

# **GSA POLARIS SB & WOSB Set-Aside Pools Lessons Learned**

**Presented by:**



**TRIDENT**  
PROPOSAL MANAGEMENT

October 2022



# Key Points

## Don't Miss Them

- ❑ Latest Updates
- ❑ Lessons Learned from SB & WOSB Pools
- ❑ HUBZone and SDVOSB Set-Asides – Where Are We At?
- ❑ FAQs

# Our Sponsor

## Trident Proposal Management

- ✓ Service-Disabled Veteran-Owned Small Business (SDVOSB) founded in 2008
- ✓ Capture Management and Proposal Support specialists
- ✓ Provides full-service Business Development, Capture, Proposal Operations and Management solutions, deliverables, and training for FedGov / DoD contractors



Pipeline  
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# Our Speaker



## **Rebecca Wayland**, Capture Management SME

- 8 years DoD Proposal Writing / Management
- FastProp Co-Author
- Trident GWAC Lead
- Market Research & Proposal Expert
- Former U.S. Navy Surface Warfare Officer

# Latest Updates - Timeline

Submitted

## ◎ **SB\*/WOSB Pools**

Due: 7 October

\*New protests for the SB and WOSB Pools were filed on 7 Oct, decision due in January 2023. Previous protest for the SB Pool filed on 26 August is still under review with a decision due December 2022.



Active Now

## ◎ **SDVOSB/HUBZone**

RFP Release:	15 SEP 2022
Amendment 1 Released:	30 SEP 2022
Questions Due:	5 OCT 2022
Due Date:	<b>4 NOV 2022</b>

# Qualifying for Polaris GWAC IDIQ

## Overview for HUBZone and SDVOSB Pools

- ✓ Must be **HUBZone** or **SDVOSB** to compete in respective pools
- ✓ Prime and all offerors **must** be a SB in **NAICS 541512**
- ✓ Must submit at least **3 qualifying Relevant Experience** Projects
- ✓ Must be **registered in SAM.Gov**\*
- ✓ Must be able to demonstrate **Fiscal Responsibility**
- ✓ JVs and MP are permitted as long as they are **SBA-Approved**\*

*\*Start this paperwork early! Some offerors are experiencing significant delays with these approvals/verifications*

# Lessons Learned

## Customer Engagement is Key

### J.P-6 Forms

- Sync with teammates ahead of time on NAICS alignment
- Pre-fill out the information (and take credit for **any and all Emerging Tech and / or Cybersecurity**)
- Provide your substantiating documents so the Customer can see what you're looking at
- For NAICS (re)alignment, include your justification of why the work you performed was integral to the project (including the SOW / PWS with tasks highlighted is a great way to do this)
- Make sure the customer understands what your request does **not** include (i.e., not asking anyone to re-code the contract, not saying the claimed NAICS was the most important part, not asking for a \$ valuation of the effort, etc.)
- Make sure the form is actually signed

# Lessons Learned

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## Symphony

- ✓ Keep your file tags simple and consistent
- ✓ Keep your file names simple and intuitive
- ✓ Build a separate file tracker so you can:
  - Track what document you've used for each category / claim
  - Verify you meet all criteria "at a glance"
  - Have a running cross-reference for your Symphony submission
  - There's no "dashboard" difference between 1 and 5 files!!
- ✓ Add all prospective users before the due date
- ✓ Don't copy and paste fields in the PSP!
- ✓ Every proposal can benefit from a second set of eyes



# Lessons Learned

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## Miscellaneous

- **Teaming**

- Stick to assigned NAICS (and know your backups!)
- Reps & Certs (Need from solicitation AND SAM.gov)
- Subk Letter of Commitment
- Previous Contract to demonstrate relationship

## **GSA Form 527**

- Follow instructions – a lot of fields aren't required
- Separate files for previous 2 years + interim statement

- **Professional Compensation Plan**

- LCATs from Attachment J-2

- **Stovepipes can happen in SBs, too!**

- Evidence listed for project verification is not a pick and choose menu – as soon as you deviate from FPDS, you need everything (award document, SOW, J.P-6, etc) so track what you do / don't have early

# Common 'Gotchas' to Watch For

## Big Picture

- **Forming too big or complex of a team.** *Watch out for the 5,000 point penalty for “new” relationships. Also keep in mind each teammate will have associated admin requirements to complete for the proposal. And there are limits to how many projects your “ringers” can submit!*
- **Not preparing the right way.** *Make sure you have the right documentation (all of it!) for your projects so you can submit evidence that validates your claims. This can take time! Take note: the list of accepted evidence in the RFP is not a list you can choose from – if claiming points not substantiated by the FPDS records, you **must** include the SOW / PWS, award form, and signed J.P-6 from the government.*
- **Not reconciling discrepancies in your documentation.** *Make sure you are using the Total Contract Value, Start / End Dates, etc. on your J.P-6 form that match what your evidence reflects (e.g., FPDS, contract award form, etc.).*

# Common 'Gotchas' to Watch For

## Evaluating your Pwin

- **Sending out forms for government / customer signature before you have a strategy.** *If you are using a teammate's project that they are also using (for a separate pool, of course), agree on the project's NAICS alignment before you send out any forms.*
- **Not claiming points for everything your project is eligible for.** *If a project included Cybersecurity and / or Emerging Tech, make sure that is reflected on the Project Verification Form **even if you don't plan to claim the points for that particular project.** It's better to have the signed forms in place for qualifying work than to have to get something re-signed later because your project lineup changes.*
- **Don't rush into a teaming or JV / MP relationship.** *These relationships may not provide the advantage you think they will.*

# Frequently Asked Questions about the HUBZone and SDVOSB Pools

## Edited for Clarity

- **Can you win in multiple pools or are you limited to one pool?** **Yes,** a company can compete and be awarded a contract in each Polaris pool for which it qualifies but may only receive **one award per pool.**
- **If an offeror does not bid on the SB pool but bids on and receives an award on the SDVOSB pool, will the SDVOSB awardee be able to see and bid on any TOs that are issued to the SB awardees?** **No.** The Fair Opportunity process shall be specific to the individual pool being competed and may not be combined with any other Polaris pools (SB, HUBZone, SDVOSB, WOSB) or any other socioeconomic GWAC vehicles outside of the Polaris contract family, as contract terms and conditions will vary.
- **Will offerors be able to re-use forms from their SB and/or WOSB bids?** **So far, yes!** Where possible, GSA plans to allow the use of documentation from the SB and WOSB proposals for the SDVOSB and HUBZone proposals.
- **How many awards will the government make on the Polaris HUBZone pool?** **60 awards** in the HUBZone pool. In the event of a precisely tied score at the 60th position, all Offerors tied at the 60th position will receive a Master Contract award.

Information courtesy of GSA Interact website

[https://buy.gsa.gov/interact/community/190/activity-feed/post/9647e694-6933-4938-894f-8eef5d2ec136/Polaris\\_HUBZone\\_and\\_SDVOSB\\_Pools\\_Update](https://buy.gsa.gov/interact/community/190/activity-feed/post/9647e694-6933-4938-894f-8eef5d2ec136/Polaris_HUBZone_and_SDVOSB_Pools_Update)



# Frequently Asked Questions about the HUBZone and SDVOSB Pools

## Edited for Clarity

- **How many awards will the government be making on the Polaris SDVOSB pool?** **70 awards** in the SDVOSB Pool. In the event of a precisely tied score at the 70th position, all Offerors tied at the 70th position will receive a Master Contract award.
- **Can offerors re-use Relevant Experience Projects from their SB/WOSB submissions?** **Yes.** Projects may be submitted as Primary Relevant Experience Projects or Emerging Technology Relevant Experience Projects in both the SB and SDVOSB pools. However, projects submitted as Relevant Experience Projects or Emerging Technology Relevant Experience Projects may NOT be used in more than one proposal for the same pool.
- **If an SDVOSB is awarded under the SDVOSB pool and loses its set-aside status during the 10 years of the contract, will they be off-ramped? Or will they be able to remain and compete in the pool until the contract runs out?** Regarding status representations, **it is anticipated for the SDVOSB pool to follow essentially the same requirements as the WOSB pool**. Refer to the [Polaris WOSB pool](#) RFP Section G.11.2 and Section H.18 Handling of Size and Status Representations on SAM.gov: **Representation of size and socioeconomic status is required prior to the Master Contract's sixth year.**

Information courtesy of GSA Interact website

[https://buy.gsa.gov/interact/community/190/activity-feed/post/9647e694-6933-4938-894f-8eef5d2ec136/Polaris\\_HUBZone\\_and\\_SDVOSB\\_Pools\\_Update](https://buy.gsa.gov/interact/community/190/activity-feed/post/9647e694-6933-4938-894f-8eef5d2ec136/Polaris_HUBZone_and_SDVOSB_Pools_Update)

# CONTACT US

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