Liberty Healthcare Corporation
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# Liberty Healthcare Corporation and Affiliates (Liberty) Standard Operating Policy

| | | | |
|---|---|---|---|
| **Title:** | **Solicitation Response Protocol (Reprocurements)** | **Effective Date:** | **11/06/2014** |
| **Author:** | **Trish Piontek** | **Last Review Date:** | **09/23/2021** |
| **Location:** | **All Locations** | **Last Revision Date:** | **09/23/2021** |
| **Functional Area:** | **Business Development / Marketing** | | |

## POLICY

The purpose of this Standard Operating Policy (SOP) is to outline those process steps and functional accountabilities associated with the response management of reprocurement activity. The objective is to ensure that the process is well-organized; transparent to all stakeholders involved in solicitation responses; and results in solicitation responses that are compliant, responsive, and competitively differentiating, increasing the likelihood that Liberty retains existing business.

## PROCEDURE

The following process steps are associated with reprocurement solicitation activity:

1. Reprocurement Strategy Development: Customer/stakeholder relationship building and analysis of potential competitors and the marketplace.
2. Reprocurement Strategy Resource Needs Action Plan and Pre-Proposal Kick-Off/Win Strategy Meetings: Key tasks to prepare for an upcoming reprocurement, including points of accountability and target dates.
3. Watchlist Integration and Monitoring: Opportunity tracking in Dynamics 365 and monitoring for the upcoming solicitation / RFP through procurement agency website(s).
4. RFP Document Distribution: Establishment of a SharePoint team site and distribution of the RFP and other solicitation documents to stakeholders.
5. Scheduling Proposal Development Related Meetings: Scheduling of proposal development related meetings (i.e., kick-off, win strategy, status, pricing, and color team reviews to review the response logistics, timelines, pricing, technical proposal development, and strategies for success.
6. Solicitation Summary / Project Plan and RFP Document Analysis Development: Documentation of the RFP highlights, including internal/external deadlines, RFP points of interest, and proposal requirements.
7. Execution of Proposal Activities: Development of the technical and cost proposals.
8. Proposal Production and Shipping Procedures: Electronic upload and/or printing and shipping of the final completed technical and cost proposals.
9. Post-Submission Protocols: Confirmation of proposal receipt, updating of SharePoint and Proposal Database to reflect edited and new proposal materials, and competitive analysis of procurement result.

Detail supporting these key steps is included as **Appendix A**. The following supporting documents are included as **Attachments:**

- Attachment A: Customer Retention Strategy
- Attachment B: Solicitation Summary and Project Work Plan
- Attachment C: Win Strategy Document
- Attachment D: Pricing Meeting Summary

**Approved By:** Trish Piontek Digitally signed by Trish Piontek Date: 2021.12.03 18:14:12 -05'00'

## Revision History

| Version | Date | Author | Summary of Changes |
|---|---|---|---|

| | | | |
|---|---|---|---|
| #1 | 11/06/2014 | Trish Piontek | Policy Created |
| #2 | 09/23/2021 | Trish Piontek | Policy reviewed with changes made |

# Appendix A: Solicitation Response Process - Reprocurement

The following is process detail supporting the key steps associated with the response management of reprocurement activity. Designated point(s) of accountability have been identified within each [].

### 1. Reprocurement Strategy Development [Contract Manager]

All Liberty operations management is conducted with an eye toward customer retention. To this end, our Contract Managers complete a **Customer Retention Strategy (Attachment A)** at least one year before the customer seeks competitive proposals, with the goal of being continually well-positioned to retain the contract. In addition to the basics of operations management, the following factors are considered in the analysis:

- Customer Relationships: Broad, deep relationships at all levels of the customer organization to maximize communication and satisfaction.
- Stakeholder Relationships: Identify all key stakeholders and develop broad, deep relationships.
- Competitor Analysis: Identify all potential competitors and make sure Liberty is well-positioned relative to competitive organizations.
- Marketplace Analysis: Identify key variables such as procurement policy and industry trends that may have an impact on the customer organization's procurement decisions.

The Sr. Proposal Specialist will create a SharePoint team site to store the Customer Retention Strategy and any other relevant background materials. After the solicitation is released, the team site will be used to host the RFP and related documents, the draft proposal, and all the documents (*Solicitation Summary / Project Work Plan, Win Strategy*, etc.) outlined below.

One year prior to the estimated reprocurement date, the Contract Manager will update the Contract Management Dashboard with the anticipated dates of the reprocurement. At that time, the Contract Manager will update the strategy and review it with a small working group including key internal stakeholders (COO, Program Director, Subject Matter Experts, VP of Marketing, Proposal Writer, Sr. Proposal Specialist, etc.) to refine the strategy. The document will be revised as necessary.

### 2. Reprocurement Strategy - Resource Needs Action Plan and Pre-Proposal Kick-Off/Win Strategy Meetings [Sr. Proposal Specialist & Contract Manager]

Following the development of the reprocurement strategy, the Contract Manager, in collaboration with other key stakeholders, will develop an action plan to address any identified resource gaps and/or risks. This action plan will include key tasks to prepare for the reprocurement (i.e., identifying and obtaining letters of reference, reviewing recent agency-issued RFPs, etc.), points of accountability, and target dates for completion. The Contract Manager will be responsible for managing and reporting against the action plan and coordinating the scheduling of any associated pre-kick-off/win strategy meetings with the Sr. Proposal Specialist.

### 3. Watchlist Integration / Monitoring [Sr. Proposal Specialist & Contract Manager]

Three (3) months prior to the anticipated contract end date, the Sr. Proposal Specialist will add the reprocurement into CRM under Sales Stage 4 - Watchlist and will work with the Contract Manager to ensure that marketing is actively monitoring the correct procurement agency and site for an RFP. The Sr. Proposal Specialist will be responsible for properly registering Liberty to automatically receive all pertinent notifications regarding the solicitation and monitoring for any addendum activity.

### 4. RFP Document Distribution [Sr. Proposal Specialist]

Following the release of the RFP, the Sr. Proposal Specialist will:

- Notify the COO, Contact Manager, Program Director, and the VP of Marketing of the solicitation release.
- Upload the RFP and all associated documents to the SharePoint team site.
- Distribute the solicitation and associated documents by sharing the site with other key stakeholders.

Upon RFP release, the Contract Manager will serve as Quarterback, the Liberty team member who is responsible for leading the development and submission of a compliant, winning proposal.

**5. Scheduling Proposal Kick-Off and Win-Strategy Meetings [Sr. Proposal Specialist]**

Following the distribution of the solicitation, the Sr. Proposal Specialist will work with the Contract Manager to schedule (goal of three (3) business days) the *Kick-Off Meeting* and the *Proposal Win Strategy Meeting*. The objective of each meeting is as follows:

Kick-Off Meeting: Review the logistics and timelines associated with the solicitation. These include but are not limited to: service scope and schedule, roles and functional assignments, evaluation criteria, pre-proposal submission activities, *Technical* and *Cost Proposal* work plans, and production details. This 30-minute meeting includes the Contract Manager/Quarterback, COO, CFO, CIO (if applicable IT), Controller, Designated Financial Analyst, Sr. Assoc General Counsel, VP of Marketing, Designated Proposal Writer, Sr. Proposal Specialist, and the Program Director.

Proposal Win Strategy Meeting: Review the reprocurement strategy document, identify win themes, review RFP document analysis (current vs. previous RFP), and assignment of *Technical Proposal* content contributions. This 60-minute meeting will include the Contract Manager/Quarterback, Program Director, Proposal Writer, Sr. Proposal Specialist, Chief Operating Officer, and Vice President of Marketing. Other proposal contributors are invited on an as-needed basis.

If the scheduling of either meeting is delayed beyond three days, the Sr. Proposal Specialist will update all stakeholders relative to the scheduling status.

Prior to the *Win Strategy Meeting*, the Contract Manager/Quarterback will develop a draft **Win Strategy Document (Attachment C).** The goal of the document is to directionally inform and guide the proposal development team in responding to the solicitation with an eye toward establishing competitively differentiated win themes. This process builds on the ongoing **Customer Retention Strategy (Attachment A)** and is specifically focused on proposal development.

**6. Solicitation Summary / Project Plan and RFP Document Analysis Development [Sr. Proposal Specialist]**

The Sr. Proposal Specialist will document the solicitation response process by preparing a **Solicitation Summary / Project Work Plan (Attachment B)** and will conduct an RFP document analysis. The draft of these documents will be sent to the Contract Manager/Quarterback for review and approval and will be distributed to the proposal team in advance of the applicable meetings. The purpose of each document is as follows:

Solicitation Summary: Identifies key external dates and points of interest relative to the solicitation.
Project Work Plan: Identifies key proposal team members and internal deadlines based on the proposal due date.
RFP Document Analysis: Analysis conducted to comparatively review and analyze the current RFP document with the previous RFP document (if applicable). Material variances are provided to the Contract Manager/Quarterback and discussed, as needed, during the *Kick-Off* and/or *Win Strategy Meeting(s).*

Following the *Kick-Off Meeting*, the *Solicitation Summary / Project Work Plan* and *Win Strategy Documents* will be revised and uploaded to SharePoint as needed. The Sr. Proposal Specialist will send invitations for the proposal reviews (Blue, Pink, and Red Team) and proposal status meetings immediately following the *Kick-Off*.

**7. Execution of Proposal Activities**

Following the *Kick-Off* and *Win Strategy Meetings,* the process continues with the further execution of proposal activities including:

- Pre-Proposal Submission Activities [Sr. Proposal Specialist]: Examples may include confirming attendance at bidders' conference, developing and sending a letter of intent, communicating as needed with the procurement point of contact, and submitting Contract Manager/Quarterback approved questions for clarification.
- Prepare a Recruiting *Pre-Recruit Open Requisition Form (if applicable)* [Quarterback/Contract Manager]
- Proposal Shell Development [Sr. Proposal Specialist]: The Sr. Proposal Specialist will develop the proposal shell and populate the draft with RFP questions and standard boilerplate materials (company profile, program summaries, standard business service descriptions, etc.) maintained in the Proposal Database.
- Blue Team Review [Identified Members / Contract Manager]: The Contract Manager/Quarterback, Program Director, Proposal Writer, Sr. Proposal Specialist, VP of Marketing, and any identified Key Contributors meet to review the completed proposal shell. The goals of this meeting are to: 1. confirm that the proposal response structure is sound, 2: identify opportunities to weave key win themes and evidence into the proposal response, and 3: begin outlining responses to each major proposal section.
- Technical Proposal Development [Proposal Writer]: The proposal writer will utilize the proposal shell and work collaboratively with the Contract Manager/Quarterback, Program Director, Subject Matter Experts, and content contributors to develop the *Technical Proposal*.

- Technical Proposal Review [Identified Color Team Review Members]: A review will be conducted on the first and final draft of the *Technical Proposal*. The objective of each is as follows:
    - First Draft/Pink Team Review – During the First Draft/Pink Team review those reviewing the draft should be conducting a strategic, in-depth review to ensure consistency with win-themes, clearly articulated value propositions, compliance with evaluation criteria, response clarity, accuracy, and thoroughness. The First Draft/Pink Team Review typically occurs halfway through the proposal process, i.e., at the midpoint between the decision to submit a proposal and the due date.
    - Final Draft/Red Team Review – During the final draft review, those reviewing the draft should ensure areas identified during the first draft review have been addressed, identify any obvious shortcomings or neglected areas that can be further improved, and fix errors and inconsistencies in spelling, grammar, style usage, etc. The Final Draft/Red Team review typically occurs no less than five (5) business days prior to the proposal due date.

  Pink and Red Team proposal drafts are issued no less than two business days prior to these reviews. Participants are responsible for reading the draft and including suggested edits and comments within the proposal draft on the SharePoint team site prior to the meeting.
- Cost Proposal Development [Contract Manager/Quarterback & Financial Analyst]: Development of *Cost Proposal* includes development of internal and client facing budget and participation in *Preliminary* and *Final Pricing Meetings*.
- Pricing Summary Sheet Developed & Distributed [Contract Manager/Quarterback]: Prior to the Preliminary and Final Pricing Meetings, the Contract Manager/Quarterback will develop and distribute a *Pricing Summary Sheet* **(Attachment D)** that summarizes relevant cost proposal information (e.g., customer budget, financial assumptions, pricing strategy) to meeting participants (24-48 hrs. prior to meeting).
- Schedule Pricing Meetings [Vice President of Marketing]: The Vice President of Marketing will contact the President following the *Kick-Off Meeting* to confirm availability and will schedule the *Preliminary* and *Final Pricing Meetings*. Unless decided otherwise, the President will participate in only the *Final Pricing Meeting*.
- Conduct Status Meetings [Sr. Proposal Specialist]: Review ongoing status of proposal activities and deadlines. Status meetings typically take place two to three times per week; more or less as needed. Attendees include the Contract Manager/Quarterback, Program Manager, Proposal Writer, VP of Marketing, and Sr. Proposal Manager. Other proposal contributors may also attend, as needed, depending on the meeting agenda.
- Complete Required Forms [Sr. Proposal Specialist]
- Monitor for Solicitation Amendments [Sr. Proposal Specialist]
- Review Legal Content [Sr. Associate General Counsel]: This includes review of penalty clauses, insurance requirements, contract performance requirements, sample contract, etc.
- SDB Plan Development [Sr. Proposal Specialist]: If MBE/WBE/VBE participation is required, a plan of action will be developed by the Sr. Proposal Specialist with input from Quarterback/Contract Manager. The Financial Analyst will also be informed to the extent that the plan impacts the development of the *Cost Proposal*.

### 9. Proposal Production and Shipping Procedures [VP of Marketing and Sr. Proposal Specialist]

Following the completion of the *Technical* and *Cost Proposals*, the VP of Marketing and Sr. Proposal Specialist will initiate activities related to proposal production and submission in accordance with requirements identified in the solicitation summary/project plan. For reprocurements, ship two days (48 hours) ahead of deadline to have a day to recover if necessary. If FedEx misses the deadline, alert Quarterback/Contract Manager immediately. A backup plan needs to be identified and agreed upon by the Quarterback/Contract Manager and VP of Marketing in the event there is an issue with shipping.

### 10. Post Submission Protocols

The following post-submission protocols are to be followed:

- Contact should be made to confirm receipt with designated procurement point of contact and an attempt made to determine the number of competitive submissions. [Sr. Proposal Specialist]
- All final proposal docs are saved in the SharePoint proposal team site. [Sr. Proposal Specialist]
- The status of the opportunity should be updated in CRM to Sales Stage 8 – Solicitation Response or Document Submitted. All related solicitation activity (e.g., responses to clarification questions, Best and Final Offer requests, etc.) should be captured and documented in CRM. The Sales & Marketing Coordination meeting will also be utilized to update and brief the team regarding the status of the proposal. [Contract Manager]
- Within three (3) business days of production, a link to the Solicitation Response Satisfaction Survey should be distributed to all team members. [Sr. Proposal Specialist]

- Edits to existing proposal content or new proposal content that may be useful in future solicitations will be added to the Proposal Database on SharePoint. [Sr. Proposal Manager]
- Respond to any clarification or BAFO requests following submission. [Proposal Team]
- Obtain, review, analyze, and report evaluation and competitive response documentation, award documentation, evaluation results, etc. [Sr. Proposal Specialist/VP of Marketing]
- An internal and external (if allowable by solicitation) debrief meeting should be scheduled in collaboration with the Contract Manager/Quarterback to review and discuss outcomes and identify process improvement opportunities. [VP of Marketing]
- Notification of the procurement outcome is to be immediately communicated to the Contract Manager/Quarterback who then informs the Executive Team of the outcome.
- All final and related solicitation files should be updated on the designated SharePoint subsite. The subsite should be archived following the final award decision. [Sr. Proposal Specialist]

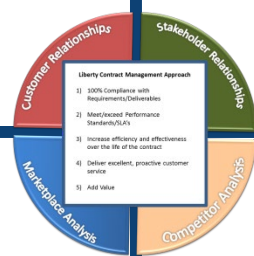
# CUSTOMER RETENTION STRATEGY ~ LANDSCAPE

Program: ______________________________ VP: ______________________________

Date: ______________________________ Director: ______________________________

## CUSTOMER RELATIONSHIPS

## STAKEHOLDER RELATIONSHIPS




## MARKETPLACE ANALYSIS

## COMPETITOR ANALYSIS

# CUSTOMER RETENTION STRATEGY ~ ACTION PLAN

Program: ______________________ VP: ______________________

Date: ______________________ Director: ______________________

## CUSTOMER RELATIONSHIPS

## STAKEHOLDER RELATIONSHIPS


## MARKETPLACE ANALYSIS

## COMPETITOR ANALYSIS

# Customer Retention Strategy ~ Things to Consider

Program: ______________________________ VP: ______________________________

Date: ______________________________ Director: ______________________________

## Customer Relationships

## Stakeholder Relationships


## Marketplace Analysis

## Competitor Analysis

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# Customer Name
# Program Name / Solicitation Number
# Solicitation Project Work Plan

## GENERAL INFORMATION

| | | | |
|---|---|---|---|
| **State** | **Solicitation/RFP Title** | | **Solicitation Number** |
| **Enter State** | | | |
| **Agency/Department/Client Name** | | **Type** | **Source** |
| | | **SELECT** | **SELECT** |
| **Date Issued** | **Date Received** | **Date Distributed** | **Due Date/Time** |
| **Product Line** | | **Service(s) to be Provided** | |
| **Contract Duration** | | **Contract Value** | |
| **Enter Data** | | | |

**Is there an incumbent? If yes, provide vendor name.**

**SELECT** Enter Data

## CLIENT CONTACT INFORMATION

| | | | |
|---|---|---|---|
| **Designated Contact** | **Title** | **Phone Number** | **Email Address** |
| **Mailing Address** | | **Submission Address** | |

## PRE-SUBMISSION ACTIVITIES

| | | |
|---|---|---|
| **Letter of Intent (date/time)** | **Pre-Bid Conference (date/time)** | **Location** |
| **SELECT** | | |
| **Internal Questions Due Date** | **Question Due Date** | **Expected Q&A Response Date** |

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# Customer Name
# Program Name / Solicitation Number
# Solicitation Project Work Plan

## SCOPE OF SERVICES, RFP & CONTRACT DETAILS

| Solicitation/Contract Details (bidder requirements, contract terms, etc…) |
| --- |
| **Background:**<br><br>**Scope of Services:**<br><br>**Contract Term:** |

## TECHNICAL PROPOSAL

| | |
| --- | --- |
| **1.** | |
| **2.** | |
| **3.** | |
| **4.** | |
| **5.** | |
| **6.** | |

## COST PROPOSAL

| |
| --- |
| |

### Small Diverse Business and Small Business Participation

| Is there a subcontracting requirement? If, yes indicate target goal | | | Subcontractors/Partners |
| --- | --- | --- | --- |
| **Yes/No** | **Goal** | | Enter Data |

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# Customer Name
# Program Name / Solicitation Number
# Solicitation Project Work Plan

**Required Documentation and Forms (☒ indicates signature required)**

| | | | |
|---|---|---|---|
| ☐ | | ☐ | |
| ☐ | | ☐ | |
| ☐ | | ☐ | |
| ☐ | | ☐ | |
| ☐ | | ☐ | |

## Project Team

**Kick-Off Meeting (date/time)**

**Quarterback/Sales Lead** **Program Operations** **Contributors** **Finance**

**Legal** **Lead Writer** **Production** **Program Implementation**

**Recruiting** **Information Technology**

## Project Work Plan: Technical Proposal

**Kick-Off Meeting:** **Win Strategy Meeting:**

| | | |
|---|---|---|
| **Pink Team Draft Complete** | **Draft Review** | **Pink Team Review** |
| **Pink Team Reviewers:** | | |
| **Red Team Draft Complete** | **Draft Review** | **Red Team Review** |
| **Red Team Reviewers:** | | |

**Technical Proposal Complete:**

## Project Work Plan: Cost Proposal

**Testing of Cost Proposal Worksheet Completed**

**Preliminary Budget Completed** **Preliminary Budget Review**

**Final Budget Completed** **Final Budget Review with Dr. Caskey**

**Cost Proposal Complete:**

# Customer Name
# Program Name / Solicitation Number
# Solicitation Project Work Plan

| | | |
|---|---|---|
| **Resumes** | **Resumes to Corporate (date)** | **Formatting Resumes (date)** |
| **Legal Review** | **Mid Pt. Review of RFP Documents (date)** | |

| **Evaluation & Scoring** | | |
|---|---|---|
| **Key Decision Makers** | **Bidders Presentations** | **Implementation Timeline** |
| **Intent to Award** | **RFP Debriefing** | |
| **Appeals/Protest Process** | | |
| | | |
| **Confidentiality / Redaction Process** | | |
| | | |

| **Production, Submission, and Shipping Details** | | |
|---|---|---|
| **Production/Shipping Date** | | |
| **Due Date** | | |
| **Number of Originals** | **Number of Copies** | **Number of Electronic Copies** |
| **Submission Address** | | |
| **Special Instructions** | | |

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# CUSTOMER NAME
# PROGRAM NAME / SOLICITATION NO.
# WIN STRATEGY ANALYSIS

## OVERVIEW

| | | | |
|---|---|---|---|
| **Win/Strategy Meeting** | | **Contract Value** | |
| **Quarterback** | | **Questions Due Date/Time** | |
| **VPO** | | **Response Due Date/Time** | |

## CLIENT/CUSTOMER INTELLIGENCE

**1. What are the overarching issues that are driving this procurement? What does the customer want to achieve by making this investment?**

**a. Who are the key decision makers and influencers (if known)?**

**c. Who are our champions (if applicable)?**

**d. Who are our detractors (if applicable)?**

**2. What are the customer's three (3) to five (5) major Motivators (i.e. hot button issues or concerns regarding this procurement) and the associated Decision Criteria (i.e. what the customer is looking for in a vendor and/or solution to address those issues?**

| | |
|---|---|
| **Motivator #1:** | |
| **Decision Criteria:** | |
| **Motivator #2:** | |
| **Decision Criteria:** | |
| **Motivator #3:** | |
| **Decision Criteria:** | |
| **Motivator #4:** | |
| **Decision Criteria:** | |
| **Motivator #5:** | |
| **Decision Criteria:** | |

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# Customer Name
# Program Name / Solicitation No.
# Win Strategy Analysis

## COMPETITIVE ENVIRONMENT

| 3. Who are the likely competitors for this procurement? |
|---|
| |
| **4. What advantages do we have compared to the anticipated competition?** |
| |
| **5. What are our vulnerabilities or weaknesses as compared to the competition?** |
| |
| **7. How can we demonstrate these advantages in our proposal?** |
| |
| **9. How will we minimize or counter our weaknesses?** |
| |
| **10. Is there additional competitive information that we need to further inform our strategy (i.e. current contracts, previous RFP responses)?** |
| |

## COMPARATIVE ANALYSIS MATRIX

| Customer Buying Criteria | Liberty | Competitor | Competitor | Competitor | Competitor | Competitor |
|---|---|---|---|---|---|---|
| *Example: Experience successfully implementing similar programs.* | ✓ | ✓ | X | ✓+ | X | ✓ |
| 1. | | | | | | |
| 2. | | | | | | |
| 3. | | | | | | |
| 4. | | | | | | |
| 5. | | | | | | |

**Key: ✓ (meets criteria), ✓+ (exceeds criterial), x (does not meet criteria)**

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# CUSTOMER NAME
# PROGRAM NAME / SOLICITATION NO.
# WIN STRATEGY ANALYSIS

## WIN THEME DEVELOPMENT

| | |
|---|---|
| **Buying Criteria:** | |
| **Liberty Offering:** | |
| **Customer Benefit:** | |
| **Proofs / Evidence:** | |
| **WIN THEME #1:** | |
| **Buying Criteria:** | |
| **Liberty Offering:** | |
| **Customer Benefit:** | |
| **Proofs / Evidence:** | |
| **WIN THEME #2:** | |
| **Buying Criteria:** | |
| **Liberty Offering:** | |
| **Customer Benefit:** | |
| **Proofs / Evidence:** | |
| **WIN THEME #3:** | |
| **Buying Criteria:** | |
| **Liberty Offering:** | |
| **Customer Benefit:** | |
| **Proofs / Evidence:** | |
| **WIN THEME #4:** | |
| **Buying Criteria:** | |
| **Liberty Offering:** | |
| **Customer Benefit:** | |
| **Proofs / Evidence:** | |
| **WIN THEME #5:** | |

**Buying Criteria:** The primary customer Motivators (hot button issues) listed on Page 1 of the Win Strategy Document.
**Liberty Offering:** The things that Liberty offers to help the customer address the hot button issues.
**Customer Benefit:** The “so what?” What does the customer stand to gain from the Liberty offering?
**Proofs / Evidence:** How will we demonstrate Liberty’s offerings and the customer benefit in our proposal response?

## PROPOSAL/RESPONSE DEVELOPMENT

| |
|---|
| **11. Does Liberty have any discriminators that set us apart from our competition, based on the Competitive Analysis matrix? How can we demonstrate them in the proposal?** |
| |
| **12. Do we offer any additional benefits that are unrelated to the customer motivators, i.e. ways to add value to the program that the customer may not have considered? If so, how can we demonstrate these benefits in the proposal?** |
| |
| **13. What do we anticipate we will need to submit a winning proposal (i.e. technology, human resource support, supporting proposal documentation)?** |
| |
| **14. Do we have all the evidence necessary to support our argument?  If not, what do we need (i.e. testimonials, documented facts, etc.)?** |
| |
| **15. What is the recommended tone of our proposal (i.e. aggressive, conservative or educational)?** |
| |

# Pricing Meeting Summary Form

**Today's Date:** ____________ **Finance Lead:** ____________

**Quarterback:** ____________ **Operations Lead:** ____________

**Brief Overview of Opportunity:**

**Duration of Contract:** ____________ **Initial Term of Contract:** ____________

**Option Years:** ____________

**Proposed Margin:** ____________

**Price Inflators?** ☐ Yes ☐ No

**Type of Contract (check all that apply):**
☐ Cost Reimbursement ☐ Fixed Fee ☐ Unit Rates ☐ Other **(describe)**

**Comments:**

**Type of Contract (check all that apply):**
☐ Paid by Customer ☐ Fee-for-Service / Third Party Billing **(describe)**

**Comments:**

**Start-Up Period & Financing:**

**Structure of Budget:**

**Pricing Summary Attachments:**

**Pricing Assumptions:**

**Client Budget Allocation:**

**Scoring of Cost Proposal:**

**Costs to Recover:**

**SBD/DBE Requirement:** ☐ Yes ☐ No

**IT Cost Confirmed?** ☐ Yes ☐ No

**Credentialing Costs Confirmed?** ☐ Yes ☐ No

**Recruiting/HR Costs Confirmed?** ☐ Yes ☐ No

**Insurance Costs Confirmed?** ☐ Yes ☐ No

**Legal Costs Confirmed?** ☐ Yes ☐ No

**Customer Pricing Sheet Attached?** ☐ Yes ☐ No

**Notes to Support Costs:**

**Additional Notes:**