



BuildPERALTA Academy

Build Peralta Academy
How to Create Award Winning Proposals
Wednesday, December 1, 2021



Safety - Starts with Self Wellness Tips



- Exercise. Aim for at least 30 minutes of exercise daily



- Eat healthy



- Avoid mind-altering substances



- Prioritize sleep



- Build an internal focus of control



- Quiet time 10 minutes a day



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Agenda

- Welcome
- Introductions
- Bond Program Overview
- Key Benefits of Build Peralta Academy
- Commitment to Local Businesses
- Course – How to Create Award Winning Proposals
- Survey
- Q&A
- Closing



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Introduction of Presenters

Sharon Serrano, AECOM



Sharon Serrano
AECOM



Dr. Bonnie James
BRJ & Associates



Shonda Scott
360 Total Concept



Dr. Bridget Ssamula
AECOM



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Meet
The
Team



Sharon Serrano

Deputy Program Manager
AECOM



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Program Overview

Sharon Serrano, AECOM



BuildPERALTA Academy

\$77 Million
State Funding in Place

\$129 Million
Contract
Commitments

15
*Major Projects
Underway*

\$115 Million
Bonds Issued

56
*Infrastructure
Packages
Underway*

\$51.2 Million
Expended

Laney College



Berkeley City College



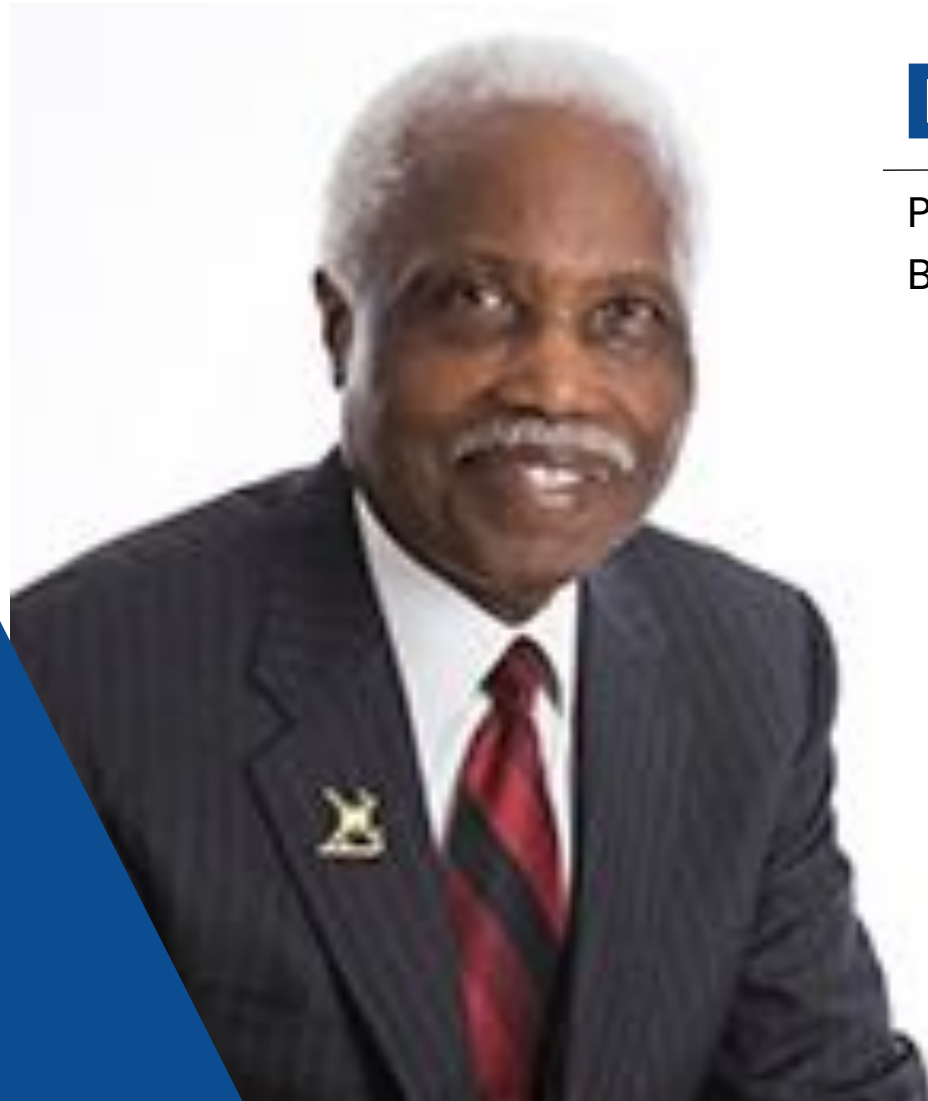
Merritt College



College of Alameda



Meet
The
Team



Dr. Bonnie James

President
BRJ & Associates



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


BuildPERALTA Academy

Dr. Bonnie James, BRJ & Associates

Key Benefits of Build Peralta Academy

- Instructional assistance workshop/ bootcamp
- Learn from industry experts
- Help small businesses build capacity



“How to Create Award Winning Proposals”

Meet the Expert:
Dr. Bridget Ssamula,
Key Account Coordinator: US East & LATAM,
AECOM






**Peralta Community College District's Bond Program
Technical Assistance Workshop Bootcamp**

12.1.2021 5:00-6:30pm Location ZOOM

Winning tips from the expert! Dr. Ssamula holds a PhD in transportation engineering, and has developed proposals winning over \$500M dollars in revenue.

Build Peralta Academy's technical assistance workshops provide tools to help small businesses navigate working on the Measure G Bond Program and major projects.

RSVP at buildperalta@peralta.edu
Upon RSVP, Zoom meeting link will be provided

@buildperalta     

build.peralta.edu



Meet
The
Team



Shonda Scott

CEO, Founder
360 Total Concept



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Commitment to Local Businesses

Shonda Scott, 360 Total Concept



- PCCD Small Business Policy
 - 25% Small Local Business Participation
- Certification (small business located in 6 cities in Peralta District: Alameda, Albany, Berkeley, Emeryville, Oakland and Piedmont)
 - SLBE: Revenue size has not exceeded gross annual revenue for the past 3 consecutive years
 - Construction Firms: \$8.5M > under
 - Goods Non-Professional Services Firms \$6M > under
 - A/E and Professional Services \$3M > under
 - SELBE
 - For businesses that have not exceeded revenue of \$1.5M past 3 consecutive years



Methods of Outreach Communications



- Peralta Website
- Build Peralta Site
- Peralta College Marketing
- Laney Construction Management Program
- Social Media: #buildperalta
 - Instagram
 - Twitter
 - Facebook
 - YouTube
 - LinkedIn

Meet
The
Expert



Dr. Bridget Ssamula

Key Account Coordinator: US East &
LATAM, AECOM



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• **Preparing Winning Proposals**

- Build Peralta Academy
- Small Business- Technical Assistance

- Bridget Ssamula PhD MBA Pr. Eng.(SA)
- Sr Director- AECOM:US East & LATAM

Proposal winning is a business growth strategy

- ✓ Marketing strategy- selling your business
- ✓ Business development- growing the pipeline
- ✓ Collaboration focus
- ✓ Focused Client engagement
- ✓ Developing your team: Seller – Doer model



Go No-Go process

- ✓ Formalize a list of questions or evaluation criteria to determine if a firm should pursue a potential project or not
- ✓ Build you pipeline 18-24 months ahead
- ✓ Address the pillars to assess project risk
 - ✓ Clients
 - ✓ Procurement requirements
 - ✓ Teaming
 - ✓ Competition
 - ✓ Win strategy

*Can we deliver the scope?
Do we team?
Do we have a good PM?
Who else will bid for this?*



Four Rules of Bidding



Rule 1 Establish who the key client decision makers are



Rule 2 What do the client key decision makers really want?

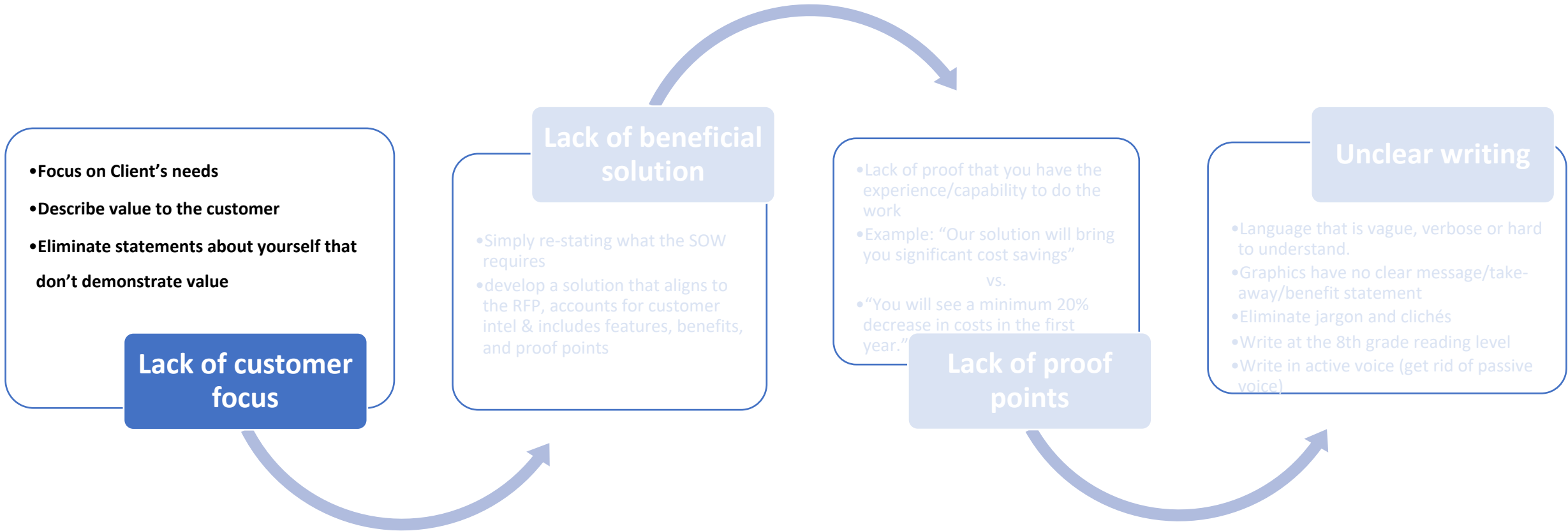


Rule 3 How can we deliver what the client key decision makers really want better than the competitors?



Rule 4 How will we communicate this clearly and effectively?

Common problems with proposals- debrief



Building Customer Focus

#1

Establish who the key decision makers are

- Who are the key decision makers for this opportunity?
- How strong is our relationship with the key decision makers (rank between 1 weak and 3 strong)?
- Background and overview of each key decision maker (specialist areas, career, likes and dislikes etc.)
- Personality and behaviours of each key decision maker

#2

Work out what the client really wants

- What are their issues, hopes, needs, fears and wants (hot buttons) for this opportunity?
- Who, in the eyes for the key decision makers, is in the 'A' team (consultants, contractors, supply chain, specialists, individuals)
- What does the winning delivery team look like to them?

#3

Work out how you can deliver what the client really wants better than your competitors

- What are our solutions to the key decision makers' issues, hopes, needs and wants (hot buttons) and how are they better than the competition's solutions?
- Who is the right bid team to create a winning bid (bid directors, workshop facilitators, and our people)?
- How can we beat the competition's solutions?

#4

Work out how you can communicate this clearly and effectively

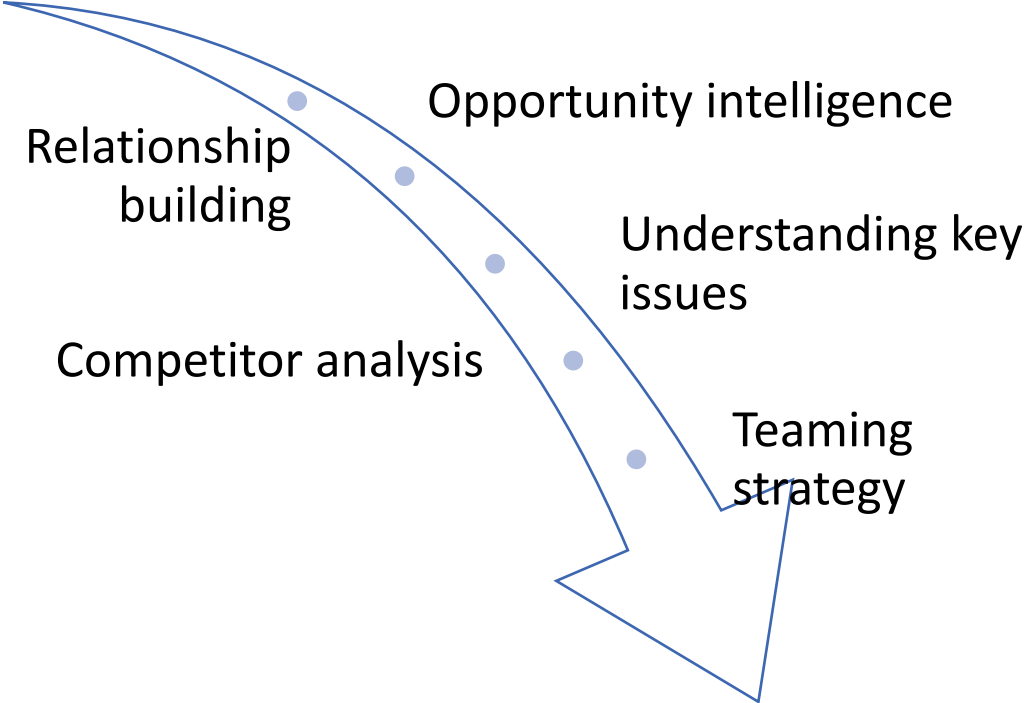
- Meetings, calls, industry talks and presentations
- Market engagement
- The PQQ and bid
- Marketing material

- ✓ Do you have a single person who manages the relationship with the Client?
- ✓ Do you have the right relationships?
- ✓ Is your business/entity known to the Client?
- ✓ Have you delivered work for them before?
- ✓ How did they rate your current /previous project delivery?



Positioning Roadmap

Project Timeline to market



Early Start

Identify COMPETITORS in the MARKET

Where are they POSITIONED?

largest

cheapest

fastest

Decide on provider's POSITIONING relative to rivals

BRAND POSITIONING

ORIGINAL CONCEPT ORIGINAL

Look for MARKET GAPS

Develop a UNIQUE SELLING PROPOSITION

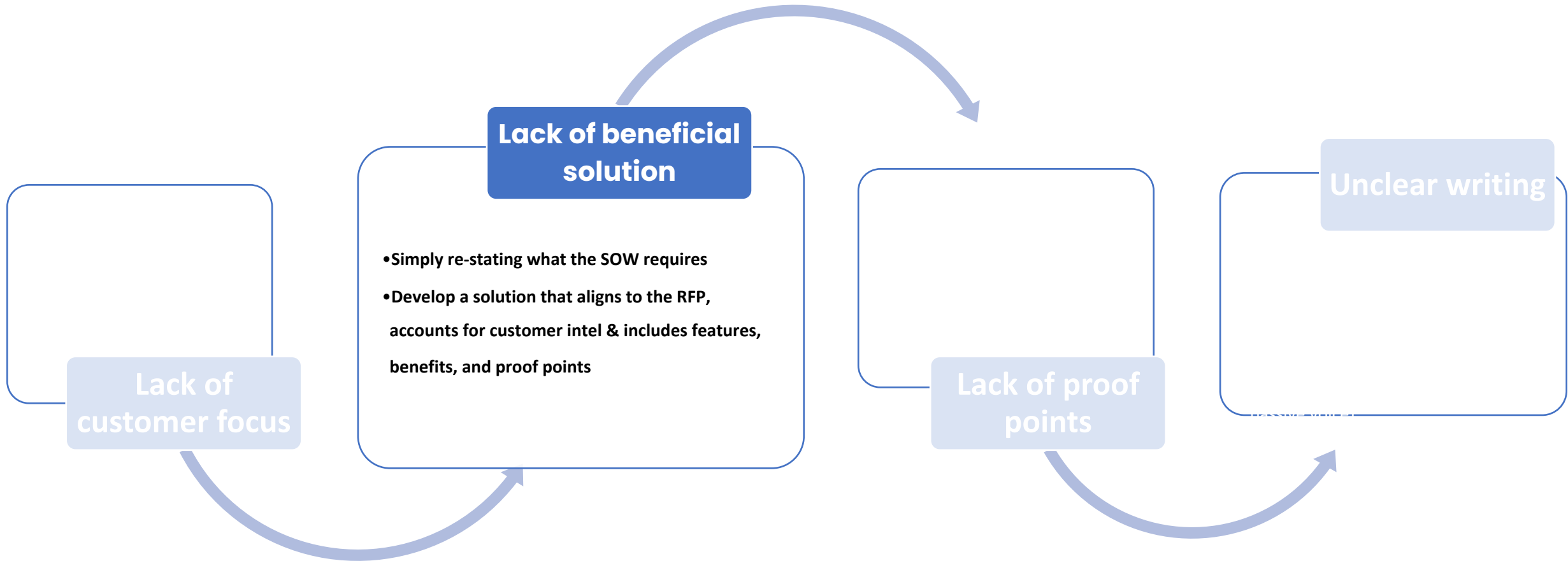
COMMUNICATE ...

DISTINCTIVE DIFFERENTIATION VALUE

... to the CUSTOMER

100% ORIGINAL

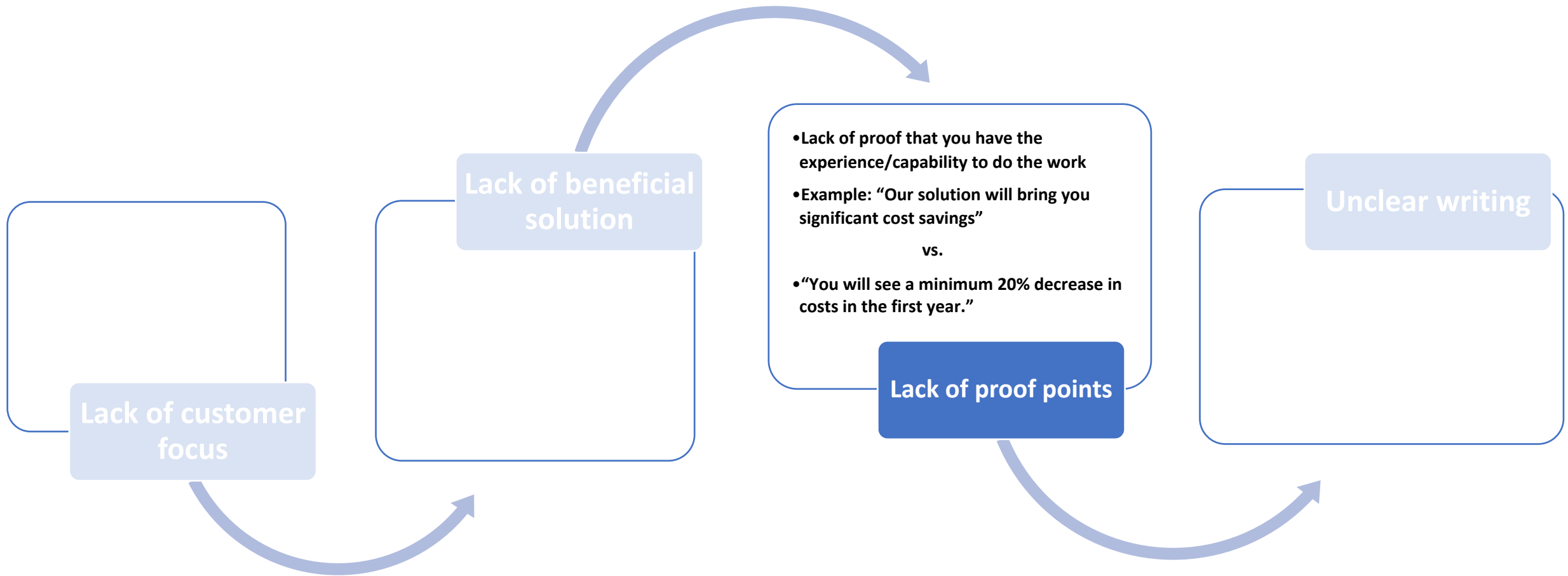
Common problems with proposals- debrief



Providing the Right Solution

A. Evaluation Criteria (Factors and Subfactors)	B. Client Challenges, Hot Buttons and/or Issues (map to evaluation criteria!)	C. Our Solution Features (Must map to column A and/or B)	D. Our Benefit to the Client (MUST address B)	E. Proof Point that Aligns to Column D	F. Strength (Benefit + Feature + Proof Point & Exceeds Requirements)
Program Management/ Quality Control					
Key Personnel					
Facilities Plan					
Past Performance					
Subcontracting Plan					

Common problems with proposals- debrief



Centralize & Collate Bid information

- ✓ Bid Support documents and certificates
 - ✓ Corporate memberships including certificates
 - ✓ Finance - information including accounts and certificates for operating and parent companies;
 - ✓ Legal - incorporation and registration certificates ;
 - ✓ Staff Numbers, Organization charts and location maps;
 - ✓ Supply Chain Management Scheme certification.



Centralize & Collate Bid information (2)

✓ Compile and standardize Bid Response Materials

- *Company Org structure,*
- *Philosophy, Intro & Strategy,*
- *Health, Safety & Environment statements,*
- *Community benefits examples,*
- *Equality, Diversity and Social Value,*
- *Ethics & Bribery statements,*
- *Business and Operational Methods,*
- *Quality,*
- *Sustainability &*
- *Corporate Social Responsibility (CSR).*

✓ Customize Bid Response Templates: RFI, SF330, SF254 and SF255 Documents—buy the templates for easy filling out.

ARCHITECT - ENGINEER QUALIFICATIONS										
PART I - CONTRACT-SPECIFIC QUALIFICATIONS										
A. CONTRACT INFORMATION										
1. TITLE AND LOCATION (City and State)										
2. PUBLIC NOTICE DATE						3. SOLICITATION OR PROJECT NUMBER				
B. ARCHITECT-ENGINEER POINT OF CONTACT										
4. NAME AND TITLE										
5. NAME OF FIRM										
6. TELEPHONE NUMBER			7. FAX NUMBER			8. EMAIL ADDRESS				
C. PROPOSED TEAM										
(Complete this section for the prime contractor and all key subcontractors.)										
PRIME CONTRACTOR	ARCHITECT	ENGINEER	ARCHITECT-ENGINEER	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT				
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/> CHECK IF BRANCH-OFFICE				
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ARCHITECT - ENGINEER QUALIFICATIONS										
PART I - CONTRACT-SPECIFIC QUALIFICATIONS										
A. CONTRACT INFORMATION										
1. TITLE AND LOCATION (City and State)										
2. PUBLIC NOTICE DATE						3. SOLICITATION OR PROJECT NUMBER				
August 29, 2018						WSP12DR-18-R-1234				
B. ARCHITECT - ENGINEER POINT OF CONTACT										
4. NAME AND TITLE										
Camee Ann Williams, CPSM Principal										
5. NAME OF FIRM										
Andana Consulting, LLC										
6. TELEPHONE NUMBER			7. FAX NUMBER			8. EMAIL ADDRESS				
443-297-9535			443-297-9535			cameeann@andana.biz				
C. PROPOSED TEAM										
(Complete this section for the prime contractor and all key subcontractors.)										
PRIME CONTRACTOR	ARCHITECT	ENGINEER	ARCHITECT-ENGINEER	9. FIRM NAME	10. ADDRESS	11. ROLE IN THIS CONTRACT				
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Andana Consulting, LLC	6030 Daybreak Circle Suite A150-252 Clarksville, MD 21029	Prime Contractor, Program Management, Project Management, Architecture, Mechanical Engineering				

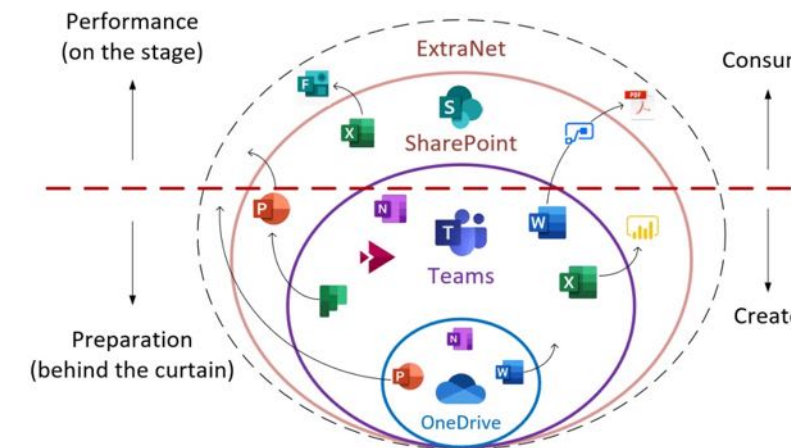
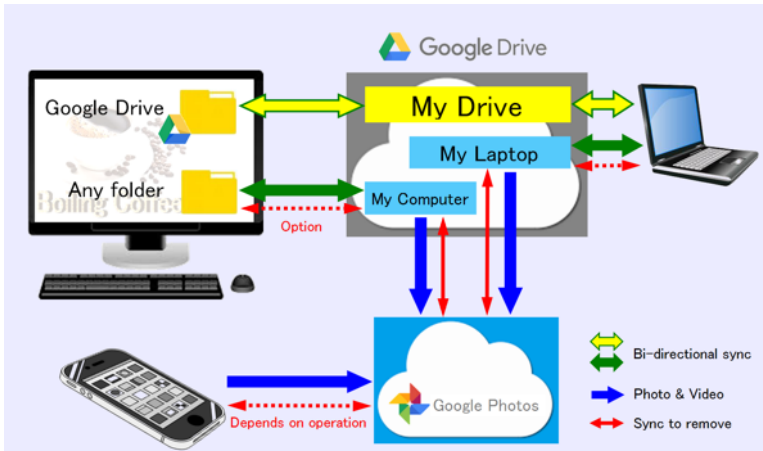
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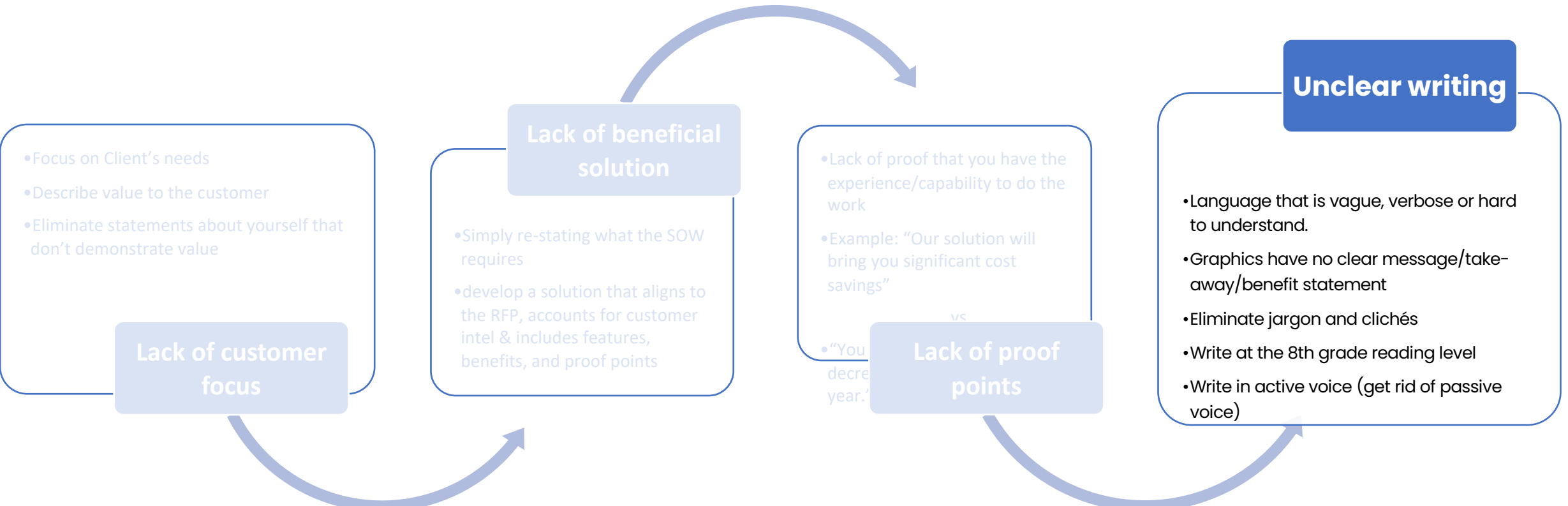
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Centralize & Collate Bid information (3)

- ✓ Bid Proof & experience
 - ✓ Graphics- Photos (Resources, projects)
 - ✓ Project experience: short form & case studies- verify facts, contact persons
 - ✓ Client & Project Reference letters
 - ✓ Resumes



Common problems with proposals- debrief



Clear Writing

- Overall writing Key Characteristics for all the writing in the proposal:
 - ✓ Well structured
 - ✓ Well presented
 - ✓ Logical idea flow
 - ✓ Clear messages
 - ✓ Convincing / compelling
 - ✓ Meaningful takeaways



- **Executive summary:** It sets the tone for what evaluators expect in the bid. It's the one most decision readers will read. It needs to contain:
 - Win Strategy
 - Win themes
 - 5-minute elevator pitch
 - Discriminators, and
 - Baseline solution

Get the proposal writing reviews done repeatedly by a set of new eyes at various stages before bid submission.

is not evaluated and doesn't score you any points but it's the "first impression and a summary of your proposal offering"

Graphics

- Pictures that provide captions that provide no clear connection to design solution/ experience/ benefit to the Customer

- Tables that are hard to read and require interpretation from the evaluator

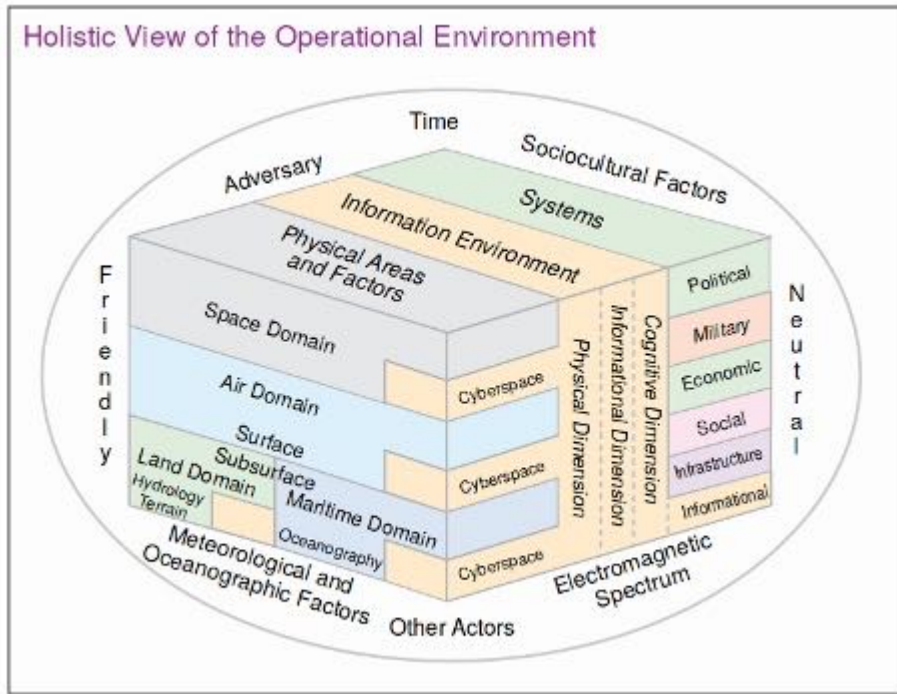
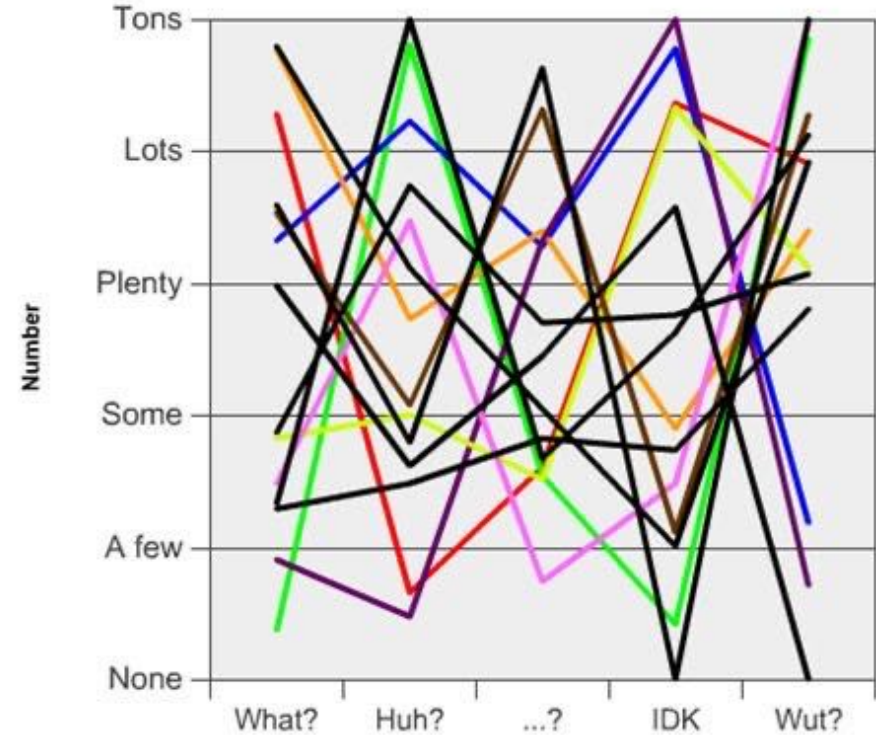


Figure I-1. Holistic View of the Operational Environment

Increase in Confusing Graphs



Overall Proposal 7 Quality Measures*

- Your proposal should exhibit:
 - Compliant structure
 - Responsive content
 - Customer-focused text
 - Compelling and feature-rich solution
 - Easy to evaluate structure
 - Visual communications
 - Well-written, easy-to-read text



*[APMP](#)

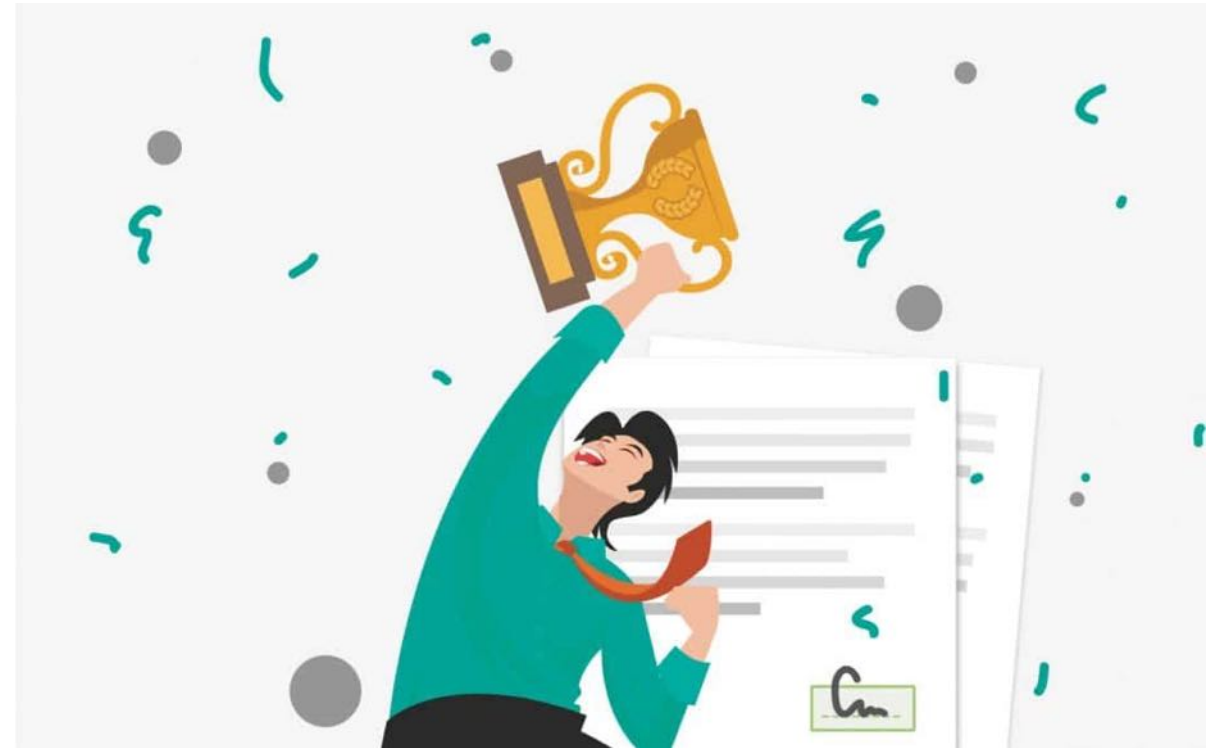
Key Takeaways[1]

– Start Early

- Work on your pipeline 12-18 months ahead
- Formalize Go No-Go process
- Develop action plans around Go projects
- Bios, resumes, compliance documentation

– Action Plan should cover

- Project intel
- Teaming/ Collaboration strategy
- Positioning- Message, Differentiators
- ISBP- provide a clear solution
- When RFP Hits the market
 - Confirm TOR's are as expected
 - Messaging & solution are still relevant
 - Schedule & Plan RFP delivery
 - Plan for reviews at 50%, 75% and 100% completion



Key Takeaways-[2]



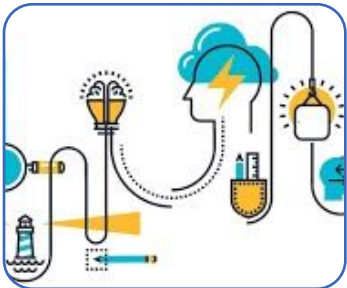
People

- Resume Database
- Identify teaming partners
- Ad-hoc technical writer & graphics support



Processes

- Agility in RFP development process required whether in Prime/ Sub position
- Keep track of compliance documentation & requirements- Small business
- Signatory powers, Core bid team



Systems

- Online –shareable platforms will make work easier. Investigate the need for one and invest in it.
- Proposal development software decisions- Word templates, Adobe Pro, In-design?



Thank you.

QUESTIONS?



Build Peralta Bond Program Contact Information



Website: build.peralta.edu
Email: buildperalta@peralta.edu
Phone: 510-587-7828
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