

**FAR 16.5 Solicitation Instructions and Evaluation.[[1]](#footnote-1)**

**Seeking a Commercial Off-the-Shelf Solution Using Oral Presentations in Response to a SOO (Annotated Sample[[2]](#footnote-2))**

1. **Instructions**Contract holders must submit their written response in three separate sections[[3]](#footnote-3) within specified formats below at the close of the solicitation. If no page limitations are listed below then assume there are none. Any pages submitted beyond the limitations will not be evaluated.
	1. **Section1- Oral Presentation:**
		1. Technical and management presentation (Microsoft PowerPoint)
		2. Risk management plan (data loss) (Microsoft PowerPoint)
		3. Performance management plan (i.e., performance & quality objectives and measures) (Microsoft PowerPoint)
		4. Technical demonstration of key topics (see figure 1)
			* Performance Retrospectives – (Microsoft PowerPoint)
		5. Project specific organizational chart (Microsoft PowerPoint)
		6. Staffing plan (Microsoft PowerPoint)
			* Personnel must be enterprise cloud platform certified, as appropriate[[4]](#footnote-4)
			* Key personnel[[5]](#footnote-5). Resumes are required. (Word or Adobe, 2 pages)
			* System Architect
			* Information Technology Infrastructure Library (ITIL)
			* Facility Management Professional
	2. **Section 2 – Written Response:**
		1. Non-proprietary performance work statement (Microsoft Word) (25 pages. The entire document must be readable and of a professional caliber which could be part of a legal contract)
		2. The PWS may, in whole or part, become part of the task order
			* At a minimum please include:
				+ A description of activities and how to perform each outcome by objective and task
				+ A deliverable schedule
				+ Risk management measurements and controls
				+ Security concerns (e.g., Maintenance of ATO, Patching, etc.)
			* Please do not include:
				+ Marketing
				+ Contractor names or identifying markers
				+ Any statements that the government “shall” or “must”
		3. Accessibility Conformance Report (Section 508)
	3. **Section 3 – Pricing Information:**
		1. Price (Microsoft Excel)
			* Technical presentations are limited to the scheduled time of the presentation agenda; only those slides which are presented during oral technical presentations will be evaluated, any additional slides will be removed from the record by the contracting officer. Presentations must be readable (when printed out[[6]](#footnote-6)) and only what is on the slide will be considered for evaluation. For technical demonstrations of key topics, contractors must demonstrate from their portfolio how they have implemented their approach in a similar environment.
2. **Technical Presentation Instructions**Contract holder submissions must be clear, coherent and delivered in enough detail for the government to determine its level of confidence in the contract holder’s ability to perform the requirements of this task order (TO). Presentations must clearly demonstrate how the competitor intends to accomplish the project and must include convincing rationale and substantiation of all claims. Oral presentations will follow the schedule in Figure 1.

Contract holders must use their own equipment to deliver the presentation. The government conference room may include (lectern, microphone, presentation screen with computer connection cords, guest Wi-Fi, etc.). Competitors may arrive up to 30 minutes before the scheduled time of their presentation to set up. If held virtually, the government will provide an electronic invitation for the presentation so that it may viewed in real time by multiple government personnel.

Contractors may bring up to nine attendees. Contractors are encouraged to have only proposed personnel deliver the presentation however the system architect[[7]](#footnote-7) must be at the presentation. For the successful contract holder who wins this TO, please note the annual contractor performance assessment may include a government statement assessing the proposed personnel, what personnel performed, and any disruptions that may delay work due to contractor personnel replacements[[8]](#footnote-8). Any firm may attend only one oral presentation, whether for itself as a prime contract holder or as a subcontractor for only one prime firm.

Contract holders will use the exact presentation submitted at the close of the TO request. The contracting officer will ensure the written presentation is identical to the submitted documents, any substitutions may disqualify a contract holder from award. Contract holders’ presenters and attendees may not use electronics, phones, or other means to reach their firm for any input during the presentations. Oral presentations will be held in or near Washington, D.C. or virtually.

Oral presentations may be recorded. Given current global conditions, there is a high probability oral presentations may be, in whole or in part, held virtually. This determination will be decided by mutual agreement between each contract holder and the government. If presentations are held virtually, each member of the competitor’s team may be required to adhere to more specific restrictions. Such restrictions may include signing a statement certifying during the time of the presentation the member did not reach out to resources outside of the identified and present oral presentations team. The contract holder is responsible for sending the names and email addresses of all oral presentation participants to the contracting officer and contract specialist prior to the start of the presentation.

Due to internal government technological connectivity issues the government prefers to use a WebEx meeting for virtual orals. The government is open to alternate software solutions however alternate suggestions will require a connectivity check prior to scheduling oral presentations.

**Figure 1: Oral Presentations Agenda**

| Date and Time (sample) | Activity | Duration | Location |
| --- | --- | --- | --- |
| 7:30 AM ET | Competitors may arrive and begin set up | Up to 30 minutes | Rockville, MD or virtual |
| 7:50 AM ET | Contracting officer welcomes contractor and provides brief process overview | 5 to 10 minutes | Rockville, MD or virtual |
| 8:00 AM – 9:00 AM ET | Oral presentation | 1 hour | Rockville, MD or virtual |
| 9:00 – 9:15 AM ET | Break | 15 minutes | Rockville, MD or virtual |
| 9:15 – 10:15 AM ET | Technical demonstration of key topics. Contract holders are not limited to the number of performance retrospectives. Rather presenters are limited by the time allowed.Topic 1: ServiceNow retrospectiveTopic 2: SaaS retrospectiveTopic 3: PaaS retrospective | 1 hour  | Rockville, MD or virtual |
| 10:15 – 11:00 AM ET | BreakGovernment meets to identify any clarifications or elaborations it may require to understand the presentation and demonstration.  | 45 minutes | Rockville, MD or virtual |
| 11:00 AM – 11:45 AM ET | Questions and answers | 45 minutes | Rockville, MD or virtual |

1. **Technical and Management Approach**

The contract holders shall provide a performance work statement (PWS) in response to the statement of objectives (SOO). The proposed solution shall include an explanation of how project and contract management, communication and collaboration with the government, security requirements, documentation, and reporting will function in conjunction with the proposed (agile) methodology.

Address how your company manages information technology techniques and agile implementation for the delivery of the applications described in the SOO. Address techniques for release planning, plans for engaging end users, methods for capturing and applying lessons learned, testing processes, reasons behind the composition of your agile teams and the rationale behind the proposed development talent and project oversight (tied to the scope), and how you will make resources available within schedule and budget constraints.

For this effort, the PWS shall clearly illustrate how the outputs of the SOO will be delivered. All applicable deliverables under the PWS shall be executed in a manner consistent with best practices from the U.S. Digital Service Digital Services Playbook. Agile deliverables under this TO are defined as the completion and acceptance according to the “definition of done” of the iterations completed, which are based on the contract holder’s agile methodology. Each iteration shall be defined in the PWS and should document how planning, requirement analysis, testing, quality assurance, and documentation will all meet the contract holder’s proposed “definition of done.”
2. **Performance Retrospective**The contract holder shall submit information on previously performed contracts or on-going contracts. This may include contracts where the contract holder acted or is acting as a subcontractor. This information should be similar to this project and was or is performed for federal, state or local governments or industry for commercial items.

Performance retrospectives – contract holders shall submit retrospectives for recent projects (within the last three years). Each performance retrospective should specifically identify how these performances relate to this requirement. Additionally, at a minimum, each performance retrospective must contain the following information which specifically relates to the ability to perform under this TO:
	1. **ServiceNow Enterprise Cloud Platform with IWMS and IT Applications**
		1. Describe previous implementations of the ServiceNow Enterprise Cloud Platform with both IWMS and IT applications, specifically how data and workflows could be shared between applications, via the shared platform
		2. Describe how role and permissions were established to ensure the facilities group and IT group did not interfere with each other’s work
		3. Describe how a single request portal was or could have been established to receive and process all facility and IT requests
		4. Describe how other organizational groups, such as Clinical, Laboratory, or HR, leveraged or could leverage this type of solution in partnership with Facilities and IT
		5. Describe how data and workflows were migrated from existing systems, ensuring continuity of operations, while also improving the integrity of the data and the efficiency of the workflows
		6. Describe how a governance and change approval board was established to ensure changes during and after implementation are appropriately reviewed and approved prior to deployment
		7. Describe how both fulfillers and end-users were trained
		8. Describe how the overall change management and communication to the organization was managed
	2. **Facility Management, Asset Management, Integrated Workplace Management (IWMS)**
		1. Describe your experience with Maintenance Management, including Preventative Maintenance, Customer-Requested Maintenance, Asset Management, Work Order Management, Parts Inventory Management
		2. Describe your experience with Construction Project Management, including project delivery method, design submissions, budget and scheduling, RFI/Submittal tracking and Earned Value Management
		3. Describe your experience with Condition Assessment and Capital Investment Planning, including estimate end of life, deficiency tracking, cost estimating, project formulation, budget planning, project promotion
		4. Describe your experience with Real Estate and Space Management, including CAD floor plans, room numbering, building numbering, space hierarchy, space types, lease management, portfolio reporting
		5. System Architecture, System Integration, Application Programming Interface, IT Project Management, IT Service Management (ITSM), UX Design, Agile
		6. Describe previous experience architecting an enterprise wide cloud platform to be used across multiple groups including Facilities, IT, HR, Clinical, etc.
		7. Describe previous experience with designing system integrations and leveraging Application Programming Interface (API).

For each retrospective, identify:

* 1. Contract number
	2. Prime or subcontractor (identify the percentage as prime or sub and type of work performed)
	3. Customer name (agency or company)
	4. Primary and alternate customer points of contact (Include name, telephone, email)
	5. Project title, project start and end dates total dollar value of project

Failure to provide accurate or complete reference information may result in a lower evaluation rating.

1. **Staffing Plan**Please describe a staffing plan and a description of your current personnel resources in sufficient detail. The plan may contain titles and labor categories and any unique skillsets to these labor categories. At a minimum your plan should address your approach, assigned staffing capabilities, team structure, size and experience to meet the requirements of the SOO. If you are teaming with another contractor identify how the combined team will work together to fulfill the deliverables.
2. **IT Accessibility Requirements**

Provide an Accessibility Conformance Report (ACR) for each commercially available Information and Communication Technology (ICT) item offered through this contract. Create the ACR using the Voluntary Product Accessibility Template Version 2.1 or later, located at https://www.itic.org/policy/accessibility/vpat.

Complete each ACR in accordance with the instructions provided in the VPAT template. Each ACR must address the applicable Section 508 requirements referenced in the Work Statement. Each ACR shall state exactly how the ICT meets the applicable standards in the remarks/explanations column, or through additional narrative. All "Not Applicable" (N/A) responses must be explained in the remarks/explanations column or through additional narrative. Address each standard individually and with specificity, and clarify whether conformance is achieved throughout the entire ICT Item (for example - user functionality, administrator functionality, and reporting), or only in limited areas of the ICT Item.

Provide a description of the evaluation methods used to support Section 508 conformance claims. The agency reserves the right, prior to making an award decision, to perform testing on some or all of the contract holder’s proposed ICT items to validate Section 508 conformance claims made in the ACR.

	1. Describe your approach to incorporating universal design principles to ensure ICT products or services are designed to support disabled users.
	2. Describe plans for features that do not fully conform to the Section 508 Standards.
	3. Describe “typical” user scenarios and tasks, including individuals with disabilities, to ensure fair and accurate accessibility testing of the ICT product or service being offered.

	Prior to acceptance, the government reserves the right to perform testing on required ICT items to validate the contract holder’s Section 508 conformance claims. If the government determines that Section 508 conformance claims provided by the contract holder represent a higher level of conformance than what is actually provided to the agency, the government shall, at its option, require the contract holder to remediate the item to align with the contract holder’s original Section 508 conformance claims prior to acceptance.
3. **Price Submission Instructions**The contract holder must submit pricing by the closing time of the solicitation. The SF-1449 must be submitted with priced contract line items.

The contract holders shall identify the labor category(s) to be used for this effort and the fixed loaded hourly rate(s) proposed.

	1. Pricing shall include the following:
		1. A total price for each CLIN (per year of effort)
		2. All reductions including rebates offered
4. **Time and Materials**For time and materials the contract holder’s pricing shall be based on their CIO-SP3 Labor Rates. The hourly rates are ceiling price rates and the contract holder may, at their discretion, elect to propose lower hourly rates when responding to a task order request. Contract holders shall explain in their TO approach any loaded hourly labor rates that exceed the rates in the GWAC or for new proposed labor categories (see Article H.1.1 of the ID/IQ). Ensure that Section II, paragraph B with a complete break out of labor categories of this solicitation is completed and returned with your submission. Other direct costs will be identified in clause 52.212-4 Alt I and by CLINs. Contractors shall price other direct costs except for travel. Travel will be a not to exceed amount set by the government.

In accordance with FAR 51 Use of Government Sources by Contractors, the successful awardee has the option to use NITAAC CIO-CS to procure task order appropriate materials. Upon request to use this option, the contracting officer will issue a letter of authorization.
5. **Evaluation Factors and Evolution Methodology**

The evaluation will consider technical factors and price. In the evaluation, technical is more important than price. Evaluation factors are listed in descending order of importance:

	1. Technical and Management Approach
	2. Staffing Plan

Technical and management are considered moderately more important than staffing. In the event solutions are evaluated as technically equal in quality, price will become a more significant consideration in selecting the successful contract holder. While pricing is always important, it will not be an evaluation factor. It will be analyzed and assessed for a fair and reasonable price determination.

1. **Technical Evaluation Factors and Evaluation Methodology**The government will assess its level of confidence that the contract holder will successfully perform the requirements of this solicitation based on the competitor’s ability and experience.

**Figure 2: Evaluation Rating Table**

| **Rating** | **Definition** |
| --- | --- |
| **High Confidence** | The government has **high confidence** that the contract holder understands the requirement, proposes a sound approach, and will be successful in performing the contract with **little or no** government intervention. |
| **Some Confidence** | The government has **some confidence** that the contract holder understands the requirement, proposes a sound approach, and will be successful in performing the contract with **some** government intervention. |
| **Low Confidence** | The government has **low confidence** that the contract holder understands the requirement, proposes a sound approach, and will be successful in performing the contract **even with** government intervention. |

1. **Price Evaluation Factor and Evaluation Methodology**A price analysis will be performed to determine if the price proposed is fair and reasonable. Price will be evaluated using the price analysis methods of FAR Part 15.4.

	1. **Selection and Award**
		1. **Fair Opportunity**
		This request is conducted under the fair opportunity guidelines of FAR 16.505 and Article G.7.1 of the CIO-SP3 GWAC. Award will be based on a determination of best value to the government, price, and other factors considered. This method does not use any aspects of FAR subpart 15.3.
		2. **Comparative Analysis**Following receipt of responses and oral presentations for this TO request, the government may perform a comparative analysis (comparing contract holders’ responses to one another). This method supports the selection of the contract holder that is best suited to fulfill the requirements, based on the contract holders’ responses to the factors outlined in this TO request.
		3. **Award on Initial Responses**
		The government anticipates selecting the best suited contract holder from initial responses, without engaging in exchanges. Contract holders are strongly encouraged to submit their best technical solutions and price in response to this TO request.
		4. **Exchanges with Best-Suited Contract Holder**
		Once the government determines the contract holder that is the best-suited (i.e., the apparent successful contract holder), the government reserves the right to communicate with only that contract holder to address any remaining issues, if necessary, and finalize a TO with that contract holder. These issues may include issues with technical, pricing and terms and conditions. If the parties cannot successfully address any remaining issues, as determined pertinent at the sole discretion of the government, the government reserves the right to communicate with the next best-suited contract holder based on the original analysis and address any remaining issues. Once the government has begun communications with the next best-suited contract holder, no further communications with the previous contract holder will be entertained until after the TO has been awarded. This process shall continue until an agreement is successfully reached and a TO is awarded.

| 1. Version History
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| --- |
| Version# | Requesting Office | Author | Created / Updated Date | Changes Made |
| *1* | *Cite office, not specific individuals.* | *Author of document not editor.* | *Date of change.* | *Make notations regarding changes made. Ex: Procedures A-1.* |
| *#* | *Fill In* | *Fill In* | *Date* | *What was changed* |
| *#* | *Fill In* | *Fill In* | *Date* | *What was changed* |

1. This example takes advantage of FAR 16.505(b)(ii), which states the contracting officer may exercise broad discretion in developing appropriate order placement procedures. The contracting officer should keep submission requirements to a minimum. Contracting officers may use streamlined procedures, including oral presentations. [↑](#footnote-ref-1)
2. This is a sample and is shared to provide the reader one way in which modern information technology solutions are evaluated. This sample is meant, in part, as a mental springboard to help you write your instructions and evaluations specific to your requirement and agency needs. [↑](#footnote-ref-2)
3. This language is meant to be all encompassing of the competitor’s total response. [↑](#footnote-ref-3)
4. FAR 39.104 tells us the solicitations must not describe any minimum experience or educational requirement for proposed information technology contractor personnel unless our need cannot be met any other way. Review this section of the FAR to ensure due diligence. [↑](#footnote-ref-4)
5. Key personnel are generally not recommended in modern information technology approaches. However, sometimes a labor category is needed because it is challenging to fill that role in the current marketplace, or a specific expertise would be tenuous without such personnel. One approach that has been successful in reducing and eliminating key personnel is to use solicitation language similar to, “for the successful contract holder who wins this TO, please note the annual contractor performance assessment may include a government statement assessing the proposed personnel, what personnel performed and any disruptions that may delay work due to contractor personnel replacements.” [↑](#footnote-ref-5)
6. In this example limited restrictions (font size, margin, etc.) are in place due to feedback from industry. Market research sessions have revealed sometimes industry can spend hours trying to make a format fit to a prescribed standard. [↑](#footnote-ref-6)
7. Consider having only the critical key personnel at the oral presentations. [↑](#footnote-ref-7)
8. The intent is not to measure individuals or individual performance but to [↑](#footnote-ref-8)