

SECTION B: RFO INSTRUCTIONS AND EVALUATION FOR AWARD

Introduction:

1.1. Offeror Questions/Clarifications

All Offeror questions and clarifications pursuant to this RFQ must be received by the Contracting Officer, [REDACTED]o.gov, and Contract Specialist [REDACTED] no later than June 25 2020 at 10:00 AM, EDT. The Government reserves the right not to provide a response for any Offeror question/clarification received after the date and time stated above. If, however, the Contracting Officer determines that a request cites an issue of significant importance, the Government will provide a written response to all Offerors.

The Government will not provide information in response to telephone calls. Contacting other USPTO personnel regarding this solicitation in an attempt to gain procurement-sensitive information may result in disqualification from the evaluation process. Written responses to all Offeror questions/clarifications will be sent to all Offerors with due regard to the proper protection of proprietary information via an amendment to the solicitation.

The Government intends to conduct this procurement through a two-phased submission and evaluation process in order to determine the best-suited Offeror and then negotiate a Performance Work Statement (PWS) and Quality Assurance Surveillance Plan (QASP).

1.2. Period of Performance

The BPA call period of performance includes a six (6) month base period and one (1) twelve (12) month option period for a total of eighteen (18) months beginning date of award.

1.3. Quotation Preparation and Delivery Instructions

The Phase I submission shall consist of: (1) Signed cover letter certifying that the Offeror has read and agrees to comply with all of the conditions and instructions provided in this RFQ document, and any potential amendments issued; (2) Experience answer submission.

Phase II submission shall consist of: (1) Signed cover letter certifying that the Offeror has read and agrees to comply with all of the conditions and instructions provided in this RFQ document, and any potential amendments issued; (2) Technical submission (oral presentation) and (3) Price Matrix. Additionally, Offerors shall be prepared to present their Technical submission in an oral presentation.

Signed cover letters must provide the following information:

- A. Name of Offeror
- B. Address
- C. City, State, Zip code
- D. Data Universal Numbering System (DUNS) Number & CAGE Code
- E. Taxpayer Identification Number (TIN)
- F. Points of Contact (Primary & Alternate) for both Technical and Pricing Submissions

- G. Telephone Number
- H. Electronic Mail Address
- I. Solicitation/Quotation number
- J. Date of Quotation
- K. GSA Schedule Contract Number reference in IAISS BPA award
- L. Small Business Representations made by the Offeror
- M. Prompt Payment Terms
- N. A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation without exceptions or assumptions.
- O. Names and contact information of persons authorized to negotiate on the Offeror's behalf with the Government in connection with this solicitation.
- P. Name, title, and signature of person authorized to sign the quotation.
- Q. Current Performance Period the GSA Schedule with Option Periods as applicable
- R. A Statement certifying that the proposed solution falls within the scope of the Offeror's referenced GSA Schedule contract(s) as applicable by signing the cover letter.

All submissions MUST cite the applicable GSA Schedule contract number from the IAISS BPA award in all documents submitted in response to this RFQ.

1.4 Quotation Submission

Please review the requirement and respond via email to the Contracting Officer with a courtesy intent to provide a response to Phase I. After, Phase I, advisory notifications will be sent to all Offerors indicating a recommendation to proceed or not to proceed to Phase II. After advisory letters have been received, Offerors shall respond via email to the Contracting Officer with a courtesy intent to provide a response to Phase II.

Electronic Submissions: The Offeror shall provide an electronic copy of its Phase I and II response/quote (as applicable). Submission must occur prior to the Submission Deadlines specified in Section 1.5.1 of this Section (SECTION B).

1.5 Response/Quotation Preparation

The Government will not consider pages submitted in excess of the stated page limitations, or materials not included in full text within the quote (no links to external information will be reviewed or considered. Page limitations include all text, graphs, pictures, appendices, references, exhibits, etc. Tabs, index sheets, tables of contents, dividers and other such aids that are solely used to assist the evaluator in locating information and are advisory in nature, imparting no other information other than the identification of content, will not be counted against any page limits stated within this RFQ.

Phase	Volume	Not to Exceed Page Limits
Phase I	Factor 1: Experience	10 pages
Advisory Notice		
Phase II	Factor 2: Technical	Oral Presentation, maximum of 2 page submission to include: (A) a one-page document that

		summarizes the points intended to make during oral presentation, (B) a list of attendees at the oral presentation (including name, employer, title, proposed role in performance, and citizenship). Note we are not asking for a written response to the four (4) questions above, however, this may be provided not to exceed 10 pages.
	Factor 3: Price	Section D: Price Matrix (Attachment #1 & #2)
Negotiation	Select Best-suited and negotiate: PWS & QASP	

All narrative text contained in the quote response must be formatted to 8 ½ x 11 paper with margins of at least 1” at the top, bottom, and both sides; using single spaced, Times New Roman 12 point font. For charts, tables, exhibits and figures, no less than 8 point Times new Roman font is acceptable. Offerors are cautioned that quotation elements using a font less than 12-point Times New Roman for the narrative and less than 8-point Times New Roman for charts will not be reviewed by the Government.

1.5.1 Response/Quotation Submission Deadline

Offerors shall submit Phase I: Experience responses no later than 3:00 pm, EDT June 29, 2020.

Submission deadlines for the later Phases will be detailed in future instructions provided by the Government. Following Government advisory recommendation post Phase I, Offerors will have approximately 2 business days to notify Government of interest to proceed to Phase II; actual timeline will be communicated within the notification. The Offeror will have at least 2 weeks from the Government’s receipt of the Offeror’s decision to proceed to prepare the submission for Phase II. The government will determine one Offeror to be the best-suited (e.g. the apparent successful awardee), the government reserves the right to engage with only that firm to negotiate a Performance Work Statement (PWS) and Quality Assurance Surveillance Plan (QASP) (See Section A, paragraph 11) as well as to address any remaining issues, if necessary, and finalize a BPA call with that firm. 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 engage the next best-suited firm based on the original analysis and address any remaining issues. Once the government has engaged the next best-suited firm, no further engagements with the previous firm will be entertained until after the call has been awarded. This process will continue until an agreement is successfully reached and a call is awarded.

Failure to participate in Phase I of the solicitation precludes further consideration of an Offeror. Submissions will not be accepted from Offerors who have not submitted the Phase I response/quote by the due date and time stated in this RFQ. Additionally, an Offeror’s decision not to participate in Phase II of the procurement precludes further consideration of an Offeror. Finally, the Offeror’s decision not to submit the PWS and QASP precludes further consideration of an Offeror and renders them ineligible for award.

1.6 Breakdown of Evaluation Factors

Technical Factors	Business Factors
1. Experience	3. Price
2. Technical	

1.7 Specific Submission Instructions Relative to the Submission Phase

Offerors are cautioned that the quality of their response/quotation and adherence to RFQ response requirements and/or restrictions, are considered reflective of the manner in which Offerors will be expected to perform work under this Call. This will be given due consideration throughout the evaluation process. Offerors are strongly encouraged to emphasize content in response to all RFQ requirements.

The Government will be conducting the evaluation in two -phases to determine to determine an Offeror best-suited and then negotiate a Performance Work Statement (PWS) and Quality Assurance Surveillance Plan (QASP). Evaluations will be based on the requirements specified in SETION A PEDS SOO.

Phase I: The Government will be evaluating Factor 1: Experience. Offerors shall furnish written responses that address all four (4) questions below:

1. Please describe your experience with [REDACTED]
[REDACTED] Describe the environment including [REDACTED]
2. Describe the expertise your team has in [REDACTED] ?
What challenges, constraints and/or risks were encountered [REDACTED] ?
3. Please describe your team's experience [REDACTED] ?
4. Explain how you have worked with senior-level, cross-sector teams to collaboratively plan and execute major initiatives. What is your project management approach to defining objectives that support the mission and ensure success for [REDACTED] ? What experience does your team have successfully managing and implementing [REDACTED] ?

The information shall be sufficiently detailed so that the Government can determine whether the answers(s) demonstrate the prime contractor's experience.

After the Government completes evaluation of the Phase I submission, Offerors will receive an advisory notification via email from the CO. The notification will advise the Offeror of the Government's advisory recommendation to proceed or not to proceed to Phase II. Offerors who are rated most highly will be advised to proceed to Phase II of the proposal submission process. Offerors who were not among the most highly rated will be advised that they are unlikely to be viable competitors, along with the general basis for the Government's advisory recommendation. The intent of this advisory notice is to minimize development and other costs for those offerors with little to no

chance of receiving an award. The Government's advice will be a recommendation only and those Offerors who are advised not to proceed may elect to continue their participation in the procurement.

The Government does not intend to provide debriefings after the completion of the advisory notifications.

Phase II: Phase II will require submission of Factor 2: Technical and Factor 3: Price. This phase requires a written response and oral presentation. Technical information and price information may be incorporated into the BPA call, as applicable. Specific instructions including limitations and deadlines will be provided to those Offerors that elect to proceed to this phase at least 2 weeks prior to the submission due date. The Government will be scheduling Oral Presentations to evaluate Factor 2: Technical. For the Technical factor (Factor 2) the Offeror shall submit, by the date and time set in the Phase I advisory notice for receipt of Phase II quotations, (A) a one-page document that summarizes the points it intends to make in its oral presentation, (B) a list of attendees at the oral presentation (including name, employer, title, proposed role in performance, and citizenship) (*Note we are not asking for a written response to the four (4) questions above, however, this may be provided), (C) A pricing quote utilizing the templates included as Attachment #1 (on-site) and Attachment #2 (off-site). The Government will evaluate each Offeror's total evaluated price with respect to reasonableness based on the total evaluated price as stipulated in the Government's Price Matrixs (Attachment #1 and Attachment #2). The total evaluated price consists of the total evaluated price for the six (6) month base period and the twelve (12) month option periods. The total price shall be for on-site support (Attachment #1) for the entire period of performance and a COOP situation for off-site support for the entire period of performance (Attachment #2). (A), (B), and (C) must be submitted electronically in advance of the oral presentation. (A) and (B) will not be evaluated.

For the oral presentation, the Offeror shall prepare and provide a virtual oral presentation with the Government where they will exhibit their proposed solution's capability in performing selected requirements discussing the technical factor which addresses all four (4) technical questions below. Any parts of the technical solution and oral presentation, including but not limited to responses to questions, may be incorporated into the BPA call.

1. Please describe your team's experience developing [REDACTED]
 - a. How would you use [REDACTED] ? What would be your measure of success?
 - b. Please describe your approach to [REDACTED]
2. Describe how you would implement and manage a [REDACTED]
3. A robust critical business infrastructure that utilizes [REDACTED], describe your approach that would ensure a [REDACTED]
4. Please address how you will handle [REDACTED]

During the Oral Presentation, the quoter shall not make any reference to cost or price; however, resource information (such as data concerning labor hours and categories, materials or supplies required for performance, subcontracts, etc.) may be discussed so that the quoter's understanding of the requirements may be evaluated. The same confidence rating methodology used in Phase I will be used for evaluation purposes of Phase II.

The Oral Presentation will be conducted in such a manner as to enable the Government reviewers to make a thorough evaluation and arrive at a sound determination of whether the quoter understands the technical requirements. Presentations which merely offer to perform in accordance with the Government's requirements or which merely paraphrase the requirements document, or use phrases such as, "standard engineering practices will be employed," or "well established techniques will be employed," etc. may not provide confidence to the Government evaluators. The Contractor must present an explanation of its proposed technical approach in conjunction with the tasks to be performed in achieving the program objectives.

The oral presentation will occur virtually. Offerors may use a whiteboard and/or chart as they see fit, but the government will not evaluate the whiteboard, chart, nor any other visuals utilized or provided as part of the oral presentation. The quoter is limited to three attendees. The attendees must include the Technical Architect, Senior Cloud Engineer and Program/Project Manager. The Government intends to evaluate the oral presentation immediately after it occurs.

During the oral presentation, the quoter will have up to 60 minutes to answer all four (4) questions listed within the Technical section above, and up to 60 additional minutes to answer any follow-on questions that may be asked after the four (4) technical questions have been answered.

After the Government completes evaluation of Factor 2: Technical and Factor 3: Price, the government will determine one Offeror to be the best-suited (e.g. the apparent successful awardee), the government reserves the right to engage with only that firm to address any remaining issues, if necessary, and finalize a call with that firm. 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 engage the next best-suited firm based on the original analysis and address any remaining issues. Once the government has engaged the next best-suited firm, no further engagements with the previous firm will be entertained until after the call has been awarded. This process will continue until an agreement is successfully reached and a call is awarded.

The Government does not intend to provide debriefings after the completion of the advisory notifications.

1.8 Evaluations and Selection

Evaluations will be conducted in accordance with FAR Part 8.4. The PWS and QASP will be negotiated and a BPA call will be established with the best-suited Offeror whose response/quotation from each Phase (Phase I and II) receive the highest confidence rating and trade-off analysis to represents the best value to the Government. For the purposes of this RFQ, "best value" is defined as the procurement process resulting in the most advantageous acquisition decision for the Government and is performed through an integrated assessment and trade-off analysis among the three (3) evaluation factors. The Government may elect to award to other than the lowest priced quote, based on the results of the tradeoff analysis between non-price and price factors. The Government intends to evaluate responses/quotations and award a single-award call without communications with Offerors. The Offerors should therefore propose their best approach in each Phase to meet the requirements of the SOO and solicitation. However, the Government reserves the right to

enter into communications if it is deemed to be in the best interests of the Government.

1.8.1 Evaluation Ratings

The evaluation of Factor 1& 2 will be done holistically with a rating scale of "high confidence," "some confidence," and "low confidence," representing the Government's confidence that the Offeror understands the requirement and will be successful in performing the work.

High Confidence	The Government has high confidence that the Offeror understands the requirement, proposes a sound approach, and will be successful in performing the contract.
Some Confidence	The Government has some confidence that the Offeror understands the requirement, proposes a sound approach, and will be successful in performing the contract.
Low Confidence	The Government has low confidence that the Offeror understands the requirement, proposes a sound approach, or will be successful in performing the contract.

All technical factors are weighted in order of importance, with Factor 1 (Experience) being more important than Factor 2 (Technical), and both Factors 1 and 2 being more important than the business factor, Factor 3 (Price). When combined, Factors 1 and 2, are more important than Factor 3.