

May 15, 2007

NOTICE TO ALL OFFERORS

REFERENCE: AMENDMENT NO. 1
DOL071RP20115

Additional information has been requested by prospective offerors and it has been determined by the Contracting Officer that this information is made available to all bidders. The closing date and time for the receipt of proposals is still May 24, 2007, 2:00 p.m. local time.

CHARI A. MAGRUDER

CHARI A. MAGRUDER
Contracting Officer

Attachment

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

BPA NO.

1. CONTRACT ID CODE

PAGE
1OF PAGES
242. AMENDMENT/MODIFICATION NO.
00013. EFFECTIVE DATE
05-15-2007

4. REQUISITION/PURCHASE REQ. NO.

5. PROJECT NO.(If applicable)

6. ISSUED BY CODE

ETA

7. ADMINISTERED BY (If other than Item 6)

CODE

U.S. Department of Labor, ETA/OGCM
Division of Contract Services
200 Constitution Avenue, NW
Room N-4655
Washington DC 20210

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)

To all Offerors/Bidders

(X)

9A. AMENDMENT OF SOLICITATION NO.

DOL071RP20115

X

9B. DATED (SEE ITEM 11)

10A. MODIFICATION OF CONTRACT/ORDER NO.

10B. DATED (SEE ITEM 13)

CODE

FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning 0 copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.
05-24-2007 2:00PM EST

12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACTS/ORDERS, IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(X) A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.

B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).

C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:

D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor is not, is required to sign this document and return 0 copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

(See Attachment)

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)

16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)

CHARI A. MAGRUDER
Contracting Officer

15B. CONTRACTOR/OFFEROR

15C. DATE SIGNED

16B. UNITED STATES OF AMERICA

16C. DATE SIGNED

(Signature of person authorized to sign)

BY

(Signature of Contracting Officer)

14. Continuation page

A. The purpose of this amendment is to change the terms and conditions of the Request for Proposal (DOL071RP20115) in accordance with the following:

1. **Section B – SUPPLIES OR SERVICES AND PRICE/COSTS** – is hereby corrected as follows:

The incumbent contractor under this solicitation is:

Berkeley Policy Associates of Oakland, California

2. **Section H.25 – INDIRECT COSTS** – is hereby deleted in its entirety and is replaced with the following:

H.25 INDIRECT COSTS

This clause is applicable to all awardees receiving funds from multiple sources. Organizations receiving funds from only one source does not need an indirect cost rate (ICR) approved.

You are governed by one of the categories of cost principles listed below. Please comply with your cost principles as appropriate to your organization:

- (1) Private-for-Profit organizations - Federal Acquisition Regulation (FAR) Subparts 31 and 42.
- (2) State and local governments and Indian Tribal governments - OMB Circular A-87.
- (3) Educational Institutions - OMB Circulars A-21 and FAR 42.705-3.
- (4) Nonprofit organizations - OMB Circular A-122.

In order to avoid major audit problems, disallowed costs, and to receive timely reimbursement of indirect costs, contractors should take those necessary steps to comply with this clause as well as the critical timeframes for submission of indirect cost proposals.

Note that the contractor must obtain approval from the Contracting Officer to transfer funds from other budget line items to the indirect cost budget line items to accommodate higher approved indirect cost rates.

Support for Indirect Cost Claims

As part of the business proposal (see Section L for details), you will need to identify whether or not you have a current Federally approved indirect cost rate to support your indirect cost claims. A copy of the rate agreement will be requested

to verify the Federal cognizant (Federal agency providing the preponderance of direct federal funds to the organization.) agency and the rate information (rate approved, type of indirect cost rate(s) approved, and allocation base).

You will also need to provide historical and budgetary rate information to support the rates proposed if the offeror does not have a federally approved indirect cost rate. More information is available in Section L.

Temporary Billing Rate (TBR) – For those offerors that do not have a Federally approved indirect cost rate, the Contracting Officer may negotiate a (TBR) to allow initial indirect cost claims for the first 90 days of award.

During these 90 days, the offeror must submit an acceptable indirect cost proposal to your Federal cognizant agency to obtain a provisional indirect rate. **Failure on your part to submit an indirect cost proposal within this 90 day period means that you shall not receive further reimbursement for your billing rate. Also, action may be taken to recoup all indirect costs already paid to you.**

Ceiling Indirect Rates or Ceiling Amounts - The Contracting Officer may impose the offeror administrative cost limitations (ceilings) regarding the contract based on the documentation received. Please note that these “ceilings” does not exclude your organization from the responsibility of submitting an indirect cost rate proposal(s) for approval.

It is important to point out that all organizations are to submit a final indirect cost proposal to its cognizant agency within 180 days after the end of its fiscal year.

If **DOL** is your Federal cognizant agency, proposals shall be sent to:

Chief, Division of Cost Determination (DCD)
U.S. Department of Labor, OASAM
200 Constitution Avenue, N.W., Room S-1510
Washington, D.C. 20210
Tel. (202) 693-4100
<http://www.dol.gov/oasam/programs/boc/costdeterminationguide/main.htm>

3. Section L.8 – SUBMISSION OF PROPOSAL - is hereby deleted in its entirety and is replaced with the following:

(A) - General Instructions:

Each offeror must submit an offer (proposal) in strict accordance with these instructions. When evaluating an offeror, the Government will

consider how well the offeror complied with the letter and spirit of these instructions. The Government will consider any failure on the part of an offeror to comply with both the letter and spirit of these instructions to be an indication of the type of conduct it can expect during contract performance. Therefore, the Government encourages offerors to contact the Contracting Officer by electronic submission only, in order to request an explanation of any part of these instructions.

Your proposal must be submitted in three (3) separate and distinct parts as outlined below, consisting of the number of stated copies and accompanied by the required supportive materials to insure that the proposal will be considered responsive to the Request for Proposals.

Part 1 – (1) Original and two (2) signed copies of completed Standard Form 33, Solicitation, Offer and Award,

(2) Original and two (2) signed copies of Section K, the Representations, Certifications and other Statements of Offerors, DOL does not accept illegible copies. (All copies must be ink-signed.)

Part 2 - (1) A set of overhead transparencies and five (5) paper copies in a sealed package. These transparencies form the basis of the offeror's Oral Presentation. PLEASE NOTE: The sealed package containing the transparencies will not be opened until the scheduled date for the offeror's presentation, in the presence of the Contract Specialist and a representative of the offeror. DOL uses both the transparencies and the Oral Presentation to evaluate the offeror's capability to perform the contract (See Section M.2 (C));

(2) Original and three (3) copies of a modified resume (See Attachment J.10 for an example of a modified resume) for each key personnel involved in the project. (See Section M.2 (B)) At a minimum, the resume shall include:

- a. The title and position to which the individual would be assigned for the project;
- b. The individual's current employment status and a list or description of the activities or projects on which the individual is currently working;
- c. The individual's previous work experience, to include position title, dates in position, employing organization, duties performed, and role performed, e.g., management, task leader, lead investigator,

chief analyst, etc., and how these are relevant to the tasks and duties in this project;

- d. The titles of the individuals previous or in process written products or reports, with their date of completion or publication and other authors noted; and the relevance of these works to the tasks and duties in this project; and
- e. The individual's educational background and a brief description of its relevance to the individual's role in the project. The overall staffing plan is reasonable and likely to support the technical approach.

(3) Original and three (3) copies of letters of intent for each key personnel, including employees and contingency hires (defined as persons not currently employed but who have executed a binding letter for commitment for employment with the offeror, if the offeror receives award under this solicitation). Letters of intent must be dated and include signatures from the individual and the offeror/contractor. The letter must state that the individual will be available for the number of hours stated in the proposal and that the individual will be available for at least 6 months. The letter must also disclose the position the person will have on the contract.

(4) Original and three copies of relevant past performance information (See Sections L.6 and M.2(D)); and

(5) Original and three (3) copies of their technical approach (See Section M.2 (A, E and F)). (PLEASE NOTE: Text type shall be at least 12 point font size or larger.)

Part 3 -

A detailed Business Management Proposal for the prime contractor and each subcontractor as further outlined in the below instructions and consisting of:

(1) Three (3) copies of Attachment J.2 - Cost and Price Analysis, ETA 8555 (Mar. 1981);

(2) One (1) copy of Attachment J.3 - Statement of Financial Capability, ETA 8554 (Mar. 1981) (c).

(3) One (1) Accounting System Certification which is a statement certifying that the offeror has an established accounting system with internal controls adequate to safeguard their assets, insure that funds are accounted for

by cost categories, check the accuracy and reliability of the accounting data, promote operating efficiency and permit compliance with Government requirements and accounting procedures with respect to Cost Reimbursement types of contracts.

The statement must be executed by a certified public accountant (CPA), licensed public accountant, a bona-fide accounting or audit organization such as Defense Contract Audit Agency (DCAA) or an entity of equivalent status acceptable to the Government.

(4) Contractor's current approved Indirect Cost Rate Agreement or a description (including dollar amounts) of the base for all proposed indirect rates.

The Cost and Price Analysis (ETA 8555) and Financial Capability Forms (Attachment J.3) support information shall be augmented as follows:

1. Most current published annual balance sheet and profit or loss statement.

2. List the names and addresses of any subcontractor* the offeror intends to use in the performance of a resulting contract. Include the following information about the subcontract(s).

(a) How subcontractor was selected?

(b) Has the subcontractor submitted a cost proposal?

(c) Will he be able to start performance at the start of the contract period?

(d) What is the total cost of (each) subcontract?

(e) What services (skills) will the subcontract provide?

(f) What experience do they have in this technical area?

*Also provide the above information for consultants you intend to use in the performance of a resulting contract.

Consultants: Persons who are members of a particular

profession or posses a special skill and who are not officers or employees of the contractor.

NOTE: Part 1, 2, and 3 should be sealed in separate envelopes and included in one master package. The RFP number and related Part numbers outlined above, if applicable, should show in the upper left hand corner of each of the envelopes as well as the master package.

(B) - Cost and Price Analysis

The Contracting Officer may forward the cost and price analysis review of the business proposal to the DOL's Division of Cost Determination (DCD). The cost analysis performed by DCD will be based on FAR 15.404-1(c)(1).

DCD requires the following specific information to be provided in addition to the ETA form 8555 - Cost and Price Analysis:

1. **Salaries** – Provide support for all of the proposed salaries, i.e. payroll records (current employees), letters of intent or salary surveys (new employees). Also provide proposed escalation of salary increases for option years, if applicable.
2. **Fringe Benefits** –If a fringe rate has been approved by a Federal cognizant agency, please note it. If not, please see related information below for indirect rates to support these costs.
3. **Staff Travel and Per Diem** – In addition to the information requested in the ETA form 8555, please provide the following detailed information using the sample table below:

	<u>Traveler's Name/ Position</u>	<u>From</u>	<u>To</u>	<u>Travel Days</u>	<u>Airline Fees</u>	<u>Lodging</u>	<u>Meals</u>	<u>Car Rental</u>	<u>Other</u>	<u>Total</u>
1										\$0
2										\$0
3										\$0
				Total	\$0	\$0	\$0	\$0	\$0	\$0

4. **Consultant Fees** – Provide specific hourly/daily rate for proposed consultants with their letters of intent.
5. **Consultant Travel** – See #3 above.
6. **Rent** – Specify if the costs are directly or indirectly charged. If directly charged, provide comments on the rent costs, i.e., lease agreement (already signed) or informal documentation attesting to the offeror's efforts to find reasonable lease costs, i.e.

multiple bids, or area surveys. If a lease has been already signed, please provide a copy for support.

7. **Insurance & Bonding** – Specify if the costs are directly or indirectly charged. If directly charged, provide support for the insurance costs and bonding costs, i.e., quotes from different insurance companies.
8. **Materials & Supplies** – Follow the Form 8555 (Page 5) in detail.
9. **Communications** - Follow the Form 8555 (Page 6) in detail, **also** providing quantity/units.
10. **Property** – Follow the Form 8555 (Page 6) in detail.
11. **Supportive Services** - Follow the Form 8555 (Page 7) in detail.
12. **Subcontractor Costs** – Follow the Form 8555 (Page 7) in detail. Also, provide a separate submission of the Form 8555 for each subcontractor noting all items of costs in this list.
13. **Indirect Costs (Overhead, G&A, other rates)** – If your entity has a current federally approved indirect cost rate agreement, provide a copy.

If no rates have been approved by a Federal cognizant agency, the offeror should provide support for review and analysis to determine if the rates proposed are allowable, allocable, and reasonable.

Specifically, the offeror should submit **two** “Statements of Total Costs” for:

- a. the latest fiscal period of the entity based on actual costs.
- b. the projected fiscal period of the entity based on budgeted costs; including any applicable DOL contract costs (assume that the contract will be awarded).

Samples of the Statement of Total Costs are available in DCD’s website:

<http://www.dol.gov/oasam/programs/boc/costdeterminationguide/main.htm>

Specifically, at:

<http://www.dol.gov/oasam/programs/boc/costdeterminationguide/main.htm>

[de/sec3.pdf](#), pages III-7 or III-9, as applicable. These statements have two ways of calculating the indirect cost rate built into the schedule.

Note that if the entity has multiple rates (overhead, G&A, offsite, onsite, etc.) the indirect cost column presented in the schedule should be modified to include each proposed rate into separate columns.

14. Fee – Please provide the specific rate proposed.

The Government warns offerors that taking exception to any term or condition of the RFP (including submitting any alternative proposal that requires a relaxation of a requirement), will make an offer unacceptable and the offeror ineligible for award, unless the RFP expressly authorizes such an exception with regard to that specific term or condition. The Government will consider any exception to a term or condition of the RFP that is not expressly authorized by the RFP to be a deficiency, as defined in FAR Part 15.

An offeror may eliminate a deficiency in its proposal only through discussions, as defined and prescribed in FAR Part 15. However, the Government intends to award a contract without technical discussions, as authorized by FAR Part 15. Therefore, any offeror planning to take exception to a term or condition of the RFP must consult with the Contracting Officer prior to submitting a proposal, unless the RFP expressly authorizes such an exception. Notwithstanding its plan to award without discussions, the Government reserves the right to conduct technical and cost discussions with offerors in a competitive range, if necessary, and to permit such offerors to revise their proposals. The government also reserves the right to change any terms and conditions of their RFP by amendment at any time prior to contract award and to allow offerors to revise their offers accordingly, as authorized by FAR Part 15.

The offeror must not make reference to cost or price data so that an independent technical evaluation may be made on the basis of technical merit alone. Proposals must not specify less than one hundred twenty (120) days Government Acceptance. After the due date, an offeror can not take exception to any provisions of this Request for Proposals or place any condition on his/her proposal. Offerors may only submit one proposal.

DOL will not award to offerors whose proposals do not meet the above requirements.

4. **Section M.2 – EVALUATION CRITERIA** - is hereby deleted in its entirety and is replaced with the following:

M.2 EVALUATION CRITERIA

A. TECHNICAL APPROACH (40 points)

The proposal should provide a detailed technical approach for performing the evaluation, including:

1. A description of the proposed evaluation and how it will help determine if strategies are operating as per their intent;
2. A list of study questions and hypotheses for the evaluation; data needed to address each question; proposed sources of the quantitative and qualitative data needed to address the questions; including administrative and extant data; plans for obtaining the data in timely fashion, including responding to OMB data collection requirements, if any; potential problems in accessing the data; and how the offeror intends to overcome these problems without excess burden on grantees;
3. Proposed site visit strategies, procedures and timelines, including site sampling procedures and rationale, if offeror believes site sampling is appropriate;
4. A discussion of possible problems in conducting the site visits and how these will be overcome by the offeror without excess burden on grantees;
5. Proposed survey methods, topics to be included in the survey(s), sampling procedures, if appropriate, and timelines,
6. A discussion of possible problems in administering the survey(s), and
7. Proposed analytical methods for the evaluation.

PLEASE BE ADVISED THAT OFFERORS WILL BE EVALUATED UNDER THIS FACTOR BASED ON THE FOLLOWING:

(1) Offeror's technical approach is sound, comprehensive, relevant to the WIRED Initiative, and its presentation is clear and concise with a cross-reference table identifying the page location of each specific element of the technical approach requirements; **(8 points)**

(2) Offeror proposes a list of hypotheses and related study questions for both Generations under the evaluation, with a description explaining how and why they vary, that include and expand upon the study objectives discussed in section C. 3 of this RFP and that clearly demonstrates an understanding of ongoing activity within Generation II regions and expected plans for Generation III; **(7 points)**

(3) Offeror specifically identifies all data items to be collected, including administrative and extant data, and keys them to the proposed study questions; data sources and collection procedures, including proposed site visits and surveys, are described and will likely provide complete and high-quality data; key concerns surrounding data collection are identified and addressed; potential challenges in accessing data on a timely basis (and/or conducting site visits and administering surveys) and how they will be overcome by the offeror with minimum burden on grantees are described; **(6 points)**

(4) Analytical methods for assessing economic transformation and relevant indicators and possible outcomes in each Generation of regions and over the evolution of the WIRED Initiative are described in detail and are appropriate to the issues and type of information being analyzed; **(5 points)**

(5) Proposed site visit and survey strategies and procedures, including specific sampling procedures and justification if offeror believes sampling is appropriate, is provided; **(5 points)**

(6) Offeror understands and describes the process for obtaining OMB approval for site visit protocols and surveys and the offeror's role in preparing for and securing that approval on a timely basis is provided and is adequate for the evaluation; **(5 points)**

(7) Offeror's approach to accomplishing tasks is reasonable, coherent, and likely to lead to its successful completion and includes input from grantees where appropriate. **(4 points)**

B. CONTRACTOR'S CAPABILITY TO PERFORM THE CONTRACT (25 points)

The Government will evaluate each offeror's capability to perform the contract on the basis of its oral presentation and the responses it gives during the question and answer session that will follow the oral presentation. In making this evaluation, the government will consider an offeror's: (1) knowledge of the content of the work in terms of constituent activities, their inputs and outputs, and their interrelationships and interdependencies (See Section L.7 (5b)) **(5 points)**; (2) recognition of the appropriate sequence and realistic duration of the work activities (See Section L.7 (5c)) **(5 points)**; (3) knowledge of the appropriate types of resources required to perform the work activities (See Section L.7 (5d)) **(5 points)**; (4) familiarity with the difficulties, uncertainties, and risks associated with the work (See Section L.7 (5e)) **(5 points)**; and (5) knowledge of the personnel and subcontractor qualifications necessary to the performance of the work (See Section L.7 (5f)) **(5 points)**.

C. INDIVIDUAL STAFF EXPERIENCE AND QUALIFICATIONS (25 points)

Successful performance of the proposed work depends heavily on the qualifications of the individuals committed to this project and the adequacy of the time commitment for each individual in relation to the specific tasks that they will perform. This section of the proposal shall provide sufficient information for judging the quality and competence of staff proposed to be assigned to the project to assure that they meet the required qualifications. Successful performance of the proposed work depends heavily on the qualifications of the individuals committed to this project, and the adequacy of the time commitment for each individual in relation to the specific tasks that they will perform. The proposal shall include the current employment status of personnel proposed for work under this RFP, i.e., whether these personnel are currently employed by the contractor or are dependent upon planned recruitment or subcontracting.

The Government, in its evaluation of the contractor's proposal, will place considerable emphasis on the contractor's commitment of personnel qualified for the work involved in accomplishing the assigned tasks. Accordingly, the following information shall be furnished:

2. The proposed Project Director and an indication of a commitment for the forty-five months of the project;
3. The proposed project organization, including key personnel;
4. The proposed plan for deploying personnel and resources including: staffing charts listing names and project roles, staff time/task, loading charts showing the amount of time each staff person will devote to each task and sub-task; and a narrative description of each staff person's role in the project, qualifications, and experience (including outside consultants);
5. A resume for each person to be assigned to the project. At a minimum, the resume shall include:
 - a. The individual's current employment status and previous work experience, including position title, dates in position, duties performed and employing organization. Duties shall be clearly defined in terms of the role performed, e.g., management, task leader, lead investigator, chief analyst, etc.;
 - b. A description of the activities or projects on which the individual is currently working; and
 - c. The individual's educational background and its relevance to the tasks assigned; and
 - d. A brief (one paragraph) description of work that the individual has completed or which is currently underway for work that is relevant to their proposed work on this project.

PLEASE BE ADVISED THAT OFFERORS WILL BE EVALUATED UNDER THIS FACTOR BASED ON THE FOLLOWING:

(1) The Project Director shall have a minimum of five (5) years of experience in leading related work and a graduate degree in a relevant area of social science (e.g., economics, sociology, political science, or public administration). The Project Director's required time commitment is 40%. **Be advised that offerors who do not meet the education requirements for the Project Director sub-factor will receive 0 points for that sub-factor and may not be considered for award. (5 points)**

(2) Principal Investigator(s) shall have at least five (5) years of experience relevant to the proposed role in the project. Principal Investigator(s) must have a graduate degree in a relevant area of social science (e.g., economics, sociology, political science, or public administration). The Principal Investigator(s) must demonstrate experience performing the tasks assigned them in the offeror's proposed management plan. These individuals shall be identified with specific reference to responsibility for tasks and must demonstrate previous experience in similar responsibilities. The Principal Investigator(s)'s time commitment is 35%. **Be advised that offerors who do not meet the education requirements for the Project Director sub-factor will receive 0 points for that sub-factor and may not be considered for award. (5 points)**

(3) A Task Leader must be identified for each of the tasks identified in the offeror's management plan. Each Task Leader must demonstrate at least three (3) years prior experience directly relevant to their proposed role and graduate education in an area relevant to their role in the project. The Task Leaders(s) must demonstrate experience performing the tasks assigned to them in the offeror's proposed management plan. These individuals shall be identified specifically with respect to responsibility for tasks. Time commitment for each task leader for each task is 25%. **Be advised that offerors who do not meet the education requirements for the Project Director sub-factor will receive 0 points for that sub-factor and may not be considered for award. (5 points)**

(4) The time commitment of all personnel assigned to the project, according to each task and sub-task (the number of hours per month that each individual will devote to each aspect of the project over its life) is described, relevant to their experience and adequate for the evaluation. **(4 points)**

(5) The overall staffing plan is reasonable and consistent with the technical approach and management plan; and **(3 points)**

(6) Letters of intent are provided for each key personnel, including employees, contractors, or contingency hires (defined as persons not currently employed but who have executed a binding letter for commitment for employment with the offeror, if the offeror receives award under this solicitation.) Letters of intent must be dated and include signatures from the individual and the offeror/contractor. The letter must state that the individual will be available for the number of hours

stated in the proposal and that the individual will be available for at least 6 months from the date of contract execution. The letter must also disclose the position the person will have on the contract. **(3 points)**

D. MANAGEMENT PLAN (20 points)

This plan shall include a schedule of task milestones or timeline, and delivery dates during the entire period of performance and a table showing the level of effort for each task and sub-task. Offerors may divide the project into as many tasks as they deem appropriate for their proposed design. However, the management plan shall include a minimum of five tasks (examples of possible tasks include: design, site visits, survey, collection of extant data, analysis and project management or combinations therein). In addition, the plan shall describe the management structure, reporting relationships and internal communications links for the contractor and any subcontractors. Where subcontractors or outside assistance are proposed, organizational control shall be clearly delineated so as to demonstrate and ensure responsiveness to the needs of the Government.

PLEASE BE ADVISED THAT OFFERORS WILL BE EVALUATED UNDER THIS FACTOR BASED ON THE FOLLOWING:

(1) The management plan clearly depicts how the project will be organized, includes all tasks and deliverables and the overall leadership, business management, task or team leaders, and staff for each task. The organization of the project does not have to conform strictly to the tasks in C.4., but must clearly show all tasks and deliverables and who will be responsible for them; **(6 points)**

(2) The scale of each task (e.g., the number and length of site visits) and the level of effort to be devoted to each task make sense and is sufficient, given the government's estimate of total level of effort, to fully accomplish the task's objectives; **(5 points)**

(3) The listing of task milestones is complete and the timing of activities and due dates are realistic, leaving sufficient time for conducting each activity and for review and response by ETA; and **(5 points)**

(4) The proposed management structure, reporting relationships, and communications links are likely to lead to a smooth and efficient functioning in all phases of the evaluation. **(4 points)**

E. CONTRACTOR'S PAST PERFORMANCE (15 points)

Past performance shall include evaluating offerors with no relevant performance history, and shall provide offerors an opportunity to identify past or current

contracts (Federal, State and local government, and private) for efforts similar to the Government requirement. Offerors will be provided the opportunity to address unfavorable reports of past performance, if the offeror has not had a previous opportunity to review the rating. Offerors shall provide information on problems encountered on the identified contracts and the offerors' corrective actions. The Government shall consider this information, as well as information obtained from any other sources, when evaluating the offeror's past performance. The contracting officer shall determine the relevance of similar past performance information. Offerors shall submit past performance information regarding predecessor companies, key personnel and subcontractors that will perform major or critical aspects of the requirement. Offerors without relevant past performance history or for whom information on past performance is not available may not be evaluated favorably or unfavorably on past performance. In this instance the offeror would receive a neutral score of half of the points assigned to Criterion E, Contractor's Past Performance.

F. UNDERSTANDING (12 points)

The proposal should provide clear evidence (in a separate section) of the offeror's knowledge and understanding of:

1. The WIRED Initiative;
2. The public workforce investment system, including the Workforce Investment Act and related programs, and the education system;
3. Demonstrated and potential regional economic development strategies
4. Relevant research being produced by leading entities;
5. Partnerships that fuel innovation and facilitate the process of bringing ideas to market;
6. Evaluation methodologies; and (1 point)
7. How the findings from this evaluation relate to key legislative, regulatory, and technical assistance questions related to the project.

PLEASE BE ADVISED THAT OFFERORS WILL BE EVALUATED UNDER THIS FACTOR BASED ON THE FOLLOWING:

(1) The offeror's complete understanding of the WIRED Initiative and its relevance for regional economic transformation, including the role of the public workforce investment system, the education community and regional economic development systems in such transformation; **(4 points)**

(2) The offeror's complete understanding of the intent and requirements for measuring a wide range of regional transformation indicators and economic transformation and development under this contract as demonstrated in the technical approach; **(4 points)**

(3) The offeror's understanding of the proposed evaluation's methodological approach and its strengths and weaknesses; and **(2 points)**

(4) The offeror's description of how the findings from the different parts of the evaluation will be linked to one another and how the findings will provide information useful for administering the initiative or determining possible areas for legislative change. **(2 points)**

B. RESPONSES TO TECHNICAL QUESTIONS

1. Question: The solicitation requires that the contractor collaborate with Berkeley Planning Associates (BPA) and to use the BPA survey instrument. Is BPA eligible to bid in response to this solicitation? If so, it appears that the requirements for collaboration and use of the survey instrument favor BPA and disadvantage other bidders. How would the government correct this apparent bias toward BPA?

ANSWER: There is no bias towards Berkeley Policy Associates (BPA). BPA is eligible to respond to this solicitation. The requirements for collaboration and use of the same survey instrument are necessary to ensure the information collected is consistent across generations. Consistent information is required so that the issues listed in section C.3, Cross Generation Comparisons, of the RFP can be addressed properly. Also note that offerors will be rated on their ability to meet the objectives of the RFP; not on their ability to collaborate with BPA (see section M.2.A Technical Approach).

2. Will the government provide a copy of the Berkeley Planning Associates survey instrument and the details of the survey methods for Generation 1? If not, how can a bidder estimate the costs of surveying, since it is mandated that the BPA survey instrument be used?

ANSWER: The survey instrument for the Generation I regions will be developed in late summer 2007. ETA expects that the survey will consist of 25-30 items, most of which will require closed-ended responses with a few short-answer or open-ended items that will require coding. The evaluation team will mail all surveys to respondents and instruct recipients to respond by returning the survey. The instructions will include the website and provide the opportunity to respond electronically, if preferred. In addition, the instructions will provide the opportunity to respond over the telephone. Because the survey sample will need to ensure adequate coverage of the categories of respondents necessary to provide information sufficient for the analysis, the survey sample will include individuals serving in a range of roles within partner organizations and other key stakeholders in the regional collaboratives. While the size of the survey samples will vary depending on the complexity and make-up of the regions and the

collaboratives in each region, we anticipate between 75 and 100 individual respondents in each region.

3. Will the government provide the draft or final BPA Evaluation Design? Report for the evaluation of Generation 1, since the content will substantially influence the approach to collaboration with BPA?

ANSWER: The final BPA/UCSD Evaluation Design Report for the evaluation of Generation I regions will be provided to the successful bidder for the contract to evaluate Generation II and III regions. Offerors for this contract are encouraged to propose their best strategies for collaborating with BPA/UCSD.

4. The original RFP for the WIRED evaluation, for which BPA was the successful bidder, specified that the contract would cover Generation 1 and Generation 2. The current RFP covers Generation 2 & 3. Please clarify the scope of work for BPA's evaluation contract for WIRED. Does it include both Generation 1&2 or just Generation 1?

ANSWER: The BPA/UCSD evaluation team is responsible for evaluation of the Generation I regions only. While the team's initial responsibilities included the Virtual Community (VC) regions, the VC regions' scope of work expanded substantially with the additional funding and responsibilities provided by ETA, as they transitioned to Generation II regions. Because their proposed activities now extend well beyond what was initially envisioned, ETA determined that a substantially increased focus on their activities was warranted and, thus, they are no longer part of BPA/UCSD's scope of work.

5. Can the survey instruments and procedures developed by BPA be provided to potential bidders? If not, can you tell us what the delivery method of the survey is? Face-to-face, or paper?

ANSWER: See the response to question #2, above.

6. Task 4 under C.4 Tasks state that the contractor will use the same instruments and design developed by BPA/UCSD for the survey of Generation I regions. Will the grantee be allowed to modify the instruments and design in coordination with BPA/UCSD to allow for difference between Generation I, II and III regions?

ANSWER: The evaluator of Generation II and III regions will be allowed to modify the instruments and design in coordination with BPA/UCSD, subject to the requirement noted in the response to question #1, above.

7. Regarding past performance, if an applicant plans to subcontract a portion of the work, is it required that applicants submit five J.7 forms for both the applicant and subcontractor, or five total, with at least three being from the

applicant?

ANSWER: Offerors are expected to submit at least five references for the prime and five references for each subcontractor, if a subcontractor is proposed. For example, if an offeror has one subcontractor, then a minimum of ten past performance references should be submitted (five for the prime and five for the subcontractor).

8. Is it correct that Part 2, section 5 will include a narrative that addresses the Technical Approach, Management Plan, and Understanding evaluation criteria?

ANSWER: Yes, Part 2, Section 5 shall address the Technical Approach, Management Plan and Understanding.

9. Do monthly progress reports have to be submitted for peer review, or just the annual and final reports?

ANSWER: Only the evaluation design and final evaluation reports will be submitted for peer review.

10. Are we to assume that all activities projected for this project will relate only to Generation II and III grantees? Generation I grantees will not be a direct subject for these evaluation activities?

ANSWER: Correct, Generation I grantees will not be a direct subject for these evaluation activities.

11. Has a structured telephone instrument been completed for the Generation I grantees? If yes, is it possible to obtain a copy of the questionnaire?

ANSWER: See the response to question #2, above.

12. Has the Generation I evaluator defined the respondent universe for the telephone questionnaire? If yes, can we obtain that information?

ANSWER: See the response to question #2, above.

13. Is there any limit to the number of Special Issue Papers that may be requested?

ANSWER: Offerors can expect to produce three or four special issue papers, depending upon the topic and the amount of research that will be required for each. See the response to Question #27, below.

14. Is it correct to assume that each Annual Report will be devoted to the activities of a single generation of grantees?

ANSWER: No. Annual reports may cover both Generations II and III when the grantees' periods of performance overlap.

15. Is there a defined list of performance measures on which the grantees must report? If yes, can we obtain the list of such performance measures?

ANSWER: All grantees will be required to provide performance measures information for participants enrolled in job training (talent development) activities under the grant. These measures include the entered employment rate, employment retention rate, and average earnings. In addition, all grantees will collect and report information on metrics that are aligned with their own implementation plans, which vary from region to region.

16. Is the Generation I evaluator eligible for bidding on this contract?

ANSWER: Yes, the Generation I evaluator is eligible to bid on this contract.

17. In Task 4 of the solicitation it is indicated that the BPA/USCD survey instrument will be used for this evaluation. Are we to assume that we cannot make any changes the instrument? This seems to contradict the language regarding design in Task 1.

ANSWER: See the responses to questions #2 and #6, above.

18. Has OMB approval been sought for the BPA/USCD instrument? If not, when will it be? If so, has it been obtained?

ANSWER: ETA is currently seeking OMB approval for the Generation I region site visit protocol. After the survey instrument is developed, in late summer 2007, ETA will seek approval for that instrument as well.

19. If someone other than BPA/USCD is awarded the contract it appears that the evaluations will have significant overlap in timing. Is that true?

ANSWER: The timing of the evaluations will overlap regardless of who is awarded the contract.

20. If there is significant overlap, how would the design needs of the evaluation of Gen II and III impact any of the design or process activities of the Gen I evaluation? Would the Gen I design have precedence?

ANSWER: There should be no overlap in design or process activities, since the evaluations are dealing with different grantees.

21. Will the Department assist the contractor in obtaining individual State UI

wage record data?

ANSWER: Access to states' UI wage data, if needed for the evaluation, must be arranged between the contractor and the individual states. DOL will assist in this where possible.

22. C.4 (2) in the SGA addresses the need for coordination with the evaluators of Generation I to ensure comparable information collection and to avoid duplication. Is any information regarding Generation I data collection currently available for review?

ANSWER: No. See the answer to question #2 above.

23. C.4 (4) requires that the contractor will survey the Generation II and III regions using the same instruments and design developed by the BPA/UCSD for the survey of Generation I regions. Is a copy of this survey available now to potential contractors?

ANSWER: See the answer to question #2, above.

24. Is the survey noted in C.4 (4) to be administered via mail, phone, or in-person?

ANSWER: See the answer to question #2, above.

25. Is there a limit on the number of pages to be contained in the proposal?

ANSWER: No, there is no page limitation.

26. Approximately how many Special Issue Papers do you anticipate? Can you provide any additional information concerning the potential scope of each paper?

ANSWER: See the answer to question #13, above.

27. What would trigger the desire to generate a Special Issue Paper? Is it something the contractor defines or the Department of Labor?

ANSWER: The Department of Labor will define potential topics for the Special Issue Papers as the Initiative evolves and information is required on specific elements or issues.

28. Has the Generation I evaluator already developed any Special Issue Papers that are available?

ANSWER: No.

29. What is the overall length (i.e. number of questions) and mode of delivery (i.e. in- person, telephone) for the Generation I survey instrument

ANSWER: See the answer to question #2, above.

30. What is the specific purpose of the Generation I survey?

ANSWER: The survey is intended to provide information on important elements of each region's collaboration efforts, including the roles and responsibilities of partners in the region, the array of collaborative approaches implemented in the regions and the efforts to support innovation and capacity changes within the context of economic transformation.

31. Who completes the Generation I survey instrument (i.e. five people per region)?

ANSWER: See the answer to question #2, above.

32. Is there a page limit for the proposal?

ANSWER: Please see the answer to question #25, above.

33. What are the reporting requirements for Generation II and III WIRED grantees?

ANSWER: See the answer to question #15, above. In addition, grantees are required to submit quarterly financial status reports and quarterly narrative progress reports.

34. Should we assume that the winning contractor will begin work with the Generation III grantees in Year 2, or is there the possibility of working with them from the time they are awarded their grants?

ANSWER: The contractor should anticipate working with the Generation III grantees from the time ETA approves the contractor's evaluation design.

35. Are there any specific data collection requirements for grantees? If so, what are those requirements?

ANSWER: See the answer to question #33, above.

36. What, if any, data is DOL collecting specifically for the WIRED initiative?

ANSWER: From each regional grantee, DOL will be collecting implementation plans, quarterly financial and operational progress reports, and the performance measurement information described in response to question #15, above.

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