

How to Submit a Winning Proposal

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LCLS-II-HE Supply Chain Director

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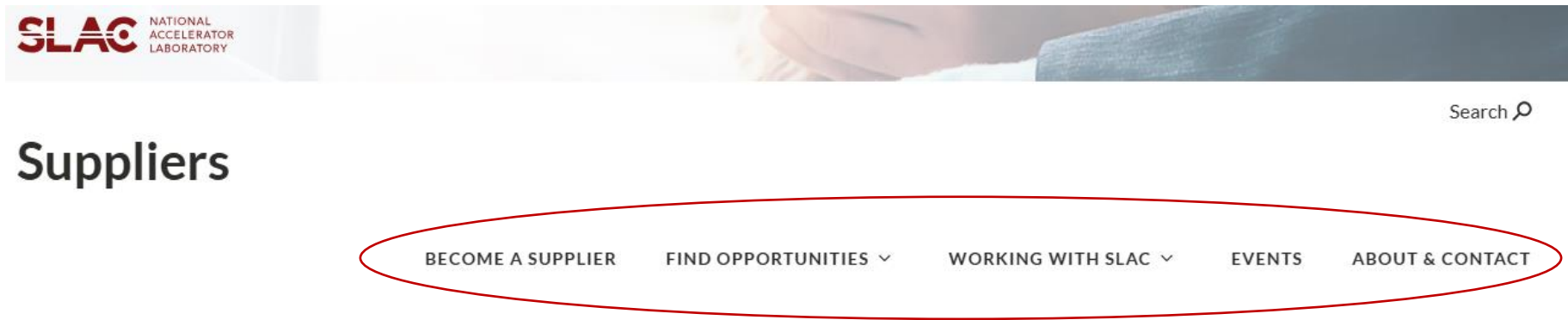
Outline

- Understand the Customer
- Understand the Customer's Requirements
 - Evaluation Criteria
- Respect and Follow the Customer's Process
- Bid/No-Bid Decision
- Develop Proposal Strategy and Plan
- Proposal Best Practices
 - General, Business, Technical
- Debriefings



Understand the Customer

- Understand SLAC and SLAC's Operating Environment – FFRDC's
 - [FFRDCs—A Primer: Federally Funded Research and Development Centers in the 21st Century](#) by Mitre Corp
- National Labs
 - [Home - The National Laboratories | U.S. Powerhouses of Science and Technology](#)
- SLAC Suppliers Web Page
 - <https://suppliers.slac.stanford.edu/>



Understand the Customer's Requirements

Solicitation / Request for Proposal (RFP)

Read entire solicitation/RFP including the terms and conditions concentrating on the:

- Statement of work
- Specification
- Pricing structure, including options
- Delivery requirements
- Proposal instructions
- Evaluation criteria
- Draft Subcontract



Most of SLAC's Procurements are Firm Fixed Price (FFP)

Understand the Customer's Requirements

Ask Questions during the Q&A Period

This is your opportunity to better understand anything that is unclear or ambiguous, to obtain more detailed information or resolve any inconsistencies

- SLAC will provide the question and answer to all offerors to ensure a level playing field
- SLAC may genericize the question to eliminate proprietary references or ask you to do so prior to us releasing it to the other offerors



Caution: Does your question reveal your bidding strategy such that you give away your creative competitive advantage to other offerors?

Solution: Write a focused question and avoid proprietary approaches

RFP Section M – Evaluation Criteria

LCLS-II HE Product Procurement Example (Each of these have subfactors)

Factor 1 – Conceptual Design of all Components

Factor 4 – Installation Plan and Preliminary Resource Loaded Schedule

Factor 2 – Capabilities and Experience of Key Project and Technical Staff

Factor 5 – Schedule and Delivery Date

Factor 3 – Production Facilities and Equipment

Factor 6 – Quality Assurance

RFP Section M – Evaluation Criteria

Construction Procurement Example (Each of these have subfactors)

Factor 1 -
Technical
Approach

Factor 2 -
Safety

Factor 3 -
Schedule

Factor 4 -
Project
Management

Factor 5 -
Experience

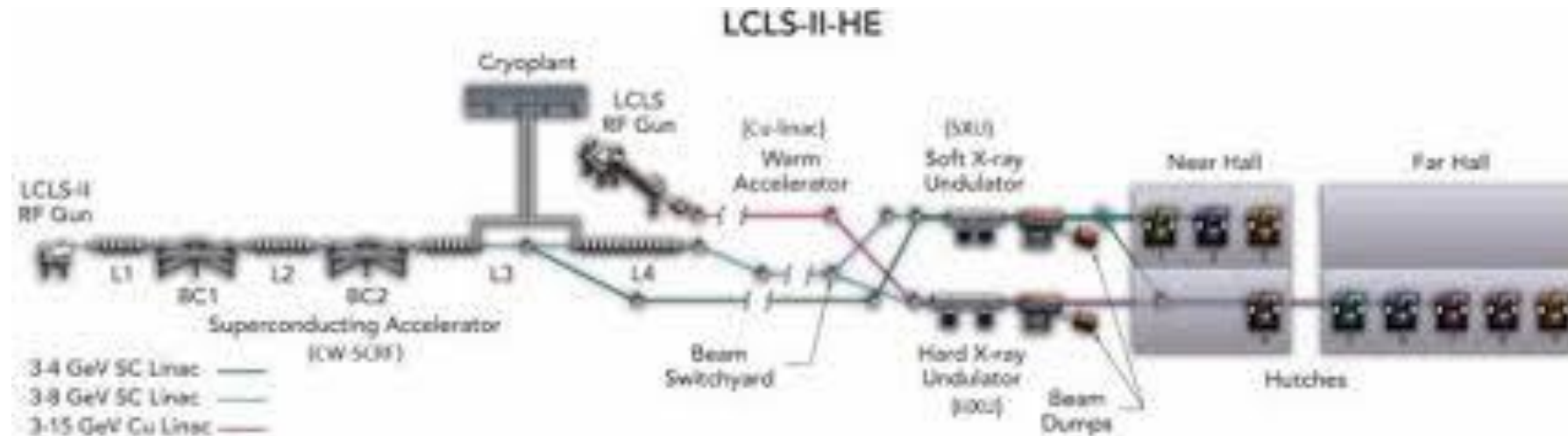
Factor 6 - Key
Personnel

Factor 7 -
Statement of
Qualifications

Respect and Follow the Customer's Process

Solicitation/RFP contains strict rules

- Unless instructed otherwise in writing, communicate only directly with the Buyer/Subcontracts Administrator listed in the solicitation/RFP
- Maintains fairness and integrity of the source selection process
- Non-compliance may lead to disqualification and elimination from the competition



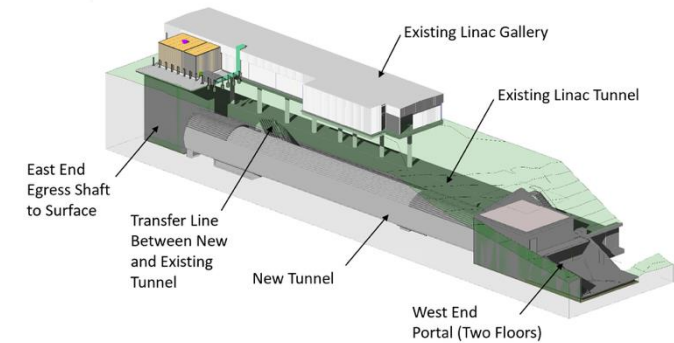
Bid/No-Bid Decision

- Can all the requirements be successfully met?
- Competitively positioned?
- Performance and delivery capability?
- Will the job be profitable?
- Will cash flow be adequate?
- Can the work be performed with acceptable risk?
- Is staffing adequate to submit a winning proposal in accordance with the solicitation requirements?
- What is my opportunity cost?
 - The value of the next-best alternative foregone when making a decision



Develop a Proposal Strategy

- Address Evaluation Criteria
 - Determine how will you address the evaluation criteria
- Win Themes
 - Consistent narrative that explains why you are the best value or are technically acceptable
- Competitive Analysis
 - Counter your competitor's strengths and demonstrate your strengths over their weaknesses
- Proposal Discriminators
 - Communicate and support why you are uniquely qualified for the job



Develop a Proposal Strategy 2

- Risk Mitigation
 - Disclose and discuss how you will address your risks and turn them into strengths
- Partnering/Procurement Strategy
 - Select the right partners/subcontractors
 - Can impact reputation and performance
 - Have adequate and capable resources to oversee suppliers
 - FAR 52.215-23 Limitations on Pass-Through Charges
 - Need to demonstrate value, cannot subcontract all or nearly all of the work
- Avoid Cognitive Biases
 - Confirmation Bias – Emphasizing only strengths without acknowledging weaknesses and risks and how they will be mitigated
 - Overconfidence Bias – Failing to rigorously justify your proposal with explicit evidence and supporting data

Develop a Proposal Plan

- Proposal Lead – One key accountable person in charge
- Proposal Compliance Matrix – Correlates each proposal task to the solicitation instructions and any other specific requirements in the solicitation/RFP
- Roles & Responsibilities – Clear delineation of tasks proposal team members will perform to tied to the Proposal Compliance Matrix
 - Includes reviews by management and final production and submittal
 - Proposal Structure – Proposal logically structured to address the proposal requirements
- Proposal Schedule – Detailed schedule that addresses all proposal milestones
- Easy to understand format for evaluators

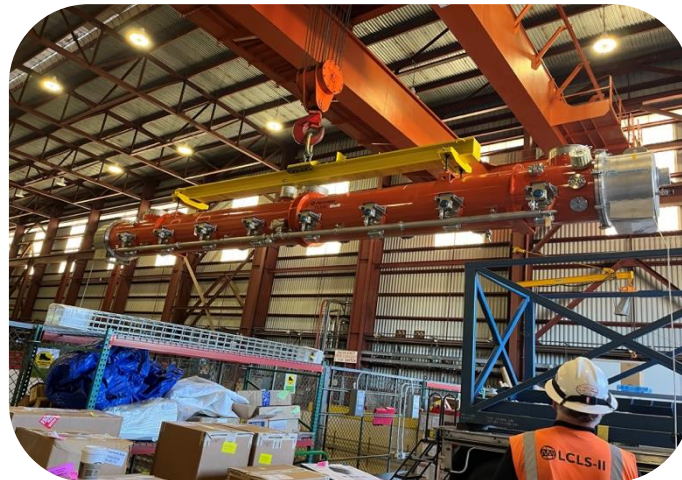
Proposal Best Practices – General

- Read the entire Solicitation/RFP and all Amendments
- Provide all the information requested in the solicitation/RFP
- Bid on all the proposed work in the solicitation
 - Partial bids are NOT allowed
- Adapt your approach to the solicitation requirements instead of providing only your standard proposal offering
- Ensure **all** evaluation criteria are addressed
- Simple visuals help explain concepts



Proposal Best Practices – Business Volume

- No or limited exceptions to SLAC standard terms and conditions
 - Avoid excessive redlining
 - Avoid requested changes not commensurate with the procurement size or risk
- Know what is in your Dun and Bradstreet financial report or provide 3 years of audited financials
 - Address any weaknesses in your proposal



Proposal Best Practices – Technical Volume

- Substantiate your approach
 - Provide evidence, examples
 - Provide adequate design or installation details
 - Do not regurgitate the SOW
- Acknowledge risks and provide a risk mitigation plan
- Acknowledge poor prior past performance, and highlight what you changed in your company to prevent a reoccurrence
- Provide detailed schedules
 - Breakdown of tasks by phase, ensure major scope elements are addressed

Proposal Best Practices – Technical Volume

- Describe Quality Management System, and certifications, e.g. ISO
- Describe Supplier Management Process
- Overcome new product introduction by highlighting similarity to existing products and overcoming potential risks by including risk mitigations

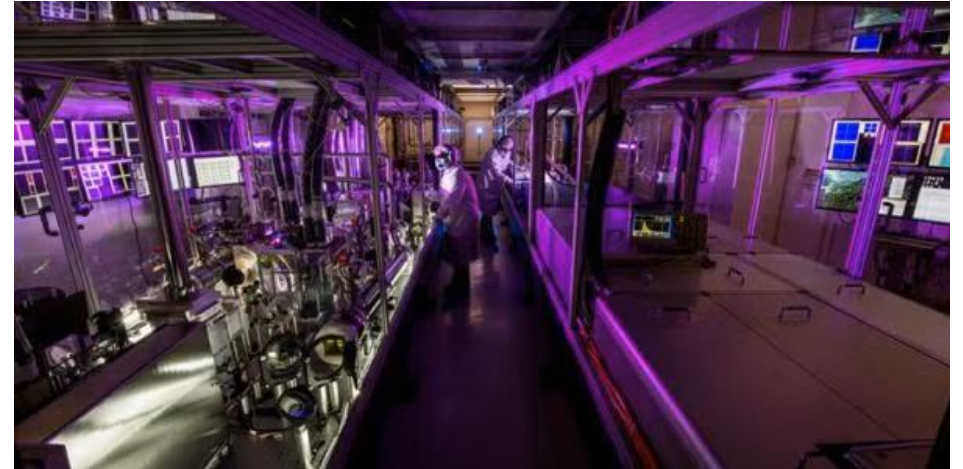


Debriefings

- Requesting a debriefing is encouraged
- Debriefings are structured and focused by SLAC
- Learn about evaluated strengths and weaknesses
- Learn about perceived risks and whether they were adequately mitigated
- Don't be defensive

- Debriefings will not provide:
 - Competitor pricing or evaluations
 - Comparative rankings
 - Proprietary or source selection sensitive information

- Debriefings are a learning opportunity



Summary



- Understand the customer
- Understand the customer's requirements
- Read the entire solicitation/RFP
- Respect and follow the customer's process
- Develop a proposal strategy
- Develop a proposal plan
- Address the evaluation criteria
- Learn from proposal debriefings

Thank You!

Questions?



Feedback

- Please provide your feedback on this presentation and any other improved proposal guidance that you would like to see to:
 - frankb@slac.stanford.edu
 - cc: cheryl.stafford@slac.stanford.edu
 - cc: ncolley@slac.stanford.edu
- After addressing your feedback, an update of this presentation will be posted on:
 - **SLAC Suppliers Web Page**
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