "green lighted" than the Capture Manager and Proposal Manager must carefully review every aspect of the solicitation. This includes any modifications or attachments. If possible, they will determine the agency or funding body's needs (practical or political motivation – i.e. job creation). Through this in-depth analysis the reviewers can develop a cursory understanding of how SP can address the need and provide a solution fit for the stated problem(s). During the review questions should be formed, such as:

- What makes SP best suited to address the needs?
- What is the return on investment (ROI) for the funding body?
- Is there additional opportunity other then the initial solicitation?

Additional questions addressing any ambiguity or need for clarification or additional information may also be determined.

2. Determine the Resources

Proposal Manager & Capture Manager

The Capture Manager and Proposal Manager determine the expertise needed to respond to the solicitation and will cycle through the in-house human capital for subject matter experts to respond to sections of the solicitation. They will also determine if there is a need for a partner to fill any capacity lacking by SP. If a partner is needed, then agreements will be issued, signed, and collected by the Proposal Coordinator. The CM and PM will also develop a preliminary timeline and schedule, working backwards from the submission date. Once the resources have been determined the Proposal Manager will send the solicitation to the entire proposal team.

3. Prepare the Solicitation Cross Reference Matrix

Proposal Manager

Included in the Solicitation Cross Reference Matrix (Appendix A) is the following information:

- General Information
- Statement of Work broken down by section and paragraph
- Proposal Instruction
- Evaluation Criteria

Our cross reference matrix should make it easy for the proposal team to find what they are looking for. Organize the content based on the previously listed items.

- *General Information* is usually the Due Date, Submission Information, Formatting, and Page Count.

- *Statement of Work (SOW)* sections (requirements) are gathered from the solicitation and put into a table format. The requirements will consist of all information within the solicitation that notes what the Contractor (Offeror, applicant, etc.) shall, will, or may perform.

- *Proposal Instructions* list the detailed instruction on setting up the proposal and the proposal content. If there are no detailed instructions we recommend we use the following layout and design:
  - A serif typeface such as Times Roman
  - 10-12 point type
  - A column width of 50-60 characters (either double column or "scholar's margins")
  - Margins of at least .5"
  - The use of color whenever possible
  - Extensive use of graphics
  - Full use of front matter (Table of Contents, List of Figures, etc.)
  - "Navigation aids" such as a cross-reference Matrix
  - Appendices for data that must be provided but disrupts our solicitation response's message
  - If the page count is large enough, use 3-ring binders or other binding
  - Use tabs that break the content down into section and make finding material easier

- *Evaluation Criteria* details the requirements that the funding agency expects us to respond to

4. Conduct the Kickoff Meeting

Proposal Manager, Capture Manager, & Proposal Team

If there is one universal rule for solicitation responses it would have to be plan before we write and write to the plan. Our solicitation response should have specific goals and objectives that should answer specific customer requirements according to explicit evaluation criteria (whether provided by the customer or assumed). Our outline, themes, and text should all correspond. In most solicitation responses this will only be possible if we plan the solicitation response's contents prior to writing.

During the initial Kickoff meeting the Proposal Team is assembled for an all day work session in order to figure out exactly what SP is proposing, and how we will demonstrate what we are proposing in our response. The kickoff meeting will proceed according to the following agenda:

- Introduce the team
- Discuss roles and responsibilities
- Review the cross reference matrix and the solicitation

- Perform SWOT Analysis (Strengths, Weaknesses (Internal), Opportunities (external trend or outside force that is to our advantage), and Threats (External)) – See Appendix B
  - Discuss win themes/differentiators (what makes SP special)
  - Plotting the response to the solicitation (course of action, goals and objectives)
- Develop Storyboard (Appendix C) - each item in our solicitation response cross reference matrix, we should plan to address:
  - customer requirements
  - evaluation criteria
  - themes
  - points of emphasis
  - projects/experience to cite
  - graphics/illustrations to include

SWOT Analysis: The proposal team shall participate in is a strategic planning method used to evaluate the Strengths, Weaknesses, Opportunities, and Threats involved in the solicitation response. It involves specifying the objective and identifying the internal and external factors that are favorable and unfavorable to achieving that objective.

- Strengths: attributes of company or personnel that are helpful to achieving the objective
- Weaknesses: attributes of company or personnel that are harmful to achieving the objective
- Opportunities: external conditions that are helpful to achieving the objective
- Threats: external conditions which could do damage to the objective

Storyboards: The proposal team shall complete the storyboards to provide the information that needs to be presented in each section of the solicitation response. The bulk of our response including: win themes, differentiators, continuity, and innovation. The storyboard acts as a data collection tool when working with multiple authors.

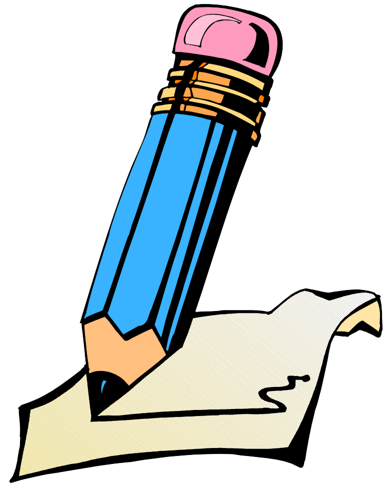
5. Detailed Writing Instructions

All data from the Kickoff Meeting is compiled and disseminated to each of the writers for their particular sections in the aforementioned Storyboard format. In the table will be the Strategy, Win Themes, and Differentiators that the writer will need to address in their assigned sections as well as for overall solicitation continuity

Prior to writing, the proposal team should have the following items:

- The solicitation
- Solicitation response cross reference matrix
- Storyboards
- List of assignments
- Schedule
- Contacts Directory
- File access/naming convention

6. Write



Here is a simple approach to help us cover all the bases in our solicitation response. For each section/requirement that we must address, make sure we answer: who, what, where, how, when, and why. Repeat it until it rolls off our tongue and we have it memorized.

- **Who:** who will do the work, who will manage the work, who does the customer call if there is a problem, who is responsible for what?

- **What:** what needs to be done/delivered, what will be required to do it, what can the customer expect, what will it cost?

- **Where:** where will the work be done, where will it be delivered?

- **How:** how will the work be done, how will it be deployed, how will it be managed, how will we achieve quality assurance and customer satisfaction, how will risks be mitigated, how long will it take, how will the work benefit the customer?

- **When:** when will we start, when will key milestones be scheduled, when will the project be completed, when is payment due?

- **Why:** why have we chosen the approaches and alternatives we have selected, why should the customer select us?

This simple little phrase (who, what, where, how, when, and why) can help us ensure that our solicitation response says everything needed to "answer the mail." For each of the customer's requirements, go through the list and the kickoff materials and we will probably have everything covered. We can use it for inspiration when writing and we can use it like a checklist for reviewing a draft solicitation response.

7. External Review – Pink Team Review

Once the first draft of the solicitation response is written, it is time to review the draft. The Pink Team reviewers will consist of an agreed upon external reviewer that is not involved with the solicitation response, and the outside Proposal Manager. The first review will consist of:

- Looking for continuity (does the win theme exist throughout the writing)
- Making sure that the evaluation criteria and objectives are answered
- Making sure that a persuasive argument has been provided

While previous reviews used marking-up of hard copy draft or Track Changes in the working document, we will now complete review forms. This will ensure Document/Versioning Control. The Pink Team Review Form (Appendix D) will be filled out for each section. After the review is completed the Proposal Manager will collect and compile the external reviewer comments, populate the Pink Team Review form to provide to the Proposal Team.

8. Write

After the Pink Team review meeting is held, the Proposal Team will take the reviewer's comment sheets and begin writing to address the comments made and for clarity. Once they are completed with their sections the information is sent to the Proposal Manager to compile for the second round of reviews (i.e. "Red Team" reviews).

9. Conduct the Red Team Review

Proposal Manager, Capture Manager, SME, & External Reviewer
The Red Team is an intensive all day meeting that will focus on recommending-fixes and evaluating the solicitation response for a broad range of factors.

- The PM shall collect all updated writing from the team and assemble into a draft response document. The document will present the entire body of the technical response that has been completed to date.

- The PM shall tailor Red Team review materials for the Red Team meeting. Materials will include:
  - Solicitation Cross Reference Matrix, including General Information, Statement of Work, Proposal Instructions, and Evaluation Criteria (Appendix A)
  - Red Team Review Schedule (Appendix E)
  - Red Team Comment Worksheets (Appendix F)
  - Red Team Evaluation Worksheets (Appendix G)

- The Red Team meeting will proceed according to the following agenda:

  - *Introduce the Opportunity:* The PM will relay a summary of the effort to the team. Distribute the Solicitation Cross Reference Matrix.

  - *Introduce the team:* The PM will introduce Red Team members to each other and explain their roles regarding the review process.

  - *Distribute the draft response document:* The PM will pass out the draft response

  - *Discuss red team review schedule and review assignments:* The PM will go over who will review what section and in what order. Each reviewer will be given an opportunity to review each section. Distribute the Red Team Review Schedule.

– *Discuss red team reviewing procedures:* – The PM will discuss and provide a brief description and instruction on how all of the review materials, including the Worksheets, will be used. Distribute the Comment and Evaluation worksheets.

For **each section** to be reviewed:

- Red Team members will review the Solicitation Response Compliance Matrix for the scheduled area of the proposal to be reviewed.
- Red Team members will read the proposal section.
- Red Team members will address any issues on the Comment Worksheets - **write legibly please!**
- Red Team members will re-read the evaluation criteria listed in the Solicitation Response Compliance Matrix for that section.
- Red Team members will use the Evaluation Worksheet to score the section
- Start the process again for the next section

– *Document Red Team finding:* The PM will gather all Comment and Evaluation worksheets after the allotted amount of time and thank the Red Team members.

– *Distribute Red Team Findings:* The PM will consolidate all of the Red Team findings, sorted by section, into one document. The PM will distribute the draft response document and the Red Team Findings (Appendix H) to the entire proposal team.

10. Create the Budget

Capture Manager & Finance
The Capture Manager and Finance will use the solicitation response data (strategy, personnel, and technical approach) to determine the appropriate budget.

11. Write

Proposal Manager, Capture Manager, & Proposal Team
The PM, CM, and proposal team will review the Red Team Findings for their individual sections.

- If the comment is valid the team member will write to and address the comment in the draft response document and mark the status as “Addressed” on the Red Team Findings worksheet.

- If the comment is deemed to be invalid or just a difference of opinion with no perceivable effect. The writer will mark the status as “N/A” with a brief description of why on the Red Team Findings worksheet.

- The entire proposal team will submit their updated sections to the PM along with the Red Team Findings worksheet.

- The PM will review the sections against the Findings worksheets and assemble a revised draft.

12. Conduct the Gold Team Review

Proposal Manager, Capture Manager, Proposal Team, and Upper Management (UM)

- The PM will send the post Red Team revised draft to the entire proposal team and upper management for a final editorial review. This review will provide checks for:

  - Spelling
  - Grammar
  - Formatting
  - Other errors, i.e. numbering mistakes, omissions, repeats, standardized language, etc.

- Based on the thoroughness of the previous reviews, there should be no need to address high level issues such as solicitation compliance, strategy and themes, or other glaring problems.

- All reviewers will submit their review to the PM electronically, using the comments and track changes function.

13. Make the Final Corrections

Proposal Manager

The PM shall review and address Gold Team reviewer comments and changes. The entire assembled document will be reviewed and the PM will provide final formatting and polishing.

14. Production

Proposal Manager & Proposal Coordinator

The PM and PC will assemble the document according to the solicitation guidelines and make sure that the stipulated formats are adhered to. A Solicitation Response Checklist (Appendix I) will be prepared and completed by the PM or PC.

- For electronic formats, Word documents will be converted into PDF format and reviewed for formatting glitches.

- Hard copy format will be solely dictated by the solicitation requirements. The PM and PC will assemble the hard copies and arrange delivery.

15. Submission

Proposal Manager & Proposal Coordinator

- The PM will authorize final release on the solicitation response.

- The PM and PC shall submit the solicitation response through the designated submission vehicle (electronic and/or hardcopy).

- During submission, both the PM and PC will provide quality control to ensure that all response items are submitted correctly.

16. Award

Proposal Manager & Proposal Coordinator

The PM and CM will routinely follow up with the solicitation office to determine status and submission outcome. Updates will be provided on the scouting report.

17. Post-Award

Proposal Manager, Proposal Coordinator, Capture Manager, & Upper Management

- If the solicitation response is successful, the CM and UM shall conduct negotiation for project implementation prior to project startup.

- If the solicitation is unsuccessful, the PM and PC shall request debrief information and present the finding to the team.

Appendix

Appendix A – Solicitation Cross Reference Matrix

This form breaks down the solicitation by requirement (generally anywhere the solicitation says “the contractor shall, will, or may” is broken down into its own row). The form also shows where the requirement will be provided in the response. If it is a government contract solicitation, this form also shows where the requirement is referenced in the Proposal Instructions (Section L) and the Evaluation Criteria (Section M) for easy reference.

Sol. Ref. No.	Solicitation Requirement	Response Sec. (Vol.Sec.Sub.)	Section L	Section M	Resp.
C.1	**STATEMENT OF WORK**				
C.1.2	PERSONNEL REQUIREMENTS				
C. 1.2.1	The Contractor must provide managerial and technical personnel who are fully qualified to perform all the requirements identified in this SOW.	II.1.1	L. 1.(a)	M.1.c.1	
C. 1.3	LABOR CATEGORIES				
C. 1.3.1	Key Personnel performing on this contract shall meet the minimum requirements for the specific labor category described, unless a specific waiver is requested from the government and the waiver approved by the government.	II.1.1.1.2	L. 1.(b)	M.1.c.1	
C.1.4	EXPERIENCE/TECHNICAL SUPPORT				
C.1.4.1	The Contractor may be required to provide services for the specific tasks listed below.	II.1.0	L. 1.(b)	M.1.c.1	
C.1.5	NETWORK ANALYSIS				
C.1.5.1	The Contractor shall be able to perform Performance Analysis studies, Fault Tolerance studies, Capacity Planning studies, Response Time Analysis studies, and Communication Protocol studies, as requested by the government within a specific task/delivery order.	II.1.2.2 II.1.2.4	L. 1.(c)	M.1.c.1	
C.1.6	END-USER SUPPORT				
C.1.6.1	The Contractor may be required to develop, implement, and staff information center and Help Desk activities which offer the following services: prompt end user software problem resolution; assessment of current/new off-the-shelf software; and prompt end user support for PC hardware related problems.	II.1.2.3	L. 1.(c)	M.1.c.1	
C.1.7	TRAINING SUPPORT				
C.1.7.1	The Contractor may be required to recommend training from outside sources or to develop and provide their own training. Recommendations will be reviewed by the government before any Contractor actions are performed.	II.1.2.3	L. 1.(d)	M.1.c.1	
C.1.8	IMPLEMENTATION AND USER SUPPORT				
C.1.8.1	The Contractor may be required to plan for implementation and user support for all standard hardware and software on the network.	II.1.2.4	L. 1.(e)	M.1.c.1	

Appendix B – SWOT Analysis

This SWOT example is for a new business opportunity. Many criteria can apply to more than one quadrant. Identify criteria appropriate to our own SWOT situation.

Criteria Examples	**Strengths**	**Weaknesses**	**Criteria Examples**
Advantages of proposition? Capabilities? Competitive advantages? USP's (unique selling points)? Resources, Assets, People? Experience, knowledge, data? Financial reserves, likely returns? Marketing - reach, distribution, awareness? Innovative aspects? Location and geographical? Price, value, quality? Accreditations, qualifications, certifications? Processes, systems, IT, communications? Cultural, attitudinal, behavioural? Management cover, succession? Philosophy and values?			Disadvantages of proposition? Gaps in capabilities? Lack of competitive strength? Reputation, presence and reach? Financials? Own known vulnerabilities? Timescales, deadlines and pressures? Cashflow, start-up cash-drain? Continuity, supply chain robustness? Effects on core activities, distraction? Reliability of data, plan predictability? Morale, commitment, leadership? Accreditations, etc? Processes and systems, etc? Management cover, succession?
Criteria Examples	**Opportunities**	**Threats**	**Criteria Examples**
Market developments? Competitors' vulnerabilities? Industry or lifestyle trends? Technology development and innovation? Global influences? New markets, vertical, horizontal? Niche target markets? Geographical, export, import? New USP's? Tactics: eg, surprise, major contracts? Business and product development? Information and research? Partnerships, agencies, distribution? Volumes, production, economies? Seasonal, weather, fashion influences?			Political effects? Legislative effects? Environmental effects? IT developments? Competitor intentions - various? Market demand? New technologies, services, ideas? Vital contracts and partners? Sustaining internal capabilities? Obstacles faced? Insurmountable weaknesses? Loss of key staff? Sustainable financial backing? Economy - home, abroad? Seasonality, weather effects?

Appendix C – Storyboard

Use this storyboard layout as a planning tool to help authors plan a proposal section prior to writing it.

<table>
<tr><td>Volume:</td><td>Completed by:</td><td>Date:</td></tr>
<tr><td>Section #:</td><td>Heading:</td><td>Page Limit:</td></tr>
<tr><td colspan="3">Top Level Theme:</td></tr>
<tr><td>Sol. References:</td><td colspan="2">Graphic:</td></tr>
<tr><td rowspan="3">Section Outline:</td><td colspan="2">Action Caption:</td></tr>
<tr><td colspan="2">Section Level Themes/Discriminators</td></tr>
<tr><td colspan="2">Projects to Reference</td></tr>
<tr><td>Features of our Approach</td><td>Benefit of Each Feature</td><td rowspan="8">Notes:</td></tr>
<tr><td></td><td></td></tr>
<tr><td></td><td></td></tr>
<tr><td></td><td></td></tr>
<tr><td>Risk</td><td>Mitigation</td></tr>
<tr><td>Performance:</td><td></td></tr>
<tr><td>Schedule:</td><td></td></tr>
<tr><td>Risk:</td><td></td></tr>
</table>

Appendix D – External Reviewer/Pink Team Review Form

Use this following form, similar to that sometimes used by Government customers, to document proposal problems and their severity (clarification or deficiency).

Proposal:	**Section/Para #:**	**Reviewer:**
Volume #:	**RFP Ref:**	**Date:**
Clarifications Requested:		
Deficiencies:		
Received by:	**Date:**	
Resolution:		

Appendix E – Red Team Review Schedule

This form designates the proposal reviewer and designated time for each section.

Proposal Review Order				
Time	**Reviewer 1: Proposal Manager**	**Reviewer 2: Capture Manager**	**Reviewer 3: SME**	**Reviewer 4: External Reviewer**
10:00 11:00	1. Executive Summary	3. Management Plan	2. Technical Approach	5. Past Performance
11:00 12:00	2. Technical Approach	1. Executive Summary	4. Personnel/Resumes	3. Management Plan
1:00 2:00	3. Management Plan	2. Technical Approach	5. Past Performance	4. Personnel/Resumes
2:00 3:00	4. Personnel/Resumes	5. Past Performance	1. Executive Summary	2. Technical Approach
3:00 4:00	5. Past Performance	4. Personnel/Resumes	3. Management Plan	1. Executive Summary

Appendix F – Red Team Comment Worksheet

This form is for proposal reviewers to use to ensure that key aspects of proposal quality are considered.

Proposal:	**Section/Para #:**	**Reviewer:**
Volume:	**Sol. Ref:**	**Date:**

Bid Strategies. Does it reflect the correct bid strategies?	
Sol. Compliance. Make sure all solicitation requirements are addressed. Note any ways that the section does not adequately address a solicitation requirement. Call attention to anything that might contradict a solicitation requirement.	
Proposed Solution. Will it work? Does it fall within risk tolerances? Is it price-competitive? Is it best-in-class/best-value? Have all the benefits of the solution or approach been pointed out. Have all the features been sufficiently tied to the evaluation criteria in order to ensure credit?	
Experience. Has all relevant corporate experience been mentioned? Often proposal reviewers are senior managers and may be aware of project experience that didn't occur to the proposal team.	
Themes. Are the themes for this section adequately highlighted?	
Additions. Note anything missing that should be added to the section or any parts that require additional detail.	
Deletions. Is there anything that really shouldn't be there or that a client might find patronizing? Is there anything redundant or superfluous. Is there anything that can be taken out that will make it easier for the evaluator to get through our proposal?	
Changes/corrections. Note anything that is not accurate or requires changing.	
Graphics/Illustrations. Are there a sufficient number of graphics in the proposal? Is there anything in the text that could be enhanced through illustration?	

Appendix G – Red Team Evaluation Worksheet

This form is for reviewers to score each section of the solicitation response according to the evaluation criteria.

Proposal	Reviewer	Date:

Instructions. Score the proposal according to the evaluation criteria, as if we were the client.

SECTION	MAXIMUM POINTS	SCORE
☐ Executive Summary		
☐ Technical Approach		
☐ Management Plan		
☐ Personnel/Resumes		
☐ Project References/Past Performance		
TOTAL	**100 points**	**100 points**

Strengths:

Weaknesses:

Comments:

Appendix H – Red Team Findings

This form is for writers to review and address Red Team comments for each section of the solicitation response.

Com	Rev	Sec	Pg	Type	Comment	Status
41	1	1.1	8	BS	Every sub paragraph should include or start with a specific reference to one of our 5 experience qualifications	
58	2	1.1	8	CC	Should mention "cleared technical personnel for the administration of Networks of a system of at least 2000 users" as in previous section. Think about the length of this section versus the previous; i.e., more emphasis on hiring than retention.	
89	3	1.1	8	CC	Too wordy, although the intro paragraph is okay. What follows should succinctly describe how we retain staff in 2/3 line statements (the exception would be training)	
19	4	1.1	8	D	Delete paragraph it does not say anything or add to the proposal.	
22	1	1.2	9	CC	See Red Markup on actual proposal.	
5	2	1.2	9	D	2nd sentence is no longer true	
12	3	1.2	9	A	Mention “mentor-Protégé” program.	
13	4	1.2	9	D	Take out “Standing Army”	
27	1	2.1	10	D	First full paragraph: FBI and WFO have already been spelled out on previous page. Recommend only using the acronyms on page 49.	
49	2	2.1	11	CC	Make first long paragraph into 2 or 3 paragraphs. It is too long and hard to read. It is too technical/specific in terms of what equipment was used	
53	3	2.1	12	RC	The 'Effort/Program Title/Description' block needs to be expanded and tied directly to the Sol. Para. L.14.b.1(a-g) words.	
68	4	2.1	12	RC	This section is insufficient and incomplete. This section will be rewritten to reflect a broader range of requirements in the SOW	

Appendix I - Solicitation Response Checklist

The following form is for completion by proposal team members/subcontractors to help ensure responsiveness.

Item	Date Due	Status/Comment
Non-Disclosure Agreement		
Teaming Agreement		
Resource Requirements		
Resource Contributions		
Questions regarding the Sol.		
Logo		
Corporate Summary		
Contact List		
Project References		
Resumes		
Writing Assignments		
Review Participation		
Pricing		
Certs/Reps		
Other		