

TRACIE G. GRANT



Do-It-Yourself GSA

Preparing you to:

Write • Win • Succeed

GSA Proposal Guide

GFY 2022

PREVIEW

CREATE YOUR SUCCESS WITH THE GSA MULTIPLE
AWARD SCHEDULE (MAS) USING OUR
COMPREHENSIVE DIY TOOLS.

Built from the GSA Knowledge
Library of GSA Proposal Help



GSA Proposal Help

Put our expertise into your hands.



GSA PROPOSAL GUIDE

Created by DIY GSA™ and GSA Proposal Help™

Get Your GSA Multiple Award Schedule (MAS)

by Writing a Winning Proposal

Tracie G. Grant

Principal Consultant

GSA Proposal Guide™

GFY 2022

(Through GSA Solicitation Refresh 10 released March, 2022)

FOREWORD

Tracie Grant is a GSA Consultant, Contracts Manager, and Author who helps companies needing or using the GSA Multiple Award Schedule to find success with this key government contracting vehicle.

Currently the owner and principal consultant of GSA Proposal Help, DIY GSA, and Contract Management Consulting, Ms. Grant is continually updating her products and services to help businesses break into the lucrative federal government marketplace. This book is written for those in the GSA proposal trenches by one in the trenches beside them. Ms. Grant has been working with GSA Schedules since 1994 and has written this book based on the challenges and successes she has seen over the last 25+ years.

Ms. Grant is not an attorney and this guide is not meant to provide legal advice. It is a representation of experience gained over the last 25+ years and captures what DIY GSA or GSA Proposal Help would likely do in relation to documents and activities completed when putting together a GSA proposal for a client. While we can't say this guide covers every single thing you'll run up against, we can say that it is by far the best GSA proposal guide on the market. It has always been our philosophy that people can write their own winning GSA proposals if they have the appropriate tools. It's not easy, and though GSA has tried to find ways to help businesses, they can't seem to get into the details of proposal preparation successfully. They can review proposals and heaven knows they can reject proposals. Typically, though, they haven't written any GSA proposals. And, unless you've written proposals multiple times, there are many places where you can slip up. We try to cover as many of those places as we can.

For additional information about our **DIY tools and services**, visit us at www.diy-gsa.com. For **turnkey proposal information**, visit us at www.gsaproposal.net. You can also find **quick tips and Q&A** at www.gsaHotline.com, our newest tool to help you which is due to be up by the end of June, 2022.

The legal side of things: GSA Proposal Help™, Do-It-Yourself GSA™, DIY GSA™, the GSA Proposal Guide™, the DIY GSA 30-Day Workbook™ and the Six-Step Process™ are trademarks of GSA Proposal Help. The purchaser of this book and accompanying materials may print only one copy and it is for that person's personal use only. Copying, reproducing, transferring, selling or otherwise exploiting this guide is prohibited by law. This guide may not be used by any GSA Consultants outside of GSA Proposal Help who may be guiding clients through this process without license and permission of GSA Proposal Help and Tracie Grant.

CONTENTS

INTRODUCTION.....	1
THE GSA PROCESS.....	2
INITIAL QUESTIONS – Are you ready for a GSA MAS?.....	4
IMPORTANT WEBSITES.....	9
THE SIX-STEP PROCESS™.....	12
ACRONYMS AND DEFINITIONS.....	13
Chapter One – Step One:.....	16
Chapter Two – Step Two:.....	24
Chapter Three – Step Three:.....	32
Chapter Four– Step Four:.....	37
Chapter Five – Step Five:.....	42
Chapter Six – Step Six:.....	44
SUMMARY.....	49
APPENDIX.....	50
List of Large Categories.....	51
GSA FAST LANE GUIDANCE.....	52
READINESS ASSESSMENT STEPS.....	55

INTRODUCTION

The GSA Multiple Award Schedule, now called the MAS, (also referred to as GSA contract or GSA number) is a key tool for federal government contractors and procurement officials. Getting a GSA MAS and keeping it are difficult tasks, but if you have the right resources, you can do it, and do it well. We initially published the GSA Proposal Guide back in 2015 and have updated about every year or two since. This current version supports the changes through Refresh 10 of the “new” MAS solicitation. GSA updates the solicitation for the GSA MAS a few times a year. Each update is called a “refresh.” We update as often as we can to keep things fresh and current.

DIY GSA is a different kind of consulting company as we work hard to meet our clients where they are and provide them the resources they need at the pricing they can afford. Most GSA consulting companies want to keep you beholden to them as it provides them a continual revenue stream. We would love to do this for free, but just like you, we have families, bills, and goals. However, if we can save you from spending \$5,000 to \$15,000 to get a GSA MAS, we’ll be most pleased! Of course, if you don’t want to do it yourself, there are good consulting companies out there. Our favorite is our sister company, GSA Proposal Help.

STARTING THE PROCESS

As a federal or potential federal contractor, now IS the time to explore getting a GSA Multiple Award Schedule (MAS) to gain access to the BILLIONS of federal dollars that run through the GSA MAS program every year. If you are like many business owners wanting a GSA MAS, you have searched for information on the internet and you may have even found the solicitation, but you have either thought you had no clue as to how to begin or you have downloaded all the documents and now you know you have no clue how to work through that 140-page-ish solicitation document and its 15 or more attachments!

To help you attack your proposal, we have created six steps that break down the tasks and documents you must create to submit a full and acceptable proposal. We have listed the steps (and their related sub-steps) that we use to guide our clients as they develop their winning GSA proposals. While this book is not a guarantee that you will put together a winning proposal and does not address every question that can come up during the proposal writing process, it does contain the methodology we use when helping clients complete their GSA proposals. We hope that it can help you create your own winning GSA proposal.

THE GSA PROCESS

The GSA process that we have worked through over the years to help our clients receive and maintain GSA Multiple Award Schedule contracts includes the following elements:

- 1) Proposal (or offer) Preparation
- 2) Proposal Submission
- 3) GSA Review of Proposal (currently taking up to a year for some submissions)
 - a) Clarifications
 - b) Financial Review
 - c) Negotiations
 - d) Final Proposal Revision
- 4) GSA Contract Award
- 5) GSA Advantage Upload and Input
- 6) GSA Contract Marketing
- 7) GSA Task Orders and Delivery
- 8) Ongoing GSA Contract Administration and GSA Contract Compliance

For those of you who are more visual, the following diagram represents our take on the GSA Process.



Proposals (also referred to as offers) are prepared by contractors (also referred to as vendors) who want to receive a GSA MAS to sell to the federal government. These proposals are prepared in response to the GSA MAS solicitation located at sam.gov at the url below:

<https://sam.gov/opp/39dbe5bebef94a568b1cb0c27fc2deda/view>.

The GSA MAS is organized under one solicitation (47QSMD20R0001) that includes attachments for the following large categories:

Large Category Title
Office Management Category
Facilities Category
Furniture and Furnishings Category
Human Capital Category
Industrial Products and Services Category
Information Technology Category
Miscellaneous Category
Professional Services Category
Scientific Management and Solutions Category
Security and Protection Category
Transportation and Logistics Services
Travel Category

Each large category is broken down into subcategories and then further broken down into Special Item Numbers or SINS. We'll review this more in Step One of our Six-Step Process.

Key note: Developing a winning GSA proposal is not a project to pass along lightly to someone who is new to the company to help them learn about the company or because their workload is not yet over the top. This project requires knowledge and decisions from the experienced, knowledgeable leaders of your company. If you are going to pass this on to a new employee, make sure you give them all the support they will need!

INITIAL QUESTIONS – Are you ready for a GSA MAS?

The first thing we do when a client wants to dive into the GSA process is ask these five questions:

- 1) Do you have a Commercial or Commercial Market Price List?
- 2) Do you follow your Commercial or Commercial Market Price List?
- 3) Do you have at least \$250,000 (more is better) in sales over the last year or two and will you be able to sell at least \$25,000 through your GSA Schedule (if awarded) within the next two years and then every year after that?
- 4) Is your product compliant with the Trade Agreements Act (i.e. is it made in the USA or a designated country and not in China or a non-designated country)?
- 5) Is your company able to show that it is financially responsible?

If you can say yes to these five questions, this may be a great time for you to complete a proposal for one of the most respected and effective federal government contracting vehicles. The GSA Schedule program is open to all businesses, whether large or small, as long as they meet GSA's requirements and submit a winning proposal to GSA, so don't let your size hold you back.



When you see this sign,
it's time to stop and
assess your situation,
make a choice, and/or
document information.
Below is our first pause.

ARE YOU READY FOR A GSA SCHEDULE?

Complete the following by reading the parameter in Column 1, choosing the best-fitting statement in Column 2, and writing the corresponding points in Column 3:

Column 1 (Parameter) Read this statement and choose the option in Column 2 which fits best.	Column 2 (Check the statement which fits your current status.)	Column 3 “Points”
This is the status of my Commercial (or Market) Price List (CPL).	<input type="checkbox"/> I have a written CPL. (3 pts) <input type="checkbox"/> I have an informal CPL and can formalize it in writing. (2 pts) <input type="checkbox"/> I have no CPL, but can try to make one. (1 pt)	
We sell commercially or have sales to federal agencies. This is the status of my CPL and how closely we follow it.	<input type="checkbox"/> I follow my CPL to a “T”. (3 pts) <input type="checkbox"/> I generally follow my CPL, but there are some clients I have to discount outside my parameters. (2 pts) <input type="checkbox"/> I discount as needed to make sales regardless of what is written in my CPL. I have to survive and that takes sales. (1 pt)	
My annual sales for last year (and good past performance) are...	<input type="checkbox"/> over \$300,000 and excellent past performance. (3 pts) <input type="checkbox"/> between \$100,000-\$299,000 and/or good past performance. (2 pts) <input type="checkbox"/> less than \$100,000 and/or not much past performance. (1 pt)	
My products are made in the USA or a designated country (products made in China are not accepted).	<input type="checkbox"/> All my products are TAA compliant or I only sell services. (3 pts) <input type="checkbox"/> Some of my products are TAA compliant and I sell services as well. (2 pts) <input type="checkbox"/> None of my products are TAA and I sell no services. (1 pt) (for more TAA info, see: https://vsc.gsa.gov/administration/compDetails.cfm)	
This explains how my financials look overall and describes my accounting system (QuickBooks is typically acceptable).	<input type="checkbox"/> I have two to three years of excellent financials, and an excellent accounting system. (3 pts) <input type="checkbox"/> I have two-to-three years of reasonable financials <or> my solicitation doesn’t require two years, and my accounting system is adequate. (2 pts) <input type="checkbox"/> I have financials, but things have been mighty tough and they don’t look that great. (1 pt)	
Add up all the points you have written in Column 3 and write the total here:		
<p>How to interpret your score:</p> <p>11-15 points – This may be the perfect time for you to take advantage of the GSA MAS program and prepare a proposal. You may have an excellent chance at completing a winning GSA proposal.</p> <p>6-10 points – A GSA Schedule may be within your grasp, but you may want to tighten up your business practices as you work towards your proposal to enhance your chance at completing a winning GSA proposal.</p> <p>1-5 points – You may wish to examine your business practices and results before you embark on the preparation of a GSA proposal. You may be able to complete a winning GSA proposal, but the odds do not look so good at this time. You are welcome to call us for a free consultation just to be sure – 320-434-9472.</p>		

Once you review your company's ability to potentially meet GSA's requirements, you need to make sure that you can meet the responsibility requirements in FAR 9.104 as listed below:

"9.104-1 -- General Standards.

To be determined responsible, a prospective contractor must --

- (a) Have adequate financial resources to perform the contract, or the ability to obtain them (see [9.104-3 \(a\)](#));
- (b) Be able to comply with the required or proposed delivery or performance schedule, taking into consideration all existing commercial and governmental business commitments;
- (c) Have a satisfactory performance record (see [9.104-3\(b\)](#) and [Subpart 42.15](#)). A prospective contractor shall not be determined responsible or nonresponsible solely on the basis of a lack of relevant performance history, except as provided in [9.104-2](#);
- (d) Have a satisfactory record of integrity and business ethics;
- (e) Have the necessary organization, experience, accounting and operational controls, and technical skills, or the ability to obtain them (including, as appropriate, such elements as production control procedures, property control systems, quality assurance measures, and safety programs applicable to materials to be produced or services to be performed by the prospective contractor and subcontractors). (See [9.104-3 \(a\)](#).)
- (f) Have the necessary production, construction, and technical equipment and facilities, or the ability to obtain them (see [9.104-3\(a\)](#)); and
- (g) Be otherwise qualified and eligible to receive an award under applicable laws and regulations.”¹

Estimated Time Commitments

It takes time to go through the GSA MAS proposal process. A conservative estimate of your time is between 25 and 125 person hours (more if your company is large and your offerings complex). On the GSA side, GSA strives to review proposals as quickly as practicable, but they often now estimate up to 3 to 12 months or more. The Information Technology large category also has a rapid review program called “FAST Lane” or “FASTLane” that can help get your proposal approved in less than 60 to 90 days so long as you have the right offerings and meet specific parameters. There are specific requirements for a FAST Lane proposal. See the Appendix for GSA's guidance on the subject.

¹ FAR 9.104-1

The intent of this book and our supporting material is to make getting, keeping, and succeeding with a GSA Schedule contract easier. For those readers well-versed in government proposals and contracts, this book may be all you need to find your way through the proposal process. For those who have never prepared a government proposal before, you may find this book to be helpful, but it may not get you all the way through the process. You may find that you need additional assistance in preparing your proposal. We would suggest that you always have a professional review your proposal to ensure that it gets through the GSA review smoothly. GSA proposals can be complicated and hundreds of pages long. In the event you need more information to complete your proposal yourself, visit our website at diy-gsa.com. DIY GSA offers a variety of GSA proposal preparation products and services and hourly consulting rates for proposal assistance and contract management assistance. We honestly hope this book will be a great springboard for you. If you want additional, low-cost assistance, we often offer a DIY webinar series to help you find more answers that may be unique to your organization's offerings and requirements. Or you can check out our YouTube videos.

IMPORTANT WEBSITES

If you made it through the previous exercise and believe that your company can qualify for a GSA MAS contract, there are several websites you are going to want to remember. Let's go through these sites and get you set and ready to accomplish your GSA MAS goal.

- 1) www.gsa.gov This is the site for all things GSA.
- 2) www.elibrary.gsa.gov This is your gateway to the specifics about the different GSA Multiple Award Schedules, their solicitations, and your competitors who have GSA contracts. We will refer to this many times and you can go there often to find answers such as:
 - Whether your competitors have a GSA MAS Contract
 - Your competitors' terms and conditions
 - How to find your solicitation documents
 - What SIN fits your company offerings
 - GSA's definition of scope or their SOW (hint: It's the SIN description.)
- 3) www.gsaadvantage.gov This is where we can see what your competitors are selling and what their pricing looks like.
- 4) www.sam.gov This is the key registration for government contractors. You must be registered and have the appropriate NAICS for your GSA Schedule and (SIN) in order to win a GSA contract. GSA has recently ramped up sam.gov and is creating a central location for all things procurement.
- 5) <https://vsc.gsa.gov> GSA's Vendor Support Center. You will use this site to help you complete your proposal, submit your proposal, and to manage your contract after you receive it from GSA. You will need this site!
- 6) <http://eoffer.gsa.gov> GSA's eOffer. This is where you will go to upload your proposal and to register for GSA's many websites.
- 7) <https://d2d.gsa.gov/report/fas-schedule-sales-query-plus-ssg> GSA's Schedule Sales Query site. This is where you can find out the dollars being spent through each schedule as well as how much revenue your competitors may be receiving through their GSA Schedule. You will also use this site to complete the required Readiness Assessment.
- 8) <https://www.gsa.gov/buying-selling/purchasing-programs/gsa-schedule/selling-through-schedule/roadmap-for-new-schedule-offerors/1-get-ready/available-offerings-and-requirements> A critical website that gives you access to information about requirements in the solicitation and some forms you need that, sadly, aren't included with the solicitation.