

## Innovation Technique I— Oral Presentation

**Purpose:** *To bring in the actual technical staff to see and hear their proposed solutions!*

- You can't guarantee who writes the content of a written proposal, but you can specify that you want key personnel or company executives to present an oral presentation!
- Gives us greater confidence the company knows the technical requirement.
- FAR 15.102(c): "Information pertaining to areas such as an offeror's capability, past performance, work plans or approaches, staffing resources, transition plans, or sample tasks (or other types of tests) **may be suitable for oral presentations.**"
- Outline the grounds rules in solicitation including logistics, attendance, and format.
- May or may not be accompanied by slides — if so, decide which is evaluated: Oral Presentation or slides.
- FAR 15.102(a): "Oral presentations provide an opportunity for **dialogue** among the parties." See *Dialogue in Oral Presentations* in this workbook's GAO Guide. 
- Questions to be asked may be:
  - announced long before the oral presentation (such as in the solicitation);
  - provided an hour or so before the oral presentation; or
  - spoken during an on-going oral presentation.
- Wherever possible, let oral presentations replace paper proposals!

### RECOMMENDED

- *DO* include on-the-spot questions (questions or exercises that offerors won't see until the oral presentation begins). Isn't **interactive dialogue** better than a one-way presentation?
- *DO* add a twist – interrupt their pitch with a particular scenario for them to address.
- *DO* consensus evaluation **immediately** following each offeror's oral presentation.
- *DO* state that a firm may attend only one oral presentation, whether for itself as a prime offeror or as a subcontractor for another firm.

### NOT RECOMMENDED

- *DON'T* require the offeror to cover **ALL** aspects of the requirements document; rather, focus on the most important aspects and go into detail!
- *DON'T* leave ambiguity in the solicitation concerning rules or format for the orals.
- *DON'T* assume that you must videotape the presentation. We must have a record for the file, and FAR 15.102(e) lists several possibilities (including videotaping) for the record. See *If Evaluators Misunderstand Something from an Oral Presentation* in this workbook's GAO Guide.
- *DON'T* allow the offeror's presenters to use electronics or phones for reach back.



1. **The PIL recommends letting the oral presentation stand as its own evaluation factor(s).** Generally, the PIL does not recommend using oral presentations to update an already-assigned rating based on a previous written submission.
2. Oral presentations may be brief, or they may last all day.
3. Oral presentations may occur at Government or offeror locations.
4. FAR 15.102 provides guidelines for conducting oral presentations.
5. A product or technical demonstration (see Innovation Technique 2) is a variant of an oral presentation.

**Your oral presentation approach has to fit your acquisition.  
Cut-and-paste as a start, but always adapt to fit!**

Sample from **NFIP PIVOT**—

<b>Rules of Engagement for Oral Presentations:</b>	
1.	The Government will not provide the Offeror a copy of its quote during oral presentations.
2.	The Government does not intend to ask questions about information contained in an Offeror’s submission for Phase I or the Offeror’s written submission for Phase II. The Government questions will be presented by the Contracting Officer after the Government caucuses; any other Government attendees are not expected to engage with Offerors directly.
3.	The Offeror may not generally ask questions during the oral presentation. Any questions asked must be directed to the Contracting Officer, and should only deal with logistics and conduct of the oral presentation.
4.	Oral presentations do not constitute discussions. The Government will not ask questions that will invite or allow the Offeror to change its offer. The Offeror shall not volunteer any information that might be construed as changing its offer. Oral presentations are distinct from the Government’s reserved right to conduct exchanges.
5.	The Offeror will be provided with a standard question set. The Offeror is in control of its presentation and may choose not to present or respond to any question provided by the Government.
6.	The Government will provide a white board, dry erase markers, a flip chart pad, blue tape, notepads, pens and pencils for use during oral presentations, including during the one hour caucus period.
7.	The Offeror shall not bring any computers, tablets or smart phones into the oral presentation conference room, and shall not bring or distribute any written or electronic materials during the oral presentation.
8.	The Offeror participants shall not reach back, by telephone, e-mail or any other means, to any other personnel or persons for assistance during the oral presentation.
9.	Offerors can expect the presentation will be conducted in a conference room with a table of sufficient size to accommodate the participants, including the Government attendees.

**Thoughts from Industry:** “Anytime you have orals, it increases the price a little bit, because we have additional resources doing the slides, preparation and practice, etc. But, we would rather do orals. The written proposal not being 150 pages was a nice innovation as well, and gave us a chance to do really strong orals. Gave us opportunity to not be rated just on the quality of what you can put on paper but the quality of people you can put in front of it. We like that, that’s really good stuff.”

Sample from **JETS**—

If a Morning Presentation—		If an Afternoon Presentation—	
8AM	Government shares questions/problem statements; Government evaluators leave the room. Offering contractor attendees review the information and prepare for the second hour.	1PM	Government shares questions/problem statements; Government evaluators leave the room. Offering contractor attendees review the information and prepare for the second hour.
9AM	The offering contractor shares its answers and problem resolutions with the Government evaluators.	2PM	The offering contractor shares its answers and problem resolutions with the Government evaluators.
10AM	Government caucuses to identify any clarifications it may require to understand the presentations. Then, Government may ask clarification questions of the offering contractor.	3PM	Government caucuses to identify any clarifications it may require to understand the presentations. Then, Government may ask clarification questions of the offering contractor.
11AM	Oral Presentation concludes.	4PM	Oral Presentation concludes.