



Date: November 4, 2016

To: GSA 00CORP - Professional Services Schedule, Mission Oriented Business Integrated Services Holders: SIN 874-1, 874-4, and 874-7

From: GSA Federal Acquisition Services - Office of Acquisition Operations

Subject: Request for Quote – GSA Blanket Purchase Agreement – Presidential Appointee Orientation Program (RFQ No. QMAE-VS-170001-D)

GSA's Federal Acquisition Service – Office of Acquisition Operations is issuing this Request for Quote (RFQ) on behalf of the GSA Presidential Transition Support Team for orientation support services of the Presidential Appointee Program. This requirement will be competed full and open under the Professional Services Schedule (PSS – 00CORP), Mission Oriented Business Integrated Services (MOBIS): SIN 874-1, 874-4, and 874-7. This RFQ is issued in accordance with the regulatory authority of the Federal Acquisition Regulation (FAR) Part 8.4. In addition, this RFQ, and resultant Blanket Purchase Agreement (BPA), and all orders issued under the BPA are subject to the contractual terms, conditions, and clauses contained in the awardee's PSS – 00CORP MOBIS SIN 874-1, 874-4, and 874-7 contract, as applicable.

This RFQ is being released via the GSA eBuy site located at [https://www.ebuy.gsa.gov/advantage/ebuy/start\\_page.do](https://www.ebuy.gsa.gov/advantage/ebuy/start_page.do). In order to conduct this acquisition most effectively, all notices and postings will be made at this web site. Please be aware that the solicitation, questions and answers, comments or any other information will not be disseminated in any other format or location. Be sure you check the eBuy site regularly for any amendments.

Contractors are encouraged to submit a complete quote. Contractors should propose their best price with their initial quote, as it is GSA's goal to award without discussions. Note that incomplete quotes may be rejected.

Should you have any questions, please contact Vincent Spencer at [Vincent.Spencer@gsa.gov](mailto:Vincent.Spencer@gsa.gov). I look forward to receiving your quote!

V/r,  
Matthew Gormley  
Contracting Officer

## **A. INTRODUCTION**

### **A.1 Identification of Agency**

The General Services Administration (GSA), Federal Acquisition Service (FAS), Presidential Transition Support Team, 1800 F Street NW, Washington, DC 20405 has a requirement to acquire training and orientation activities for support services in public policy and political and governance expertise to orient approximately 4,000 (on a rolling basis) presidential appointees in support of the development and implementation of the Presidential Appointee Orientation Program. FAS intends to establish a single Blanket Purchase Agreement (BPA) under the authority of the successful Offeror's Multiple Award Schedule (MAS) BPA clause (I-FSS-646).

### **A.2 Type of Order**

The Government anticipates awarding a **Firm-Fixed-Price FFP BPA** as a result of this RFQ. Separate funding will be provided for each Task Order issued under the BPA. The Contracting Officer associated with this RFQ, and identified below, shall be the only individual authorized to issue Task Orders under this BPA.

### **A.3 BPA Estimated Threshold**

The Government estimates, but does not guarantee that the total volume of purchases under this agreement shall be \$1 million. This is not a requirements contract. Each Order hereunder shall have no required minimum guarantee or maximum guarantee.

### **A.4 Small Business**

To promote small business participation, this RFQ encourages Contractor Teaming Arrangements (CTA) and includes Socio-Economic Status as an evaluation factor.

### **A.5 BPA Ordering Process**

The Government may place Task Orders directly under the established BPA only, in accordance with (IAW) FAR Part 8.405-3(c)(1).

**B. SUPPLIES OR SERVICES AND PRICE/COSTS**

**B.1 Applicable Special Item Numbers (SINs)**

This RFQ will establish a Firm-Fixed-Price BPA for orientation program support. The Contractor shall provide a fixed price, inclusive of all direct and indirect costs to the Contractor, for each Phase of the program.

The tables below list the events that can be used by the Offeror to provide their total fixed price. Only Contractors who currently hold one or more of the following SINs are eligible to submit a quote: **SIN 874 1 - Integrated Consulting Services; SIN 874 4 – Training Services: Instructor Led Training, Web-Based Training and Education Courses, Course Development and Test Administration, Learning Management, Internships; and, SIN 874 7 - Integrated Business Program Support Services under the Professional Services Schedule 00CORP.**

**B.2 Task Orders**

Phase I: Initial orientation event, pre-inaugural, to orient cabinet level and senior White House staff.

<b>Line Item</b>	<b>Description</b>	<b>Estimated Quantity</b>	<b>Total Fixed Price</b>
0001	Orientation Program for potential appointees and senior White House staff. Government provided facility. Pricing should be all inclusive (e.g., labor, materials, speakers, etc.)	500 attendees	
0002	Value Added Items (identify offered items, quantity and price – add lines if needed)		

Phase II: Initial orientation event, pre-inaugural, to orient other presidential appointees.

<b>Line Item</b>	<b>Description</b>	<b>Estimated Quantity</b>	<b>Total Fixed Price</b>
0003	Orientation program for potential appointees as designated by the President Elect in any of the tiers identified whether or not requiring senate confirmation, including sub-cabinet level in the Executive Office of the President, departments and agencies, Senior Executive Service (SES) and, Schedule C appointees that are not otherwise covered by Office of Personnel Management (OPM) orientation activities for SESs and Schedule C employees.	1,000 attendees	
0004	Value Added Items (identify offered items, quantity and price – add lines if needed)		

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Phase III: Continuing education orientation events as requested, post-inaugural.

Line Item	Description	Estimated Quantity	Total Fixed Price
0005	Orientation program for potential appointees as designated by the President-Elect in any of the tiers identified whether or not requiring Senate confirmation, including sub-cabinet level in the Executive Office of the President, departments and agencies, SES and, Schedule C appointees that are not otherwise covered by Office of Personnel Management (OPM) orientation activities for SESs and Schedule C employees.	2,500 attendees	
0006	Value Added Items (identify offered items, quantity and price – add lines if needed)		

The estimated quantities for the Phase III continuing education items may be for new attendees that are onboarding (i.e. additional appointees that did not previously receive initial orientation) or continuing education needs for the same attendees that received pre-inaugural orientation. There may be significantly fewer attendees initially, growing in numbers as FY17 advances. Depending on schedules of the various attendees and the approach of the Contractor, this could be done in several smaller sessions or fewer large sessions.

**TOTAL EVALUATED PRICE**

Line Item	Description	Estimated Quantity	Total Fixed Price
0001 0003 0005	Orientation program	4,000 attendees	

Stated quantities are estimates only and are not guarantees of any volume.

If there is a premium for events in the Contractor’s location (rather than a Government facility) it must be identified and included in the price quote. Events may be held at either the Government or Contractor facility. The pricing, above, should clearly indicate whether or not there is a differential for events at the Contractor facility.

**B.3 Value-Added Items**

Contractors are not required to offer value-added products and services for award of the BPA. The Contractor may provide a variety of value-added products and services that enhance or facilitate the program. The types of products and services are limited to the scope of the BPA, as determined by the Contracting Officer, and must be on the Contractor’s Federal Supply Schedule (FSS) by the time of BPA award or if using a Contracting Teaming Arrangement, on the partner’s FSS. If such products and services are offered, and if there is a cost associated with such products and services, they will be evaluated solely for price reasonableness.

Contractors may distinguish themselves in the evaluation process by offering value-added products and services that are demonstrated to benefit the technical approach of the proposed program as set forth in Section F.

## **C. STATEMENT OF OBJECTIVES (SOO)**

### **C.1 BACKGROUND**

The [Presidential Transition Act of 1963](#), as amended by [The Presidential Transition Act of 2000](#) (P.L. 106-293), the [Pre-Election Presidential Transition Act of 2010](#) (P.L. 111-283) and the Presidential Transitions Improvements Act of 2015 (P.L. 114-136), (collectively the PTA) authorizes an orientation program for key presidential appointees.

### **C.2 PURPOSE**

The purpose of the overall Presidential Appointee Orientation is to provide valuable information, resources and insights to help key appointees succeed in their positions, with a strong focus on collaborative, effective and accountable leadership and management. It is intended to start at the top and extend throughout the Federal Government, establishing the tone and culture of collaboration and accountability for the President's Administration. It is critically important to build teamwork and to foster relationships and cross Government networks in order to achieve the best possible outcomes in areas of top priority to the American people.

As outlined by the PTA, the purpose of the orientation activities is to "acquaint key prospective presidential appointees with the types of problems and challenges that most typically confront new political appointees when they make the transition from campaign and other prior activities to assuming the responsibility of governance after inauguration." Orientation for individuals the President-Elect intends to nominate as department heads or appoint to key positions in the Executive Office of the President will include briefings, workshops, human resources management, and other activities as strategically determined by the President-Elect's team. There are approximately 4,000 appointees, with over 1,200 requiring Senate confirmation, including cabinet secretaries, their deputies, and heads of agencies as well as ambassadors. There are over 350 presidential appointee positions not requiring Senate confirmation, most of which constitute the White House staff and smaller Federal agencies.

In addition, non-career personnel work in key positions beneath the top-tier presidential appointees, partnering with political leaders and civil service employees throughout the Federal Government. Approximately 10% (or 680) of the SES may be political appointees.

Finally, there are 1,401 Schedule C appointees who serve in a confidential policy role in advising political leaders. All of the potential 4,000 appointees (though not brought on at the same time) should be considered in the development of the Appointee Orientation.

### **C.3 SCOPE**

Consistent with the requirements of the PTA, the Contractor shall provide all personnel, tools, equipment, and materials for the development and implementation of the Presidential Appointee Orientation Program for all appointees. The participants in the program will be presidential nominees and appointees in the White House, the Executive Office of the President, departments and agencies that are not otherwise covered by Office of Personnel Management (OPM) orientation activities for SESs and Schedule C employees.

#### **C.4 REQUIREMENTS**

The Government requires a Contractor that understands the political landscape and the inner workings of the Federal Government. Consistent with the requirements of the Act, the Contractor shall work with an Administration Steering Group (ASG) comprised of individuals chosen by the President's Administration and led by the Office of Cabinet Affairs (OCA) to guide the program at all stages of planning, development, implementation and evaluation of the program. Neither the ASG nor the OCA has the ability to change the scope and/or content of work. Any such changes determined to be within scope of the BPA would be effected in advance via a contract modification by the Contracting Officer.

The Contractor shall be a subject matter expert(s) in all of the following areas:

- Understanding the President's agenda and the key goals and objectives of the Administration;
- Knowing how to work with others in the White House and across the Federal Government to get things done, effectively and ethically;
- Understanding the Federal Budget, authorization and appropriation processes and how to work with OMB and the Congress on management and budget;
- Understanding effective strategies for outreach and public engagement;
- Knowing how to operationally support and sustain the Administration's commitment to transparency, public engagement, and use of the internet as an interactive communications tool;
- Understanding Government oversight (USOIGs', GAO, Congress) and media scrutiny;
- Understanding effective strategies to motivate and recognize high level performance and accountability for progress and results by career and non-career members of Government teams;
- Understanding Government procurement, procurement integrity, and the acquisition process;
- Understanding the capabilities, limitations and needs of current Government information systems and communications technology;
- Knowing how to successfully accomplish work within the framework of existing laws, Executive Orders and regulations; and
- Understanding human resources management and performance-based management.

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Three phases of the Presidential Appointee Program are envisioned. The first phase will consist of the Initial Event that should include, at a minimum, Presidential Appointees at the cabinet level and senior White House staff. The second phase, which will include additional pre-inaugural activities, as identified, will be the development of the Orientation Program for all appointees. This will include appointees as designated by the President-Elect in any of the tiers identified whether or not requiring Senate confirmation, including sub-cabinet level in the Executive Office of the President, departments and agencies, SES and Schedule C appointees that are not otherwise covered by OPM orientation activities for SESs and Schedule C employees.

The third phase envisions continuing orientation activities for the same Phase II participants, including any replacements and newly “onboarded” participants. These activities will be developed with consideration for the ongoing needs of the Administration.

Phase I - Initial Event: pre-inaugural to orient presidential appointees during the transition.

Participants	Estimated No. of Attendees	Minimum Number of Events
Cabinet Level appointees and senior White House staff	500 attendees	1

Phase II and Phase III - Series of Orientation Activities: may include additional pre-inaugural events as well as post-inaugural events.

Participants	Estimated No. of Attendees	Minimum Number of Events
Appointees as designated by the President-Elect in any of the tiers identified whether or not requiring Senate confirmation, including sub-cabinet level in the Executive Office of the President, departments and agencies, SES and Schedule C appointees that are not otherwise covered by Office of Personnel Management (OPM) orientation activities for SESs and Schedule C employees	3,500 attendees	Dependent on Contractor approach

Work may be performed at the Contractor’s facility (or alternate location for a specific event) and/or various Federal Government locations in the Washington, DC Metropolitan Area or other locations as determined by the Government.

**Key Personnel:**

The Key Personnel specified in the offer are considered to be essential to work performance. At least 30 calendar days prior to diverting any of the specified individuals to other programs or contracts (or as soon as possible, if an individual must be replaced, for example, as a result of leaving the employ of the Contractor), the Contractor shall notify the Contracting Officer and shall submit comprehensive justification for the diversion or replacement request (including proposed substitutions for key personnel) to permit evaluation by the Government of the impact on performance under the Task Orders. The Contractor shall not divert or otherwise replace any key personnel without the written consent of the Contracting Officer.

The Government may modify the BPA to add or delete key personnel at the request of the Contractor or Government.

The Contractor's team must be composed of Key Personnel who will play a significant role in the Presidential Appointee Orientation Program. **The Contractor must provide résumés of all members of the key personnel team as part of their Technical Quote.**

**Phase I - Initial Event:**

The Contractor shall coordinate with the President-Elect's designee(s) to develop the agenda and format for the initial orientation event. The purpose of this initial event is to focus on achievement of the programmatic priorities, emphasizing such key themes as: teamwork, collaboration among departments and agencies, strategies for outreach and public engagement, effective management in the Federal Government, and accountability for measurable progress and results. Operational principles and practices, including the roles of White House staff, cabinet level and sub-cabinet appointees, information flow, Presidential decision process, and accountability mechanisms will also be discussed. The format is envisioned as interactive and conversational, both in plenary and small group sessions, with the flexibility to address questions, concerns or suggestions raised by the participants. Speakers from inside and outside of the Administration are envisioned to add value and perspective. The desired outcome is for participants to leave informed, connected and energized to achieve important results in the short and long term, tapping the resources available to them (people, technology, innovation) inside and outside of the Federal Government.

**Phases II and III:**

The Contractor shall perform the following tasks for the Presidential Appointee Orientation Program:

**(a) Activity Development** - The Contractor shall develop and deliver a series of orientation activities, supplemented by other educational materials, that will acquaint nominees and/or appointees with the types of problems and challenges that most typically confront new political appointees when they assume the responsibility of governance. As a result of orientation, their understanding should include, but not be limited to:

- Accountable leadership – Strong focus on collaborative, effective and accountable leadership and management across Government;
- Working within the Administration to get things done (how to successfully accomplish their work within the framework of existing laws, Executive Orders and regulations);
- What to expect during the Senate confirmation process;
- How to succeed while under Congressional and media scrutiny;
- Lessons learned – Successes and failures of past political appointees;
- Oversight accountability – Working with the Government Accountability Office (GAO), congressional oversight committees and the Inspectors General;
- In concert with Congress – Building productive relationships with Members of Congress and their respective committees;
- Communication and perception – Working in partnership with communications staff on issues of media interest;



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- Public scrutiny – The Government employee vs. the private sector employee;
- Unity of purpose – The importance of political appointees and career Government employees working together in sync;
- Key goals and objectives of the Administration;
- How to be a successful and effective political appointee; and
- Communication and technology – understanding the legacy systems and the requirements surrounding information and communications technology and building on or replacing current platforms.

The Contractor shall propose a non-partisan format and schedule for orientation activities that take into account the nature of the audience and specific topics that may be chosen by designees within the President's Administration.

The Contractor shall coordinate with appropriate Federal Agencies, as necessary, including, but not limited to the GSA, OPM, OMB, the Office of Government Ethics, and the National Archives and Records Administration, regarding presentations and materials that address those agencies' areas of responsibility. The Contractor shall also involve, as appropriate, non-Federal organizations that can contribute to the success of the program and seamlessly manage those organizations in the performance of this program.

**(b) Activity Delivery** - The Contractor shall provide presenters, panelists, subject matter experts, instructors or facilitators, course materials, and other support items/services for each orientation activity. The Contractor is responsible for securing the location and providing all logistical, administrative, technical, and consultant support required for each orientation activity whether on site facilities are being utilized or via webinar through a remote location.

**(c) Resources Library** - The Contractor shall identify resource materials for each activity. The Contractor shall provide hard copies and electronic copies of all materials to the Government unless otherwise requested. The Contractor shall provide the GSA with web-based materials as appropriate, and GSA will link it to the Presidential Transition Resources website.

**(d) Program Development** - The Contractor shall work with the President-Elect's Designee(s) to develop a continuing series of events, beyond the pre-inauguration events and activities, supplemented by educational materials, contacts and other resources to help appointees succeed in their positions.

**(e) Design and implement educational materials** on important topics that best lend themselves to brief presentations accompanied by online, webinar or hand-out materials. Materials should be broad-based and focus on strategic information, rather than on details that can be acquired from support staff. The following are examples of topics (specific topics to be chosen by the customer):

- Ethics and avoiding conflicts of interest
- The Federal budget process
- Information technology
- Continuity of operations procedures

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- The clearance process for new hires
- Human resources management
- The legislative and policy clearance process
- Performance-based management
- Procurement integrity
- Records management

**(f) Recommendations for Orientation** and education of nominees and/or appointees who join the Administration after initial orientation activities have ended, including the use of activities and/or materials developed under this contract that can be made available online (including video).

**(g) Arrangement of speakers**, panelists, presenters and facilitators, audio-visual and webinars, as needed.

**(h) Assistance with internal and external communications** about the orientation.

**(i) Management Plan** - The Contractor shall provide a management plan as part of the quote. The plan is subject to revision based upon decisions made by the President-Elect's designee. The plan should include, but not be limited to:

- Description of Approach shall include the goals, themes, content and format for activities for identified intended audience (e.g. Senate confirmed appointees vs. non-confirmation appointees) and how the Contractor will manage work and resources effectively and seamlessly;
- Personnel who will work on delivering the orientation activities, their specific roles, and a description of their relevant backgrounds and experience, inclusive of résumés and a certification that these personnel will be the resources committed to delivering the orientation activities;
- Key Milestones in the overall program;
- Schedules and iterative procedures and processes for each task;
- Quality controls and risk mitigation measures to monitor work in progress and to maintain quality throughout the performance of the BPA and underlying Task Orders; and
- Evaluation approach to assess the success of the orientation program.

### C.5 DELIVERABLES

Flexibility in the dates is required – review of the design/development deliverables need to be coordinated with the ASG and/or Office of Cabinet Affairs (OCA). (Note: NLT means “no later than”.) Subject to the guidance of the ASG, deliverables include, but are not limited to:

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ID	DELIVERABLE TITLE	FREQUENCY	DUE DATE
1	Orientation Event – Cabinet Level/White House Staff	Once	Pre-Inauguration
2	Orientation Event(s) and Activities – All Sub-cabinet Level and others	As requested	Post-inauguration
3	Educational Materials	As requested	Prior to orientation events and as requested
4	Event Debrief and Follow-up	Per event	After orientation events
5	Orientation Recommendations	As requested	TBD
6	Status/progress reports	Bi-weekly	2 <sup>nd</sup> and 4 <sup>th</sup> Friday
7	Summary and Final Assessment	Once	Contract Completion

**Bi-Weekly status/progress reports.** Bi-weekly status/progress reports shall be submitted to the Contracting Officer Representative (COR) NLT 3pm of the Second and Fourth Fridays of every month. Status reports must be submitted on the prime Contractor's letterhead. The status reports shall include but not be limited to:

- Narrative review of work accomplished during the reporting period and significant events;
- The deliverable process;
- Problem areas and proposed solutions; and
- Anticipated activity for the next reporting period.

The reports shall be provided electronically to the COR (who will be identified at the kick-off meeting with the awarded Contractor) and the Contracting Officer (CO).

**Summary and final assessments** will be requested by the CO.

**C.6. QUALITY AND TIMELINESS STANDARDS**

If GSA determines that a final work product is deficient in quality to include the absence of information essential to the issues, GSA may return the deliverable to the Contractor to remedy the deficiency.

Penalties shall not apply where GSA has granted an extension of the due date prior to the expiration of the original due date. Penalties shall not apply where delay is due to GSA action or inaction, such as failing to provide Contractor with documents. However, if the Contractor fails to promptly notify GSA of any delays and/or fails to elevate issues of non-cooperation, a negative CPARs rating may be imposed.

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Task Description	Performance Objective	Performance Standard		Frequency of Delivery	Method of Surveillance	Incentive / Disincentive
		Objective	Threshold			
Phase I Orientation	Timely Delivery/ Targeted Training per SOO/Order	100% on time, 100% customer acceptance of training	95% on-time, 97% customer satisfaction	Start of Orientation	Quality Review by the COR	Favorable Performance Evaluation & CPARS Rating /Negative CPARS rating
Phase II Orientation	Timely Delivery/ Targeted Training per SOO/Order	100% on time, 100% customer acceptance of training	95% on-time, 97% customer satisfaction	Start of Orientation	Quality Review by the COR	Favorable Performance Evaluation & CPARS Rating /Negative CPARS rating
Phase III Orientation	Timely Delivery/ Targeted Training per SOO/Order	100% on time, 100% customer acceptance of training	95% on-time, 97% customer satisfaction	Start of Orientation	Quality Review by the COR	Favorable Performance Evaluation & CPARS Rating /Negative CPARS rating

**D. PERIOD AND PLACE OF PERFORMANCE**

The period of performance shall be one (1) year from the date of award. Training may be performed at the Contractor's facility and/or various Federal Government or other locations in the Washington, DC Metropolitan Area, or as determined by the Contractor and President-Elect's designees.

## **E. INSTRUCTIONS TO OFFERORS**

### **E.1 Request For Quote**

This is an RFQ under FAR 8.4 - Ordering Procedures to establish a single award BPA for training and orientation activities to support the development and implementation of the Presidential Appointee Orientation Program. The scope of this BPA is bound by the terms and conditions of PSS, MOBIS (00CORP) SINs 874 1, 874 4, and 874 7.

### **E.2 Submission of Questions/Quotes**

**Any questions regarding this procurement shall be sent electronically to [Vincent.Spencer@gsa.gov](mailto:Vincent.Spencer@gsa.gov) with an electronic copy to [Matthew.Gormley@gsa.gov](mailto:Matthew.Gormley@gsa.gov) with the subject line “Presidential Appointee Orientation Program RFQ QMAE-VS-170001-D Questions” NLT 2 pm eastern time on Tuesday, November 15, 2016.** In posing questions, Contractors must cite the relevant RFQ section and page number. Questions should be written in a manner that enables clear understanding of the Contractor’s questions or concerns. Statements expressing opinions, sentiments, or conjectures are not considered valid inquiries and will not receive a response. Further, Contractors are reminded that GSA will not address hypothetical questions aimed at receiving a potential “evaluation decision.” Written answers will be provided via eBuy to all prospective Contractors, giving due regard to the proper protection of proprietary information and anonymity.

**Contractors shall submit their quote as one (1) electronic .zip file in the format described below. Paper copies will not be accepted. ELECTRONIC COPIES OF QUOTES MUST BE RECEIVED BY 1:00 pm eastern time on Thursday, December 1, 2016, AT THE FOLLOWING ADDRESS: [Vincent.Spencer@gsa.gov](mailto:Vincent.Spencer@gsa.gov) with an electronic copy to [Matthew.Gormley@gsa.gov](mailto:Matthew.Gormley@gsa.gov). PLEASE DO NOT SUBMIT HARD COPY QUOTES.**

### **E.3 General Instructions**

Quotes shall clearly demonstrate an understanding of the requirements, as well as convey the Contractor’s capability for transforming its understanding into successful performance under any Task Order.

Any assumptions forming the basis of the submittal must be clearly identified in the cover letter submitted in response to this RFQ.

### **E.4 Format For Submission**

To aid in the evaluation of quotes, each quote shall be clearly and concisely presented in electronic format and submitted to the email addresses listed above. Include all information required by this RFQ, with pages numbered and logically assembled. Electronic documents should be submitted on traditional letter sized paper (8.5” x 11”) templates. Each quote shall identify the name of the Contractor, date of submission and RFQ number.

All quotes shall be arranged and clearly marked: **Volume 1 – Technical Quote**; **Volume 2 – Price Quote** and labeled as follows:

- 1) Volume 1 – Technical Quote
  - Tab A – Cover Letter
  - Tab B – Technical Capability and Management Plan with résumés
  - Tab C – Past Performance
- 2) Volume 2 – Price Quote

#### **E.4.1 Technical Quote (Volume 1)**

Failure of a Contractor to address any item listed may make the quote unacceptable and may result in not being considered for award.

The technical quotes section is comprised of factors relating to the Contractor’s ability to perform. Contractors are highly encouraged to review the RFQ prior to preparing a response to this section.

An authorized official who can obligate the Contractor shall sign a Cover Letter demonstrating the Contractor’s intent to be bound to the BPA terms and conditions.

Contractors shall prepare and compile the information identified under each factor listed below and clearly label the response to each factor.

#### **E.4.2 Evaluation Factors**

**a. Technical Capability and Management Plan (Maximum of 40 pages - not including résumés of Key Personnel)**

Provide a detailed description of the Contractor’s technical capabilities and proposed management plan for delivering a Presidential Appointee Orientation Program in accordance with the SOO in Section C of the RFQ. This should include:

1. A description of the proposed approach, including: the goals, themes, content and format (e.g., syllabus or curriculum), as discussed in the statement of objectives for Phase I and its approach and concept for the Phase II and III event(s). In addressing Phase II and III, describe what events/activities are envisioned, educational materials, contacts and resources are proposed to help presidential appointees succeed and demonstrate how the approach will accomplish the requirements;
2. A description of how any value added items will enhance the requirements stated herein and add value to the program;
3. A project plan and milestones;
4. Résumés of Key Personnel who will have a leadership, visible and/or other substantial role in this project, their roles, and relevant background and depth of experience. Résumés must be sufficiently detailed to permit an assessment of the capability of professional staff to provide the services described in the quote responsive to the RFQ. Résumés should be specific as to educational credentials and demonstrated successful experience in providing the specified services. No single résumé shall exceed 3 pages in length and shall not count toward the 40 page maximum;

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5. A description of plans to partner with other organizations for support of specific subject areas and/or provision of special expertise and how the Contractor will manage multiple organizations seamlessly;
6. Quality controls and measures to monitor work in progress and mitigate risk; and
7. An approach to evaluating the success of the event utilizing feedback from the participants and the program office.

**b. Past Performance (Maximum of 5 pages)**

Each Contractor must provide a list of three (3) relevant contracts or projects completed or ongoing (within the closing date of this solicitation) similar to the size, scope and complexity as anticipated herein. The Contractor shall ensure that the Past Performance Questionnaires (Attachment A) are returned to [Vincent.Spencer@gsa.gov](mailto:Vincent.Spencer@gsa.gov) with an electronic copy to [Matthew.Gormley@gsa.gov](mailto:Matthew.Gormley@gsa.gov) NLT December 1, 2016 1:00 p.m. eastern time. If submitting information for a current contract or project, that contract or project must have been in place at least six (6) months as of the closing date of this solicitation. No more than one (1) of the references provided may be for a current, uncompleted contract.

**c. Socio-Economic (Maximum of 1 page)**

Each Contractor must identify their business size as follows:

- Small Disadvantaged Business
- Woman-Owned Small Business
- Service Disabled Veteran Owned Small Business
- Hub Zone
- Small business
- Large business

**E.5 Price Quote (Volume 2)**

The tables in Section B.2 can be used by the Offeror to provide their respective Total FFP per Phase.

In accordance with FAR 8.404, Offerors are encouraged to offer discounts from their GSA Schedule contract prices. The Government intends to make award without further communications; therefore, it is recommended that each Offeror submit their best offer in response to this RFQ.

The Price submission (Microsoft Excel format - no page limitation) shall include a Total FFP per Phase. To ensure the Total FFP is within the Contractors GSA Schedule rates, a price breakdown shall be included in the price submittal that identifies the composition of the price (e.g., labor category(s), labor rate(s), number of hours, etc.).

**Note: COMBINED OTHER DIRECT COSTS OR INCIDENTALS CANNOT EXCEED THE MICROPURCHASE THRESHOLD per order. ALL NON-SCHEDULE PRICING MUST BE CLEARLY IDENTIFIED IN THE QUOTE.** This limitation does not include

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travel costs (if any) which will be reimbursed in accordance with the underlying GSA Schedule contract terms and conditions.

**CONTRACTOR TEAMING ARRANGEMENTS**

Contractors may enter into Contractor Teaming Arrangements (CTAs) as necessary. A copy of the CTA agreement shall be included as part of the offer. The price quote must clearly identify CTA prices, cross-walk the item back to the underlying FSS, and provide a copy of such item under FSS. A template for establishing a CTA can be found in Attachment B of this RFQ.



## **F. EVALUATION CRITERIA AND SELECTION PROCESS**

Evaluations will be conducted in accordance with FAR Part 8.4. GSA will verify that prices quoted are consistent with the Contractor's' GSA Schedule **PSS - 00CORP, MOBIS SIN 874-1, 874-4, and/or 874-7 pricing and, if applicable, any proposed CTA's FSS pricing.**

### **F.1 Basis for Award**

A BPA award will be made to the responsible Offeror whose offer provides the best value to the Government using a tradeoff process. Best value shall be determined by the Contracting Officer using trade-off procedures considering technical factors, past performance, socio-economic status, and price. When combined, all evaluation factors other than price will be considered *significantly more important* than price. As quotes become more equal under the non-price factors, the importance of price increases.

The evaluation criteria are listed in descending order of importance:

#### Factor 1 – Technical Capability and Management Plan:

In evaluating this factor, the Government will look for clear evidence that the Contractor completely understands the Appointee Orientation Program requirements along with the context of current Federal Agency needs and the potential needs and viewpoints of the next Administration. The Contractor understands the objectives; can manage the work and resources effectively; has the relevant experience in the Federal Government political arena; demonstrates the ability to support the President's agenda; and demonstrates the ability to perform successfully. Key personnel proposed have the breadth, depth and knowledge to support the President's agenda and achieve the requirements of the Appointee Orientation Program as described in this RFQ and supported by the PTA. The quote leaves the Government with a high-degree of confidence that services will be delivered timely, in a quality manner, and will result in demonstrative high user-satisfaction.

#### Factor 2 – Past Performance:

Past performance will be evaluated as part of the risk management strategy under this contract. In evaluating past performance, GSA will consider the relevance in size, scope and complexity of each project to the work required by the RFQ as well as the quality of services provided and customer satisfaction. The rating for this factor will result from the comments received from the references, and any other information available to the Government. The Contracting Officer may identify and analyze the past performance of the Offeror on any other contract or project that they currently have or had of which the Contracting Officer has knowledge or obtains knowledge. Because of the wide variety of past performance history of individual Offerors, the Government is not required to ensure that an equal number of references be obtained for each Offeror.

Factor 3 – Socio-economic Status:

In evaluating socio-economic status, the GSA will give preference as noted to the following confirmed business size status:

Highest preference (purple color rating) to:

Small Disadvantaged Business

Woman-Owned Small Business

Service Disabled Veteran Owned Small Business

Hub Zone

Preference to (blue color rating):

All other small businesses

No additional preference to large businesses (green color rating).

Factor 4 – Price:

For purposes of price evaluation only, the Government will add the total price for each Phase to come up with the total evaluated price for CLINs 0001, 0003, and 0005. The price of value-added items, CLINS 0002, 0004, and 0006 (if priced) will not be added to or affect the total evaluated price as these items may or may not be selected by the customer.

The price evaluation will include price completeness and accuracy, price reasonableness, and total cost to the Government. Price will be evaluated to determine if the prices are realistic for the work to be performed, reflect a clear understanding of the requirements, and are consistent with the technical quote. A price breakout shall be provided to show the proposed pricing is in accordance with the Contractor's approved GSA Schedule prices.

**F.2 Color Coding Ratings**

GSA intends to evaluate all non-price factors in response to this RFQ (except see socio-economic evaluation factor below), using a Color Coding system as follows:

**Purple:** Demonstrates an excellent understanding of public policy and political governance in support of the development and implementation of the Presidential Appointee Orientation Program. The proposal offers several value added items that benefit the proposed technical approach and enhance/facilitate the program. The proposed approach significantly exceeds the requirements; minimizes risk to the Government; has a high probability of satisfying the requirement; has several strengths and no significant weaknesses.

For the socio-economic evaluation factor only, PURPLE will be the color assessed by the Government if the Offeror is a designated as a Small Disadvantaged Business OR Woman-Owned Small Business OR Service Disabled Veteran Owned Small Business OR Hubzone Business.

**Blue:** Meets and sometimes exceeds the requirements and demonstrates a good understanding of public policy and political governance in support of the development and implementation of the Presidential Appointee Orientation

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Program. The proposal offers value added items that benefit the proposed technical approach and enhance/facilitate the program. There is little risk to the Government and the Offeror demonstrates one or more strengths that will benefit the Government and no significant weaknesses.

For the socio-economic evaluation factor only, BLUE will be the color assessed by the Government if the Offeror is a designated as a Small Business.

**Green:** Meets the requirements and demonstrates an acceptable understanding of public policy and political governance in support of the development and implementation of the Presidential Appointee Orientation Program. There may be some risk to the Government that can be minimized with normal Contractor effort and Government monitoring to offset. The quote has no significant weaknesses.

For the socio-economic evaluation factor only, GREEN will be the color assessed by the Government if the Offeror is a designated as a Large Business.

**Yellow:** Fails to meet one or more requirements and/or demonstrates a poor understanding of public policy and political governance in support of the development and implementation of the Presidential Appointee Orientation Program. There is a low probability of satisfying the requirements. The Offeror demonstrates one or more significant weaknesses. The offer presents risks to the Government and there is an uncertainty of success even with close Government monitoring.

**Red:** Fails to meet minimum requirements and/or does not demonstrate an understanding of public policy and political governance in support of the development and implementation of the Presidential Appointee Orientation Program and/or noted deficiencies require major revisions to the quote in order to make the quote acceptable. There is high risk to the Government and/or little probability of successfully satisfying the requirements.

Evaluators will use the following definitions when identifying a strength, weakness or deficiency:

	<b>Standard Definition</b>
<b>Strength</b>	A strong attribute or quality of particular worth or utility; an inherent asset. Note: Simple adherence to the requirements or ability to meet a requirement is compliance but should not be listed as a strength.
<b>Significant Weakness</b>	A flaw in the quote that increases the risk of unsuccessful contract performance.

<b>Deficiency</b>	A material failure of a quote to meet a Government requirement or a combination of significant weaknesses in a quote that increases the risk of unsuccessful contract performance to an unacceptable level.
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### **F.3 Oral Presentations**

The Government reserves the right to require oral presentations after the date of submission of quotes. If held, they will be held at 1800 F Street NW, Washington, DC 20405; will be no more than two hours; and, Offerors will be provided the agenda and topics of discussion (based on the Offeror's technical quote) at least 7 business days prior to their scheduled appointment.

The Offeror must provide an electronic copy (email) of the presentations at least 1 full workday before the scheduled oral presentation. The material must be compatible with standard MS Office products or Adobe Acrobat PDF formats. The Offeror's oral presentation team must be composed of the Key Personnel proposed by the Offeror to play a significant role in the performance of the requirements set forth. These Key Personnel will be required to brief their respective parts of the proposed work effort. Only employees of the Offeror and its team members identified in the CTA may participate in the oral presentations.

The Offeror must provide the names and titles of all members of the briefing team at least 1 full workday before the scheduled date for the oral presentation. If held, the oral presentations will be evaluated by the Technical Evaluation Team (TET) using the criteria described above.

## **G. CONTRACT ADMINISTRATION**

### **G.1 Government Point of Contact for RFQ**

**Vincent Spencer**  
**Contract Specialist**  
**U.S. General Services Administration**  
**1800 F Street NW**  
**Washington, DC 20405**  
**E-mail: [Vincent.spencer@gsa.gov](mailto:Vincent.spencer@gsa.gov)**

**Matthew Gormley**  
**Contracting Officer**  
**U.S. General Services Administration**  
**1800 F Street NW**  
**Washington, DC 20405**  
**E-mail: [Matthew.Gormley@gsa.gov](mailto:Matthew.Gormley@gsa.gov)**

All written correspondence regarding the RFQ shall be sent to the Contract Specialist with an electronic copy to [Matthew.Gormley@gsa.gov](mailto:Matthew.Gormley@gsa.gov).

### **G.2 Invoice Submission**

Invoices shall be submitted electronically to the GSA website VCSS (<http://vcss.ocfo.gsa.gov>). A password and electronic invoice access may be obtained at the same website. A copy of the invoice must be sent electronically to the COR for payment. The COR's name and contact information will be provided to the Contractor after award.

Invoices shall be sent not later than the 15th calendar day of every month and must include the following information:

1. Name of Vendor
2. Invoice Date
3. BPA and Order Number
4. Vendor invoice Number
5. Description (including, for example, contract line number), price, and quantity of goods and services rendered;
6. Tax Identification Number
7. Contact name, title, and telephone number

### **G.3 Contracting Officer Representative Responsibilities**

***COR to be determined:***

***U.S. General Services Administration***

***1800 F Street NW***

***Washington, DC 20405***

- a. The COR is responsible for interface with the Contractor and the Contracting Officer (CO) and performance of duties such as those set forth below. It is emphasized that only the CO has the authority to modify the terms of the contract. In no event will any understanding, agreement, modification, change order, or other matter deviating from the terms of the BPA between the Contractor and any other person be effective or binding on the Government. If, in the opinion of the Contractor, an effort outside the scope of the BPA is requested, the Contractor shall promptly notify the CO in writing. No action may be taken by the Contractor that is deemed outside the scope of the BPA unless the CO has issued a contractual change. The Contractor can provide questions or other clarification requests to the COR who, in-turn, will contact the CO. This interface with the Contractor could include but is not limited to the following:
  1. Advice/recommendations/clarifications of specific details relating to various aspects of requirements in the contract;
  2. Milestones to be met within the general terms of the contract or specific subtasks of the contract; or,
  3. Any other area necessary for the Contractor to perform the work specified in the contract.

The COR is the point of contact through whom the Contractor can relay questions and problems concerning contract requirements to the CO. The COR is prohibited from issuing any instruction which would constitute a contractual change. The COR shall not instruct the Contractor how to perform. If there is any doubt whether instructions contemplated fall within the contract requirements, the Contractor shall contact the CO for guidance, as required.

- b. Performance of work under this BPA must be subject to the technical direction of the COR identified above, or a representative designated in writing. The term "technical direction" includes, without limitation, direction to the Contractor that directs or redirects the labor

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effort, shifts the work between work areas or locations, fills in details and otherwise serves to ensure that tasks outlined in the work statement are accomplished satisfactorily.

- c. Technical direction must be within the scope of the requirement.

The COR does not have authority to issue technical direction that:

1. Constitutes a change of assignment or additional work outside the requirement;
  2. In any manner causes an increase or decrease in the contract price, or the time required for contract performance;
  3. Changes any of the terms, conditions, or specification(s)/work statement of the contract;
  4. Interferes with the Contractor's right to perform under the terms and conditions of the contract; or
  5. Directs, supervises or otherwise controls the actions of the Contractor's employees.
- d. Technical direction may be oral or in writing. The COR shall confirm oral direction in writing within 5 work days, with a copy to the CO.
- e. The Contractor shall proceed promptly with performance resulting from the technical direction issued by the COR. If, in the opinion of the Contractor, any direction of the COR, or his/her designee, falls within the limitations in (b), above, the Contractor shall immediately notify the CO no later than the beginning of the next Government work day.
- f. Failure of the Contractor and the CO to agree that technical direction is within the scope of the contract shall be subject to the terms of the underlying GSA Schedule's "Disputes" clause.

## **H. ATTACHMENTS**

**Attachment A: Past Performance Questionnaire**

**Attachment B: Contractor Teaming Arrangement Template**

**\*\*\*\*END OF RFQ\*\*\*\***