

POLARIS WEBINAR SERIES

POLARIS GWAC HUBZONE/ SDVOSB WEBINAR



TRIDENT
PROPOSAL MANAGEMENT



Polaris GWAC Webinar Series

HUBZone and SDVOSB – On deck!

And other relevant news...

Presented by:



Key Points

Don't Miss Them

- Latest GSA updates on Polaris GWAC
- Choosing teammates wisely
- Show stoppers for Polaris
- How to get to a bid decision fast
- Trident's winning GWACs Proven Process



Our Sponsors



TRIDENT Proposal Management

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- SDVOSB founded in 2008
- Specializes in Capture Management and Proposal Support
- Provides full-service Business Development, Capture, Proposal Operations & Management solutions, deliverables, and training for FedGov / DoD contractors.

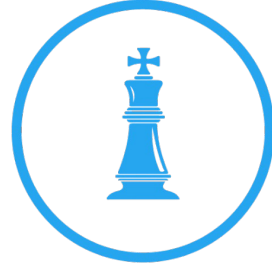
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Market
Management



Capture
Management



Proposal Management
and Writing



Training, Coaching and
Mentoring

Our Speakers



Nelson Santini, Business Development Expert

- US Navy Submarine Force Officer
- 25+ Years of FedGov/DoD BD/Sales
- Over \$2B in IDIQ Sales
- Avid SOPS blogger

nelson@tridentproposals.com



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Qualifying for Polaris GWAC IDIQ



Agenda

- Timeline and Program Review
- Scoring / qualification points for Polaris
- Polaris and Joint Ventures (JVs)
- Polaris GWAC IDIQ – Overview and Implications
- Evaluating your Pwin & COAs
- Bidding Process
- Teaming if you are “not best qualified”
- Planning beyond the bid
- Tools and Resources





Nelson Santini

Capture SME

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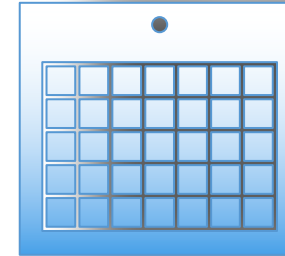


Polaris GWAC IDIQ - Timeline

- ◉ SB/WOSB

Questions: 08AUG2022

Deadline: 19AUG2022



- ◉ SDVOSB/HUBZone

Release: Q4 FY 2022

Qualifying for Polaris GWAC IDIQ

Overview

- GSA Sponsored / Governmentwide
- \$\$ via multiple awards (IDIQ)
- 10 years (1+4,+5 extensions)
- Small Business Set Aside
 - Hub Zone, SDVOSB
- I.T. Centric (All things I.T.)
- 100-200 Primes



Qualifying for Polaris GWAC IDIQ

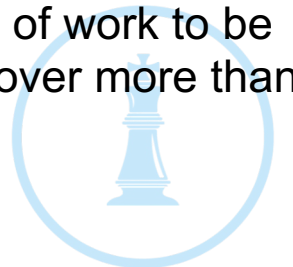
Implications / “So What?”



GWAC	10YR
IDIQ	\$B
“I.T.”	SBSA
CMMC	CAS

Key Implications

- All “traditional” Government agencies will likely be steered through one contract vehicle.
- Missing the bus on a 10yr vehicle sets you up for pain. May have few “onboardings”
- Multiple Task Orders – You either drive them, or “support others” – So you need this team function
- Rapid TO turn around – 10-15 days!!
- Small Businesses must lead / No “pass throughs” – So you must “staff up” the contract team
- Buried in “I.T.” there is a broad umbrella of work to be addressed. Teaming is a good idea to cover more than “one vector”



Relevant Experience and Past Perf.



Maximize your score

- Relevant Experience and Past Performance volumes of Polaris GWAC IDIQ will account for

70% to 90%
of your score!

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Relevant Experience and Past Perf.



Prioritize and focus your effort

- Draft your contract lineup
- Down select!
 - Identify Top projects
 - Drop “duds” early
- Rack ‘n Stack
- Identify key opportunities and evaluate BNB
- Strengthen bidding position and consider teaming

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Polaris GWAC IDIQ - Overview

Volume	Contents
1 – General	<ul style="list-style-type: none">• SF 33• Self Scoring Worksheet• Teaming Arrangements• Meaningful Relationship Commitment Letters• Professional Employee Compensation Plan• Uncompensated Overtime Policy• Representations and Certifications
2 – Relevant Experience	<ul style="list-style-type: none">• Primary Project Experience• Emerging Technology Project Experience
3 – Past Performance	<ul style="list-style-type: none">• CPARs or Past Performance Survey• <i>Negative Past Performance Narrative (Optional)</i>
4 – Systems, Certifications, and Clearances	<ul style="list-style-type: none">• <i>Cost Accounting System and Audit Information (Optional)</i>• <i>Approved Purchasing System (Optional)</i>• <i>CMMI Certification (Optional)</i>• <i>ISO 9001:2015 Certification (Optional)</i>• <i>ISO 20000-1:2018 Certification (Optional)</i>• <i>ISO/IEC 27001:2013 (Optional)</i>• <i>Facility Clearance (Optional)</i>
5 – Risk Assessment	<ul style="list-style-type: none">• Organizational Risk Assessment• Limitations on Subcontracting Compliance Risk (HUBZone & WOSB Only)
6 - Responsibility	<ul style="list-style-type: none">• Cybersecurity and SCRM Assessment• Financial Resources

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Qualifying for Polaris GWAC IDIQ

Evaluating your Pwin



- Not bidding, but for the wrong reasons
- Crafting a faulty bid strategy
- Forming too big or complex of a team
- Not preparing the right way (Claim vs. Evidence)
- You think your past performance covers areas it doesn't
- Ignoring "Emerging Tech" project experience
- Expecting work w/o hard work

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Qualifying for Polaris GWAC IDIQ

Evaluating your Pwin



About the Eligibility Checklist

- Go/No-Go decision making checklist
- Items in **RED** are potentially disqualifying
- Don't lose hope; we can help you team up!

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GSA POLARIS SERIES

BASIC ELIGIBILITY CHECKLIST

HOW TO USE THIS FORM

- This checklist will help you determine your company's eligibility to inform a go/no-go decision for the GSA Polaris Government-Wide Acquisition Contract (GWAC).
- Items in Red indicate *potentially disqualifying criteria* that should be confirmed or resolved prior to your company's decision to propose on the Polaris Master Contract.

Note: All information/criteria in this form is based upon the January 2021 Draft RFP and is subject to change.

**HAVE QUESTIONS ABOUT YOUR ELIGIBILITY?
NEED HELP FINDING A TEAMMATE?**

VISIT OUR WEBSITE AT
<https://www.tridentproposals.com/polaris>

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GSA POLARIS GWAC ELIGIBILITY CHECKLIST

on the Draft RFP and is subject to change.

Company POLARIS Contracts Manager
Name: Click or tap here to enter text.
Email: Click or tap here to enter text.
Phone: Click or tap here to enter text.

☐ Yes
☐ No – Contact Trident for help

508 of the Rehabilitation Act of 1998 (P.L. 105- Internet Information and

☐ Yes, Ineligible for Polaris ☐ No

☐ Yes
☐ No, Alternate IT Services NAICS Code will be used.
☐ Other – Contact Trident for help

☐ Small Business
☐ HUBZone
☐ Woman-owned Small Business
☐ None of the above – See next question

☐ Yes
☐ No, ineligible for Polaris

☐ Yes
☐ No – Contact Trident to find a team

SAM Registration is up to date?
☐ Yes
☐ No – Contact Trident for help

On Excluded Parties List:
☐ Yes – Ineligible for Polaris
☐ No

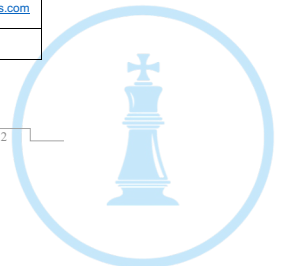
IT Services NAICS Code listed:
☐ Yes
☐ No – Contact Trident for help

☐ Yes
☐ No

☐ Yes
☐ No
☐ Unsure – Contact nelson@tridentproposals.com for a consultation

☐ Yes
☐ No – Contact Trident to find a team

Company can provide Relevant IT Services Experience?



*All information/criteria in this checklist is based upon the Draft RFP and is subject to change.

Company Name	Click or tap here to enter text.	
DUNS #	Click or tap here to enter text.	
Company POLARIS Program Manager: Name: Click or tap here to enter text. Email: Click or tap here to enter text. Phone: Click or tap here to enter text.	Company POLARIS Contracts Manager Name: Click or tap here to enter text. Email: Click or tap here to enter text. Phone: Click or tap here to enter text.	
Company Website Address: Click or tap here to enter text. Website conforms to accessibility standard referenced in Section 508 of the Rehabilitation Act (29 U.S.C. 794d), as amended by the Workforce Investment Act of 1998 (P.L. 105-220), August 7, 1998, Section 1194.22, Web-based Intranet and Internet Information and Applications?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Contact Trident for help	
Company is an Inverted Domestic Corporation?	<input type="checkbox"/> Yes, Ineligible for Polaris <input type="checkbox"/> No	
Company is a Small Business with a primary North American Industry Classification System (NAICS) code: 541512 Computer Systems Design Services?	<input type="checkbox"/> Yes <input type="checkbox"/> No, Alternate IT Services NAICS Code will be used. <input type="checkbox"/> Other – Contact Trident for help	
Company's Small Business Socio-economic designation is:	<input type="checkbox"/> Small Business <input type="checkbox"/> HUBZone <input type="checkbox"/> Woman-owned Small Business <input type="checkbox"/> None of the above – See next question	
If company is a Large Business, is the company considered a Small Business under IT Services NAICS 541512?	<input type="checkbox"/> Yes <input type="checkbox"/> No; ineligible for Polaris	
Company can submit Primary Relevant Experience under IT Services NAICS code?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Contact Trident to find a team	
System for Award Management (SAM) Status:	SAM Registration is up to date? <input type="checkbox"/> Yes <input type="checkbox"/> No – Contact Trident for help On Excluded Parties List: <input type="checkbox"/> Yes – Ineligible for Polaris <input type="checkbox"/> No IT Services NAICS Code listed: <input type="checkbox"/> Yes <input type="checkbox"/> No – Contact Trident for help	
Company able to maintain minimum insurance coverage for duration of Master Contract in accordance with POLARIS RFP Section G.9?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Company can expect to meet minimum contract sales requirement of \$500,000?	<input type="checkbox"/> Yes <input type="checkbox"/> No Unsure -- Contact nelson@tridentproposals.com for a consultation	
Company can provide Relevant IT Services Experience?	<input type="checkbox"/> Yes <input type="checkbox"/> No – Contact Trident to find a team	

Qualifying for Polaris GWAC IDIQ

Evaluating your Pwin



About the Relevant Experience Checklist

- Simple and straightforward approach
- Items in **RED** are potentially disqualifying
- Don't lose hope; we can help you team up!

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GSA POLARIS SERIES

RELEVANT EXPERIENCE PROJECT EVALUATION FORM (PRIMARY)

HOW TO USE THIS FORM

- This form is designed to help you determine how well a project aligns to the anticipated Relevant Experience criteria for GSA Polaris.
- Use a separate form for each project you are evaluating.
- **Items in Red** indicate *potentially disqualifying criteria* that should be confirmed or resolved prior to selecting the project for use in your proposal – contact us if you have questions!

Note: All information/criteria in this form is based upon the January 2021 Draft RFP and is subject to change.

**NEED HELP OR HAVE QUESTIONS?
WANT TO MAKE SURE YOU DO IT RIGHT?**

VISIT OUR WEBSITE AT
<https://www.tridentproposals.com/polaris>

Verification Documents

- ☐ FPDS-NG Report
- ☐ Standard Form (SF) 1449 – Solicitation/Contract/Order for Commercial Items – (Block 17a identifies the Prime Contractor, Block 9 identifies the U.S. Federal Government Agency, Block 3 identifies the Award/Effective Date, and Block 31c identifies the date the Contracting Officer signed).
- ☐ SF26 – Award/Contract – (Block 7 identifies the Prime Contractor, Block 5 identifies the U.S. Federal Government Agency, Block 3 identifies the Effective date, and Block 20C identifies the date the Contracting Officer signed).

Relevant Experience Project Evaluation Form (Primary)

ASSMENT FORM

on the Draft RFP and is subject to change.

Information

rd contract
e-Award Indefinite Delivery task order contract
Schedule contract
se Agreement

Contractor?

the subcontract specify the work in support of the

Related Services
g Services
Vices
nt Services
es

Performance of the project and for IT services?

**Inter text.
Inter text.
posal due date?
al RFP)**

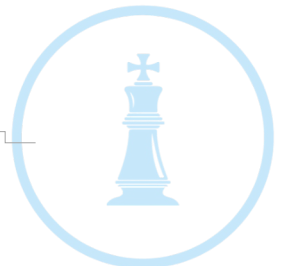
nce at the time of submission?

**nation.
ss than one year and that period of performance is complete.**

**red meet minimum criteria
is available?**

Relevant Experience Project Evaluation Form (Primary)

2



GSA POLARIS RELEVANT EXPERIENCE ASSESSMENT FORM

*All information/criteria in this form is based upon the Draft RFP and is subject to change.

Basic Project Information	
Project Title	Click or tap here to enter text.
Contract Type (Select One)	<input type="checkbox"/> Single contract <input type="checkbox"/> Single task order awarded under a Multiple Award contract <input type="checkbox"/> Single task order awarded under a master Single-Award Indefinite Delivery task order contract <input type="checkbox"/> Single task order placed under a Federal Supply Schedule contract <input type="checkbox"/> Single task order placed under a Blanket Purchase Agreement <input type="checkbox"/> None of these
Contract Role	Work performed as Prime Contractor or Subcontractor? <input type="checkbox"/> Prime <input type="checkbox"/> Subcontractor
Relevance of Work	If work was performed as a subcontractor, does the subcontract specify the work in support of the relevant experience area? <input type="checkbox"/> Yes <input type="checkbox"/> No – Project does not meet minimum criteria
Performance Area(s) Covered	<input type="checkbox"/> 518210 Data Processing, Hosting, and Related Services <input type="checkbox"/> 541511 Custom Computer Programming Services <input type="checkbox"/> 541512 Computer Systems Design Services <input type="checkbox"/> 541513 Computer Facilities Management Services <input type="checkbox"/> 541519 Other Computer Related Services <input type="checkbox"/> Other
Relevance	Were these performance areas integral to the performance of the project and for IT services? <input type="checkbox"/> Yes <input type="checkbox"/> No – Project does not meet minimum criteria
Project Status	<input type="checkbox"/> Project is ongoing <input type="checkbox"/> Project is completed Project Start Date: Click or tap here to enter text. Date of Completion: Click or tap here to enter text.
Period of Performance (Recency)	Completion is within 5 years of anticipated proposal due date? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> TBD (too close to call without final RFP)
Project Duration	Does project have at least one year of performance at the time of submission? <input type="checkbox"/> Yes <input type="checkbox"/> No – See next question If no, which one of these situations applies? <input type="checkbox"/> The project has an Interim or a Final CPARS. <input type="checkbox"/> The project has a completed Award Fee Determination. <input type="checkbox"/> The project had a base period of performance less than one year and that period of performance is complete. <input type="checkbox"/> None of these
Project Value	Total Value of Project: Greater than \$1M? <input type="checkbox"/> Yes <input type="checkbox"/> No – Project does not meet minimum criteria
Verification Documents	Which of the following contract documentation is available? <input type="checkbox"/> FPDS-NG Report <input type="checkbox"/> Standard Form (SF) 1449 – Solicitation/Contract/Order for Commercial Items – (Block 17a identifies the Prime Contractor, Block 9 identifies the U.S. Federal Government Agency, Block 3 identifies the Award/Effective Date, and Block 31c. identifies the date the Contracting Officer signed). <input type="checkbox"/> SF26 – Award/Contract – (Block 7 identifies the Prime Contractor, Block 5 identifies the U.S. Federal Government Agency, Block 3 identifies the Effective date, and Block 20C identifies the date the Contracting Officer signed).

Qualifying for Polaris GWAC IDIQ

Course of Action - Options



About the Courses of action

- No bid
- Bid alone – *we can help you do that*
- Build a team – *we can help you do that*
- Be part of a team – *we can help you do that*



Joint Ventures and GSA Polaris



JV Definition - 13 C.F.R.§121.103(h)

- A Joint venture is an association of individuals and/or concerns with interests in any degree or proportion intending to engage in and carry out business ventures for joint profit over a two-year period, for which purpose they combine their efforts, property, money, skill, or knowledge, but not on a continuing or permanent basis for conducting business generally.

Key Implications

- 51% owned by SB "Concern"
- 40% / 40% limits
- Past performance can be used.
- Two-year nonpermanent commitment. May be extended by KO.
- Not permanent & must be staffed / stood-up
 - This takes money and time!!
- IF YOU WANT TO MAKE A JV, YOU NEED TO START YESTERDAY.



Teaming Agreements

Teaming Arrangements FAR Subpart 9.6

Defined:

1) Two or more companies form a partnership or joint venture to act as a potential prime contractor;
or

(2) A potential prime contractor agrees with one or more other companies to have them act as its subcontractors under a specified Government contract or acquisition program.

Note: Teaming agreements often only apply to one solicitation or to a specific government program

Teaming Agreements



Benefits of Teaming Agreements

- Limit the parties' obligations to one another;
- Team members can tailor their negotiations to the specific solicitation and provide for a variety of termination provisions.
- Allow parties who are unfamiliar with each other and therefore reluctant to jointly form a new entity to pursue the solicitation;
- Reduce risk by requiring the prime contractor and the subcontractor to bear their own proposal preparation costs;
- Provided the parties comply with the limitations on subcontracting (48 C.F.R. § 52.219-14), the parties will not be considered "affiliates" for small business size calculations.

Teaming Agreements



Drawbacks of Teaming Agreements

- The re-negotiation of a teaming agreement for each solicitation;
- The risk that after the prime contractor receives the prime contract, the prime contractor and the proposed subcontractor will be unable to reach an agreement on the terms of a subcontract;
- The prime contractor is the only party in privity of contract with the government, and therefore bears the entire risk of contract performance.



Teaming Agreements

Things To Consider:

- Designation of a prime contractor and a subcontractor.
- Purpose and scope of the agreement.
- **Confidentiality** - Parties likely to share proprietary/confidential information while building a proposal. Mutual Confidentiality Agreement highly recommended.
- Protection and allocation of intellectual property – Include provisions to protect technical data, software, inventions, patents, etc.
- Relationship between prime and sub; Define division of responsibilities;
- Duration – Provides termination of agreement on occurrence of specified events such as end of contract, award to another contractor, inability to agree on T&C's, and cancellation of solicitation to name a few.

Conclusion



Joint Venture VS. Teaming Agreement:

JV

- Formation of new entity
- Can claim SB size standard
- 2-Year Period (possible extension) to bid
- Sharing Profit/Losses
- Equal Control
- Both parties has privy of prime contract
- SBA Protégé-Mentor program
- Hard to terminate

Teaming

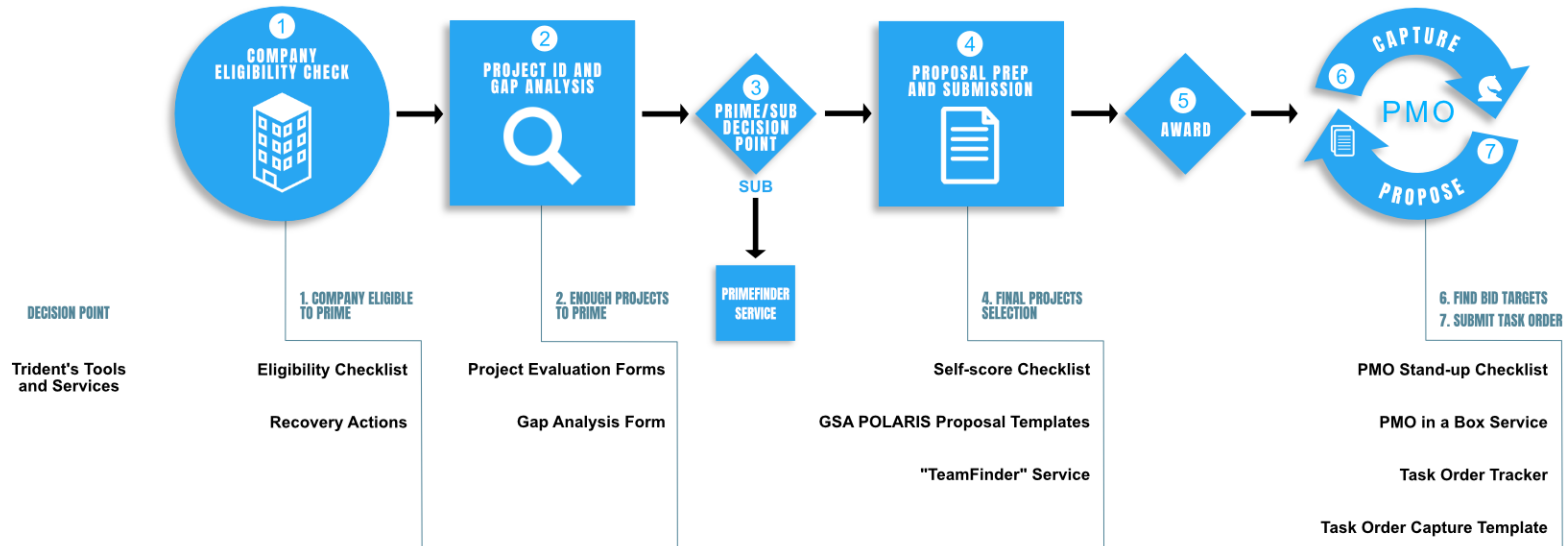
- Arrangement between two or more companies
- Size standard defined by each company
- Prime vs. Sub choices
- Customized agreement for each solicitation
- Not sharing Profit/Loss
- Sub has no Privy of Prime Contract
- No special SBA program
- Easy to terminate

Qualifying for Polaris GWAC IDIQ

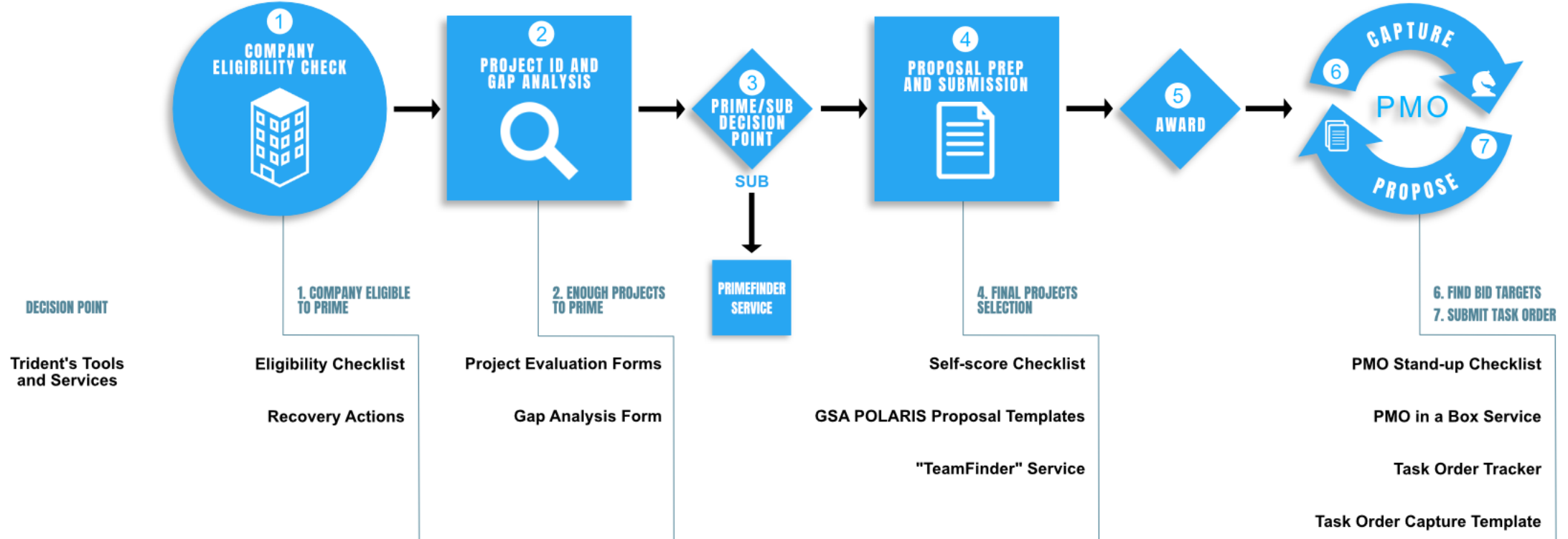
Bidding Process



TRIDENT'S **GWAC/IDIQ** PROVEN PROCESS



TRIDENT'S **GWAC/IDIQ** PROVEN PROCESS



Meet with us!



Learn more at

www.tridentproposals.com/blog?tag=polaris

First - Still time to bid Polaris



Available Support Options

Third Party Compliance Check

\$4,750

**Professional Support to Determine Eligibility,
Prime, Sub, or No Bid Decision**

- Review all of Volume 2 and Volume 3 documentation
- Complete your compliance and scoring matrix for Polaris within 2 business days
- Deliver a gap assessment with remedial recommendations
- Debrief with your capture and proposal team to discuss our findings and recommendations for improvement

Done for You Proposal Support

\$29,750

Professional Support to Complete the Proposal

- Complete your compliance and scoring matrix for Polaris, and guide you through an initial "Bid/No-Bid Evaluation"
- Help your team collect, organize, and prepare all materials required to complete your submission
- Perform a detailed review of your proposal and substantiating documentation to ensure compliance
- Monitor Q&A and Amendments to recommend updates or adjustments throughout the proposal response period
- Conduct a final quality check prior to submission