

# Bidmatch Profiles - New Resource? Time to Update?



NH PTAC

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- ▶ NH PTAC offers a free “Bidmatch” service to automate your daily search for government bid opportunities and market intelligence. This webinar will provide an understanding of what the service searches, and how search “profiles” are designed to produce individualized results. Many years’ experience has taught us that the best way to build an effective search profile is to work in close collaboration with clients who have some understanding of the process. Here’s your chance to peek behind the curtain.



## What is Our Goal Today?

- ▶ Not to make you experts – that's our job.
- ▶ To deepen your understanding of the BidMatch capabilities –
- ▶ In the hope that you will push the limits of the BidMatch tools, and get the most that it has to offer.



## Key Features of a Bid Searching Tool

- ▶ Comprehensive – must cover a very broad array of probable sources of bids

<https://www.outreachsystems.com/index.php/products-en/bid-match>

- ▶ Accuracy – must have a high probability of finding bids of interest
- ▶ Selectivity – must not capture too much extraneous material



# Comprehensive

- ▶ Federal Opportunities
  - ▶ beta.SAM Contract Opportunities
  - ▶ DIBBS
  - ▶ Others
- ▶ State Opportunities
  - ▶ Commodities
  - ▶ Construction
  - ▶ Other/Agency-specific
- ▶ Local Governments
- ▶ International Opportunities

# Federal Opportunities

- ▶ First & Foremost – beta.SAM Contract Opportunities
  - ▶ Published Daily
  - ▶ Over \$25,000 and not limited to MAC vehicles
- ▶ Other Federal Sources

<a href="#">American Public Transportation Association</a>	<a href="#">NASA NSPIRES</a>
<a href="#">Aviation News Today</a>	<a href="#">Native PTAC</a>
<a href="#">Department of Defense BlueTops Press Releases</a>	<a href="#">NECO - Navy Electronic Commerce Online</a>
<a href="#">DIBBS: Defense Supply Center Columbus</a>	<a href="#">SAM.gov</a>
<a href="#">DIBBS: Defense Supply Center Philadelphia</a>	<a href="#">Sandia National Laboratories</a>
<a href="#">DIBBS: Defense Supply Center Richmond</a>	<a href="#">SBA SubNet</a>
<a href="#">FedConnect</a>	<a href="#">SBIR/STTR Gateway</a>
<a href="#">Federal Aviation Administration</a>	<a href="#">TransitTalent.com</a>
<a href="#">Government Printing Office</a>	<a href="#">Transportation Research Board</a>
<a href="#">Grants.gov</a>	<a href="#">Unison Marketplace</a>
<a href="#">IDEAS - Interior Department Electronic Acquisition System</a>	<a href="#">US Army Corps of Engineers - New England District</a>
<a href="#">Los Alamos National Laboratory Long Term Opportunities</a>	<a href="#">USDA Agricultural Marketing Service</a>
<a href="#">Los Alamos National Laboratory Short Term Opportunities</a>	

# State & Local Opportunities

## ► New Hampshire Sources:

City of Concord	Department of Administrative Services
City of Dover	Department of Transportation (NHDOT)
City of Laconia	Department of Environmental Services
City of Manchester	Department of Health and Human Services
City of Nashua	New Hampshire Local Government Center
City of Portsmouth	New Hampshire Public Notices:
City of Rochester	The Cabinet
Town of Derry	The Carriage Towne News
Town of Merrimack	The Derry News
Town of Rye	The Telegraph
Town of Salem	The Union Leader
University System of NH (USNH)	Community College System of New Hampshire (CCSNH)

# More State & Local Opportunities

## ■ Massachusetts Sources:

Barnstable County	City of Somerville
City of Boston	City of Springfield
City of Boston Planning and Development Agency	City of Waltham
City of Brockton	City of Watertown
City of Cambridge	City of Worcester
City of Cambridge Construction	Commonwealth (COMMBUYS)
City of Fitchburg	Massachusetts Bay Transit Authority
City of Framingham	Massachusetts Port Authority
City of Haverhill	Massachusetts Port Authority Capital Bids
City of Lowell	Massachusetts Public Notices
City of New Bedford	Town of Amherst
City of Newton	Town of Chelmsford
City of Quincy	

# International Opportunities (outside NH PTAC scope)

Canada - Alberta Purchasing Connection	Canada - City of Winnipeg	ESA - European Space Agency
Canada - British Columbia	Canada - Georgian College	Eurocontrol - European Organisation for the Safety of Air Navigation
Canada - City of Fort Saskatchewan	Canada - Humber College	European Commission - Directorate General Expressions of Interest
Canada - City of Hamilton	Canada - New Brunswick Government Services	European Commission - Directorate General Proposals
Canada - City of Kelowna	Canada - Newfoundland and Labrador	European Commission - Directorate General Tenders
Canada - City of Kingston	Canada - Nova Scotia Tenders	European Union - Tenders Electronic Daily
Canada - City of Kitchener	Canada - Ontario Tenders Portal	Jamaica - Government of Jamaica Procurement Notice Board
Canada - City of London, Ontario	Canada - Public Works and Government Services	MERX Canadian Public Tender
Canada - City of Mississauga	Canada - Queen's University	NATO International
Canada - City of Ottawa	Canada - Saskatchewan Sasktenders	Organization of Eastern Caribbean States
Canada - City of St. Catharines	Canada - St. Francis Xavier University	Turks and Caicos Islands - Government Tenders
Canada - City of Thunder Bay	Canada - St. Joseph's Health System	United Kingdom - UK.GOV Contracts Finder
Canada - City of Toronto Construction	Canada - University of Manitoba	United Nations - Development Programme Procurement Notices
Canada - City of Toronto Goods and Services	African Development Bank Group	United Nations - Procurement Division Expressions of Interest
Canada - City of Toronto Professional Services	Asian Development Bank	United Nations - Procurement Division Requests for Information
Canada - City of Vancouver	Australia - AusTenders	United Nations - Procurement Division Tenders
Canada - City of Vernon	Cayman Islands - Ministry of Financial Services	United Nations - United Nations Global Market
Canada - City of Victoria	Commonwealth of the Bahamas - eProcurement Portal	
Canada - City of Waterloo	Commonwealth of the Bahamas - National Insurance Board Public Tenders	

# Accuracy – Developing a Selective Profile

- ▶ Codes
  - ▶ NAICS – some codes are specific, others vague and general
    - ▶ Good codes are specific, narrow and don't overlap into other products or disciplines
      - ▶ Examples: 332710 – Machine Shops; 238130 - Framing Contractors
    - ▶ Bad codes are too general or have much overlap
      - ▶ Examples – 541330 – Engineering Services; 511210 – Software Publishers
  - ▶ FSC/PSC – codes are much more specific, but may not always fit
    - ▶ <http://support.outreachsystems.com/resources/tables/pscs/>
- ▶ It's not just the codes, it's the KO who assigns them to the contract
  - ▶ Do research in beta.SAM to understand code usage.



# Geographic Selectivity

- ▶ Know your geographic service area
  - ▶ In-state
  - ▶ Multi-state/regional
  - ▶ National (CONUS)
  - ▶ Global
- ▶ Understand usage of contracting office vs. place of performance (POP)
- ▶ Search accordingly



## Keywords

- ▶ Some keywords are powerful. Take “plasma” for example:
  - ▶ Can refer to blood products, or
  - ▶ Plasma cutting, or
  - ▶ ICAP or ICP-MS trace metals analysis, or
  - ▶ a very few other things.
- ▶ While the word “plasma” is used in several different contexts, they are easy to sort out.
- ▶ Some obvious weak keywords:
  - ▶ design, manage, engineer, quality, information, technology



## Phrases are Better than Words

- “Plasma Cutting”
- “Marine Engineering”
- “Graphic Design”
- “Patent leather”
- “Household goods”



## Selectivity – How do we Screen out the Junk?

- ▶ Some junk is inevitable
- ▶ A moderate amount of junk is ok. The human brain is very good at making quick, fairly accurate determinations as to what interests us and what doesn't. We can easily ignore some junk.
- ▶ Too much junk makes our results too frustrating to be useful.
- ▶ If it's too frustrating, or doesn't deliver any reward, we give up.
- ▶ The right amount of junk filtering can be critically important



# Boolean Logic - Logical terms are best

- ▶ We can use Boolean Logic to create complex search terms. These are by far the most powerful tools that we have in BidMatch to obtain accurate results and reduce junk.

- ▶ A simple example:

Let's say we are interested in bids related to the eyes of hurricanes. We might code:

**“eye” if and only if “hurricane” is found within 3 words either side of “eye”.**

By requiring “hurricane” to be found nearby, we can eliminate virtually all references to other meanings of “eye”. We simultaneously only capture references to hurricanes when the word eye is also present.

We could narrow this search further by specifying “eye wall” or “eyewall” instead of eye.

# Boolean Operators in BidMatch

## Basic Operators

Operator	Description	Example	Example Matches On
<b>and</b>	The and operator between two search terms requires the bid abstract to include both terms in order to match.	hose and fire	Any solicitation containing the word "hose" and the word "fire."
<b>not</b>	The not operator can be combined with the "and" operator to exclude bid abstracts that contain a particular word.	hose and not fire	Any solicitation containing the word "hose" that does not also contain the word "fire."
<b>or</b>	The or operator between two search terms requires the bid abstract to include at least one of the terms in order to match.	fire or flame or blaze	Any solicitation containing one or more of these words.
<b>&lt;#&gt;</b> (eg. <3>)	A numeric value enclosed in angle brackets between two terms requires the bid abstract to include both terms, in that order, with no more than the specified number of words between them in order to match.	fire<3>alarm	Any solicitation containing "fire" and "alarm," in that order, with no more than three words between them (e.g. "fire, smoke and burglar alarm")
<b>&lt;#u&gt;</b> (eg. <2u>)	A numeric value and letter "u" enclosed in angle brackets between two terms requires the bid abstract to include both terms (regardless of order - i.e. unordered) with no more than the specified number of words between them in order to match.	fire<2u>alarm	Any solicitation containing "fire" and "alarm," in any order, with no more than two words between them (e.g. "alarm, burglar and fire")

**fire<>extinguisher and not halon<>gas**



# Boolean Operators in BidMatch Wildcards

- ▶ You can use the \* (asterisk) wildcard character to substitute for any combination of characters at the end of a term in your keyword or agency search string, letting you search for variations of a particular word without searching for each variation separately. For example, the search term "extinguish\*" would match on extinguish, extinguishing, extinguisher, and so on.
- ▶ You can also use the ? (question mark) wildcard to substitute for any *single* character at the end of a term. For example, the search term "fold?" would match on "fold" and "folds" but not "folding" or "folder."
- ▶ **Note:** You may see the \* or ? wildcard at the end of *any* keyword that has at least 3 characters or more. You cannot, however, use a wildcard in front of or in the middle of a word.

# Boolean Operators in BidMatch Index Terms

Index Term	Description	Example	Example Matches On
<b>nsn!</b>	The nsn! index term is used to search for NSN numbers which sometimes include dashes, and which sometimes do not include dashes.	nsn!1560012332175	Any solicitation containing the NSN number 1560012332175 or 1560-01-233-2175.
<b>pn!</b>	The pn! index term is used to search for part numbers which sometimes include dashes, and which sometimes do not include dashes.	pn!937E500207	Any solicitation containing the part number 937E500207 or 937E-5002-07.
<b>state!</b>	The state! index term is used to search (or restrict the profile) for certain geographic states. The actual state name does not have to be spelled out in the bid. The OutreachSystems search engine will also use its intelligence to determine where a bid takes place.	state!hi	Any solicitation that references Hawaii, HI or even Pearl Harbor or Honolulu.

# Boolean Operators in BidMatch

## Complex Search Terms

- ▶ We can create complex, multilevel search expressions in the *Keywords* or *Agency* field, but these separate entities within each expression will always be placed in parentheses, as in the following examples:

**computer<2>training and (state!ky or state!tn or state!mi)**

or

**juice?<2u>(apple? or orange? or grapefruit or tomato\*)**

The above juice example will match on:

- ▶ apple juice  
juice, orange  
grapefruit or lemon juice  
juices such as tomato
- ▶ The word "juice" combined with any keyword listed in the parentheses will cause a match to occur. And the words can even be unordered, where the word "juice" comes within two words either before or after the name of the fruit.



# Tools for developing your codes, keywords, phrases & Boolean Logic

- We develop search profiles using an iterative approach. This is essentially a way of saying “informed trial & error.”
- There are a number of tricks we can use to reduce the number of trials & errors it takes to achieve a good outcome.
- **Critical Concept: It doesn't matter what you call your services or products. What's important is what your customer will call them.**
- **1<sup>st</sup> Corollary to the Critical Concept: Only the Contracting Officer's choice of NAICS and FSC/PSC Codes matter.**
- **Use historical and competitor research in [www.beta.SAM.gov](http://www.beta.SAM.gov) and/or [www.FPDS.gov](http://www.FPDS.gov) to tweak your code and keyword lists.**
- **Use iSearch to test your keywords - <https://isearch.outreachsystems.com//>**



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- ▶ Use these tools to find historical or contemporary contracts & solicitations that might be of interest to you.
- ▶ When you narrow down to a good result, download to a spreadsheet
- ▶ Sort by NAICS and/or FSC/PSC codes. Use this data to inform your code choices.
- ▶ Check out the titles and Product Description fields – scour them for keywords.
- ▶ Tip: Searches on successful competitors can expedite this process.



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# Thank you!

New Hampshire Procurement Technical Assistance Center  
Division of Economic Development  
Department of Business and Economic Affairs  
100 North Main Street, Suite 100  
Concord, NH 03301  
603-568-8485

[nheconomy.com/sell-to-the-government](http://nheconomy.com/sell-to-the-government)

Email: [govcontracting@livefree.nh.gov](mailto:govcontracting@livefree.nh.gov)

Deborah Avery Danielle Bishop Jane Brezosky Larry Findeiss Dave Pease

