How to respond to an RFQ, RFP, & IFB

Jake Shaw
Contracting Officer
Walla Walla District USACE
March 25, 2014
Overview

- What – is an RFQ, an RFP and an IFB?
- How – can I differentiate between them?
- Why – do I need to differentiate?
- What and How – should I submit?
- When – should I submit?
- Who – should I submit to?
- Tips
What is an RFQ, RFP, IFB

- Different, but all should contain...
- Instructions to Offerors
- Information required to be submitted by Offerors
- Evaluation factors and sub-factors (when applicable)
- Provisions and Clauses
- Tech Specs, Drawings, Scope of Work, etc.
What is an RFQ

- Request for Quote
- Typically lower value and/or complexity
- Commercial or smaller construction jobs
- Evaluation criteria more simple
- Need for discussions or negotiations with offerors not anticipated
- Faster turnaround
What is an RFP

- Request for Proposal
- Typically higher value and/or complexity
- Can be services, supplies, construction or A-E
- More detailed evaluation criteria
- Discussions or negotiation with offerors may be necessary
- Proposals are binding
- More lengthy process
What is an IFB

- Invitation for Bid
- The solicitation document used in Sealed Bidding procurement
- Procedure is generally for Construction but may be used for Service or Supply
- Used for firm fixed-price
How to differentiate

- Different forms (Word Doc, SF 1449, SF 1442, DD 1155, SF 33)

- Different # (Q, R, B)
  - In the block containing the Solicitation number, for example W912EF-13-B-0033 = Invitation for Bid
### SF 1449

**Solicitation/Contract/Order for Commercial Items**

**Offer to Complete Blocks 12, 17, 23, 24, & 30**

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Schedule of Supplies/Services</th>
<th>Quantity</th>
<th>Unit</th>
<th>Unit Price</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
</tbody>
</table>

**FOR SOLICITATION INFORMATION CALL:**

- **Name:**
- **Telephone Number:**
- **Offer Due Date/Local Time:**

**ISSUED BY:**

- **Code:**
- **Address:**

**Contractor:**

- **Code:**
- **Facility Code:**

**Payment Will Be Made By:**

- **Code:**

**Check if Remittance is Different and Put Such Address in Offer:**

- **Submit Invoices to Address Shown in Block: 18a. Unless Block 18b. Below Is Checkered.**

**Accounting and Appropriation Data:**

- **Total Award Amount (for Govt. Use Only):**

**Signature of Offeror/Contractor:**

- **United States of America (Signature of Contracting Officer):**

**Name and Title of Signer (Type or print):**

- **Date Signed:**

- **Date Signed:**

**Standard Form 1449 (Rev. 3/2009) Back**
SF 1442

<table>
<thead>
<tr>
<th>SOLICITATION, OFFER, AND AWARD (Construction, Alteration, or Repair)</th>
</tr>
</thead>
<tbody>
<tr>
<td>SOLICITATION NO.</td>
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<tr>
<td>-----------------</td>
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</tr>
</tbody>
</table>

**IMPORTANT:** The “offer” section on the reverse must be fully completed by offerer.

1. CONTRACTING OFFICER NO.
2. REQUEST FOR BID NO.
3. PROJECT NO.
4. ISSUED BY
5. ADDRESS OFFER TO

**FOR INFORMATION CALL:**

a. NAME
b. TELEPHONE NO. (Include area code; NO COLLECT CALLS)

**SOLICITATION:**

NOTE: In sealed bid solicitations “offer” and “offeror” mean “bid and “bidder.”

10. THE GOVERNMENT REQUIRES PERFORMANCE OF THE WORK DESCRIBED IN THESE DOCUMENTS (title, identifying loc, date)

11. The contractor shall begin performance on _____________ calendar days and complete it within __________ calendar days after receiving an award.

12a. THE CONTRACTOR MUST FURNISH ANY REQUIRED PERFORMANCE AND PAYMENT BONDS? (If “YES,” indicate within which calendar days after award in item 12b.)

12b. CALENDARY DAYS

12c. All offers are subject to the (1) work requirements, and (2) other provisions and clauses incorporated in the solicitation in full text or by reference.

12d. Offers providing less than __________ calendar days for Government acceptance after the date offers are due will not be considered and will be rejected.

13. ADDITIONAL SOLICITATION REQUIREMENTS:

a. Sealed offers in original and ___________ copies to perform the work required are due at the place specified in Item 6 by ____________ (hour)

b. Local time ____________ (date)

14. NAME AND ADDRESS OF OFFEROR (Include Zip Code)

15. TELEPHONE NO. (Include area code)

16. REMITTANCE ADDRESS (Include only if different than Item 14)

17. The offer agrees to perform the work required at the prices specified below in strict accordance with the terms of this solicitation, if this offer is accepted by the Government in writing within ____________ days of receipt of notice that the offer is accepted.

18. The offer agrees to furnish any required performance and payment bonds.

19. ACKNOWLEDGEMENT OF AMENDMENTS

(Amendment reflects any changes to the solicitation – give number and date of each)

20. NAME AND TITLE OF PERSON AUTHORIZED TO SIGN OFFER (Type or print)

21. SIGNATURE

22. OFFER DATE

10. OFFER DATE

**AWARD (To be completed by Government)**

21. ITEMS ACCEPTED:

22. AMOUNT

23. ACCOUNTING AND APPROPRIATION DATA

24. SUBMIT INVOICES TO ADDRESS SHOWN IN Item 25, OTHER THAN FULL AND OPEN COMPETITION PURSUANT TO 10 U.S.C. 2306(c) ( ) 41 U.S.C. 2004 ( )

26. ADMINISTERED BY

27. PAYMENT WILL BE MADE BY

**CONTRACTING OFFICER WILL COMPLETE ITEM 28 OR 29 AS APPLICABLE**

28. NEGOTIATED AGREEMENT (Contractor is required to sign this document and return __________ copies to issuing office) Contractor agrees to furnish and deliver all items or perform all work requirements identified on this form and any continuation sheets for the consideration stated in this contract. The contractor must furnish a written agreement that contains the terms and conditions and the effective date of this agreement. This contract is not subject to the provisions of FAR 48 CFR 52.212-212).

29. AWARD (Contractor is not required to sign this document) Your offer on this solicitation is hereby accepted as to the item stated. This award consummates the contract, which consists of (a) the Government solicitation and your offer, and (b) this contract award. No further contractual action is necessary.

31a. NAME OF CONTRACTOR (Type or print)

31b. SIGNATURE

32. DATE

33. UNITED STATES OF AMERICA

34. BY

35. DATE

STANDARD FORM 1442 (REV. 4-88) BACK
SF 33

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**SOLICITATION, OFFER AND AWARD**

1. **THIS CONTRACT IS A RATED ORDER UNDER DPAAS (15 CFR 7900)**

2. **CONTRACT NUMBER**

3. **SOLICITATION NUMBER**

4. **TYPE OF SOLICITATION**
   - Sealed Bid (RFP)

5. **DATE ISSUED**

6. **REQUISITION/PURCHASE NUMBER**

7. **ISSUED BY**
   - CODE

8. **ADDRESS OFFER TO**
   - (if other than Item 7)

**NOTE:** In sealed bid solicitations “offer” and “offeree” mean “bid” and “bidder”.

9. Sealed offers in original and copies for furnishing the supplies, services or in the Schedule will be received at the place specified in Item 10, or if hand carried, in the depository located in until
   - (handwritten: Dated)

**CAUTION:** Late Submissions, Modifications, and Withdrawals: See Section 1. Provision No. 52.216-7 or 52.215-1. All offers are subject to all terms and conditions contained in the solicitation.

10. **FOR INFORMATION CALL**

| A. NAME |
| B. TELEPHONE (NO COLLECT CALLS) |
| C. E-MAIL ADDRESS |

| AREA CODE | NUMBER | EXT. |

11. **TABLE OF CONTENTS**

<table>
<thead>
<tr>
<th>X</th>
<th>SEC.</th>
<th>DESCRIPTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>CONTRACT FORM</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>SUPPLIES OR SERVICES AND PRICES/COSTS</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>DESCRIPTION/SPEC./WORK STATEMENT</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>PACKAGING AND MARKING</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>INSPECTION AND ACCEPTANCE</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>DELIVERIES OR PERFORMANCE</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>CONTRACT ADMINISTRATION DATA</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>SPECIAL CONTRACT REQUIREMENTS</td>
<td></td>
</tr>
</tbody>
</table>

**OFFER (Must be fully completed by offeror)**

**NOTE:** Item 12 does not apply if the solicitation includes the provisions at 52.214-16. Minimum Bid Acceptance Period.

12. In compliance with the above, the undersigned agrees, if this offer is accepted, within calendar days (80 calendar days unless a different period is inserted by offeror from the date for receipt of offers specified above. Furnish any or all items upon which prices are offered at the set aside period, delivered at the designated point(s) within the time specified in the schedule.

| 13. **DISCOUNT FOR PROMPT PAYMENT** |
|---|---|---|---|---|
| 10 CALENDAR DAYS (%) | 20 CALENDAR DAYS (%) | 50 CALENDAR DAYS (%) | CALENDAR DAYS (%) |

| 14. **ACKNOWLEDGMENT OF AMENDMENTS** |
| (The offeror acknowledges receipt of amendments to the solicitation for offers and related documents numbered and dated) |

<table>
<thead>
<tr>
<th>AMENDMENT NO.</th>
<th>DATE</th>
</tr>
</thead>
</table>

| 15A. NAME AND ADDRESS OF OFFERER |
|---|---|

| CODE | FACILITY |

| 15B. TELEPHONE NUMBER |
| AREA CODE | NUMBER | EXT. |

| 15C. CHECK IF REMITTANCE ADDRESS IS DIFFERENT FROM ABOVE - ENTER SUCH ADDRESS IN SCHEDULE |

<table>
<thead>
<tr>
<th>16. <strong>SIGNATURE</strong></th>
</tr>
</thead>
</table>

| 17. **OFFER DATE** |

<table>
<thead>
<tr>
<th>18. <strong>AWARD TO BE COMPLETED BY GOVERNMENT</strong></th>
</tr>
</thead>
</table>

| 19. **ACCEPTED AS TO ITEMS** |
| 20. **AMOUNT** |

| 21. **ACCOUNTING AND APPROPRIATION** |

| 22. **AUTHORITY FOR USING OTHER THAN FULL OPEN COMPETITION** |
| 10 U.S.C. 2304 (a) |
| 41 U.S.C. 253 (c) |

| 23. **SUBMIT INVOICE AT ADDRESS SHOWN IN ITEM** |
| CODE |

| 24. **ADMINISTERED BY** (if other than Item 7) |

| 25. **PAYMENT WILL BE MADE BY** |

| 26. **NAME OF CONTRACTING OFFICER** (Type or print) |

| 27. **UNITED STATES OF AMERICA** |

| 28. **AWARD DATE** |

| (Signature of Contracting Officer) |

**IMPORTANT:** Award will be made on this Form, or on Standard Form 26, or by other authorized official written notice.

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Previous edition is unsuitable

**STANDARD FORM 33 (REV. 9-98)**

Prescribed by GSA - For (48 CFR) 52.214-16

**BUILDING STRONG®**
## ORDER FOR SUPPLIES OR SERVICES

<table>
<thead>
<tr>
<th>1. CONTRACT/Purchase Order No.</th>
<th>2. DELIVERY ORDER/CALL No.</th>
<th>3. DATE OF ORDER/CALL (yy/mm/dd)</th>
<th>4. REQUOTATION/PUNCH REQUEST No.</th>
<th>5. PRIORITY</th>
</tr>
</thead>
</table>

### 6. ISSUED BY
- CODE
- ADMINISTERED BY (If other than DEPARTMENT Code)
- DESTINATION
- OTHER (See Schedule of Allotted)

### 7. CONTRACTOR
- CODE
- FACILITY
- BILL TO, IF DIFFERENT FROM SHIP TO
- BUSINESS NAME
- TYPE OF BUSINESS
- ADDRESS
- SUB-CONTRACTOR
- MATERIALS INDUSTRY
- MAILING ADDRESS
- PAYEE
- CURRENCY
- TERMS
- DISCOUNT
- MAIL INVOICE TO THE ADDRESS IN BLOCK

### 9. TYPE OF ORDER
- DELIVERY CALL
- PAYMENT

### 11. SCHEDULE OF SUPPLIES/ Services

<table>
<thead>
<tr>
<th>Item No.</th>
<th>Description</th>
<th>Quantity Ordered</th>
<th>Units</th>
<th>Unit Price</th>
<th>Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00</td>
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</tr>
</tbody>
</table>

### 16. ITEM NO.
- DESCRIPTION
- QUANTITY
- UNIT
- TOTAL

### 21. UNITS
- DESCRIPTION
- QUANTITY
- UNIT
- TOTAL

### 24. UNITED STATES OF AMERICA

### 25. TOTAL
- DESCRIPTION
- QUANTITY
- UNIT
- TOTAL

### 28. PAYMENT
- PAYEE
- BILL TO
- PAYMENT TERMS
- PAYMENT CONDITION
- PAYMENT DATE
- PAYMENT INSTRUCTIONS
- PAYMENT AMOUNT

### 30. SIGNATURE OF AUTHORIZED GOVERNMENT REPRESENTATIVE
- DATE
- PRINTED NAME AND TITLE
- AUTHORIZED GOVERNMENT REPRESENTATIVE

### 36. ORDERING OFFICER
- SIGNATURE
- DATE
- PRINTED NAME AND TITLE
- ORDERING OFFICER

### 39. RECEIVED AT
- DATE RECEIVED
- RECEIVED BY (Title)
- DATE RECEIVED
- TOTAL CONTAINERS
- ACCOUNT NUMBER
- VOUCHER NUMBER

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**DD FORM 1155, DEC 2001**

Fuel is consumed in the Army.

**U.S. Army**

**BUILDING STRONG®**
Why should I differentiate?

- Makes easier for you to decide which jobs to focus on.
  - It’s an investment of your time, so choose wisely
  - Mistaking the procedures for submission could cause your package to be dismissed as nonresponsive
    - RFQ = e-mail usually okay
    - IFB = hand deliver or mail only
    - RFP = it depends
What should I submit?

- General
  - All should have instructions for offerors or information for offerors
  - Most have evaluation criteria
  - Be sure to submit everything required by instructions and evaluation criteria
What should I submit?

- RFQ
  - Sometimes word doc
  - Sometimes SF 1449 or DD 1155
  - Typically fill in the blanks with company info, price, etc.
  - Sign SF 1449 or DD 1155 – unless the form is signed or work commences, it is not a binding contract
What should I submit?

- RFP
  - SF 1442 (Construction)
  - or SF 1449 (Commercial Item/Service)
  - or word document (A-E Task Order or Design Build)
- Read the instructions to offerors
- Read the evaluation criteria
- Submit (all the information requested – ensure its accuracy)
What should I submit?

- IFB
  - Signed form (back page) with completed bid schedule
  - Acknowledgement of all amendments
  - Bid Bond (construction, when required)
  - Representations & Certifications
  - Insure all *changes* to prices are legible and initialed by an officer of the firm
How should I submit?

- RFQ
  - See instructions for offerors
  - Typically by e-mail by sometimes hard copy
  - Separate price and technical proposals may be required
How should I submit?

- RFP
  - See instructions for offerors
  - Typically by e-mail, but sometimes hard copy
  - Multiple copies may be required
  - Separate price and technical proposals generally required (technical evaluation team is not allowed to see pricing until after they have evaluated technical proposals)
How should I submit?

- **IFB**
  - Snail mail or hand deliver
  - Sealed envelope
  - Marked with offerors name and address, solicitation # and the date and time offers are due
  - Timely! (submitted so that it is received by the designated office no later than the exact time set for opening of bids)
When should I submit?

- See page 1, box 8 on SF 1449
- See page 1, box 9 on SF 33
- See page 1, block 13 on SF 1442
- Good idea to e-mail at least one day before closing (e-mail not generally allowed for Construction)
- Good idea to request confirmation that your message with xxx # of attachments and xxx # of pages was received
Tips to Offerors: The Basics

- Note the due date and time -- set a calendar reminder so you don’t miss the deadline.

- Reach out to subs early if you think you will need them -- they need time to prepare just like you.

- Offerors who don’t follow instructions or submit incomplete packages can be eliminated from competition as non-responsive.
Tips to Offerors: choosing projects to include in your quote / proposal

- Read the Project Description and Evaluation Criteria – select projects based on similar attributes

- Provide experience that demonstrates abilities that meet the requirements in size, scope and complexity

- Projects that demonstrate teaming relationships with your proposed team
Tips to Offerors: Describing project experience

- Identify Key personnel who worked on the previous project – are they on the proposed team?
- Don’t overstate your involvement in the project – were you the prime or a sub?
- Provide information in concise statements
- Provide all information required – excessive information beyond the requirements does not add value
Tips to Offerors: Resumes

- Would you hire the person based on this resume?
- Address the requirements in solicitation (tailor the resume)
- State the level of experience with corresponding dates to show the person meets requirements
- Cross reference to project experience sheets
Tips to Offerors: Put your best foot forward

- Your proposal / quote is an example of your work / your company
  - Edit for typos and grammatical errors
  - Do tables / charts convey the message you are trying to send?
  - Check your firm’s name throughout the document – is it consistent?
  - Check the project title, especially when template from a another proposal
  - Answer all stated requirements in the solicitation
Tips to Offerors: Independent review of proposal

- Have someone outside of the proposal team review your documents
- Make a point-by-point comparison between your proposal and the requirements of the solicitation
  - Does your proposal address every point?
  - Check experience and training requirements for all resumes
Questions?