

DIY GSA 30-day Workbook



Do-It-Yourself GSA

Preparing you to:

Write • Win • Succeed

**A companion workbook
to the
GSA Proposal Guide
GFY 2022
PREVIEW
By Tracie G. Grant**

**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.



Iconography



Great Ideas and Best Practices



GSA Intro Videos (YouTube videos)



Live Webinars

NOTE:

Extra Tidbits of Good Information

Hello!

Welcome to our **30-day Workbook**. This workbook has been created to supplement our **GSA Proposal Guide** along with our **GSA Sample Proposal**. The GSA Proposal Guide was initially published in 2014 and has been updated several times as GSA has adjusted the Multiple Award Schedule program. The Workbook has been a dream since about 2015, but every time we'd have room in our schedule to work on it, GSA would update the solicitation and we'd have to turn our focus back to the GSA Proposal Guide to update it. We have finally forced the schedule because:

- GSA's efforts to communicate better and simplify the proposal process is giving contractors more tools, but they don't know things from the commercial side and what they provide isn't quite complete,
- We truly believe that there are thousands of business owners who want to save \$5,000 - \$15,000 in proposal writing fees, and
- Technological advances make it possible for us to offer our services to you in a blended learning platform so you can access all our resources, so,

NOW is the time to release this Workbook, and here it is!

NOTE:

As you start out, you will need to know that the order of the work you need to complete may not align perfectly with the GSA Proposal Guide because of so many of GSA's recent changes; however, they do complement each other, and along with the GSA Sample Proposal, they give you the trifecta of tools that will allow you to finally complete your own GSA Proposal.

The 30-day outline we suggest is provided below. You do, of course, have the freedom to move the days around to suit your business. If you are a larger business, it may take your Accounting Department long than three days to get you the invoices you request on Day 14, so you won't have them for Day 17's activities. If that is the case, adjust your timeline.

We would suggest you review the schedule below and then read the GSA Proposal Guide before you tackle the GSA Solicitation or even GSA Pathways to Success training document. There is great background information in the GSA Proposal Guide that will give you a good foundation for the rest of the process.

The Next 30 Days: What you are going to do!

Activity	Approximate Time
Day 1 – Create a Master folder for your GSA documents, review GSA’s new Roadmap site, and complete the Pathways to Success training.	2 - 4 hours
Day 2 – Review the solicitation.	1 - 2 hours
Day 3 – Create a list of the products and services you could, or that you want to, include in your GSA proposal.	1 - 2 hours
Day 4 – Review the list you created in Day 3 and choose which large categories, subcategories, and SINs fit your offerings. Review the SINs and decide which ones you will propose under.	1 - 2 hours
Day 5 – Send out the past performance questionnaires to at least three (3) clients and write a narrative to provide to GSA, or, if you already have them, gather three CPARs from three different and distinct contracts.	1 hour
Day 6 – Review your sam.gov registration to ensure it is current and accurate and you have all the NAICS you need in your profile. Each SIN must have a corresponding NAICS in your sam.gov profile.	.5 hour
Day 7 – Complete the Readiness Assessment.	1 - 3 hours
Day 8 – Prepare your Commercial or Commercial Market Price List, including project descriptions and/or labor category descriptions.	1 - 2 hours
Day 9 – Customize your proposal tracker and review the process.	.5 - 1 hour
Day 10 – Create a FAS ID.	.5 hour
Day 11 – If a non-manufacturer, determine who you need to send a Letter of Supply to, contact those companies, and request the Letter of Supply. Also, complete product SIN-relevant testing and quality requirement documents, hazardous materials information, and MSDS.	1 - 3 hours

DAY ONE: Folders/GSA Roadmap/Pathway to Success Training

Day 1 – Create a Master folder for your GSA documents, review GSA’s new Roadmap site, and complete the Pathways to Success training.

Time Commitment:

~2-5 hours

By the end of the day, you should have:

- ✓ Created your folders.
- ✓ Familiarized yourself with the GSA Roadmap.
- ✓ Completed the Pathway to Success Training.

CREATING THE MASTER FOLDER: (~TIME: 15 MINUTES)

You will need to create a place where you can permanently save your GSA files. A place where you can find them over the next 20 years.

We typically set up our file storage folders with the following:



- Folder “00 GSA Draft Documents”
- Folder “01 GSA Info Documents”
- Folder “02 GSA Award Documents”
- Folder “XX ARCHIVES”

REVIEW THE GSA ROADMAP: (~TIME: 15 MINUTES - 1 HOUR)

GSA has created a Roadmap to help you complete your GSA proposal correctly. They have made monumental strides in contractor assistance with the GSA Roadmap located at

<https://www.gsa.gov/buying-selling/purchasing-programs/gsa-schedule/selling-through-schedule/guide-to-preparing-a-schedule-offer>.

We will provide you some level of illustration here, but we also provide a review webinar where we walk through the site so you can see what we believe is most important.

Roadmap for New Schedule Offerors

1: Get Ready

Get Ready

Before submitting an offer to be a Multiple Award Schedule (MAS) contractor under MAS solicitation 47QSMD20R0001 there are a few steps you must take to get ready.

This section has three parts: training to help you better understand the MAS contract vehicle, completing required registrations, and identifying Special Item Numbers that best fit what you offer.

- Train
 - Pathways To Success
 - Readiness Assessment Training
- Register
 - D-U-N-S Number
 - System For Award Management(SAM)
 - Past Performance
 - Interact
- Understanding the Solicitation
 - Offer Document Submission Checklist [PDF - 96 KB]

Let's walk through the "Get Ready" section:

Train: Here on **Day 1**, we will address the Pathways to Success. We will address the Readiness Assessment on **Day 6**.

Register: This is a bit murky, and we expect GSA to clean it up over the next few months.

The **DUNS Number** is being replaced by the Unique Entity Identifier. If you have been in business for more than two years (as required by GSA), or if you are building a joint venture company, you should already have a DUNS Number. If you don't, you will want to get your registration completed before diving into your GSA proposal.

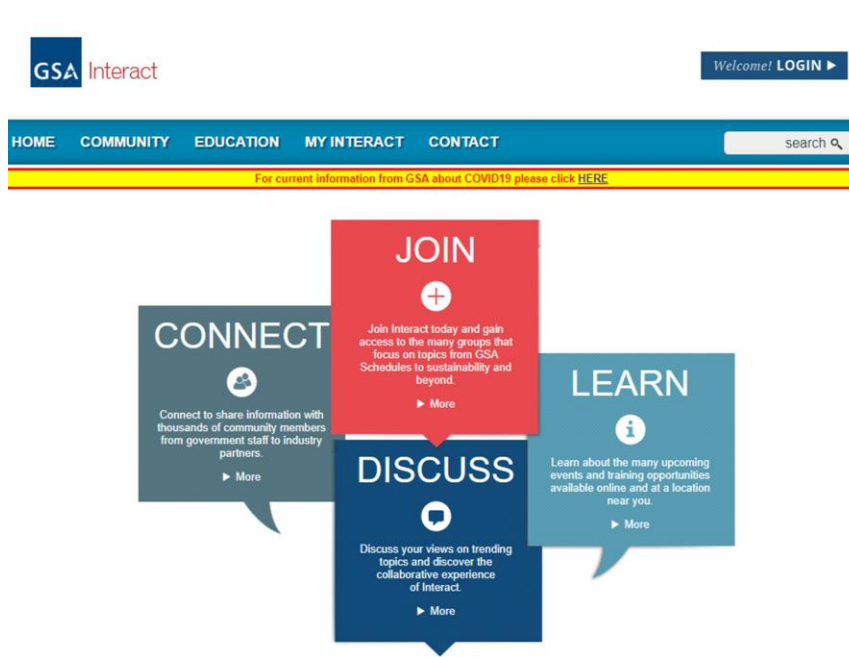
The **Systems for Award Management or (SAM)** registration must be completed before you can get paid for any government work. You can complete this registration on your own or pay someone to do it for you, but most companies do it themselves. Here's the URL that will take you to the registration page: <https://sam.gov/content/entity-registration>.

NOTE:

When you complete your sam.gov registration, make sure you list the authorized negotiators you are including in your GSA proposal as your points of contacts. It will make other registrations possible.

The **Past Performance** registration is not really applicable. There are two ways you can provide past performance. If you have CPARS, you should be able to access them without additional registration (no reference to registering for CPARS is included on the GSA page). If you're providing questionnaires from customers, there is no registration required. You will provide them the questionnaires with Section 1 completed and they complete the rest of the form. We address this further on **Day 4**.

Interact is a GSA website (<https://interact.gsa.gov/>) that gives you access to current and relevant GSA information.



It is not required for you to join Interact, but it is highly advisable. It is invaluable when it comes to staying current on all the GSA changes, and believe me, there are always changes and new places where you have to register!

Understanding the Solicitation: The solicitation is a document with more than 140 pages and 14 attachments. You will enjoy enough learning today with the Pathways to Success, so we'll tackle the Solicitation in our **Day 2** activities.

COMPLETING THE PATHWAYS TO SUCCESS: (~TIME: 1.0 – 4.0 HOURS)

Have the authorized negotiator who will be signing the proposal complete GSA's Pathway to Success training. It usually takes about an hour or two to complete this project.

This “training” is currently a pdf with reference links as located here (<https://www.gsa.gov/buying-selling/purchasing-programs/gsa-multiple-award-schedule/selling-through-schedule/roadmap-for-new-schedule-offerors/get-ready#pathways>) and in the Appendix to this book. You will need to read the full PDF and actually click on the reference links and understand the information presented. We have to commend GSA for working hard over the last few years to develop material that is helpful for prospective contractors. The information in the Pathways to Success is relevant and focused. If you are already a government contractor, it will be understandable. If you are new to government contracting, it will seem overwhelming at first, but if you go through it a few times, we think you’ll find it very helpful.