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How to Competitively
Respond to Department
of Energy's Sources
Sought to Influence the
Acquisition

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New American Energy Era



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Agenda

- Sources Sought Notices
- Market research
- Government's Best Practices
- Responding to Notices
- Marketing techniques
- Who wins?
- Take Home

What is a Sources Sought Notice?

The Sources Sought Notice is a synopsis posted by a government agency that states they are seeking possible sources for a project. This is a part of Market research.

It is not a solicitation for work, nor is it a request for proposal. Reference the FAR, Subpart 7.3 and OMB Circular A-76.

What is Market Research?

- Collecting & analyzing information about the market's capabilities to satisfy agency needs. (FAR 2.101)
- Federal Acquisition Streamlining Act of 1994 prescribes market research as a critical component in describing the agency needs, developing an overall acquisition strategy, & identifying the terms, conditions, & practices appropriate for the items being acquired.

What is Market Research?

- FAR Part 10.001 requires:
 - Before developing new requirements documents.
 - Before soliciting offers above the Simplified Acquisition Threshold. (SAT) (\$250k) &
 - Before soliciting offers below the SAT when adequate information is not available.

Purpose of Market Research

- Determine whether a commercial source exists to meet the requirement.
- Assess whether **two or more** small, 8(a), or HUBZone small businesses can meet the requirement **for set-asides**.
- Ascertain whether the item needs some minor modifications.
- Determine if the requirement can/should be modified
- Identify commercial practices (e.g., warranties & licenses, buyer financing, maintenance programs, terms & conditions, and commercial discounts).
- Can help obtain best price/best value for the government.(Options)
- Identify successful acquisition strategies

Why Perform Market Research

- Needed to support effective acquisition planning.
- It is performed because it is a FAR requirement.
- Provides help to define requirement.
- Provides a database to support industry capabilities, product availability, competitive market forces, and alternative sources.

Why Should Industry Help Government Do Market Research

- Helps Government avoid mistakes.
- Helps industry understand Government requirements better.
- Allows communication with Government before formal acquisition rules apply. (marketing opportunity!)

Government's Failure to Perform Market Research

Can result in:

- Protests of sole source or limited competition acquisitions.
- GAO could order re-competition and payment of bid and proposal costs.
- Contract administration problems
- The government could miss out on the newest & best technology or services.

Government Perspective: How Much Market Research Is Enough?

- The extent of market research will vary, depending on such factors as complexity, urgency, estimated dollar value, & past experience.
- Generally speaking, do as much market research as possible (until decision-makers understands the marketplace well) since it saves time in the long run.

Techniques for Accomplishing Market Research

- **Contact knowledgeable people** within Government and industry.
- Review **recent market research** for similar items.
- Publish formal requests for information (**RFI**).
- Query Government and commercial databases.
- Obtain source lists for similar items from other organizations.
- Commercial catalogs and other product literature.

Techniques for Accomplishing Market Research

- Conduct interchange meetings or pre-solicitation conferences with potential vendors.
- Contact known vendors.
- Sources Sought Notices.
- Capability Statements on file.
- Internet.

Who Performs the Market Research?

- Joint technical & procurement collaboration
- Small business specialist & resource analyst also provide some feedback.
- All layers of decision-makers!
 - CO, PM, SB

Topics in Government Market Research Documentation

- Summary of acquisition background
- Identification of market research team
- Description of agency's needs
- Desired or required schedule for the delivery of the end items.
- Explanation of the list of potential suppliers
- Summary of industry sources
- Customary commercial terms, provisions, and conditions
- Price ranges & pricing structure/terms
- The Market Research (including summary of available commercial or no developmental items.)

Government's Purpose: Sources Sought Notices

- Determine if industry can provide the agency with the required services or products
- Determine if small business can participate

Business' Purpose: Sources Sought Notices

- Over 2,000 posted in last 30 days
- Great head's up: what is going to happen
- Advance notice: it is not an RFP
- Establish relationships in agencies
- Helps you focus your business development efforts
- Opens the door to opportunities!

Sources Sought Notices vs. RFIs

Sources Sought:

- Market Research without pricing
- Market Research without technical recommendations
- Identification of possible socio-economic certified vendor pool

RFI:

- RFIs may be used when the Government does not presently intend to award a contract, but wants to obtain price, delivery, other market information, or capabilities for planning purposes." **FAR Part 15.201(e)**

Where are "Sources Sought" notices?

Can be anywhere the government is posting notices or opportunities!

- FBO.gov
- FedConnect
- GSA eBuy
- Agency web site
- Social media!



FBO "Sources Sought" Search

The screenshot shows the 'Opportunities' section of the FBO website. A navigation bar at the top includes 'My FBO', 'My Profile', and 'Opportunities'. Below this, a row of tabs includes 'Opportunities List', 'Advanced Search', 'Watched', 'Search Agents', 'Bids/Responses', and 'Archives'. A search bar is present with a 'Keyword / Solicitation #' field, a 'TIPS' icon, a 'Posted Date' dropdown set to 'Last 90 Days', and 'Search', 'Clear', and 'Save Defa' buttons. Below the search bar, there are links for 'Search by Agency, Set-aside, State, and Type' and 'Search by Classification, NAICS code, Recovery actions, and more'. A table of search results is displayed, showing columns for 'Opportunity', 'Agency/Office/Location', and 'Type / Set-aside'. Two rows of results are visible, both for 'AMC AMCOM Carla Test Office' and 'Presolicitation' type. Yellow arrows labeled I through VIII point to specific elements: I points to the 'Opportunities' tab; II points to the 'Opportunities List' tab; III points to the 'Search by Agency, Set-aside, State, and Type' link; IV points to the 'Advanced Search' tab; V points to the 'Watched' tab; VI points to the 'Search Agents' tab; VII points to the 'Bids/Responses' tab; VIII points to the 'Archives' tab.

Opportunity	Agency/Office/Location	Type / Set-aside
S - subject N000104000A S - Utilities and housekeeping services	AMC AMCOM Carla Test Office	Presolicitation
S - subject N0001040001234 S - Utilities and housekeeping services	AMC AMCOM Carla Test Office	Presolicitation

FBO Sources Sought Notices Search

You can use the following search technique to find Sources Sought notices in the FedBizOpps Advanced Search:

1. Go to www.fbo.gov
2. Click on "opportunities" main navigation (upper navigation bar).
3. On the "opportunities list" tab, use the "Advanced Search" field to see additional search filters.
4. Select "Sources sought" type.
5. Refine the search with other search criteria as appropriate to your search (e.g., agency, keyword, posting date).
6. Click "go" to proceed to filter the lists of opportunities.
7. Save!

FBO Search Agent

- As a vendor, you can set up “search agents” based on detailed search elements that highlight newly added opportunities aligning with your search criteria.
- You may also add opportunities to a “watched list” list (a la “favorites” list). This allows for ease in referencing targeted opportunities.
- Additionally, vendors receive updates about opportunities on their Watched List.

FedConnect

- Sign in - Full Access
- Don't sign in – Limited Access and only public opportunities
- Need help? – Tutorials
- <https://www.fedconnect.net>

GSA eBuy

- <https://www.ebuy.gsa.gov/ebuy>
- FAR recommended (FAR 8.402 & 8.405-6)
- Allows for sources sought or RFI only
- Simplifies the acquisition process saving you time
- Assesses no fees
- Allows for small business set-asides
- Fulfills full and open competition requirements for GWACs and technology contracts

Results of Sources Sought Notices

- If one commercial item or source is found, procurement proceeds in accordance with FAR Part 12 - Acquisition of Commercial Items.
- If commercial item is not found, requirement should be reviewed to see if it can be restated to permit commercial item or service.
- Proceed with set-aside or sole source contracts
- Proceed with full and open competition

Government's Best Practices

- Start early
- Involve users
- Communicate
- Market research is ongoing
- Tailor the investigation/research
- Refine as you proceed
- Document, document, document!
- More training for procurement/non-procurement

Vendor: Respond or Not?

- Yes:
 - Sales and Revenue Goals
 - Pursue a sole source
 - Relationships
- No: wait for RFP
 - May never see it!

How to Respond

- Always copy the Small Business representative at office/agency- <https://www.energy.gov/sites>
- Always “answer the mail” exactly!
- Do NOT attach a pre-written Capability Statement
- Always follow-up
- Begin and continuously market to decision-makers

Build Relationships With the Multiple Layers of Decision-makers

- Contracting and acquisition staff
 - CO, CS
- Program and technical managers
 - PM, end-user, COR
- Small business representatives
 - OSDBU

Sole Source Contracts

- 8(a), ED/WOSB, SDVOB
- Know the required process!
- Involve all decision-makers as early as possible
- Do as much preparation as possible
- Ask for it!
- Ask again!

Marketing Processes

- Registrations (SAM & SBDS)
- Web Site
- Capability Statement
- White Papers
- Lead Generators
- Vendor Outreach Meetings
- Debriefings
- Social Media, Blogs
- Public Relations
- Advertising: TV, Radio, Print (XXX)

Company and Personal Marketing Outreach

- Emails (not spam)!
- Phone calls
- Capability Statements
- News Releases
- Articles
- White Papers
- Case Studies
- Repeat!

Communication

As part of the ongoing, government-wide effort to improve vendor communication, OFPP and OMB's Office of E-Government and Information Technology worked with the Chief Financial Officers (CFO) Act agencies to develop vendor communications plans for:

- Reducing barriers to communication,
- Incorporating more industry input into agency acquisitions,
- Publicizing engagement events, and
- Providing training and awareness to employees and vendors

Bonus: Matchmaking Pitch

- Develop a focused “Matchmaking Pitch” to communicate specific offerings
- No company does “Everything.”
- An example of “Reverse Pyramid”

Matchmaking Speech: I am _____ with _____.

We provide _____

Our primary focus is _____

We are the absolute best at _____

We are different because _____

We can help your agency/office by _____

Government Conclusion

- Performing market research by posting Sources Sought notices is a logical process that, if planned, can provide the information you need to generate requirements & locate sources & information on alternative commercial products, services, & practices.
- Conducting market research up front may take time and effort; may initially feel too busy to spend; however, the benefits down the road in terms of a smoother, faster buy with fewer performance problems makes it more than worthwhile.

Take Home!!!!!!!!!!!!!!

- The more Sources Sought Notices and RFIs You answer and plan a strategic follow-up for, the more business you win!

Session Evaluations

Reminder:

**Please complete the Speaker/Session
Evaluation Form located in the
Mobile App.**

Thank you!



USD E'19



Questions?

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