From Certification to Contract





TEXAS A&M
INTERNATIONAL
UNIVERSITY

From Certification to Contract



What is Certification



Finding Opportunities



Roles & Responsibilities



Winning Proposals



Essential Terms



Next Steps...
Marketing

Certified Woman-Owned Business Owner

Former Executive Director

Women's Business Enterprise Alliance (WBEA) Women Contractors Association

25+ Year's working with Small Businesses

Named One of Houston's Most Influential Women by Houston Woman Magazine

Top 25 Women of Houston by Rollingout.com

Awarded Legacy Award in Recognition for work with woman owned businesses in Houston















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Learn to grow through Government **Contracting Opportunities**

Set the Foundation to Ensure **Your Success**

Save you time and avoid mistakes that could cost you the contract

OUR SESSIO N

IS NOT

Cover everything you need to know

Guarantee you a contract with any Government Agency



WHAT TO EXPECT





Engaging session

Tools for immediate implementation

Time for questions

Victory Plan

Listen & participate

Test drive these ideas

Provide feedback

Share & celebrate successes



What is Certification (or What is it Not)



Not Required



Still Not Required



Does not Win

contracts

Is not the service you provide



It is a tool in your Toolbox



Roles & Responsibilities

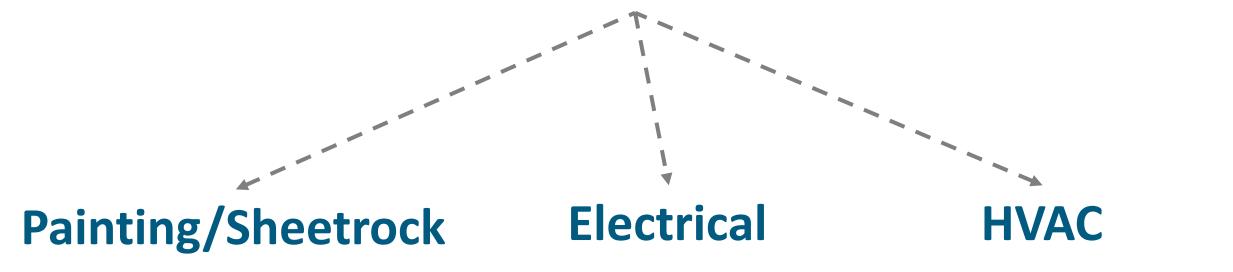


Prime Contractors & Subcontractors

PRIME CONTRACTOR Subcontractor Subcontractor

Prime Contractors & Subcontractors

GENERAL CONTRACTOR/PROJECT MANAGER



GENERAL CONTRACTOR/ PROJECT MANAGER

Contract Holder & Project Manager

- Responsible for Project Success
- Subcontractor Management
- Invoicing
- Insurance Requirements (Prime & Assisting Subs)
- Primary Contract
- Project Updates
- Small Business Reporting

SUBCONTRACTORS

Specific Scope of Work

- Do A SPECIFIC SCOPE Work
- Insurance
- Invoicing
- Do a Good Job
- Team Player
- HELP HIT GOALS

Where do you Fit

Prime vs Subcontractor Role can change with each Opportunity.

Some agencies you can submit as both.

Prime

Read the RFP/RFQ/IFB

- Perform All or Majority of Scope of Work
- Has a relationship with subcontractors
- Has Capacity (funding, equipment)
- Can Staff the Project
- Insurance /Bonding Requested
- Time to Manage the contract
- Understands the reporting

SUBCONTRACTORS

- Cannot do the Majority of the Work
- No Subcontracting Relationships
- Capacity Concerns
- Not sure how to price the other scope

Procurement Methods: Formal vs Informal



Formal vs Informal Example

PROCUREMENT

FORMAL (\$50,001+)

- RFP
- RFQ
- IFBs
- May have small business goals

INFORMAL (\$50,000 and under)

Standard Process

- Three Quotes
- If small business program, one quote has to be from a SBE





Informal Bids

 Each government entity has a process that allows informal bidding for smaller projects.

The \$ amount is set by each entity.

 This is normally under \$50,000.

Pricing Only

Informal Process Benefits / Challenges

- Increased S/MWBEs participation (if the entity has a small business program)
- Introduction to entities processes
- Larger school districts have fewer Informal bids due to # of schools / students
- Not always posted / Relationship Driven
- Must be registered in entity's database to hear about informal

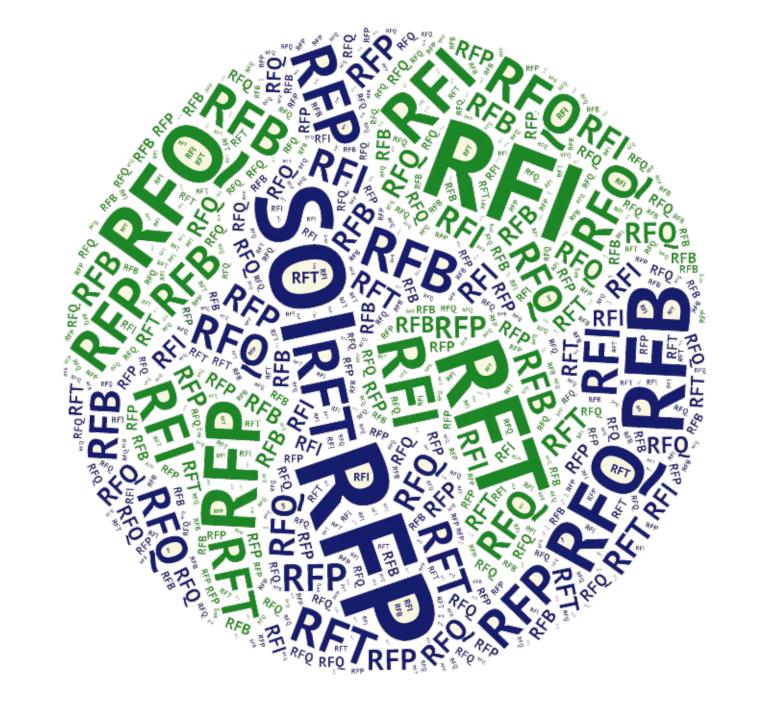
Purchasing – Informal Process

Requirements for All Businesses

Must be registered in entities supplier database

- Ability to comply with schedule
- Satisfactory safety and environmental
- Satisfactory references
- Necessary resources







Easy to prepare

- References
- No Price in response
- Approach

- Team Qualifications
- Attachments

Past Performance

Bid Tabulation

Capacity and capabilities
Your qualifications to perform the work
Your ability to perform the services outlined in the SOW
Your understanding of the Agency
What differentiates you from your competitors.

RFQ

Request for Qualifications

I need this done.

Are you **able** to build it, design it, deliver it, provide it?

- Specification Driven
- Price-based response
- Attachments &
 - **Exhibits & Items**
- Project Manager

- References
- Safety (EMR Report)
- Financial Status & Bonding
- Bid Tabulation

Capacity and capabilities
Your qualifications to perform the work
Your ability to perform the services outlined in the SOW
Your understanding of the Agency
What differentiates you from your competitors.



Invitation for *Bid*

I need this done.

What will you charge me?

- Takes more planning and effort to prepare
- Very Competitive process
- Bid Tabulation
- Structured outline (Table of Contents)

Team Past Performance Approach

References Detailed pricing Financial Status

Attachments

Capacity and capabilities
Your qualifications to perform the work
Your ability to perform the services outlined in the SOW
Your understanding of the Agency
What differentiates you from your competitors.

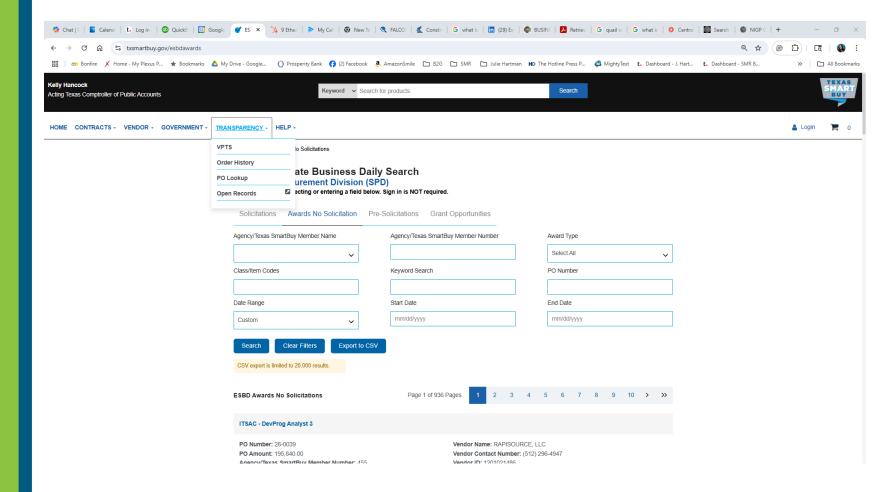




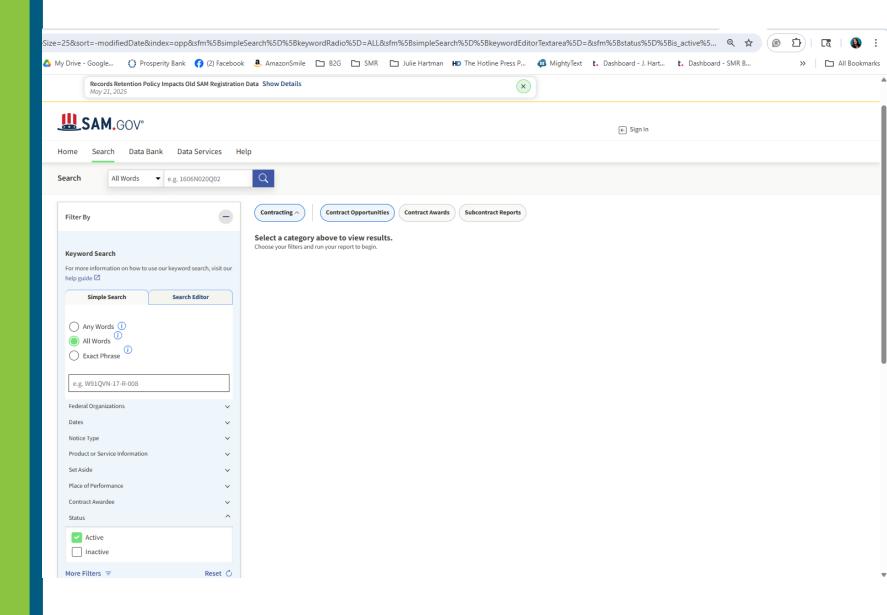
Finding Opportunities



State of Texas - ESBD



Federal -SAM



Cities







Counties







School Districts

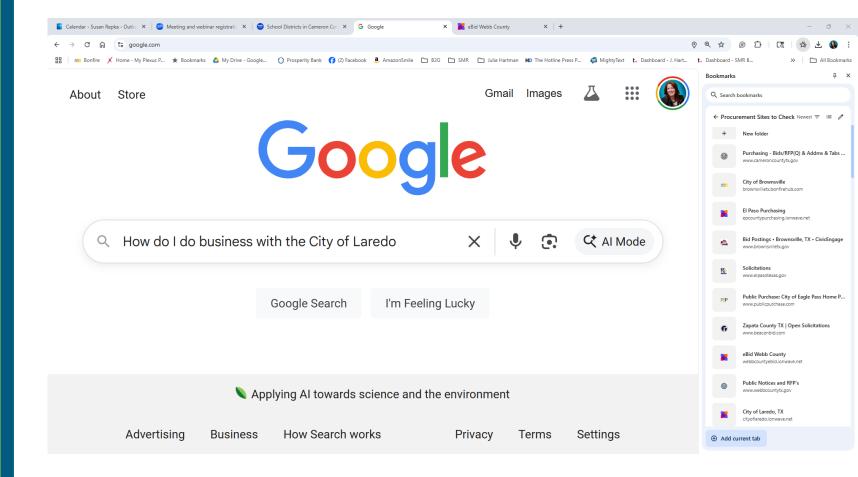








How Do You Find the Site



Contract winning Strategies



Reviewing



Request full RFP/IFB/RFQ

Make time in your schedule

No Interruptions

FOCUS

Active Reading (highlighters, pen, post-it notes)

Playlist (maybe)

Compliant

- Read and follow instructions as listed in the RFP/RFQ/IFB
- Complete (type) all forms and sign

Submit on time

 Tabs match what is written in the RFP/RFQ/IFB

Responsive

- Researched the organization
- Provided relevant material based on the Scope (Resume, projects, methodology)
- Clearly shows the WHY US
- Provides solutions

Concise and Compelling Response

Capability

- Relevant Past Performance
- Approach or Methodology
- Key Personnel Expertise
- Relevant Licenses
- QA/QC Plan
- References (that respond)

Capacity

- Staffing Plan /Org Chart
- Equipment
- Current Workload
- Financial Statements
- Bonding

Pricing

Must be competitive

Must be PROFITABLE

 Start with what you want your profit margin to be and work from there



Winning Proposals



Firm Profile

- Past Performance
- Client Logos
- New Contract

Firm Profile

- About the Numbers
- Include ALL requested information

Project Team

- Internal Team
- Subcontractors
- Roles

Project Sheets

- Information Requested
- Photos
- Evaluation Criteria

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Project Team

Resumes



Marketing: Capability Statements



Capabilities Statement Components



Marketing to Government Entities

DO NOT WANT

Fancy brochure



Pocket Folder full of inserts

"Visit my website"

ONLY WANT

Business Card

Capabilities Statement

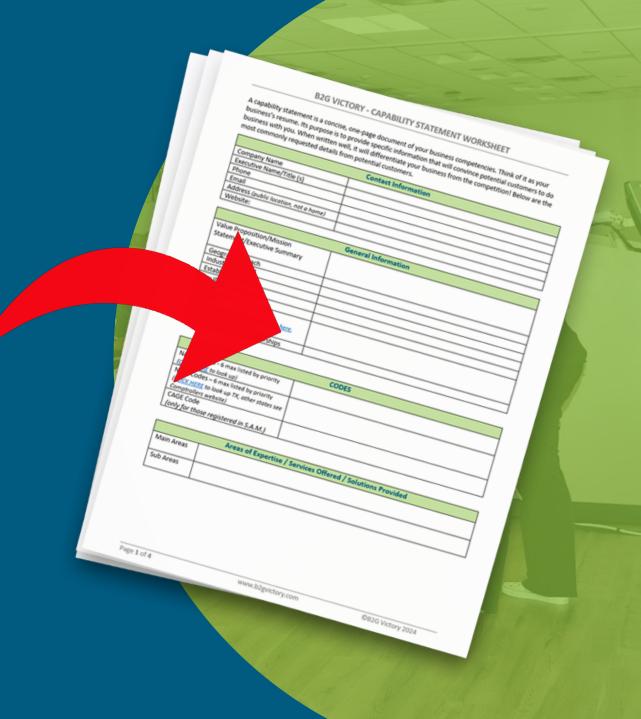




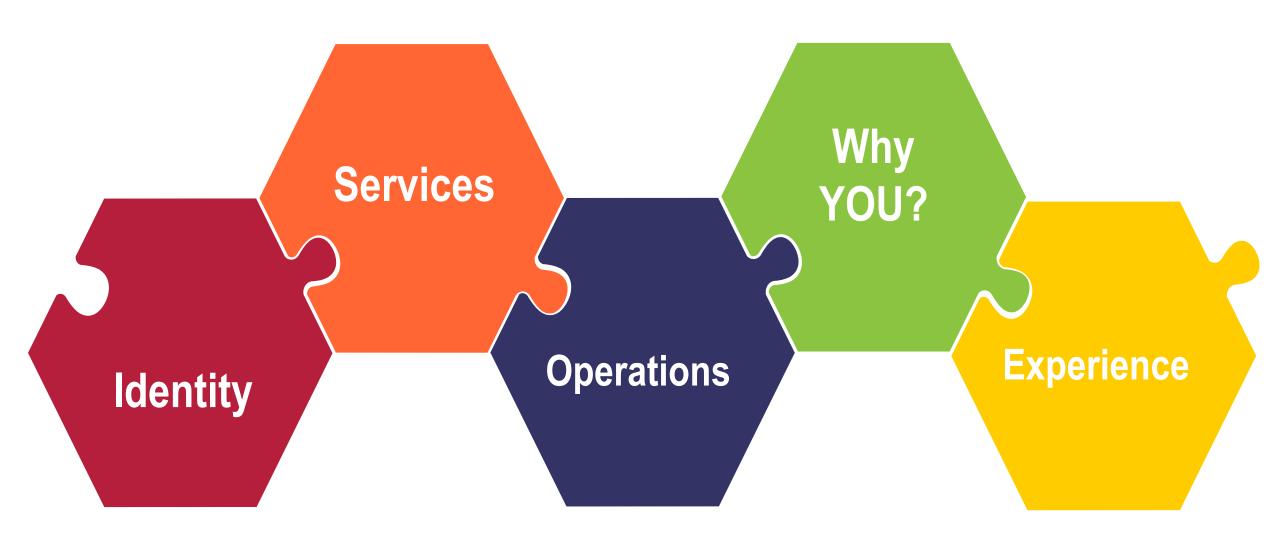
SCAN HERE



TO GET YOUR FREE
CAPABILITY STATEMENT
WORKSHEET!



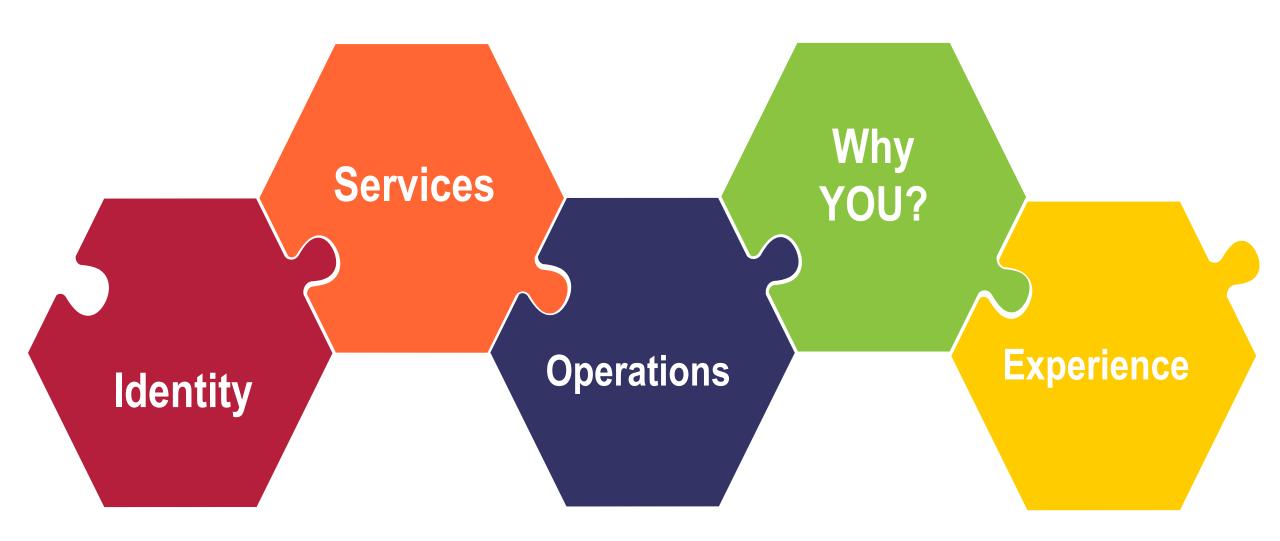
Capabilities Statement Components





- Add person's name
- Add headshot (not mandatory)
- Do not use the address if the home office
- Add Certifications HUB, City, Federal, etc
- Add Industry Certifications
 - If putting your social media links, make sure it is appropriate

Capabilities Statement Components



TO CUS



NIGP Codes

NAICS Codes

Industries Served

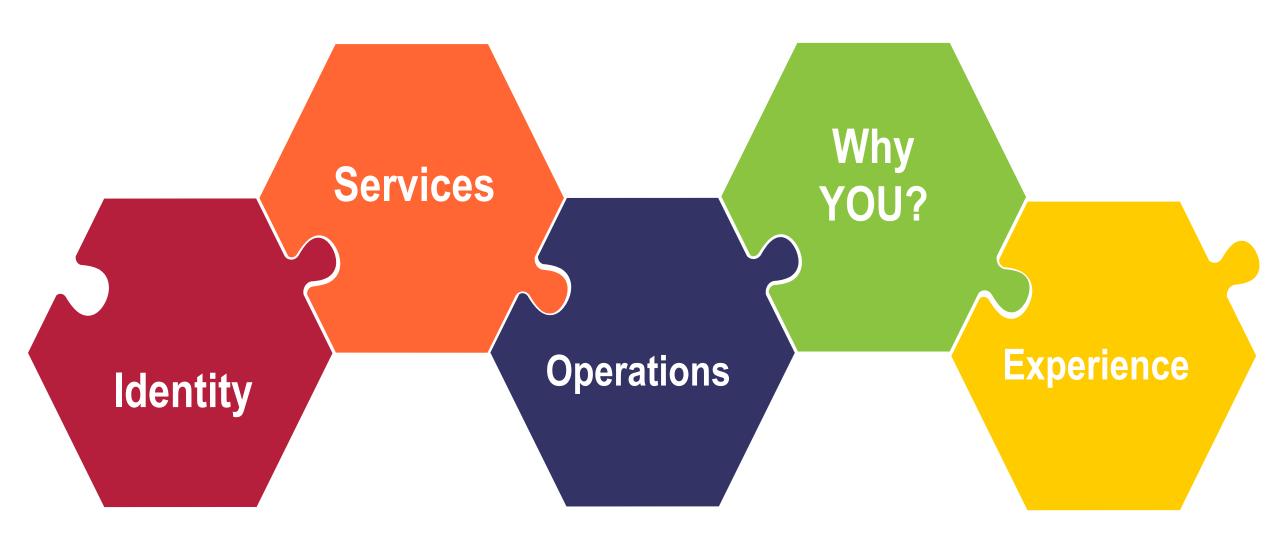
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NIGP Codes – To not put in numerical order but order of importance

NAICS Codes – See above

Industries Serviced

Capabilities Statement Components





Geographic Reach

Warehouse Locations

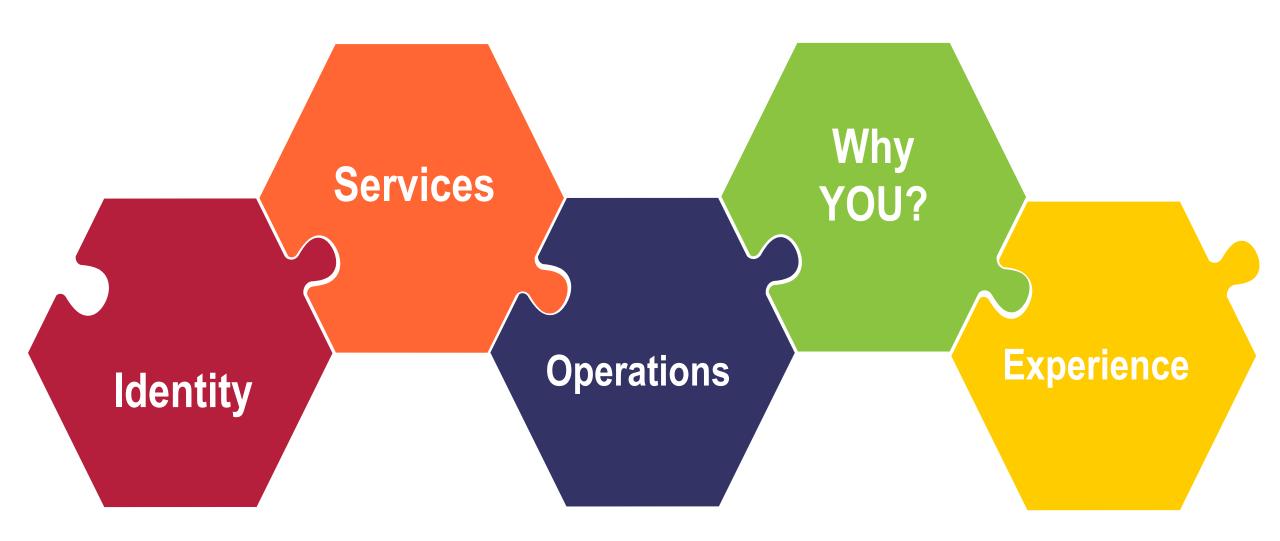
Plant Locations

Additional Offices/Cities

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Be honest about what areas you can cover

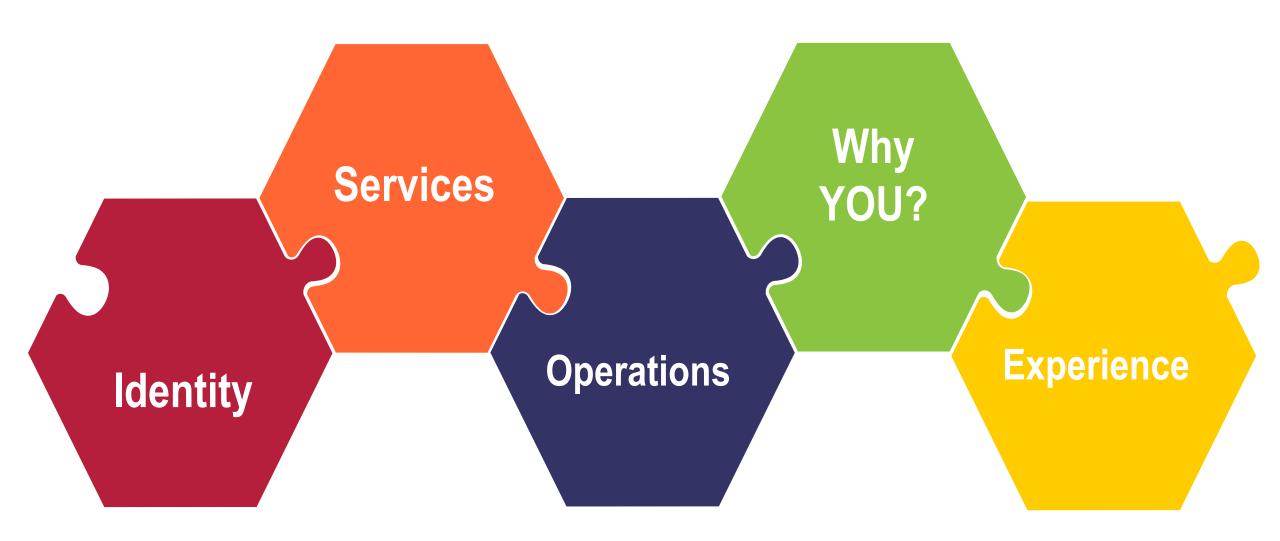
Capabilities Statement Components





- Create a Value Proposition
- References
- Insurance

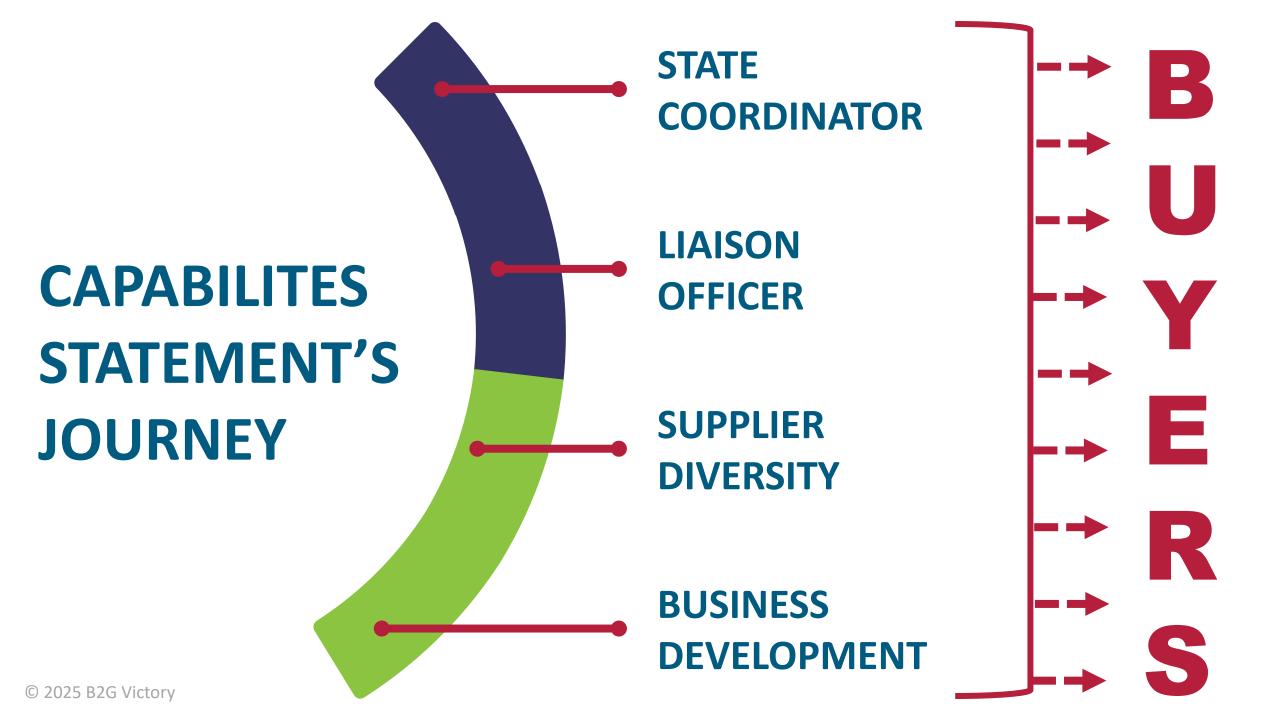
Capabilities Statement Components

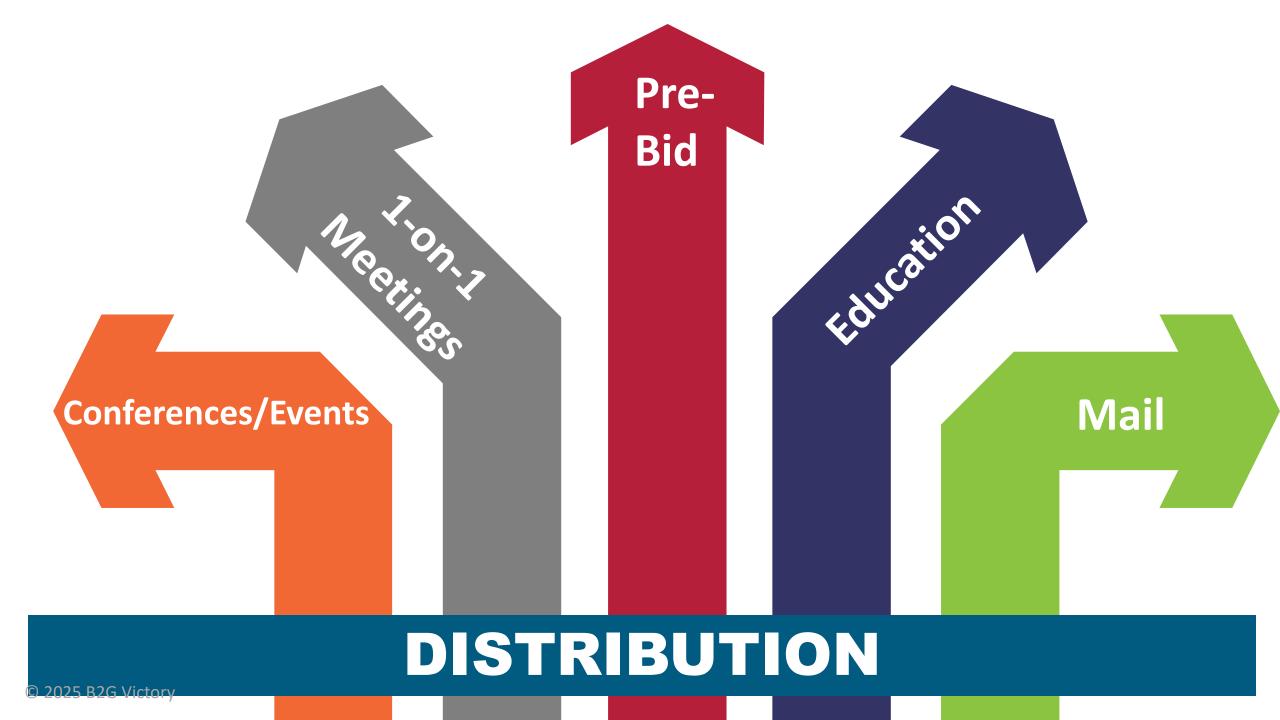




- Use logos if possible (visual)
- If new company, use owner's previous experience (label it as such)







Your Portal to Victory





B2G Victory

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Julie Irvin Hartman, MBA, Certified Proposal Manager & Susan M. Repka are the Co-Found... >

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CHECKS CASH THE SAME WAY: **INFORMAL VS FORMAL PURCHASES**

RFPSCH LWATCH

Education (K-12 & Higher Ed) **Government Contracting**

Community

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Navigating Federal Government Contracting

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State-Level Government Contracting

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Maximize Your Certifications

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FREE CAPABILITY WHEN WE **REACH 1,000**

Videos



Play all

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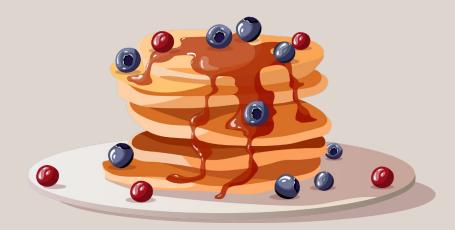
MDAnderson Cancer Center



PANCAKES WITH

PRIMES

A MATCHMAKING EVENT FOR TEXAS HUB-CERTIFIED CONSTRUCTION TRADE SUBCONTRACTORS



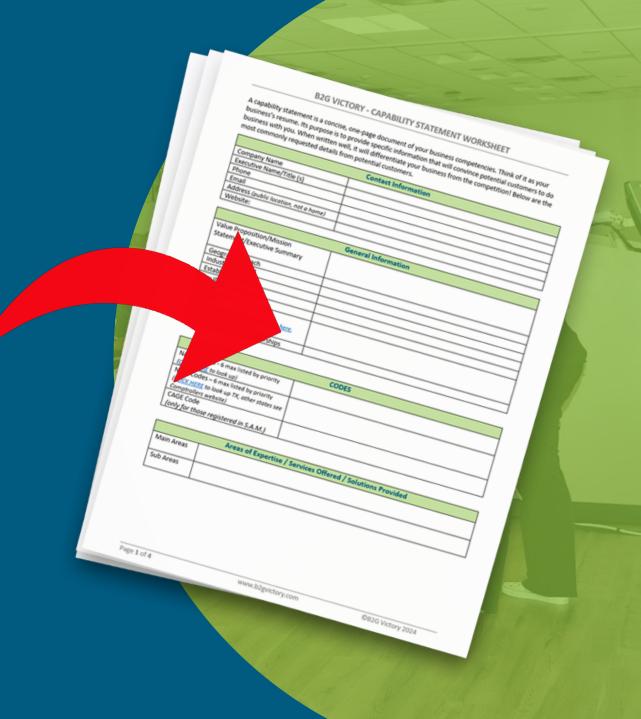


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TO GET YOUR FREE
CAPABILITY STATEMENT
WORKSHEET!



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BOOK TIME WITH JULIE OR SUSAN



Julie Irvin Hartman Co-Founder

in JulielrvinHartman









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