



Marketing Your Qualifications  
for a Successful Proposal



**Terrie Daniel Assistant VP | Office of Supplier Diversity**



**Dee Covington**

**Principal | DeeLuxe Marketing Services**



**Steve Lafferty Director | Design and Construction**

**PRESENTERS**



**University of  
South Florida**  
Office of Supplier Diversity

**Program  
Overview &  
How to Connect with OSD  
Knowing USF**

# WHAT WE DO.....



- ✓ Work with USF System Purchasing Agents, Departmental Buyers, and Facilities, Planning and Construction.
- ✓ Responsible for monitoring, implementing, progress tracking and adjustments to the university diverse business utilization strategic plan.
- ✓ Internal and external communication about the Universities supplier diversity initiatives.
- ✓ Identifying and awarding USF Supplier Diversity Champions!



# WHY?.....



**ECONOMIC  
GROWTH**

- Proactive business strategy that provides all suppliers equal access to sourcing and purchasing opportunities.
- Affords USF access to vendors who are proving they can provide better pricing, products and service offerings than larger competitors in some cases.
- Helps USF's supply chain better reflect the demographics of our community.
- Creates a platform for economic growth and development.

# WHY?.....



- Improved customer satisfaction, especially at the departmental level.
- More options and flexibility within the supply chain by working with diverse suppliers.
- Through our diverse culture we can draw upon relevant features of individual backgrounds and better serve our students and constituents.

# How to Connect...

For more information, visit  
[www.usf.edu/osd](http://www.usf.edu/osd)  
or email: [osd@usf.edu](mailto:osd@usf.edu).

# KNOW THE PROCESS



- Professional Services Selection Process
- Qualifications-Based Selections
  - CCNA vs. Brooks Act
- Cone of Silence
- Tips & Hacks



# BENEFITS OF QUALIFICATIONS-BASED SELECTION PROCESSES

COMPETITIVE,  
COST-EFFECTIVE  
PROCESS

PROJECT  
EFFECTIVENESS

ADDRESSES  
INCOMPLETE SCOPE

REWARDS  
INNOVATION



# THE PROCESS

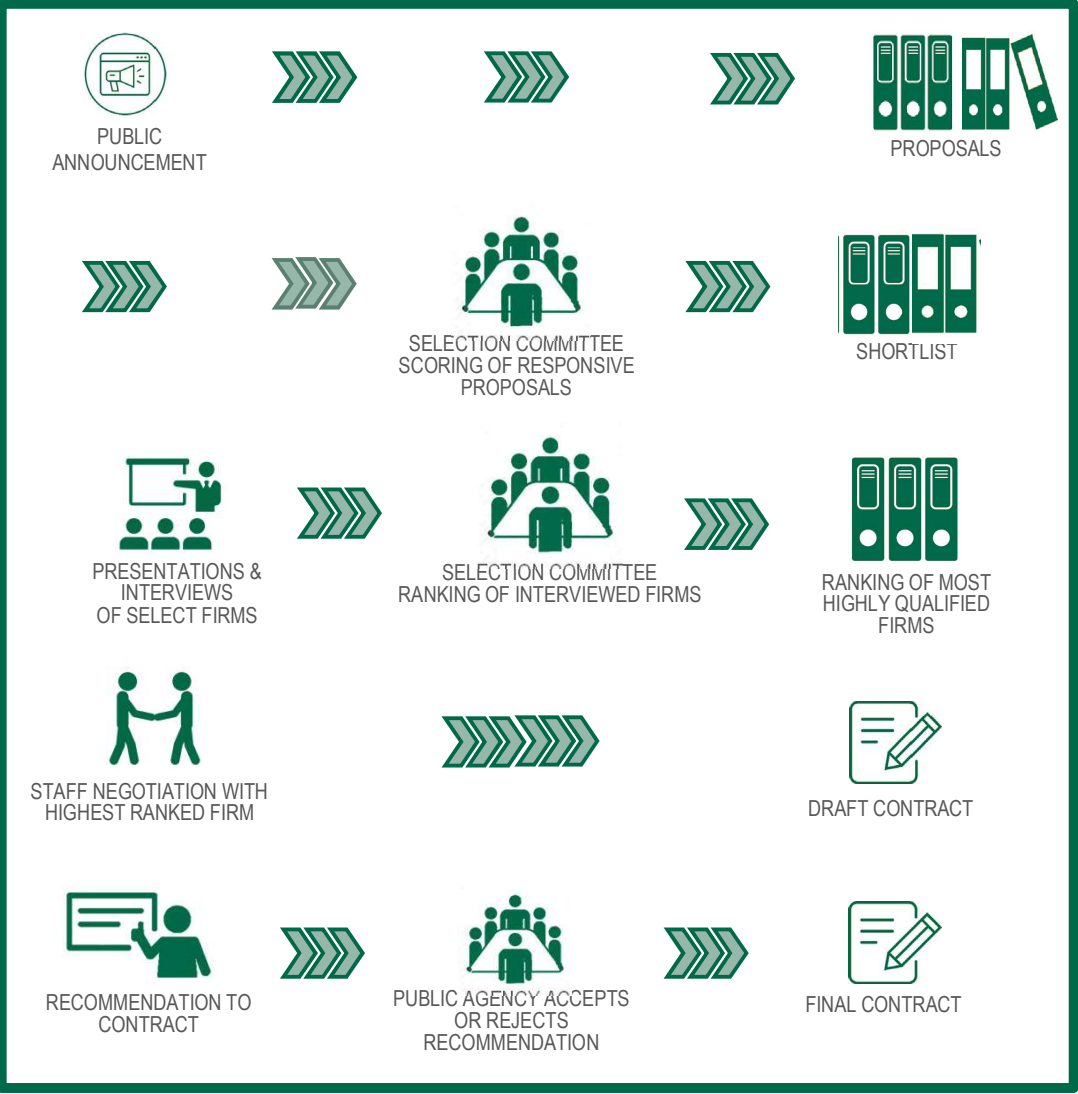
## SOLICITATION

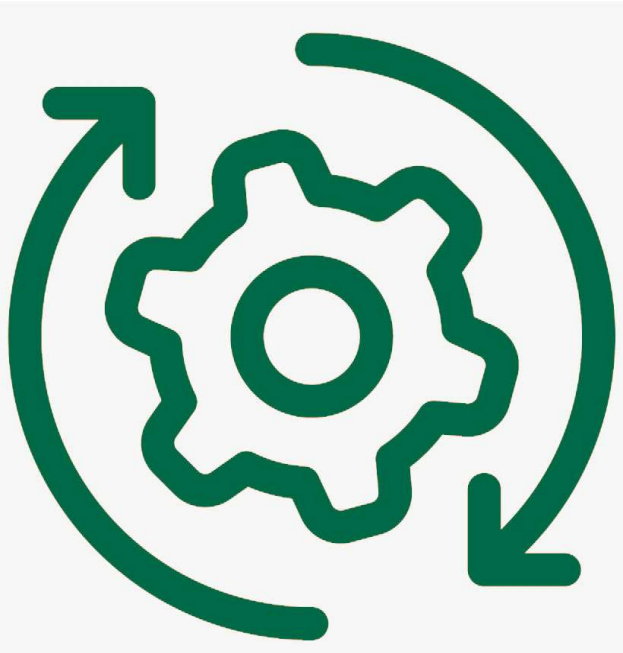
## STAFF REVIEW

## COMMITTEE INTERVIEW & RANKING

## STAFF NEGOTIATION

## RECOMMEND & AWARD





# THE USF PROCESS

## SOLICITATION

PUBLIC  
ANNOUNCEMENT



PRE-PROPOSAL MEETING WITH  
PROSPECTIVE PROVIDERS



PROPOSALS

## STAFF REVIEW

STAFF REVIEW



SELECTION COMMITTEE  
SCORING OF RESPONSIVE  
PROPOSALS



SHORTLIST

## COMMITTEE INTERVIEW & RANKING



PRESENTATIONS &  
INTERVIEWS OF SELECT  
FIRMS



SELECTION COMMITTEE  
RANKING OF INTERVIEWED FIRMS



RANKING OF MOST  
HIGHLY QUALIFIED  
FIRMS

## STAFF NEGOTIATION



STAFF NEGOTIATION WITH  
HIGHEST RANKED FIRM



DRAFT CONTRACT

## RECOMMEND & AWARD



RECOMMENDATION TO  
CONTRACT



CONTRACT EXECUTION



# THE PROCESS

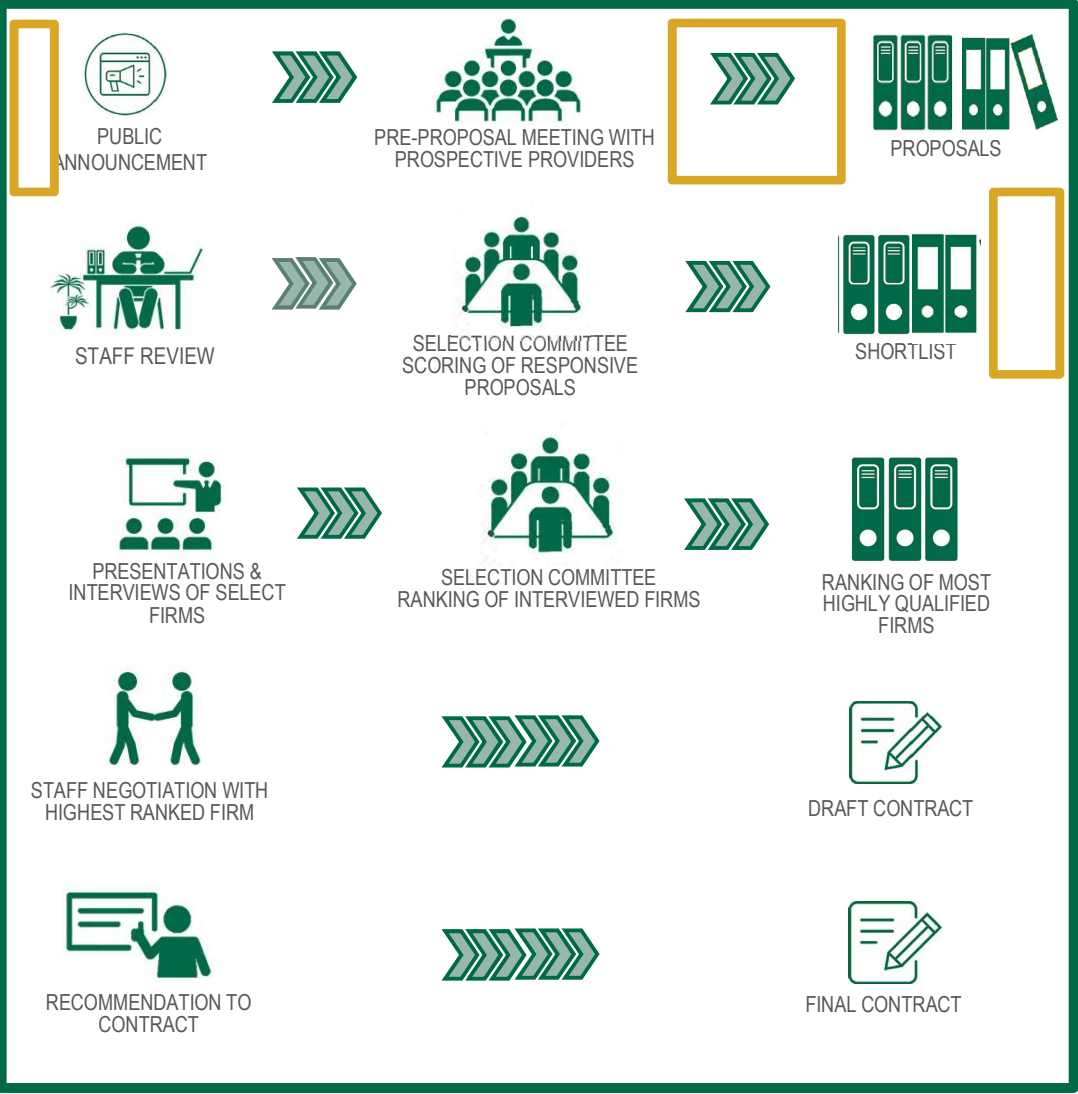
**SOLICITATION**

**STAFF REVIEW**

**COMMITTEE INTERVIEW & RANKING**

**STAFF NEGOTIATION**

**RECOMMEND & AWARD**



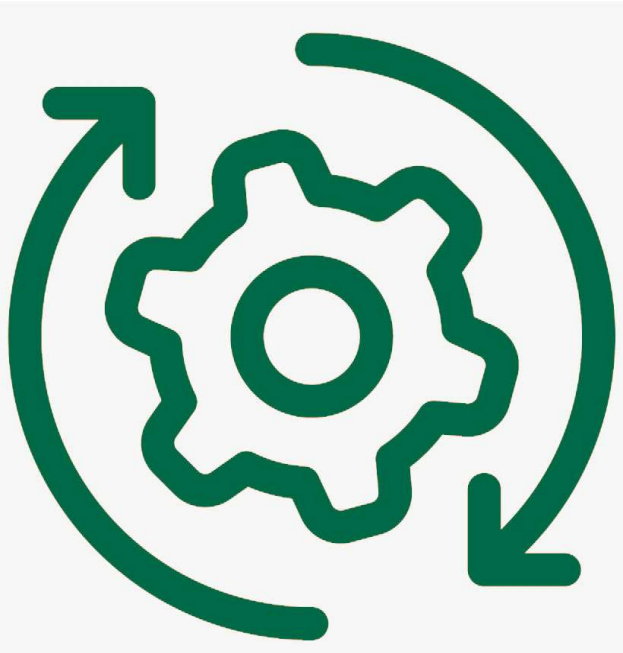




The “Cone of Silence” prohibits any communication regarding a particular RFP, RFQ or bid solicitation *after they have been advertised*. This Cone of Silence is designed to protect the professional integrity of the procurement process by shielding it from undue influences prior to the recommendation of contract award.

# FIND YOUR TARGET(S)

- ❑ IT ALL STARTS WITH A BUSINESS PLAN
- ❑ RIFLES ARE MORE EFFECTIVE AT KILLING BIG GAME THAN SHOTGUNS



# THE PROCESS

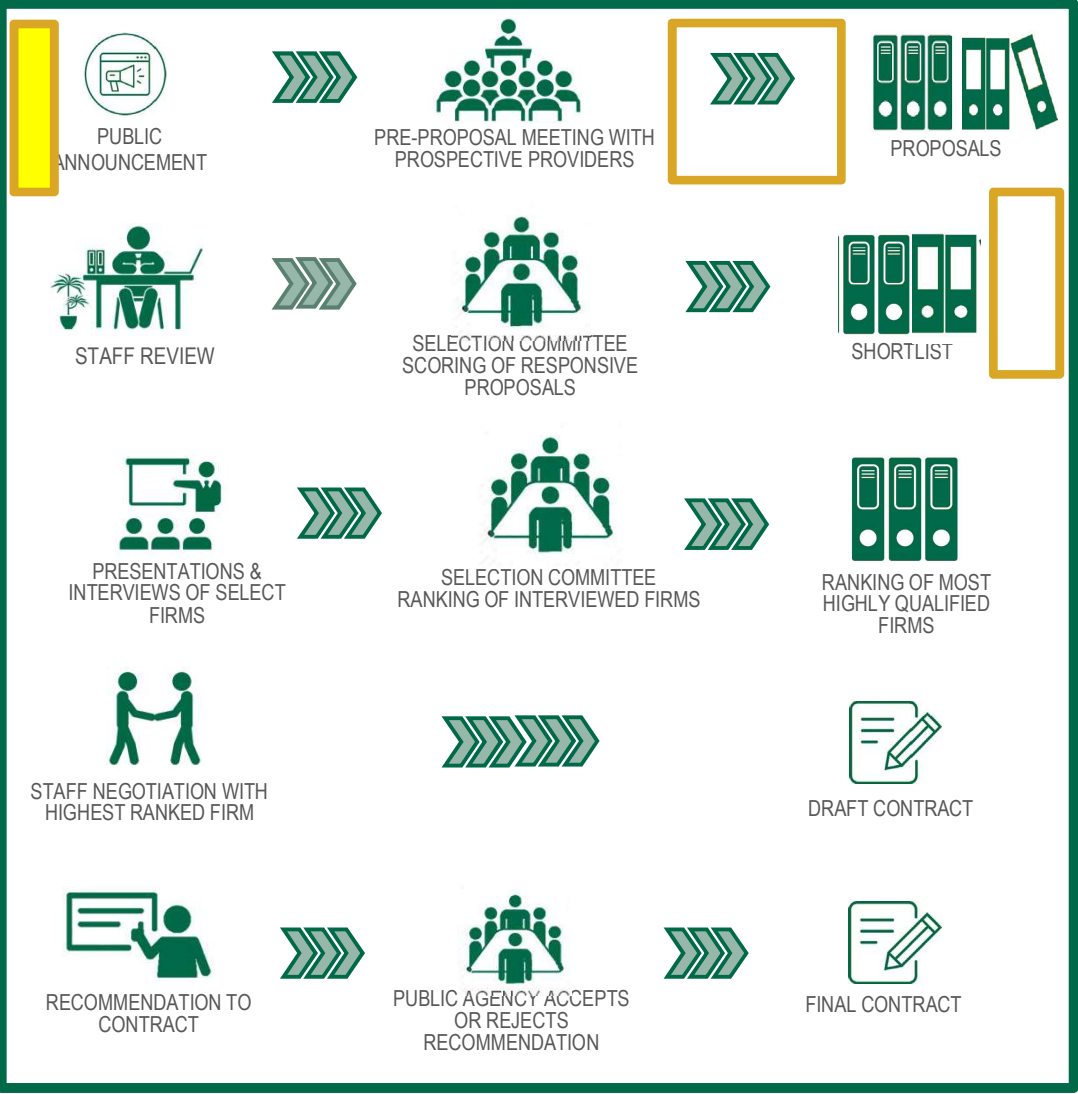
## SOLICITATION

## STAFF REVIEW

## COMMITTEE INTERVIEW & RANKING

## STAFF NEGOTIATION

## RECOMMEND & AWARD



# KNOW THE CLIENT

- RESEARCH

- People
- Future Opportunities

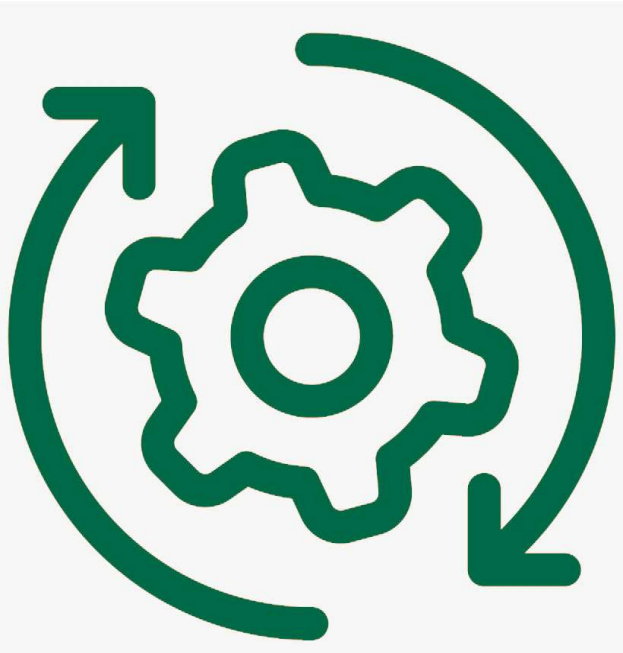
- ALIGNMENT WITH YOUR CAPABILITIES AND EXPERIENCE



# SELECT YOUR TEAM

- HISTORY
  - Dating or Marriage?
- ALIGNMENT WITH PROJECT GOALS





# THE PROCESS

## SOLICITATION



PUBLIC ANNOUNCEMENT



PRE-PROPOSAL MEETING WITH PROSPECTIVE PROVIDERS



PROPOSALS

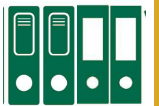
## STAFF REVIEW



STAFF REVIEW



SELECTION COMMITTEE SCORING OF RESPONSIVE PROPOSALS



SHORTLIST



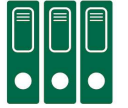
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PRESENTATIONS & INTERVIEWS OF SELECT FIRMS



SELECTION COMMITTEE RANKING OF INTERVIEWED FIRMS



RANKING OF MOST HIGHLY QUALIFIED FIRMS

## STAFF NEGOTIATION



STAFF NEGOTIATION WITH HIGHEST RANKED FIRM



DRAFT CONTRACT

## RECOMMEND & AWARD



RECOMMENDATION TO CONTRACT



FINAL CONTRACT

# TELL YOUR STORY

- EVERY PROJECT IS DIFFERENT
- EVERY TEAM IS DIFFERENT
- CAPITALIZE ON STANDARDIZED CONTENT



## ELEMENTS OF A PROPOSAL

- ✓ Cover Letter
- ✓ Standard Forms
- ✓ Project Examples
- ✓ Resumes
- ✓ What Makes Your Team Unique

Tell **YOUR** story **SHOW** your ....

# THE COVER LETTER

FIRM INFORMATION/LETTERHEAD

DATE

CLIENT'S INFORMATION

IDENTIFY PROJECT  
SALUTATION

INTRODUCTION

**WHY YOU'RE THE PERFECT  
FIRM/TEAM FOR THE PROJECT**

**A COMPELLING CLOSING**

SIGNATURE OF PRINCIPAL OF FIRM

16503 Villespin de Avila  
Tampa, FL 33613  
813.421.1565  
www.deeluxemarketing.com



March 25, 2022

Terry Mead, Administrative Specialist  
University of South Florida  
Facilities Management - Design and Construction  
3820 USF Holly Drive / OPM 100  
Tampa, Florida 33620-7550

Re: Project Name & Project Number

Dear Members of the Selection Committee:

DeeLuxe Marketing Services (DMS) welcomes the opportunity to present this proposal to serve as your marketing professional. Our varied and specialized marketing skills, extensive experience, and demonstrated success on similar projects make us ideally suited.

We have *experience in every marketing domain* to assist you in developing marketing programs that lead to sustainable growth and success. We will work with you to develop and execute a focused and results-driven marketing plan. USF's story, services, and clients' needs are unique, so we'll spend time *listening, researching, and learning* as much as we can to create and deploy customized strategies that are in line with USF's mission, goals, and vision.

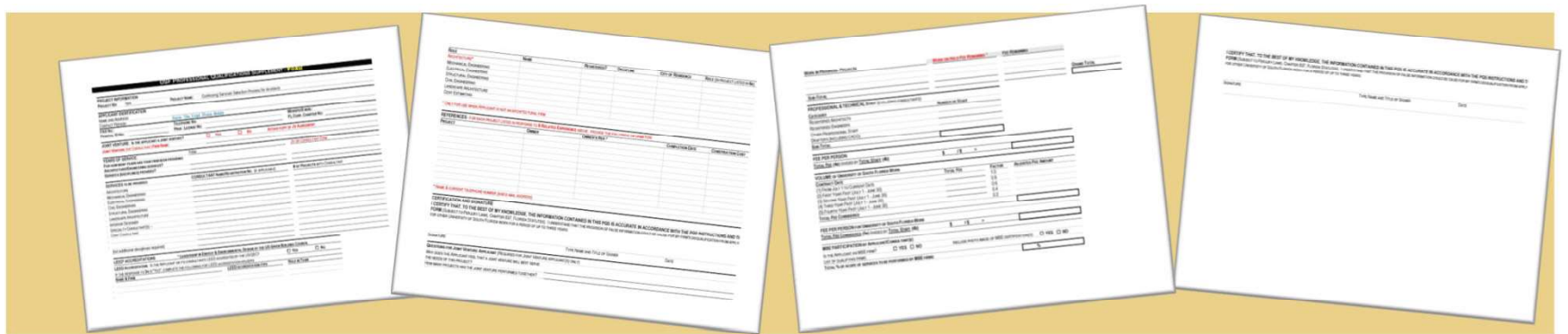
As the premier marketing agency in the region, we are well positioned to win the work you. We'll work with you from RFP kick-off to delivery and interview, or just step in to support where you need it most - unique graphics and layouts, writing a section or two, and overseeing final red team and QC. Our office is approximately 15 minutes and less than 6 miles from the University of South Florida campus. DMS is highly motivated and immediately available to commit our time and energies to USF.

*DMS's high-caliber, efficient and capable staff members, coupled with advanced, state-of-the-art computer and communication capabilities*, provide us with an unparalleled ability to handle the scope of services. We are confident that University of South Florida will benefit from our attentive, timely, and professional marketing services.

Sincerely,

Dee D.  
Covington Principal

# PROFESSIONAL QUALIFICATIONS SUPPLEMENT FORM (PQS)



**USF ARCHITECTURAL SERVICES SELECTION PROCESS**

**USF PROFESSIONAL QUALIFICATIONS SUPPLEMENT - FORM**

1. PROJECT INFORMATION  
Project No: 1574  
Project Name: Continuing Services Selection Process for Architects

2. APPLICANT IDENTIFICATION  
Name and Address: DeLuxe Marketing Services  
14501 Village de la Isla  
Tampa, FL 33617  
Contact Person: Principal J. deLuxe@deluxemarketing.com  
Phone Number: 813-471-1668  
Fax Number: N/A  
Federal ID No: 18-01244578  
Joint Venture:  Yes  No  
Years of Service: 100 years  
Firm: N/A  
JV or Consultant Firm: N/A

3a. SERVICES TO BE PROVIDED  
1. Architecture  
2. Mechanical Engineering  
3. Electrical Engineering  
4. Civil Engineering  
5. Structural Engineering  
6. Landscape Architecture  
7. Interior Designer  
8. Specialty Consultants  
9. Cost Consultant  
10.  
11.

3b. LEED ACCREDITATIONS  
LEED Accreditation: Leadership in Energy & Environmental Design of the US Green Building Council  
If the response to this is "yes", complete the following for LEED Accreditation holders:  
Name & Firm:   
LEED Accreditation Type:   
Role in Team:   
LEED Accreditation:  Yes  No

**USF PROFESSIONAL QUALIFICATION SUPPLEMENT - FORM**

1. PROJECT INFORMATION  
Project Number: 1574  
Project Name: Name of Project from RFP

2. APPLICANT IDENTIFICATION  
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14501 Village de la Isla  
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Contact Person: Principal J. deLuxe@deluxemarketing.com  
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3. Electrical Engineering  
4. Civil Engineering  
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- GENERAL INFORMATION ABOUT YOUR FIRM & CONTACT
- CUSTOMIZATION CAN INCLUDE COLORS, FONTS, AND TABLES

4a. WORK IN PROGRESS  
Work in Progress - Projects:  Yes  No  
Work in Progress - Fee Remaining:  Yes  No

4b. PROFESSIONAL & TECHNICAL STAFF (EXCLUDING CONSULTANTS)  
Category:   
1. Registered Architects  
2. Registered Engineers  
3. Other Professionals (List)   
4. Personnel (Include CAD/CAM)   
Sub-Total:   
TOTAL:   
4c. FEE PER PERSON  
TOTAL FEE PER PERSON (By person x Total Staff #) \$ 18 =

4d. VOLUME OF UNIVERSITY OF SOUTH FLORIDA WORK  
Contract Date:   
(1) From July 1 to Current Date: 10  
(2) From Year Prior (July 1 - June 30): 0  
(3) Second Year Prior (July 1 - June 30): 0  
(4) From Year Prior (July 1 - June 30): 0  
(5) From Year Prior (July 1 - June 30): 0  
Total Fee:   
TOTAL FEE (Contract Date) (By person x Total Staff #) \$ 18 =

4e. WBE PARTICIPATION BY APPLICANT (CONTRACTORS)  
Is the Applicant an WBE Firm?  Yes  No  
List of Qualifying Firms:   
TOTAL PERCENTAGE OF SCOPE SERVICES TO BE PROVIDED BY WBE FIRMS: 0%

4a. WORK IN PROGRESS  
Work in Progress - Projects:  Yes  No  
Work in Progress - Fee Remaining:  Yes  No

4b. PROFESSIONAL & TECHNICAL STAFF (EXCLUDING CONSULTANTS)  
Category:   
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- PROJECT INFORMATION
- GENERAL INFORMATION ABOUT YOUR FIRM & CONTACT
- WHICH FIRM WILL PERFORM THE REQUIRED SERVICES
- LEED INFORMATION

- WORK IN PROGRESS
- STAFF INFO
- WORK WITH USF
- CBE PARTICIPATION

CUSTOMIZATION CAN INCLUDE COLORS, FONTS, AND TABLES





# THE PQS FORM | PROJECT EXAMPLES

- DISPLAY UP TO 10 PROJECTS RELEVANT TO THE ADVERTISED PROJECT
- ADD PHOTOS
- CUSTOMIZE TABLE/GRAPH



# THE PQS FORM – QUESTIONS...

- ADD PHOTOS
- CUSTOMIZE TABLE/GRAPH

**7b. KEY MEMBERS OF PROPOSED TEAM BY NAME - CONSULTANTS**

ROLE	NAME	REGISTERED?	DISCIPLINE	CITY OF RESIDENCE	ROLE (IN PROJECT LISTED IN 6a)
1. ARCHITECTURE*					
2. MECHANICAL ENGINEERING					
3. ELECTRICAL ENGINEERING					
4. STRUCTURAL ENGINEERING					
5. CIVIL ENGINEERING					
6. LANDSCAPE ARCHITECTURE					
7. COST ESTIMATING					
8.					

\* ONLY FOR USE WHEN APPLICANT IS NOT AN ARCHITECTURAL FIRM

**8a. REFERENCES - FOR EACH PROJECT LISTED IN RESPONSE TO 6 RELATED EXPERIENCE ABOVE, PROVIDE THE FOLLOWING INFORMATION:**

PROJECT	OWNER	OWNER'S REP.*	COMPLETION DATE	CONSTRUCTION COST
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

\* NAME & CURRENT TELEPHONE NUMBER (AND E-MAIL ADDRESS)

**9. CERTIFICATION AND SIGNATURE**

I CERTIFY THAT, TO THE BEST OF MY KNOWLEDGE, THE INFORMATION CONTAINED IN THIS PQS IS ACCURATE IN ACCORDANCE WITH THE PQS INSTRUCTIONS AND THIS FORM (SUBJECT TO PENALTY LAWS, CHAPTER 837, FLORIDA STATUTES). I UNDERSTAND THAT THE PROVISION OF FALSE INFORMATION COULD BE CAUSE FOR MY FIRM'S DISQUALIFICATION FROM APPLYING FOR OTHER UNIVERSITY CITY OF SOUTH FLORIDA WORK FOR A PERIOD OF UP TO THREE YEARS.

SIGNATURE \_\_\_\_\_ TYPE NAME AND TITLE OF SIGNER \_\_\_\_\_ DATE \_\_\_\_\_

**10. QUESTIONS FOR JOINT VENTURE APPLICANT (REQUIRED FOR JOINT VENTURE APPLICANT(S) ONLY)**

- WHY DOES THE APPLICANT FEEL THAT A JOINT VENTURE WILL BEST SERVE THE NEEDS OF THIS PROJECT?
- HOW MANY PROJECTS HAS THE JOINT VENTURE PERFORMED TOGETHER?
- WHICH OF THE KEY PERSONNEL HAVE WORKED TOGETHER BEFORE?

PAGE 4 OF 5 PAGES

**7a. KEY MEMBERS OF PROPOSED TEAM BY NAME - APPLICANT**

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1.					
2.					
3.					
4.					
5.					

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2.	Project Name			
3.	Project Name			
4.	Project Name			
5.	Project Name			
6.	Project Name			
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8.	Project Name			
9.	Project Name			
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**PERSON FOR THE JOB**

Certifications  
Title

Years of Experience

Education

Registration/Certifications



**PERSON FOR THE JOB'S BIO**

**BASIC:**  
General information about “Person for the Job” and their experience in the industry.

**BETTER**  
Specific information on how “Person for the Job” is perfect for this specific job and how their experience can benefit this project.

**RELEVANT EXPERIENCE**

**BASIC:**  
General Information about past projects, i.e., project name, square footage, and general information.

**BETTER**  
Specific information on how and what features of this specific project is relevant to the project that is being pursued.

# PERSONALIZE YOUR RFP RESPONSE



- ❖ Generic Marketing Materials
- ❖ Outdated Company Bios
- ❖ Submit For Every Project
- ❖ Info Irrelevant To This Project
- ❖ Typos or Bad Grammar

**Never, never, ever** send copy and paste, generic responses.

## PERSONALIZE YOUR RFP RESPONSE



Customization and differentiation are key

- Authoritative, detailed answers
  - Answer ALL questions in the RFQ
- Tell YOUR Story
- Differentiate yourself from the competition.

ALSO –

- ✓ Proofread your text
- ✓ Follow instructions

Stand out by using your research and knowledge to create a custom submittal specifically tailored to their needs.



# THE PROCESS

## SOLICITATION



PUBLIC ANNOUNCEMENT



PRE-PROPOSAL MEETING WITH PROSPECTIVE PROVIDERS



PROPOSALS

## STAFF REVIEW

STAFF REVIEW



SELECTION COMMITTEE SCORING OF RESPONSIVE PROPOSALS



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PRESENTATIONS & INTERVIEWS OF SELECT FIRMS



SELECTION COMMITTEE RANKING OF INTERVIEWED FIRMS



RANKING OF MOST HIGHLY QUALIFIED FIRMS

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STAFF NEGOTIATION WITH HIGHEST RANKED FIRM



DRAFT CONTRACT

## RECOMMEND & AWARD

RECOMMENDATION TO CONTRACT



FINAL CONTRACT

# WIN THE WORK

PREPARING FOR THE INTERVIEW/PRESENTATION

DO THE RESEARCH (BEFORE THE PUBLIC ANNOUNCEMENT)

SPEAK WITH YOUR AUDIENCE

KNOW THE SELECTION COMMITTEE

ADDRESS ALL QUESTIONS / FOLLOW AN OUTLINE

REHEARSE AND HAVE BACK-UPS

REMEMBER 60%-75% OF COMMUNICATION IS NON-VERBAL

# IMPROVEMENT

SO.....YOU DIDN'T WIN THE WORK



SO.....YOU DIDN'T WIN THE WORK

## SCHEDULE A DE-BRIEFING MEETING

ASK TO SEE THE SUBMITTALS OF THE FIRMS THAT WERE SHORTLISTED

WERE THE INTERVIEWS RECORDED?

WHAT COULD WE HAVE DONE BETTER?



# Q & A



# THANK YOU

Don't forget to download  
additional resources

