

2014 Mid-Atlantic Conference & Expo
Sheraton Premiere
Tysons Corner



Win Lab November 21, 2014

11.20 and
11.21.14

NATIONAL CAPITAL AREA

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Win Lab



Is a simulated exercise where attendees apply best practices to develop high scoring proposals



Schedule



Time in Minutes	Agenda Topic
00-10	Introduce Win Lab, Distribute Handouts and Form Teams
10-15	Review RFP and Debrief Results
15-30	Improve Your Proposals <ul style="list-style-type: none">• Interview the customer to improve your understanding• Improve past performance/proof points using information provided by SMEs• Insert information obtained by business developers
30-35	Respond to a New Amendment
40-45	Update Your Proposal
45-55	Score the Proposals and Select a Winner
55-60	Summary – Best Practices of High Scoring Proposals



Form Win Lab Teams



- Organize into the Red, Green, and Blue Teams and With the Teams Identify the:
 - BD (s) / Capture Leads
 - Writers
 - Past Performance SMEs
 - Cost Proposal Developer
 - Reviewers
- Select Customer and SME Representatives
 - Customer Acquiring the Service (Brenda)
 - Source Selection Evaluation Board Member Volunteers (one from each team)
 - Source Selection Authority (Brenda)



Bid Packet Handouts



1. RFP Overview
2. RFP SOW
3. RFP Instructions
4. RFP Evaluation Criteria
5. Red, Green, and Blue Team Debrief/Results
6. Red, Green, and Blue Team Proposals
7. Blank Proposal Templates
8. Customer Data (not in packet; requires a customer interview)
9. SME/Past Performance Scripts for each Team
10. Business Developer Scripts for each Team
11. Amendment 1 (sealed envelope)
12. Score Sheet for SSEB Members



RFP Overview (Handout #1)



- **Agency Mission:** Provide timely, accurate, and consistent public health communications to Govt., clinicians, and the public using the most appropriate channel (paper, web, video, audio, etc.)
- **Agency Organization:** Offices for Primary Care, Maternal and Child Care, Rural Health, Contagious Diseases, and Professional Services
- **Background:** Last year the agency distributed more than 1000 pages of information to Govt., clinicians, and the public. The agency expects a 10% increase in their workload this year to addition of the Professional Services Office to the agency. The Professional Services Office provides student scholarships and places graduates serving in under-served or rural areas nationwide
- **Purpose:** The offeror will create a wide variety of communications for offices including scientific reports, speeches, public service, announcements, scripts, web pages, and online help
- **Scope:** Last year 20 FTEs performed the work



Statement of Work (Handout #2)



Technical SOW:

1. Update agency website content to communicate basic health messages using multiple media channels
2. Provide content for public outreach campaigns for topical public health issues like influenza and Ebola
3. Work with customers to develop presentations and reports describing agency challenges and goals
4. Improve agency templates to improve readability and comprehension
5. Edit documents using agency-approved terms and templates

Management SOW:

Provide a management and staffing plan to for team of 20 technical writers and editors with various areas of expertise, and ensure the quality and consistency of the information they provide



RFP Instructions (Handout #3)



- **Instructions:**

- Use the template handouts to edit a 1 page proposal
- Record strengths, mitigate weaknesses, substantiate claims for each evaluated criteria

- **Evaluation Criteria:**

- You will be graded on your understanding, technical, management, and past performance which are of equal importance and graded on a scale of 1 to 20
- See the adjectival/numeric rating used to grade the proposal



RFP Evaluation Criteria (Handout #4)



Rating/ Points	Description
Excellent 16-20	A comprehensive and thorough proposal of exceptional merit with numerous more strengths. No deficiency.
Very Good 11-15	A proposal having no deficiency and which demonstrates over-all competence. One or more strengths have been found, and strengths outbalance any weaknesses that exist.
Good 6-10 pts	A proposal having no deficiency and which shows a reasonably sound response. There may be strengths or weaknesses, or both. As a whole, weaknesses are not off-set by strengths and do not significantly detract from the offeror's response.
Poor 0-5 Pts	A proposal that has one or more deficiencies or significant weaknesses that demonstrate a lack of overall competence or would require a major proposal revision to correct.



Red, Green, and Blue Team Debrief/Results (Handout #5)



Evaluation Criteria	Red Team		Blue Team		Green Team	
	Pts.	Strengths/ Weakness	Pts.	Strengths/ Weakness	Pts	Strengths/ Weakness
Understanding	5	1 S / 3 W	15	2 S / 1 W	17	3 S / 0 W
Technical Approach	10	2 S / 3 W	13	2 S / 1 W	16	3 S / 1 W
Management Approach	12	2 S / 1 W	16	3 S / 0 W	15	2 S / 2 W
Past Performance	10	1 S / 1 W	16	2 S / 1 W	16	3 S / 1 W
Score Subtotal	37		60		64	
Price	\$3,731,000		\$3,776,000		\$3,822,000	



Proposals are Distributed / Information Collection Begins



- Retrieve Proposals and Templates from the Packet
 - Proposals Handouts 5.A – 5.c
 - Templates 6.a – 6c.
- Each Team has time to interview:
 - The Customer to obtain information about the agency's objectives, requirements, and hot buttons
 - The SME to obtain information about past performance references (Handout #9.a – 9.c)
 - The Business Developer who has information about the competition (Handout #10.a – 10.c)



Start Improving Your Proposals Now!



- Interview the customer to obtain new insights
- Improve your past performance with information from Handout #9.a – 9.c
- Improve your insight of the competitive landscape with Handout #10.a – 10.c
- Add New Strengths and Mitigate your Weaknesses or Risks



Red Team Proposal (Handout 6.A)



- **Understanding**
 - Agency ABC needs 25 full and part-time communications specialists who can produce communications for agency and public consumption using printed, web, mobile and social media communications
- **Technical**
 - Conduct an assessment of ABC Agency's technical infrastructure to determine how well it can support the development of web, multimedia, and mobile communications
 - Develop a plan for designing, developing, and delivering messages based on assessment findings and provide recommendations for incremental improvements
 - Measure user satisfaction with messages through surveys and focus groups
- **Management**
 - Create Project Management Office (PMO) to coordinate all assignments and schedules
 - Build repositories of common materials to avoid duplication
 - Implement a Quality Control Plan to verify our work meets each performance metric
- **Past Performance**
 - 10 years of experience managing content for >26 public health centers nationwide resulting in a 60% increase in readership and a 95% customer satisfaction rating
 - 3 years of experience providing content for mobile device apps for 15 public health centers resulting in a 10% increase in infant vaccinations in the greater Boston metro area
 - Developed 5 social media campaigns for the NYC Dept. of Public Health that communicated health hazards associated with drinking Big Gulps



Blue Team Proposal (Handout 6.B)



- **Understanding**
 - Agency ABC needs effective messages to influence the public to change behaviors resulting in improved health outcomes; the messages can be delivered using printed, web, mobile and social media communications
- **Technical**
 - Assess ABC Agency's current messages to determine how effective they have been in changing the public's behavior and promoting more health life cycles
 - Develop a plan for improving the quality of existing messages and a continuous improvement loop
 - Develop new messages to support the mission of the new Professional Services Office
- **Management**
 - Assign five writers to each of the five office of Agency offices and work closely with the customer to develop and update new communications
 - Setup a peer review system to review all messages to ensure they are clear, concise, and effective
 - Setup metrics to measure the effectiveness of the communications
- **Past Performance**
 - 10 years of experience developing public health communications for 26 public health centers nationwide resulting in more than 1,000 new patients taking advantage of center services
 - 3 years of experience editing communications for southwestern clinicians resulting in a 15% decrease in influenza for 2011, 2012, and 2013.
 - Developed four communications campaigns for Kaiser Permanente resulting in a 5% increase in the number of annual physicals and the identification of more than 800 pre-disease conditions



Green Team Proposal (Handout 6.C)



- **Understanding**
 - Effective communications will help Agency ABC promote healthy lifestyles, reduce the likelihood of disease outbreaks, inform clinics about grants, and students about how they can obtain the scholarships needed to further their healthcare careers. The Green Team has more than seven years of experience helping Agency ABC achieve these objectives and respond to more than 15 major work surges.
- **Technical**
 - Help the Offices for Primary Care and Maternal and Child Care develop tailored communications that will result in a 5% increase in primary care preventative tests and a 10% decrease in infant mortality
 - Help the Offices of Rural Health identify the closest service providers and the Office of Contagious Diseases immediately develop alerts in response to contagious diseases
 - Develop an outreach campaign to advise students how to obtain scholarships and opportunities for serving rural or underserved communities
- **Management**
 - The Project Manager will provide an interdisciplinary team of 20 communication, and public health specialists to develop communications that will help Agency ABC achieve its objectives
 - The Quality Manager, who also has a public health background, will review all communications to verify they meet and exceed Agency ABC standards for quality
 - The Green Team will also provide reach back to corporate resources consisting of Cloud, mobile device, social media, and SharePoint experts to assist the communications team tailor messages
- **Past Performance**
 - 8 years of experience helping the CDC develop communications in response to infectious disease outbreaks, diabetes, and heart disease resulting in increased public awareness of infectious and life style related illness
 - 5 years of experience helping the Office of the Surgeon General develop a tobacco cessation program targeted a youth – resulting in a 5% decrease in youth smoking nationwide
 - 1 year of experience helping the State of Wyoming develop public health warnings related to smoking legalized marijuana in Colorado and bringing it back into Wyoming



8. Customer Information Script



- We want develop a series of messages to promote healthy behaviors, ultimately resulting in a decrease in somewhat preventable conditions like diabetes; many can be in print and distributed a clinics
- We are trying to disseminate more than \$10M in scholarships to >250 students who will provide a range of clinical services
- The grantee instructions on the website can be improved; we are getting >1,500 questions annually about them
- With a 25% increase in the number of video viewers, so we are thinking about increasing the number of videos we produce
- We need resources that have the expertise to develop apps across multiple mobile operating systems
- We are expecting another internal reorganization resulting in the addition of the Office of Geriatric Health to our organization, which will require more paper-based communications
- It looks we will receive a budget cut next year resulting in a 10% reduction in the contract value



SME/Past Performance Script – Red Team (Handout 9.a)



• Past Performance 1

- Contract – 10-year IDIQ for Health Center Support valued at \$150M; Agency 123 TO is valued at \$45M
- Strength: 10 years of experience building websites for > 26 public health centers nationwide resulting in a 60% increase in readership and a 95% customer satisfaction rating
- Strength: Despite increased readership the websites never went down and provided satisfactory response time
- Strength: the 123 Website won a 2012 Webby Award for its design and content
- Weakness – not all work was finished on schedule due to internal HR recruiting limitations

• Past Performance 2

- Contract – 10-year IDIQ for Health Center Support valued at \$150M; Agency 456 TO is valued at \$35M
- Strength: 3 years of experience building mobile device apps for 15 public health centers that resulting in a 10% increase in infant vaccinations in the greater Boston metro area
- Strength: the apps provide support for all major mobile operation systems
- Strength: Use of the apps is growing at a rate of 15% annually
- Weakness: The project ran over budget by \$10K.

• Past Performance 3

- Strengths: Developed 5 social media campaigns for the NYC Dept. of Public Health that communicated health hazards associated with drinking Big Gulps. The campaign covered print, social media, app, and web-based platforms. It was heard by more than 5M viewers. A law approved by the mayor to prohibit the sale of 32oz big gulps.
- Weakness: The law was later overturned by the NY State Supreme Court



SME /Past Performance Script - Blue Team (Handout 9.b)



• Past Performance 1

- Contract to provide communication and technical writing services for 25 public health centers (\$25M)
- Strength: 10 years of experience developing public health communications for 26 public health centers nationwide resulting in more than 1,000 new patients taking advantage of center services
- Strength: Ability to develop both print and text messages that were sent to public health center patients
- Strength: High quality work performed on schedule and within budget
- Weakness: Poor business relations between customer and Blue Team executives

• Past Performance 2

- Contract 5 Year contract valued at \$20M with Southwestern Clinics Association
- 3 years of experience editing communications for southwestern clinicians resulting in a 15% decrease in influenza for 2011, 2012, and 2013.
- Hired outstanding epidemiologist and demographer to pinpoint and target suitable populations and adjust messages to decrease influenza vulnerability and hired top IT integrator to design web site and mobile app
- Weakness: Three weeks late in placing top public health talent on the project

• Past Performance 3

- Contract – Kaiser Permanente; 2010 to present; value \$15M
- Developed four communications campaigns for Kaiser Permanente resulting in a 5% increase in the number of annual physicals and the identification of more than 800 pre-disease conditions
- Developed targeted message for those 800 clients to support follow-up visits over a 4 year-period resulting in a decrease in chronic conditions
- Weakness: None



SME/Past Performance Script – Green Team (Handout 9.c)



- **Past Performance 1**
 - Contract: \$25M with CDC; 2006 to Present
 - Strength: 8 years of experience helping the CDC develop communications in response to infectious disease outbreaks, diabetes, and heart disease resulting in increased public awareness of infectious and life style related illness
 - Strength: Responded to more than 50 requests for infectious disease outbreaks and developed materials in 10 different languages. Developed more than 100 message to support public awareness of infectious and life style related illness
 - Strength: Led the development of breast cancer awareness, diabetes, and autism campaigns (on the web, mobile apps, radio, TV, and mobile apps)
 - Weakness: Two weeks late in finding TV production studio
- **Past Performance 2**
 - Contract: \$10M with Office the Surgeon General; 2009 to Present
 - Strength: 5 years of experience helping the Office of the Surgeon General develop a tobacco cessation program targeted at youth – resulting in a 5% decrease in youth smoking nationwide
 - Strength: Experience working with focus groups to refine messages over 3-years resulting in improved cessation statistics
 - Strength: Helped local health agencies obtain grants to smoking cessation programs; creased clear concise website and outreach campaign materials
 - Weakness: None
- **Past Performance 3**
 - Contract: \$10M with the Wyoming State Health Department; 2013 to Present
 - Strength: 1 year of experience helping the State of Wyoming develop public health warnings related to smoking legalized marijuana in Colorado and brining it back into Wyoming
 - Strength: Hired policy experts to assess and report on the economic, tax, public health and safety and criminal affects of marijuana legalization and ensure any adverse affects were communicated to the public
 - Strength: Hired top website firm that designed and build a website with valuable public health messages for Wyoming residents related to the purchase and consumption of marijuana in Wyoming
 - Weakness: None



Business Developer Script – Red Team Handout 10.a



• Red Company

- In Agency ABC's view, the Red Company is a top IT integrator. They have built networks, web portals, SharePoint, and social media apps for sister agencies that impressed Agency ABC.
- Their mobile applications have helped promote awareness of public health issues, as in the case of the Cardinal Influenza that helped stop the spread of the flu on average 2 weeks faster than normal
- The Red Company is the largest of the three company's with assets of >\$250M annually
- Its headquarters are located almost 500 miles away from agency ABC
- They have managed \$25M in IT contracts supporting the communication of public health messages on the web and mobile devices
- They implement industry best practices and have more than 100 certified individuals (PMP, ITIL)



Business Developer Script – Blue Team

Handout 10.b



- **Blue Company**

- In Agency ABC's view, the Blue Company is a top communications, technical writing, and PR company.
- They have experience crafting messages and developing outreach campaigns that have helped improve public health outcomes, as in the case of Blue Bird Influenza and Vaccines for Children Outbreak that helped stop the spread of the flu on average 2 weeks faster than normal
- The Blue Company is the second largest of the three company's with assets of >\$150M annually
- Its headquarters are located almost 500 miles away from agency ABC
- They have managed \$25M in IT contracts supporting the communication of public health messages on the web and mobile devices
- They implement industry best practices and have more than 100 certified individuals (PMP, ITIL)



Business Developer Script – Green Team

Handout 10.c



- **Green Company**

- In Agency ABC's view, the Green Company is a top public health services company. They understand our public health mission and their principals have years of experience supporting Agency ABC
- They are the newest and smallest company with eight years of contracting experience and a value of \$50M. However, they are rapidly growing and have excellent past performance, as recorded in Govt. databases.
- They have experience crafting public health message and limited experience developing the systems that delivery those messages. For example, they have built several websites, mobile applications, and videos for sister agencies in the past three years.
- Their headquarters is located within 10 mile of Agency ABC
- Their proposed Project Manager is an experienced Public Health communications professional (>20 years experience) who understands Agency ABC and knows how to develop effective public health messages
- They implement industry best practices and have more than 75 certified individuals (PMP, ITIL, Certified Public Health)



New Amendment



- Please open the Amendment 1 envelope and update your proposal accordingly



Amendment 1



- Agency ABC needs the assistance of a graphic artist
- Agency ABC will also allow primes to sub

Please revise your proposals to
incorporate Amendment 1



Red Team Review Time



- Review the proposal
- Update the proposal to reflect their comments



Revise Your Final Proposal



- Red, Blue and Green Team Member revise your proposals
- Submit them to the SSEB for review



SSA Selects the New Winner



- The SSEB (volunteers from each team) will make a recommendation and update the old score
- The SSA (Brenda) will make the decision and debrief the attendees



12. Score Sheet for SSEB Members



Evaluation Criteria	Red Team		Blue Team		Green Team	
	Pts.	Strengths/ Weakness	Pts.	Strengths/ Weakness	Pts.	Strengths/ Weakness
Understanding						
Technical Approach						
Management Approach						
Past Performance						
Score Subtotal						
Price						



Summary of Best Practices for High Scoring Proposals



1. Great customer knowledge and competitive intelligence (Best informed wins!)
2. Ability to work as a team to improve the proposal within the timeframe allowed
3. Excellent understanding of the bid criteria and trade offs
4. Ability to objectively score the proposal
5. Ability to continually improve the score based on customer and reviewer input



Questions



Thank You



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