

1.0 Contract.

This requirement is a competitive full and open acquisition. The Government intends to award a Firm Fixed Price (FFP) multiple-award indefinite delivery/indefinite quantity (IDIQ) contract with a five (5) year ordering period.

DAFSTS II will consist of two (2) Tiers within the multi-award IDIQ structure. The Government intends to award to each and all Technically Acceptable vendors that submit a proposal in Tier 1 and each and all Technically Acceptable vendors that submit a proposal in Tier 2.

2.0. To assure timely and equitable evaluation of proposals, offerors shall comply with all instructions within section 52.212-1 Instructions to Offerors, including all solicitation submission requirements, including submission requirements within the terms and conditions and representations and certifications. Proposals shall be submitted in accordance with 52.212-1 and addressed to the points of contact listed below;

Points of Contact (POC): Below are the only points of contact for this acquisition. All questions or concerns shall be e-mailed to the Contracting Officer (CO) and Contract Specialist (CS).

Name:

Email:

Ms. Destinee Narak (CO) Destinee.Narak@us.af.mil CC: AFDW.PKPKS.AFSTS@us.af.mil

Mr. Kyle Beck (CS) Kyle.Beck.5@us.af.mil

2.0.1 This acquisition will use a combination of oral presentations and written submissions.

2.1. Instructions to Offerors (ITO)

2.1.1 The Offerors proposal must include all data and information requested by this ITO and must be submitted in accordance with these instructions. The Offeror shall be compliant with the requirements as stated in this solicitation. In order to be eligible for award, offerors are required to meet all solicitation requirements, such as terms and conditions; representations and certifications; evaluation factor requirements; and be deemed responsible in accordance with FAR Part 9. Nonconformance with the instructions provided in this ITO will not be further evaluated. The proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for substantiating the validity of stated claims. The proposal shall not simply rephrase or restate the Government's requirements but rather shall provide convincing rationale to address how the Offeror intends to meet these requirements. Offerors shall assume the Government has no prior knowledge of its facilities and experience and will base its evaluation on the information presented in the Offerors proposal.

2.1.2 System for Award Management (SAM): Offerors will not be eligible to receive a contract award from a Department of Defense (DoD) activity unless they are registered in SAM. IAW FAR 52.204-7, An Offeror is required to be registered in SAM with an active record when submitting an offer, and shall continue to be registered until time of award, during performance, and through final payment of any contract, resulting from this solicitation. On-line registration and instructions can be accessed at <https://www.sam.gov/index.html>.

2.1.3 Tier Definitions. DAFSTS II consists of two (2) tiers covering differing levels of qualifications for each; separated by level of complexity value, structure, and definition of problems for the applicable mission partner. The Fortune 500 list can be found at <https://fortune.com/fortune500/>. To qualify, the companies shall have been on the Fortune list at year end published "2022" or "2023").

Prime contractors shall only be Primes in one Tier only and shall not subcontract in the same or opposite Tier. A Prime contractors' interorganizational companies/subsidiaries are not permitted to be subcontractors.

If a Joint Venture (JV) is declaring as a prime offeror, all members within the JV are also considered prime offerors. This means that once a JV declares as prime, its members cannot subcontract or be a member of another JV in either Tier. A JV cannot be both a prime and a subcontractor in the same Tier, nor can it be a part of multiple offers in either Tier.

Once a Prime Offeror declares a tier it cannot change tiers. No exceptions.

Subcontractors can perform in the same or both tiers with multiple primes.

2.1.3.1 Tier 1 - Corporate experience successfully performing studies, research and analysis, developing and implementing transformational strategies and plans for Fortune 50 companies; (must have been on the Fortune list at year end published "2022" or "2023") and experience advising C-suite executives and large organizations through crisis response and highly complex, undefined, unstructured problems. Has extensive experience advising and implementing a comprehensive rethinking of business models, systems, or processes and;

Corporate experience successfully assisting the Government (Federal, State, US Territories) at the agency level, no lower than Major Command (or equivalent), advising senior leaders through developing transformational strategies; translating and incorporating commercial (private sector) best practices through crisis response and highly complex, undefined, and unstructured problems.

For the purpose of Tier 1, the term “highly complex, undefined, and unstructured problems” means the problems faced in this tier of effort are usually large in scale with little context or definition provided. Crisis scenarios often call for an immediate and dramatic response, usually making a step change essential. Requests usually require engagement across multiple stakeholder communities (external but in limited cases internal to the requesting Agency), and usually have political or statutory impacts. There are potentially no existing best practices in Government to leverage. These initiatives are usually characterized by sudden, disruptive changes brought about by outside forces.

2.1.3.2 Tier 2-Corporate experience successfully performing studies, research and analysis developing and implementing transformational strategies and plans for Fortune 200 companies; (must have been on the Fortune list at year end published "2022" or "2023"); and experience advising C-suite executives and large organizations through moderate to complex problems. Has extensive experience advising and implementing organizations through cautious progression when the risks associated with drastic changes loom large and;

Corporate experience successfully assisting the Government (Federal, State, US Territories) at the agency level, no lower than Major Command (or equivalent), advising senior leaders through developing transformational strategies; translating and incorporating commercial (private sector) best practices through moderate to complex problems.

For the purpose of Tier 2, the term “moderate to complex problems” means the requirements of this tier are complex but are usually understood with a goal defined. The scope may involve stakeholders internal and external to the Government but are usually limited to the requiring organization being within the requesting Federal Agency. The challenges are usually not political and usually have no statutory impact. The coordination and collaboration effort needed to resolve the problem is challenging and usually requires incremental change to complete. Responses in these efforts usually require a progressive evolution, emphasizing continuous improvements. These initiatives are also usually introduced in response to internal needs, but they are usually characterized by an urgent

challenge to the status quo such as a sudden organizational restructuring or the introduction of a new strategic initiative.

A step or incremental-change that will fundamentally impact the enterprise, through the improvement of how organizations holistically use people, processes, technology, data, and physical infrastructure to develop capabilities to meet their mission. Transformation should achieve measurable improvements in efficiency, effectiveness and stakeholder satisfaction.

- Step change is like the sledgehammer: powerful, impactful, and capable of sweeping changes quickly.
- Incremental change is the scalpel: precise, deliberate, and resulting in gradual but consistent improvements over a more extended period.”

2.2 Proposal Submission. Proposal submission will be completed in three (3) steps to ensure an efficient process. The proposal submission shall be unclassified.

2.2.1 Step 1 – Minimum “Compliant/NonCompliant” Gate - Declare Tier, Facility Clearance Validation, and SB Subcontracting plan compliance review

2.2.1.1 Facility Clearance (FCL): Due to the clearance requirements, all prospective Prime Offerors shall possess a TOP SECRET Facility Clearance (FCL). TOP SECRET FCL is not required for the Joint Venture (JV) itself if the Offeror is an unpopulated JV and all members of the JV possess a TOP SECRET FCL. A JV without its own FCL will not have access to classified information and all access will solely be through the JV members with a TOP SECRET FCL. Therefore, a JV without its own FCL is required to submit, as part of its proposal, a Security Plan/Standard Operating Procedure. The FCL shall be approved/issued by the Defense Security Service (DSS) and FCL must be posted in Defense Information Security System (DISS). A verifiable TOP SECRET FCL shall exist in DISS at time of proposal submission. The Government will validate the Prime Offerors/JV Members FCL based on the CAGE code provided on the completed DD254 per the instructions in paragraph 2.2.1.2. Offerors FCL will be assessed as “compliant/noncompliant” at proposal submission. Offerors without the required TOP SECRET FCL will be deemed “noncompliant.” Offerors shall have an approved facility clearance no later than the due date shown in Table 2.

2.2.1.2 DD Form 254, Contract Security Classification Specifications: The Offeror shall complete blocks 6a – c of the DD Form 254 (RFP Attachment 3). Complete the form and submit via email with your response to Step 1 no later than the due date shown in Table 2.

2.2.1.3 Prime Offerors shall also email the Contracting POCs the Tier Declaration Memo to declare the Tier it will propose in no later than the due date shown in Table 1. Once an Offeror has declared which Tier it will propose in that Offeror SHALL NOT change Tiers at any point during the RFP process OR after award. Prime contractors can only be primes in one Tier; shall not subcontract in the same or opposite Tier. No exceptions. Joint Ventures (JV) – shall not be a part of a JV and be a prime/sub. Shall choose one. No exceptions. Complete the provided Tier Declaration Memo on the Offerors official letterhead. If it is a Joint Venture, the offeror shall list all active JV members (attach addendum to declaration memo). If the Small Business Prime is utilizing a subcontractor’s corporate experience to meet the minimum requirements for corporate experience, then the Small Business Prime shall attach the signed subcontract(s) to their declaration memo as an addendum. If a subcontract(s) is not required to meet the corporate experience requirements, then it should not be included with the proposal.

2.2.1.4 All Prime Offerors (other than Prime small businesses) shall submit a Small Business Subcontracting Plan (SBSP) as required by FAR 52.219. The plan will be reviewed by the Contracting Officer for compliance with FAR Clause 52.219-9, Small Business Subcontracting Plan. Each Small Business Subcontracting Plan shall, at a minimum, adhere to the minimum goal percentages below for small businesses concerns and for the specific socio-economic small business concerns. Offerors are encouraged to propose higher than the minimums listed below. Offerors shall use \$100M as the total subcontracting dollars for Small Business Subcontracting Plan purposes. The **Small Business** Subcontracting Plans shall be updated once the total task order award amounts exceed \$100M. Note: The offerors proposed Small Business Participation Commitment Document (SBPCD) goals shall match your Small Business Subcontracting Plan goals (see subfactor 3).

**The offeror shall plan to incorporate Non-Traditional Small Business (NTSB), and shall utilize a minimum of three (3) nontraditional small businesses over the ordering period. NTSB's shall be addressed in the small business participation commitment document.*

**If utilizing a commercial subcontracting plan, please attach an addendum updating the subcontracting percentages to minimally match the required MQR percentages.*

Business Category	Minimum Subcontracting Percentage
Small Disadvantage Business (SDB)	25%
Service Disabled Veteran Owned Small Business (SDVOSB)	20%
Women Owned Small Business (WOSB)	10%
Historically Underutilized Business Zone Small Business (HUBZone)	3%
Small Business	55%
Veteran Owned Small Business (VOSB)	25%

2.2.1.4 Offerors will be notified via email if they are deemed compliant or noncompliant for the FCL, Tier Declaration, and Small Business Subcontracting Plan requirements. If the Offeror is deemed compliant with Step 1 instructions, the Offeror will be notified via email and will move to Step 2. If the Offeror is deemed noncompliant with Step 1 instructions, the Offeror will be notified via email that it was noncompliant, the proposal will not be evaluated further, and the Offeror will not move on to Step 2.

2.2.2 **Step 2 – Minimum “Compliant/NonCompliant” Gate -Corporate Experience Review**

****Corporate experience submissions shall be from the Named company on the applicable Fortune list**Minimum compliance requirements below:**

2.2.2.1 The Prime Offeror shall provide corporate experience examples that were performed in the past three (3) years from the date of issuance of this solicitation. Submitted corporate experience examples shall follow the outlined Tier definition in paragraph 2.1.3 as transformational efforts in terms of impact and betterment within a complex, global-scale organization based on the subject areas in Table 1 (below).

2.2.2.1.1 Definitions of impact and betterment.

- Impact-a a significant major effect or influence in resolving the organizations’ problem set and meeting the mission (people, processes, technology, culture).
- Betterment-Must be a measurable (cost, schedule, performance) increase in output, efficiency, return on investment ROI, etc.

2.2.2.2 Corporate experience must be at the corporate level and not based on individual employee experience.

2.2.2.3 All submissions must provide POC Information for verification from credible source (intimate knowledge of submitted transformation example **and the period of performance**).

2.2.2.4 Offerors have the option to “mask” their commercial client’s name (e.g., “A global aerospace & defense company”) in its corporate experience submission. A separate attachment (does not count toward page limitation) with a reference to the page/slide number, cited company name, period of performance and POC email is required to assist with the validation process. As with the Offerors proposal, the provided information is protected by the Freedom of Information Act, Exemption 3.

Example: Slide 9 ABCAcme Co. Period of Performance Bill.Jackson@abcacmecocom

2.2.2.5 Submitted Corporate Experience will be validated by the Government. During the Corporate Experience validation process, the Government will email the identified POCs to confirm the Offerors asserted transformation outcome(s). The Government will not ask proprietary questions. This is a reference check only. A memo explaining the requirement for offerors to provide private sector examples is attached to this solicitation.

2.2.2.6

Table 1– Corporate Experience Instructions

a.Transformation Recovery Example:	<p>As a prime, provide two (2) transformation examples (Tier Definition) where the</p> <ul style="list-style-type: none"> -Prime offeror Unsuccessfully implemented a transformation strategy or plan and how did the Prime offeror recover Cannot be client caused issue -The offeror cannot use subcontractor’s experience. <p>The Offeror can use a submission from;</p> <ul style="list-style-type: none"> -b. successful commercial translation example or -c. private sector examples within this table. <ul style="list-style-type: none"> -Cannot be client caused issue -The offeror cannot use subcontractor’s experience. -The offeror can use a submission from; b. Successful commercial translation example or c. private sector examples within this table.
b.Successful Commercial Translation Example:	<p>As a prime, provide six (6) submissions of successfully translated commercial (Tier Definition)best practice to a Government agency (Tier Definition)</p> <ul style="list-style-type: none"> -Shall be from minimally four (4) different organizations. -SB primes can use experiences performed as a first-tier subcontractor, shall not exceed two (2) submissions of the six (6) max OR -SB primes can use experience from their named subcontractor (shall have signed/executed subcontract), shall not exceed two (2) submission of the six (6) max
c.Private Sector Example:	<p>As a prime, provide seven (7) submissions of private sector transformation efforts.</p> <ul style="list-style-type: none"> -Shall be from minimally five (5) different named Fortune company (must be on the final published Fortune 50 or 200 list as of 2022 and 2023) -SB prime can use experience as a first tier subcontractor; shall not exceed three (3) submissions of the seven (7) max OR -SB primes can use experience from their named subcontractor (shall have signed/executed subcontract), shall not exceed three (3) submission of the seven (7) max.
d.Multiple Award Vehicle Example:	<p>As a prime, provide (1) example of service type contract experience using a multiple award vehicle with at least (7) active task orders within the order period.</p>

	<ul style="list-style-type: none"> -Vehicle examples are a MAC IDIQ, BPA, OTA and BOA. -The offeror cannot use subcontractor's experience. -The offeror can use a submission from; a Transformation recovery example, b. successful commercial translation example or c. private sector examples within this table.
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2.2.2.7 The government will review the submitted corporate experience for compliance with the minimum requirements detailed in Attachment 1, Instructions to Offerors: If the entire corporate experience submission is compliant, the Offeror will be deemed compliant, the Offeror will be notified via email and move to Step 3. If any portion of the corporate experience is deemed noncompliant, the Offeror will be deemed noncompliant, the Offeror will be notified via email and eliminated for consideration for award and will not move to Step 3. The Offeror will receive written notice IAW FAR 15.503.

2.2.3 Step 3: Submit Technical Factors-three (3) Subfactors

Factor I: Technical

Subfactor1: Statement of Objective (SOO) Responses

Step 3a: SOO Response 1

Step 3b: SOO Response 2

Subfactor 2: Small Business Participation Commitment Document (SBPCD)

Step 3c: SBPCD

Subfactor 3: Management and Capacity Plan (M&CP)

Step 3d: M&CP

2.2.4.1 Proposal submission. Proposal submissions shall be sent via email only to the contracting POC no later than the due date shown in Table 2. No hard copies are required. Late proposals will be processed in accordance with FAR Provision 52.212-1(f) Late Submissions, Modifications, Revisions and Withdrawals of Offers.

2.2.4.2 Table 2 below provides a proposal timeline.

Table 2 – Proposal Timeline (ET - Eastern Time)

Requirement	Due Date
STEP 1 (Compliant/Noncompliant)	
Step 1 -Minimum “Compliant/NonCompliant” Gate - Declare Tier, Facility Clearance (DD254) Validation, and SB Subcontracting plan compliance review	9 October 2024, 1:00PM ET
Notification of Compliance / Noncompliance for Step 1	11 October 2024
STEP 2 (Compliant/NonCompliant)	
Step 2- Corporate Experience Minimum “Compliant/NonCompliant” Gate - Corporate Experience	18 October 2024, 1:00PM ET
Notification of Compliance / Noncompliance for Step 2	25 October 2024
STEP 3a Subfactor 1 (Acceptable/Unacceptable)	

Offeror receives SOO 1 and Government Schedules Oral Presentations	Starting 28-29 October 2024, 1:00PMET (10 Calendar Days Prior to Scheduled Oral Presentation Day)
Provide information for in-person attendees for base access	Next Business Day after invite receipt, 1:00PM ET
Submit response to SOO 1	Due 3 Calendar Days Prior to Offerors Scheduled Oral Presentation, 1:00 PM ET
Oral Presentations SOO 1	Various Dates (10 Calendar Days after SOO Receipt)
	*The day you receive your SOO this is the day of day 1 count down.
STEP 3b	
Subfactor 1 (Acceptable/Unacceptable)	
Offeror receives SOO 2 and Government Schedules Oral Presentations	Starting 7-8 November 2024(4 Calendar Days Prior to Scheduled Oral Presentation Day)
Provide information for in-person attendees for base access	Next Business Day after invite receipt, 1:00PM ET
Submit Technical Subfactor SOO 2	Due 1 Calendar Day Prior to Offerors Scheduled Oral Presentation, 1:00 PM ET
Oral Presentations SOO 2	Various Dates (4 Calendar Days after Scenario Receipt)
STEP 3c & 3d	
Subfactor 2 & Subfactor 3 (Acceptable/Unacceptable)	
Submit Technical Subfactor 2-3	22 November 2024

2.5 Communications.

Exchanges of source selection information between Government and Offerors will be controlled by the CO and CS. E-mail will be used to transmit such information to Offerors. The Government intends to send answers to questions by amendment to the solicitation and post to www.beta.SAM.gov. The Offerors must submit all communications via email to the Contracting POCs.

2.6 Amendments to Solicitation.

If this RFP is amended, all terms and conditions that are not amended remain unchanged. Offerors shall acknowledge receipt of any amendment via email to this request by the day and time specified in the amendment(s).

2.7 Base Access/Function List.

Step 2 Attendance Requirements. Please fill out and provide Attachment 11 function list (base access) excel sheet for attendees for Oral Presentations NLT than the date provided in Table 1. Joint Base Andrews requires a 100% ID check. If a visitor does not possess proper identification (government issued CAC, dependent ID, Retired ID) for access to Joint Base Andrews, the visitor must comply with the action provided below. If you require access and you don't have a sponsor, please provide the following information in Attachment 11. Due to Personally Identifiable Information (PII being provided, please password protect the visitors pass form and send a separate email with the password and send it to destinee.narak@us.af.mil and kyle.beck.5@us.af.mil. Do not send the form to the Visitors Center. The VCC will process the request, and those properly vetted DO NOT need to go the

VCC for passes. Simply drive to the gate and show a valid ID. The gate guard will check for clearance and allow entry. Only place individuals who are 18 years of age and older, and do not hold any form of ID onto the Function List. List all guests in alphabetical order by last name, then first name, followed by their date of birth, and lastly, list their ID and associated state and number in order to be vetted through the National Crime Information Center (NCIC). All visitors vetted through NCIC, must have a form of State or federally issued ID (Driver's license State ID card, Passport, etc).

2.8 Oral Presentations.

The Government will require unclassified oral presentations for Technical Subfactor 1, Statement of Objective (SOO) Responses (see instructions in Table 1) via in person at 1500 West Perimeter Road, Room 4170, Joint Base Andrews, MD 20762. Do not enter the building until 30 minutes prior to your oral presentation. Offerors can wait in the lobby of the building at that time. A government POC will meet in the lobby 15 minutes prior to your scheduled oral presentation.

*One (1) Engagement Executive – lead executive for engagement with high level clients

*One (1) Transformation Executive - lead executive for transformation within the organization

**Note: Some firms have executives that are dual-hatted. Please identify that when you provide listing of attendees and their roles. Attendance is limited to 10 personnel per Offeror.

2.8.2 Offerors will receive the Statement of Objective (SOO) Responses and be contacted based on the schedule in Table 1 for a time slot for oral presentations. Offerors shall also provide a listing of attendees and their roles during the presentation.

2.8.3 Attendance requirements. Due to the high-level support required for DAFSTS II, the Government is requiring **two (2)** Key Executive Personnel to be in attendance. The Key Executive shall introduce themselves at the start of the oral presentation. While each firm is organized differently, the following executive level (decision maker) personnel are required to be in attendance and brief/provide solutions and be prepared to answer questions.

2.8.4 Oral presentations will be in person at Joint Base Andrews and Offerors shall present its' slides in person via Government laptop as stated above in Table 1. In-person contractor attendees shall not exceed ten (10) personnel. Virtual participation is prohibited. The Offeror shall state in the footer that the presentation is 'unclassified' and no information will be provided by the Offeror that is classified during the presentation. All documents are submitted by Offerors in the same time frame. No changes can be made to the presentation once it has been received by the Government. 10 minutes prior to the scheduled oral presentations, the Meeting room will be open to ensure there are no technical issues. Five (5) minutes prior to the scheduled presentation, the Contracting Officer will go over rules of engagement and address any questions.

2.8.5 Restrictions on Electronic Devices. Personal cell phones and laptops are not permitted in the presentation room. There is a temporary locker available for personal cell phones outside of the presentation room. NO LAPTOPS allowed. The presentation shall be emailed to the Government prior to the scheduled brief to ensure functionality. No CD-ROMS are permitted. No cameras, camcorders, cellular devices, recording devices, etc. of any kind are allowed before, during, or after the oral presentation. Offerors shall NOT record the presentation or conversation with the Government. Any Offeror found not in compliance will be deemed 'noncompliant', its proposal will not be further evaluated, and the Offeror will be ineligible for award

2.8.6 Time Limit. Oral presentations will be limited to 30 minutes. The Government will not interrupt during the presentation to ensure all Offerors are afforded the same amount of time to brief. **Any communication, clarification or discussion will be provided via a written evaluation notice.**

2.8.7 Format for Presentations. Offerors shall provide their presentation in Microsoft PowerPoint or PDF for projection during the oral presentation.

2.9 Period of Acceptance of Offers.

The Offeror agrees to hold its proposal firm for 180 calendar days from the date specified for receipt of offers.

2.10 Federal Holidays: The following Federal Legal Holidays are observed:

- New Year's Day
- Martin Luther King Day
- President's Day
- Memorial Day
- Juneteenth
- Independence Day
- Labor Day
- Columbus Day
- Veterans Day
- Thanksgiving Day
- Christmas Day

3.0 Preparation Instructions to Offerors: The purpose of these instructions is to prescribe the format of proposals and describe the approach for the development and presentation of proposal data. They are designed to ensure the essential information required for evaluation of proposals is submitted. Offerors are cautioned to follow the detailed instructions fully and carefully, as the Government intends to make award based on initial offers received without discussions but reserves the right to hold discussions.

3.1 Organization/Number of Copies/Page Limits

To assure timely and equitable evaluation of the proposal, the Offeror must follow the instructions contained herein. The proposal must be complete, self-sufficient, and respond directly to the requirements of this solicitation. The response shall consist of Technical Subfactors 1 through 3.

3.1.1 Offerors shall prepare proposals as set forth in the Proposal Organization Table below. The titles and contents of the volumes shall be as defined in the Table, all of which shall be within the required page limits and with the number of copies as specified. The volumes identified in the Table shall be emailed.

The content of each proposal volume is described in the ITO paragraph as noted in the Table 3 below:

Table 3 – Proposal Organization

Requirement	ITO Paragraph(s)	Delivery Format	Page Limit (page numbers are maximums)
Step 1: FCL (DD254), Tier Declaration, and Small Business, Subcontracting Plan (Written)	2.2.1	Email completed page 1 of the DD254, Email Tier Declaration memo (with subcontract(s)), Small Business Subcontracting Plan (only applicable to Large Business)	- 1 page for DD254; - 1 page Tier declaration, attached memo/template & 1 page Addendum List of JV& subcontract(s) - attach reps and certs (no page limit); - shall not exceed 20 pages for Small Business Subcontracting Plan - Subcontracts unlimited pages
Step 2: Corporate Experience	2.2.2	Email Presentation (Power Point) or (PDF)	- No more than 2 pages per example (max 32 slides)
Base Access/Function List	2.7	Email completed function list	- No Page limit
Step 3a: Submit Technical Subfactor 1 SOO response 1 (Written & Oral)	4.1.1	Email Oral Presentation (PowerPoint) for SOO response 1 and Contractor Proposed PWS (PDF)	-15 pages for Oral Presentation -15 pages for PWS

Step 3b: Submit Technical Subfactor 1 SOO response 2 (Written & Oral)	4.1.1	Email Oral Presentation (PowerPoint) SOO response 2 and Contractor Proposed PWS (PDF)	-15 pages for Oral Presentation -15 pages for PWS
Step 3c & Step 3d: Submit Technical Subfactors 2-3 (Written)	4.1.2, 4.1.3	SBPCD & Management Capacity Plan (PDF or Word)	-SBPCD: 10 pages -MCP: 10 pages

3.2 Specific Instructions.

3.2.1 Page Limitations. Page limitations shall be treated as maximums. If exceeded, the excess pages will not be read or considered in the evaluation of the proposal. Blank pages, title pages, cover pages, Table of contents, tab indexing, glossaries, list of Tables and figures are not included in page limitation. Legible Tables, charts, graphs and figures may be used to depict organizations, systems and layout, implementation schedules, plans, etc.

3.2.2 Page Size and Format for Written Proposal Submission. A page is defined as each face of a sheet of paper containing information. When both sides of a sheet display printed material, it shall be counted as two pages. Page size shall be 8½ x 11 inches. Pages shall be single-spaced and typed, except for displays and the reproduced sections of the solicitation document. The font shall be Times New Roman and no less than 12 point in size. Use at least 1 inch margins on the top and bottom. Pages shall be numbered sequentially by volume. When text is included within displays (graphs, charts, figures, tables, pictures), it may be no smaller than 8 point, but must be clearly legible without magnification, as determined solely by the CO. The size of these displays shall not exceed the page size as defined above. The email copy of the proposal shall be submitted in the following formats: Any Microsoft Office documents prior to 2010 will not be allowed, or Portable Document Format (PDF), as applicable. **There are no formatting requirements for Oral Presentation (which the exception of the required use of PowerPoint™); however, it is the Offerors responsibility to ensure its presentation is legible and viewable by the intended audience. The recommended resolution is 16:9.** The email size limit to the Government is 20MBs per email. Proposals can be broken up into more than one email (label each email proposal stating more than one email is being distributed, i.e. proposal email 1 of 1). Contact the POCs if you require assistance. **The SBSP is exempt from this paragraph.**

3.2.3 Title Page (not included in the page count): Each volume must include a title page. The title pages must show:

- Solicitation Number
- Name, Address, Telephone numbers and e-mail address of the Offeror
- Cage Code and UEI

3.2.4 Cross Referencing: The proposal submissions shall be written on a stand-alone basis so that its contents may be evaluated without cross referencing to another document or area of proposal

submission. Information required for proposal evaluation which is not found in its designated proposal submission will be assumed to have been omitted from the proposal.

3.2.5 Glossary of Abbreviations and Acronyms: Each proposal submission shall contain a glossary of all abbreviations and acronyms used, with an explanation for each. As stated above in paragraph 3.1.1, glossaries do not count against the page limitations for their respective submission.

3.2.6 Compliant: Documents submitted in response to this solicitation must be fully compliant to and consistent with the terms and conditions of the solicitation or may result in being rejected as noncompliant and not being evaluated.

4.0 Proposal Instructions. The following details the specific instructions for each proposal submission.

4.0 FACTOR I – Technical.

The Technical proposal should be specific and complete. Legibility, clarity, and coherence are very important. The Offerors responses will be evaluated against the Technical subfactor criteria defined in the Addendum to FAR 52.212-2 - Evaluation – Commercial Items. The proposal should not merely reiterate or rephrase the objectives or reformulate the Government’s requirements specified in the solicitation, but shall provide convincing rationale to address how the Offeror intends to meet these requirements. Offerors shall assume the Government has no prior knowledge of their facilities and experience and will base its evaluation on the information presented in the Offerors proposal.

4.1.1 Subfactor 1: SOO Response.

4.1.1.1 Offerors will be provided each SOO response prior to the presentation date. Each Offeror shall provide an executive-level PowerPoint briefing explaining a detailed solution to the SOO response. The Offeror shall utilize and incorporate industry best practices in developing the strategy. An executive summary not required; however, if Offeror elects to do one, it will count toward the page limit.

- a. The solicitation response shall include the contractor proposed Performance Work Statement (PWS) (the “what”). *A PWS is a document that provides a transformation resolution to the Statement of Objectives (SOO)-the scenario.*
 - The PWS will minimally contain the following;
 1. General-from SOO
 2. Background-from SOO
 3. Technical Solution/PWS proposed tasks to meet objectives
 4. Section 3.0 to 7.0 (not counted towards page number)-from SOO
- b. The PWS shall provide the Offerors detailed technical solution to meet the Statement of Objectives (desired transformation outcome). This includes the Offerors proposed milestones/timeline, deliverables, and stakeholder engagement plan.
- c. The Oral presentation (the “how”) shall provide the Offerors; detailed approach on how the transformation will be completed. At a minimum the slides should address the below:

- i. **Milestones**
- ii. Strategic Approach, Methodology- Explain how the problem will be solved. Explain the selected methodology and why it was chosen
- iii. Executable Approach- Explain the **defendability** of the approach (**can the approach be verified through** data, metrics, applicable experience)
- iv. Risks Assessment- Explain risk identification, monitoring, measuring, and mitigation
- v. Objective metrics- How will success/failure be measured?
- vi. Betterment- Explain how the approach will make the organization better. Must be a measurable increase in output, efficiency, return on investment, cost savings, etc.

4.1.2. Subfactor 2: Small Business Participation Commitment Document (SBPCD)

4.1.2.1 The Small Business Commitment Document (SBPCD) is Applicable to ALL Offerors. The SBPCD is separate and distinct from the Small Business Subcontracting Plan required by FAR Clause 52.219-9, Small Business Subcontracting Plan. All Offerors shall submit a SBPCD as required by DFARS 215.304(c)(i)(B). The proposed SBPCD will be incorporated into any resulting contracts. The offeror shall plan to assign complex/variety of the work small firms are to perform. The offeror shall plan to incorporate Non-Traditional Small Business (NTSB), and shall utilize a minimum of three (3) nontraditional small businesses over the ordering period. The offeror shall include a training program plan for SB & NTSB's. The training shall assist SB's subcontractors to include NTSB's in becoming federal contractors (SAM registration, RFP process, intricacies of Government contracting, applicable regulations, etc.). The training includes plans for all socio-economic groups NTSB – Requires three (3) NTSBs over the five (5) year ordering period.

4.1.2.2. For the purpose of this requirement, “Nontraditional Small Business (NTSB) Contractor” means a small business entity that is primarily engaged in similar lines of activity as listed and described in the North American Industry Classification System (NAICS) manual, having met the small business standards for that industry, established by the Small Business Administration, that is not currently performing and *has not performed any contract or subcontract for the Federal Government. Any entity organized for profit (even if its ownership is in the hands of a nonprofit entity) with a place of business located in the United States or its outlying areas and that makes a significant contribution to the U.S. economy through payment of taxes and/or use of American products, material and/or labor, etc. A NTSB Contractor includes but is not limited to an individual, partnership, corporation, joint venture, association, or cooperative. *If the NTSB has received a contract(s) through “Pitch Day”, only performed for the government as a subcontractor once or Small Business Innovation Program, they can be considered a NTSB. NTSB's will only retain NTSB status for up to two (2) years.

4.1.2.3. Offerors shall propose an annual minimum quantitative requirement (MQR) percentage for small businesses concerns using Table 4, and explain how they intend to meet the proposed MQR percentages for the overall IDIQ. The MQR's shall match your small business Subcontracting Plan that was submitted in Step 1.

Business Category	Minimum Subcontracting Percentage
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Small Disadvantage Business (SDB)	25%
Service Disabled Veteran Owned Small Business (SDVOSB)	20%
Women Owned Small Business (WOSB)	10%
Historically Underutilized Business Zone Small Business (HUBZone)	3%
Small Business	55%
Veteran Owned Small Business (VOSB)	25%
NTSB	No Percentage

4.1.24 Offerors shall provide narrative information on how percentages for this effort were developed and explain why and how they are realistic.

4.1.2.5 SBPCD Using Table 5, Offerors shall provide the company name of each small business, its socio economic status (if applicable), nature of commitment (subcontract, letter of commitment, agreement, etc.), and what types of products/services the small business/NTSB provides (specific to this requirement).

Table 5 SBPCD Companies

Company Name	Business Category(ies)	Nature of Commitment	Product/Services Provided	NAICS
Ex. Company ABC	WOSB			541611

4.1.3 Subfactor 3: Management and Capacity Plan

4.1.3.1 For the purpose of this requirement, subcontracts are permitted; however, a Prime Offeror shall be identified in the arrangement and upon award shall perform at least 50% of the work on all awarded DAFSTS II task orders. Offerors shall explain its approach and methodology to perform 50% of each awarded task order. Offerors shall explain their plan to manage capacity and resources that will enable the Offeror to rapidly respond to the breadth of transformational tasks via the Task Order Proposal Request process through partnerships, methodologies, automation, etc. Offerors shall explain its plan to mitigate the risk to the Government associated with subcontracting consisting of several different entities to meet the scope of this requirement. Offerors shall explain their plan to manage and monitor its workforce (including subcontractors) at multiple locations at the same time while continuously meeting the Government's high-level requirements.

- Plan to handle breadth of transformational tasks
- Plan to manage multiple task orders across multiple locations simultaneously
- Risk Mitigation Plan

- Turn-over
- Subcontractors
- Performance issues

4.2 General Information.

4.2.1 Discrepancies. If an Offeror believes that the requirements in these instructions contain an error, omission, or are otherwise unsound, the Offeror shall immediately notify the CO in writing with supporting rationale as well as the remedies the Offeror is asking the CO to consider as related to the omission or error. The Offeror is reminded that the Government reserves the right to award this effort based on the initial proposal, as received, without discussion. Accordingly, Offerors are advised to submit initial proposals that are well defined and clearly acceptable without additional information, additional or substitute pages.

4.2.2 Correction Potential of Proposals. The Government intends to award without discussions. The Government will consider, throughout the evaluation, the "correction potential" of any deficiency. The judgment of such "correction potential" is within the sole discretion of the Government. If an aspect of an Offerors proposal does not meet the Government's requirements and is not considered correctable, the Offeror may be eliminated from competition.

4.2.3 Discussions. The Offerors initial proposal should contain the Offerors best terms. The Government intends to award without discussions but reserves the right to conduct discussions if it is determined to be in its best interest. Offerors are advised to submit proposals that are fully and clearly acceptable without additional information. Any discussions will be conducted in accordance with FAR 15.306. Discussions can occur at any time during the evaluation process.

4.2.4 Evaluation Notices (EN). ENs may be used for clarification or communication purposes as well as discussions. Responses to the ENs will be evaluated in accordance with the evaluation criteria stated herein. Failure to respond to ENs will eliminate the Offeror from further evaluation and consideration for award. **If required, written ENs will be issued for oral presentations.**

4.2.5 Final Proposal Revisions (FPR). If discussions are held, at the conclusion of discussions, the CO will provide each Offeror an opportunity to submit a FPR. The CO will establish a common cut-off date for receipt of FPRs. FPRs will be evaluated in accordance with the evaluation criteria stated herein. After receipt of the FPR, the Government intends to make award without obtaining further revisions.

4.2.6 Debriefings. Debriefing information relating to other Offerors proposals will not be disclosed.

4.2.6.1. Post Award. All Offerors (successful and unsuccessful) may request a Post Award debriefing within three (3) calendar days after the date in which the Offeror received notification of contract award. Post award debriefings will be available to interested parties that advance past step 1. In an effort to allow for full feedback, during post award debriefing, the Government will provide strengths, weaknesses, significant weaknesses, and deficiencies.

4.2.6.2. A “strength” is an aspect of an Offerors proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government during contract performance. A “weakness” means a flaw in the proposal that increases the risk of unsuccessful contract performance. A “significant weakness” is a flaw that appreciably increases the risk of unsuccessful contract performance; and a “deficiency” is a material failure of the proposal to meet a Government requirement or combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level. Offerors who receive a debriefing may submit additional questions related to the information provided during the briefing within two (2) business days after receiving the debriefing. After the two business days expire, the Contracting Officer is not required to respond to any additional questions. The debriefing is concluded when the Contracting Officer delivers written responses to the Offerors timely additional question