

Request for Quote (RFQ)

For:

Blanket Purchase Agreement (BPA)
To Support the:
Independent Program Assessment Office (IPAO)
NASA Langley Research Center (LaRC)

1. **Intent:** NASA LaRC intends to enter into a BPA Agreement (herein after referred to as "Agreement") pursuant to Federal Acquisition Regulation (FAR) 8.404(b)(4) and applicable General Services Administration (GSA) procedures.
2. **Applicable GSA Special Item Number (SIN):** 874-1 Management, Organization, and Business Improvement Services (MOBIS)

SIN 874-1 Description:

Consulting Services - Services may include providing expert advice, assistance, guidance or counseling in support of agencies' management, organizational, and business improvement efforts. This may also include studies, analyses and reports documenting any proposed developmental, consultative or implementation efforts. Examples of consultation include but are not limited to:
 - strategic, business and action planning
 - high performance work process and productivity improvement
 - systems alignment
 - leadership systems
 - organizational assessments
 - cycle time
 - performance measures and indicators program audits, and evaluations
3. **Agreement Terms and Conditions:** The specific terms of the prospective Agreement (e.g. duration of agreement, ordering office, point of contact, BPA total estimated value etc.) are contained in the Draft BPA Agreement. The draft Agreement is derived from a GSA template and as such contains the necessary terms and conditions. Additional terms and conditions may be incorporated into the Agreement as necessary to reflect unique requirements.
4. **Eligible Offerors:** Only GSA Schedule Contractors may compete for the BPA Agreement.
5. **Statement of Work and Task Orders:** The BPA Statement of Work (SOW) describes the general / broad scope of services to be procured under the resulting Agreement. Each Task Order placed against the BPA will contain a unique SOW

identifying the specific services associated with the Task Order. However, Task Orders will not exceed the scope of services as described in the BPA SOW.

6. **Basis of Award:** NASA LaRC will make award on the basis of “Best Value.”

As explained in the BPA SOW Introduction paragraph, the IPAO supports NASA Headquarters personnel to independently assess and evaluate newly proposed advanced concepts and ongoing programs and projects. In this support role, the IPAO is often tasked to support assessment requirements that demand *quick* response times. Thus, a primary consideration for selecting the “Best Value” GSA Schedule contractor among competitors is an offeror’s *demonstrated experience* to quickly respond to requirements involving a wide variety of technical expertise. In some cases, such services may be required with as little as one week response time to begin work. To meet such a short suspense, the successful contractor may have only two or three days to submit a proposal and assemble the technical resources to successfully accomplish the task within specified time periods. Therefore, GSA Schedule Contractors considering competing for the IPAO BPA should carefully consider their capabilities to achieve the IPAO’s short response times for submitting proposals and beginning work.

Offerors are advised to carefully review Attachment 3 – Quote Preparation Instructions and Attachment 2 - Selection Criteria which identifies additional selection criteria.

7. **Multiple Award:** The government reserves the right to make multiple award Agreements. As stated in the Draft BPA Agreement (Attachment 4), the government may elect not to compete an individual task order among each of the awarded BPA contractors. The circumstances of the task order will determine whether or not competition is pursued (e.g. logical follow-on to prior task order, unique skills or qualifications of a particular contractor, urgency of requirement, etc.)

8. **Teaming Arrangements:** Competing GSA Schedule Contractors are authorized and encouraged to propose teaming arrangements. Note however, teaming arrangements are limited to GSA Schedule Contractors.

A GSA Federal Supply Schedule Contractor Team Arrangement allows two or more GSA Schedule Contractors to work together to meet agency requirements. A Contractor Team Arrangement permits contractors to complement each other and allows them to compete for orders for which they may not qualify independently. A customer benefits from a GSA Federal Supply Schedule Contractor Team Arrangement by buying a solution rather than making separate buys from various contractors.

Comparison between Prime / Subcontractor relationship and Teaming Agreement Relationship: Under GSA Federal Supply Schedule Contractor Team Arrangements, each contractor has privity of contract with the Government since each contractor holds a GSA Federal Supply Schedule contract. Under a prime/subcontractor arrangement, only the prime contractor has privity of contract with the Government. In a GSA Contractor Team Arrangement, any GSA Schedule contractor can serve as the team leader and/or interact directly with the Government. Under a prime/subcontractor arrangement, only the prime can interact with the Government. In addition, in a GSA Contractor Team Arrangement, each GSA Federal Supply Schedule contractor's services and products are already on contract and the prices have been determined fair and reasonable. Total solutions can be put together quickly and easily under GSA Federal Supply Schedule Contractor Team Arrangements.

Additional information about Teaming Arrangements can be found at the following GSA web site:

http://www.gsa.gov/Portal/content/offerings_content.jsp?contentOID=116432&contentType=1004#003

The Agreement will incorporate specific Teaming Arrangement terms and conditions mutually agreed upon.

9. **Two-step Selection Process:** The selection process will include the following two-step process:
 - a. **Step 1:** interested quoters shall prepare a written quote in accordance with the Quote Preparations Instructions (Attachment 3). The government will evaluate quotes received for the purpose of selecting the best candidates (based on selection criteria) to proceed to step 2. Those quotes not selected will not proceed to step 2 and will not be further considered.
 - b. **Step 2:** quoters selected in Step 1 will present an oral proposal in accordance with Quote Preparations Instructions (Attachment 3). The government will evaluate the oral presentations for the purpose of selecting the successful GSA Schedule Contractor(s) for the BPA.
10. **Request for Quote Due Date and Time:** As specified on the GSA web site.
11. **Questions Due:** Questions are due not later than: July 31, 2003, 4:00pm ET.
12. **Point of Contact:** Offerors shall address questions in writing to:

Lionel (Lee) Nadeau
Contracting Officer
Office of Procurement

NASA LaRC

Phone: (757) 864-2434

FAX: (757) 864-8863

e-mail: lionel.e.nadeau@nasa.gov

and copy to:

Ms Terri Williams
Alternate Contracting Officer

Office of Procurement
NASA LaRC

Phone: (757) 864-2254

FAX: (757) 864-8863

e-mail: Terri.D.Williams@nasa.gov

13. **Applicable NASA Policy Directives:** The following NASA Policy Directives are applicable to the BPA Agreement:

7120.5B - NASA Program and Project Management Processes and Requirements
8000.4 - Risk Management Procedures and Guidelines NASA Cost Estimating Handbook

The successful contractor(s) awarded an Agreement will be responsible for compliance with the procedures and policies contained in the policy directives in conducting the independent assessments associated with the task orders.

Quoters may review the Policy Directives at the following IPAO web:

<http://ipao.larc.nasa.gov>

The directives are listed under the heading: "Link to the NASA Data Sources"

13. **Accounting / Financial System:** The quoter shall have a GSA-approved accounting /financial system capable of accurately segregating and reporting costs pertinent to Time and Material or Labor Hour task orders.

14. **Amendments:** Quoters are responsible for monitoring the GSA web site for downloading any amendments.

15. **Organization Conflict of Interest:** Given the nature of the consulting services required by the statement of work for the BPA and the specific task orders, a conflict of interest may arise such that the contractor's assessment may influence the government's decision whether or not to proceed with a particular project or make changes based on the contractor's recommendations. Consequently, interested offerors are hereby advised that the BPA Agreement will include a Conflict of Interest clause that will prohibit the successful contractor(s) awarded a BPA Agreement from subsequently competing for work associated with the particular task order that it has been awarded. The clause is included in the Draft BPA Agreement provided as Attachment 4.

5 ATTACHMENTS:

1. BPA Statement of Work
2. Selection Criteria
3. Quote Preparation Instructions
4. Draft BPA Agreement
5. Sample Task

Statement of Work for IPAO Blanket Purchase Agreement (BPA)
Attachment 1

1. Introduction

The NASA Independent Program Assessment Office (IPAO) supports the NASA leadership in independently assessing and evaluating newly proposed advanced concepts and ongoing programs and projects for the purpose of adding confidence that the programs/projects can achieve their objectives within agreed to costs and schedules. These assessments and evaluations include, but may not be limited to, the independent validation of program or project technical risks, estimation of costs, and validation of schedules. The highly technical nature of the assessments presents the need for access to a variety of engineering, analytical, scientific, administrative and project management skills, and to extensive databases and information sources. These requirements are also driven by the criticality of the assessment and the need to accurately and quickly reflect potential program risk to senior NASA management for use in their decision processes. The IPAO also holds the Agency lead responsibility for independent cost estimation and analysis. This responsibility includes providing support to the cost, schedule, and performance evaluation functions for IPAO assessments provided to Agency leadership. It also includes the development of improved cost estimating methodologies and tools, and provides for the integration of technical performance and cost in support of risk assessment activities.

2. Scope

The Contractor shall perform the requested work using highly skilled engineers, scientists, and analysts with extensive experience in design, analysis, test, operation, and management of space transportation systems, spacecraft, instruments, aerospace research, risk assessment, schedule assessment, life cycle cost estimation capabilities, cost research, cost data collection, cost tools and model development, and independent cost verification and validation. While working on assessments, the Contractor will interface with, but remain distinctly independent from all elements and contractors of NASA program/projects being assessed. All work will vary in size from one small one-person task in support of an integrated product team environment to more comprehensive efforts involving extensive technical analyses, modeling, simulation, complex studies, and tool development. All task orders shall include fully burdened labor, General and Administrative (G&A), material, and travel expenses as applicable. Each task order will include a performance-based statement of work, period of performance, and schedule of deliverables. The Contractor shall have the ability to create teaming arrangements that would allow for individuals to be subcontracted for task driven efforts (e.g. Federally Funded Research and Development Centers FFRDCs, Universities, and individual Consultants).

2.1 Response Time:

Unless otherwise specified by the contracting officer, the Contractor shall submit a quote in response to a Request for Quote (RFQ) within five (5) business days after receipt of the RFQ.

Statement of Work for IPAO Blanket Purchase Agreement (BPA)
Attachment 1

In unusual circumstances, the contractor may be required to submit a quote within two (2) business days after receipt of RFQ.

2.2. Typical work may include the following:

Advanced Concept-Critical Design Technical Assessments

- Requirements Assessment
- Summary of Design Concept
- Detailed Description of Design(s)
- Maturity and complexity of technologies
- Technical analysis of systems and subsystems (including structural, thermal, electrical, communications, fluid flow, aerodynamic, etc.)
- Identified Technical Risks/Mitigation
- Technical Performance - Concerns/Findings/Issues
- Trade Studies - alternate design concepts with supporting documentation
- Systems Engineering and Mission Assurance
- Testing and Operations
- Verification and Validation

Program Management Assessments

- Program Structure
- Schedule evaluation – adequacy, slack, critical path, associated cost risk
- Technical Performance
- Cost Risks Analyses
- Adequacy of project staffing and skill mix
- Adequacy of project fiscal reserves to address identified risks
- Independent Life Cycle Cost Analyses – cost estimating models, assumptions, and details, including Cost Analysis Requirements Description (CARD) document, cost estimate reconciliation, Work Breakdown Structure (WBS) analyses, Cost Estimating Relationships (CERs), cost data collection and programmatic information collection, and full cost accounting; included are the five standard independent cost estimate briefing charts – scope, ground-rules and assumptions, methodology breakout, S-curve, and comparison to budget (additional supporting backup cost information as appropriate)
- Program Risk Assessment – identification, management plan and mitigation plan
- Quantitative Risk Assessment – Probabilistic Risk Assessment (PRA), Failure Modes and Effects Analysis (FMEA), Failure Modes, Effects and Criticality Analysis (FMECA), Fault Tree Analysis (FTA), Fishbone Analysis.
- Readiness Reviews

Institutional Requirements Assessments

- Workforce and Resource Analysis
- Information Technology and Communication Services
- Integrated Financial Management Services

Statement of Work for IPAO Blanket Purchase Agreement (BPA)
Attachment 1

Special Assessments or Studies

- Rapid Turn-Around for a particular program, project and/or specific concept (work could include features shown above for Advanced Concept Technical and Program Management Assessments)
- Strategic analysis of various system-level issues facing NASA in short and long term – may include support to the Joint Strategic Analysis Team
- Early warning analysis – provide necessary analysis to formulate corrective action options to mitigate risk

Other Professional Engineering Assessment or Studies

- Strategic planning for Technology Programs
- Concept Development and Requirements Analysis
- System Design, Engineering, and Integration
- Test and Evaluation
- Integrated Logistics
- Acquisition and Life Cycle Management
-

Tool Development

- Cost Estimation and Analysis
- Software
- Risk Management
- Performance Metrics
- Databases
- Knowledge Management

3. Assessments, Study and/or Tool Development:

Assessments and studies shall include objective, non-advocate assessments of program/project definition, implementation planning, design approach, technical, schedule, operational and cost risk, software development and independent validation/verification, and other aspects of program/project risk as appropriate.

Assessments and studies shall typically include an assessment report and briefing slides and in electronic format on PC compatible CD-ROM disks (Power Point briefing slide with facing page text is acceptable) which would include data sources, findings, issues, and concerns, cost model used, cost assumptions, any risk models that were used and any other item specified in the IAP. Cost estimates shall include full documentation. Tool development products shall typically include any software development or enhancement to an existing tool, database, and/or new software tools.

Statement of Work for IPAO Blanket Purchase Agreement (BPA)
Attachment 1

4. Type of Task Orders:

The government may select either a Labor Hour, Time and Material or Firm-Fixed-Price type Task Order. Such selection depends on whether or not it is possible, at the time of placing the task order, to estimate accurately the extent or duration of the work or to anticipate costs with any reasonable degree of confidence.

5. Quote contents:

Unless otherwise specified, the contractor's quote for each task order shall contain the following minimum information:

- a. Contractor's technical approach for performing the task order
- b. Milestone Schedule
- c. Cost element break-out
- d. Names of personnel assigned to task order
- e. Completed Statement of Independence (see Appendix A)

Statement of Work for IPAO Blanket Purchase Agreement (BPA)
Attachment 1

Appendix A

Certification of Independent Assessment

I certify that the personnel assigned to Task Order [enter task order #] have no association, affiliation or *any* interest with the outcome of the program(s) / project(s) being assessed. Accordingly, the assigned personnel are thus qualified to conduct an independent and objective assessment.

The contractor agrees to take immediate action to remedy any circumstance adversely affecting the independence or objective assessment of assigned personnel during the performance of the Task Order and will promptly notify the contracting officer in writing of such action.

Signature
Title: _____

Date

ATTACHMENT 2
Selection Criteria

Step 1:

The government will award a Blanket Purchase Agreement (BPA) resulting from this solicitation to the Quoter whose offer represents the best value to the government, cost and other factors considered. Accordingly, the government may award to other than the lowest priced offer. In evaluating offers received, the government will consider the factors described herein and make an integrated assessment to determine "best value." All evaluation factors other than cost or price, when combined, are significantly more important than cost or price. The quote shall be specific, complete and concise. In accordance with FAR 13.106-2, the government may conduct a comparative evaluation of quotes received.

The following non-price evaluation factors are listed in descending order of importance:

1. **Technical Capability**: In accordance with simplified acquisition procedures, subfactors are not applicable to this request for quote.

The government will evaluate each Quoters' understanding of the requirements contained in the BPA Statement of Work (SOW). In particular, the government will evaluate the quoter's personnel's management and technical qualifications and experience as well as its technical approach and technical capabilities to provide independent assessments as described in the BPA SOW; Understanding the Requirement and Feasibility of proposed work plan; Management Approach (Program Management, Contractor-Government interfaces, IPAO relationships and insight to subcontractors and consultants via BPA, critical skills, key personnel); Corporate and Government Experience, qualifications, and facilities; Response to sample task and compliance with NASA Policy Directives.

2. **Ability to Meet Schedule**: The government will evaluate each quoters' capabilities to quickly and effectively determine applicable resources, organize and field technical experts, submit task order quotes and commence work.

NASA LaRC will use the following rating scheme to rate each Quoters' Technical Capability and Ability to Meet Schedule based on the information submitted:

The definitions associated with each adjective in Table 1 are intended to provide guidance in assigning ratings. It is not intended or necessary that the evaluation of the quote satisfy all elements of the definition in order to be assigned the associated rating. Assigned ratings are inherently subjective and therefore reflect the individual opinions, experience and knowledge of the evaluators and rely on the information submitted by the quoter as well as any other sources of information used by the government.

ATTACHMENT 2
Selection Criteria

Table 1

<u>Adjective</u>	Definition
<u>Exceptional</u>	<p>Clearly demonstrates capabilities and experience citing three or more examples of actual work very relevant to BPA SOW. Resources more than sufficient to successfully perform task orders. Depth and Breadth of technical and management experience and personnel expertise, qualifications and experience provide a very high degree of confidence of timely and satisfactory performance. Response to Sample Task is well defined; effectively addresses technical issues and prescribes personnel resources commensurate with the task; establishes clear, relevant objectives and milestones; includes unique or innovative technical approach or business practices.</p> <p>Proposal contains no weaknesses or deficiencies.</p>
<u>Very Good</u>	<p>Clearly demonstrates capabilities and experience citing at least three examples of actual work very relevant to BPA SOW. Resources are sufficient to successfully perform task orders. Depth and Breadth of technical and management experience and personnel expertise, qualifications and experience provide a high degree of confidence of timely and satisfactory performance. Response to Sample Task is well defined; effectively addresses technical issues and prescribes personnel resources commensurate with the task; establishes clear, relevant objectives and milestones.</p> <p>Proposal contains no more than 3 minor weaknesses and no significant weaknesses or deficiencies.</p>
<u>Acceptable</u>	<p>Clearly demonstrates capabilities and experience citing at least two examples of actual work relevant to BPA SOW. Resources are sufficient to successfully perform task orders. Depth and Breadth of technical and management experience and personnel expertise, qualifications and experience provide a reasonable degree of confidence of timely and satisfactory performance. Response to Sample Task is adequately defined; addresses technical issues and prescribes personnel resources commensurate with the task; establishes objectives and milestones.</p> <p>Proposal contains no more than 4 minor weaknesses and no significant weaknesses or deficiencies.</p>

ATTACHMENT 2
Selection Criteria

<p><u>Marginal</u></p>	<p>Demonstrates capabilities and experience but with some uncertainties or questionable business practices or technical processes. Examples of actual work are two or less and/or only somewhat relevant to BPA SOW. * Resources are inadequately described and/or insufficient to successfully perform task orders. Depth and Breadth of technical and management experience and personnel expertise, qualifications and experience provide a low degree of confidence of timely and satisfactory performance. Response to Sample Task is somewhat defined; does not adequately address technical issues and/or prescribe personnel resources commensurate with the task; objectives and milestones are somewhat uncertain, unclear or marginally relevant.</p> <p>Proposal contains 5 or more minor weaknesses or at least one significant weakness and no deficiencies.</p>
<p><u>Unacceptable</u></p>	<p>Inadequately demonstrates capabilities and experience. Examples of actual work are not relevant to BPA SOW. * Resources are insufficient to successfully perform task orders. Depth and Breadth of technical and management experience and personnel expertise, qualifications and experience provide a very low degree of confidence of timely and satisfactory performance. Response to Sample Task is poorly defined; does not effectively address technical issues and/or prescribe personnel resources commensurate with the task; does not establish clear, relevant objectives and milestones.</p> <p>Proposal contains 5 or more minor weaknesses or at least one significant weakness or one or more deficiencies.</p>

Definitions:

Strength: A strength is a quality or characteristic in the proposal that significantly increases the probability of successful contract performance.

Weakness: A weakness is a flaw in the proposal that increases the risk of unsuccessful contract performance.

Significant Weakness: A significant weakness is a flaw in the proposal that appreciably increases the risk of unsuccessful contract performance.

ATTACHMENT 2
Selection Criteria

Deficiency: A deficiency is a material failure of a proposal to meet a Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level.

* Note: "Resources" includes the quoter's organizational resources as well as Teaming Arrangements, subcontractors, consultants etc. as applicable.

2. Relevant Past / Present Performance:

References: the government will evaluate each Quoters' current past/present performance. In the case where an Quoter does not have relevant past performance experience as defined below, the government will consider the experience of predecessor companies, key personnel, or first-tier subcontractors that will perform major or critical aspects of the requirement if the experience of such companies, key personnel or subcontractors have relevant experience.

The Quoter shall provide information for three (3) references for whom it has performed services, as well as three references for each first-tier subcontractor proposed, in the format provided in Attachment 3. Such references shall be current and relevant as defined below.

Response to Adverse Information: Quoters will be given an opportunity to respond to any adverse past performance information if such a response was not previously given and the results of the adverse past performance information adversely affect the Quoter's rating.

Other Information Sources: In addition to references received, the government reserves the right to rely on any other source of information in making a "best value" tradeoff decision.

The government may consider the currency, relevancy and trends of past/current performance while conducting its performance evaluation. These terms are defined below:

Currency: For the purpose of this solicitation, "currency" is performance occurring within the last three years for the period preceding the solicitation issue date. Within this period, performance occurring later in the period may have greater importance than performance occurring earlier in the period. For example, references for work performed in April 2003 may have greater importance than work performed in February 2002.

Relevance: The government will assign an adjective descriptor (as defined in Table 2) that the government determines best describes the relevance of an Quoter's past performance (i.e. references) relative to the government's definition for "Past/Present Performance."

Trends: Performance trends may, depending upon the circumstances, have greater importance than sporadic incidents of "Exceptional", "Marginal" or "Unacceptable" performance. If the contractor has had incidents of marginal or unsatisfactory performance, the government may consider the contractor's corrective actions to ensure effective and

ATTACHMENT 2
Selection Criteria

timely problem resolution. Therefore, the contractor is encouraged to explain any such performance problems (e.g. defective equipment, untimely delivery etc.) and corrective actions.

Table 2

Adjective Description	Definition
Very Relevant	The Quoter's reference / past performance experience includes all essential elements of the definition of relevant past performance which are critical to successful project completion.
Relevant	The Quoter's reference / past performance experience includes most essential elements of the definition of relevant past performance which are critical to successful project completion.
Somewhat Relevant	The Quoter's reference / past performance experience includes some essential elements of the definition of relevant past performance which are critical to successful project completion.
Not Relevant	The Quoter's reference / past performance experience does not include any essential elements of the definition of relevant past performance which are critical to successful project completion.

Definition of relevant past/present performance:

For the purpose of this requirement, relevant experience critical to success of the project is defined as demonstrated success in activities involving extensive professional engineering service capabilities and breadth of experience necessary to provide independent assessments and recommendations to enable NASA to improve safety, performance, quality, timeliness, and efficiency throughout the Agency. Quoters' proposals shall clearly demonstrate experience in these activities which cover a broad range of consultation, program management and engineering skills such as strategic planning for technology programs/activities, concept development and requirements analysis, system design, engineering, integration, test and evaluation, integrated logistics support, acquisition and life cycle management, information technology, communication services, and management of human capital, resources, financial, risk, safety, mission success, environmental, security, export control, and foreign involvement. Contractors must possess a comprehensive knowledge of quality management theory and practice and have demonstrated they are capable of providing expert assistance to Federal activities. Demonstrated rapid response capability to subcontract, acquire, network, and integrate teaming for the requisite skills and expertise.

ATTACHMENT 2
Selection Criteria

The government will use the ratings in Table 3 to rate the quality of each Quoter's Past /Present Performance based on completed questionnaires and any other sources of information:

Table 3

(E) Exceptional/High Confidence	Based on the Quoter's performance record, essentially no doubt exists that the Quoter will successfully perform the required effort.
(VG) Very Good/Significant Confidence	Based on the Quoter's performance record, little doubt exists that the Quoter will successfully perform the required effort.
(S) Satisfactory/Confidence	Based on the Quoter's performance record, some doubt exists that the Quoter will successfully perform the required effort.
(N) Neutral/Unknown Confidence	No performance record identifiable.
(M) Marginal/Little Confidence	Based on the Quoter's performance record, substantial doubt exists that the Quoter will successfully perform the required effort. Changes to the Quoter's existing processes may be necessary in order to achieve the contract requirements.
(U) Unsatisfactory/No Confidence	Based on the Quoter's performance record, extreme doubt exists that the Quoter will successfully perform the required effort.

4. Price

The government will compare the competitive quotes received for the sample task order and the government estimate as a basis for determining a fair and reasonable price and making a best value award decision. **Quoters are cautioned that the government reserves the right to award a task order for the sample task at the quoted price. Therefore, Quoters should**

ATTACHMENT 2
Selection Criteria

quote a price for the sample task order that is realistic and commensurate with the tasks required.

Accounting / Financial System: If the quoter does not have an accounting / financial system approved by GSA that is capable of segregating and reporting costs pertinent to Time and Material and Labor Hour task orders, the quoter will be determined non-responsive.

Accuracy and Completeness of Information:

The Quoter is responsible for ensuring that the information required is accurate and complete. The government may determine the Quoter to be non-responsive if the information provided is inaccurate or incomplete to allow the Government to conduct a past performance or technical evaluation. The Quoter should validate reference information for points of contact, telephone numbers and other required information for accuracy and completeness.

Step 2: Oral Presentations

The government will invite those quoters determined to represent the “best value” from Step 1 to conduct an oral presentation. The details of the Oral Presentation are explained in Attachment 3 – Quote Preparation Instructions.

The government will award a BPA Agreement(s) to that(those) GSA Schedule Contractor(s) that represent the best value considering the following evaluation criteria:

A. Oral Presentation Topics:

- i. Organizational Structure
- ii. Understanding the Requirement (Approach)
- iii. Technical Capabilities (Qualifications)
- iv. Networking Capabilities (Scheduling, Surge)
- v. Procedures for ensuring assigned personnel have no conflict of interest with task orders (independent and objective)
- vi. Other topic selected by the presenter (optional)

B. Responses to the government’s questions

C. Sample Task

The government will assign an adjective rating from Table 4 to each evaluation criteria A, B and C. In accordance with FAR 13.106-2, the government may conduct a comparative evaluation of the oral presentations.

ATTACHMENT 2
Selection Criteria

The definitions associated with each adjective in Table 4 are intended to provide guidance in assigning ratings. It is not intended or necessary that the evaluation of the oral presentation satisfy all elements of the definition in order to be assigned the associated rating. Assigned ratings are inherently subjective and therefore reflect the individual opinions, experience and knowledge of the evaluators and rely on the information submitted by the quoter.

Table 4

<u>Adjective</u>	<u>Definition</u>
<u>Exceptional</u>	<p>Quoter demonstrated superior knowledge and experience of the subject. Presented very relevant examples and/or pertinent information that effectively conveys a clear understanding and ability to successfully satisfy the government's requirement. Possesses numerous and significant technical, management or personnel skills and / or strengths.</p> <p>Provided clear, concise answers to questions that demonstrate breadth and depth of subject knowledge and technical skills.</p> <p>Response to Sample Task is well defined; effectively addresses technical issues and prescribes personnel resources commensurate with the task; establishes clear, relevant objectives and milestones; includes unique or innovative technical approach or business practices.</p> <p>Overall presentation: No weaknesses or deficiencies.</p>
<u>Very Good</u>	<p>Quoter demonstrated good knowledge and experience of the subject. Presented very relevant examples and/or pertinent information that effectively conveys a clear understanding and ability to successfully satisfy the government's requirement. Possesses some significant technical, management or personnel skills and / or strengths.</p> <p>Provided clear, concise answers to questions that demonstrate depth and breadth of subject knowledge and technical skills.</p> <p>Response to Sample Task is well defined; effectively addresses technical issues and prescribes personnel resources commensurate with the task; establishes clear, relevant objectives and milestones.</p> <p>Overall presentation: Presentation contains no more than 3 minor weaknesses and no significant weaknesses or deficiencies.</p>
<u>Acceptable</u>	<p>Quoter demonstrated adequate knowledge and experience of the subject.</p>

ATTACHMENT 2
Selection Criteria

	<p>Presented relevant examples and/or pertinent information that effectively conveys a clear understanding and ability to successfully satisfy the government's requirement. Possesses adequate technical, management or personnel skills and / or strengths.</p> <p>Response to Sample Task is adequately defined; addresses technical issues and prescribes personnel resources commensurate with the task; establishes objectives and milestones.</p> <p>Overall presentation: Presentation contains no more than 4 minor weaknesses and no significant weaknesses or deficiencies.</p>
<u>Marginal</u>	<p>Quoter demonstrated marginal knowledge and experience of the subject. Presented somewhat relevant examples and/or pertinent information that convey an understanding and ability to successfully satisfy the government's requirement. Possesses adequate technical, management or personnel skills and / or strengths.</p> <p>Response to Sample Task is somewhat defined; does not adequately address technical issues and/or prescribe personnel resources commensurate with the task; objectives and milestones are somewhat uncertain, unclear or marginally relevant.</p> <p>Overall presentation: Presentation contains 5 or more minor weaknesses or at least one significant weakness and no deficiencies.</p>
<u>Unacceptable</u>	<p>Quoter demonstrated marginal knowledge and experience of the subject. Presented no relevant examples and/or pertinent information that convey an understanding and ability to successfully satisfy the government's requirement. Does not possess adequate technical, management or personnel skills and / or strengths.</p> <p>Response to Sample Task is poorly defined; does not effectively address technical issues and/or prescribe personnel resources commensurate with the task; does not establish clear, relevant objectives and milestones.</p> <p>Overall presentation: Presentation contains more minor than 5 weaknesses or at least one significant weakness or one or more deficiencies.</p>

Attachment 3
Quote Preparation Instructions
For:
IPAO Blanket Purchase Agreement (BPA)

Step 1: Written Quote Content:

1. **Technical Factor:** The quote shall include a detailed, written explanation of the offeror's technical approach to meet the service requirements as defined in the ¹BPA statement of work (SOW). If proposing key personnel, resumes of proposed personnel that identify pertinent qualifications and relevant experience shall be included. Quoters are advised that the government may incorporate the quoter's proposed personnel into the resulting Agreement. The contractor must obtain written approval from the contracting officer for any personnel substitutions. Any substitute personnel must possess the minimum qualifications (skill, experience, education, certifications etc.) as those of the personnel identified in the offeror's quote. Include a description of corporate and ancillary facilities and technical resources.

Quoters shall provide a detailed explanation that describes how it will respond to task orders. Describe the technical expertise, experience and breadth available within the Quoter's organization as of the date of the Request for Quote. Also identify additional resources (e.g. subcontractors, consultants etc) available outside the quoter's organization. Clearly explain how such outside resources are accessed for supporting tasks. Identify and describe any projects which involved a subcontracting, consulting, teaming or other business relationship with the additional resources cited.

If proposing a Teaming Arrangement, submit a copy of the teaming agreement. As a minimum, the agreement should cite each team members' roles and responsibilities. Explain the benefits/advantages of such teaming. If considering a Teaming Arrangement, the government prefers that terms of the Agreement specify that there be a single Team Member (organization) that is solely responsible for a given task order and interfaces with the government for that particular task order.

Sample Task Order: Quoter shall prepare a formal quote that includes a detailed technical approach, basis of any assumptions made, milestone schedule and cost element breakout that identifies (as a minimum): labor mix, fully burdened labor rates, Other Direct Costs (as applicable), identify any applicable procedures pertinent to the NASA Policy Directives (i.e. 7120.5B and 8000.4).

2. **Ability to Meet Schedule:** Quoters shall identify and explain specific examples whereby it provided similar technical support services on short notice as that required by the BPA SOW. Provide actual time lines/schedules from receipt of request for quote/proposal to submission of quote/proposal and commencement of work. Describe the complexity and nature of the sample work and the relevancy to the scope of work described in the BPA SOW.

¹ Note: each task order placed against the actual BPA will contain a specific statement of work (i.e. Task SOW) unique to the task. Each task-specific SOW shall be within the scope of the BPA SOW.

Attachment 3
Quote Preparation Instructions

For:

IPAO Blanket Purchase Agreement (BPA)

- 3. Past Performance:** Complete a table for three (3) business references for ²relevant services performed not earlier than three (3) years from the date of the Request for Quote:

NOTE: After entering the information in the tables below, PLEASE E-MAIL THIS PAGE TO: LIONEL.E.NADEAU@NASA.GOV

Quoter Name:

Reference 1:

Business Name of reference & address	
Point of Contact	
Phone number	
e-mail address	
Contract or Purchase Order Number	
Dollar Value	
Period of Performance	
Description of Services Performed or products delivered	
Explain any problems and resolutions	

Reference 2:

Business Name of reference & address	
Point of Contact	
Phone number	
e-mail address	
Contract or Purchase Order Number	
Dollar Value	
Period of Performance	
Description of Services Performed or products delivered	
Explain any problems and resolutions	

Reference 3:

Business Name of reference & address	
Point of Contact	
Phone number	
e-mail address	
Contract or Purchase Order Number	
Dollar Value	
Period of Performance	
Description of Services Performed or products delivered	
Explain any problems and resolutions	

² Definition for "relevant" past performance is included in Attachment 2.

Attachment 3
Quote Preparation Instructions
For:
IPAO Blanket Purchase Agreement (BPA)

4. **Accounting / Financial System:** The quoter shall state whether or not it has a GSA-approved accounting /financial system capable of accurately segregating and reporting costs pertinent to Time and Material or Labor Hour task orders.
5. **Identifying Labor Categories:** Quoters shall identify each labor category proposed and include a brief description of the qualifications / experience associated with each labor category as well as the GSA, fully burdened labor rate for each fiscal year.
6. **Written Quote format:** Quotes shall not exceed 30, single-sided pages, or 15 double-sided pages. Page count includes indexes, table of contents, and any attachments / appendices etc. Page size shall be standard 8-1/2" by 11"; text size shall be 12 pitch. The government will not evaluate more than the stated page limit. The quote shall be appropriately indexed and tabbed for easy referencing.
7. **Amendments:** The quote shall include a statement acknowledging receipt of all amendments (as applicable) to the Request for Quote posted prior to the quote due date. Quoters are responsible for monitoring the GSA web site for downloading any such amendments.

Step 2: Oral Presentation: *This step is applicable only to Quoters selected from Step 1.*

1. **Topics:** The content for the oral presentation shall consist of the following topics:
 - i. Organizational Structure
 - ii. Understanding the Requirement (Approach)
 - iii. Technical Capabilities (Qualifications)
 - iv. Networking Capabilities (Scheduling, Surge)
 - v. Procedures for ensuring assigned personnel have no conflict of interest with task orders (independent and objective)
 - vi. Other topic selected by the presenter (optional)
2. **Personnel Qualifications of Presenters:** Personnel conducting the oral presentation shall be senior management (i.e. president, vice president or equivalent) representing the technical disciplines most relevant to the disciplines necessary to successfully meet the scope of the BPA SOW. Presenters shall be employed directly by the GSA schedule contractor submitting the quote; hired, professional speakers / presenters are not permitted. No more than six (6) contractor personnel are authorized to attend and participate in the oral presentation including representatives of a Team – if proposing a Teaming Arrangement.
3. **Media:** The presentation may include a handout or slide presentation limited to 35 pages /slides (e.g. PowerPoint®); five (5) copies of the handout / slides shall be

Attachment 3
Quote Preparation Instructions

For:

IPAO Blanket Purchase Agreement (BPA)

provided to government at least two (2) business days prior to date of the oral presentation. The handout/ slides may be mailed to:

NASA Langley Research Center
Attention: Lionel Nadeau MS/126
9A Langley Blvd.
Hampton, VA 23681-2199

Or, in lieu of five (5) paper copies, the handout/slides may be e-mailed to:

lionel.e.nadeau@nasa.gov

The government will provide electrical power for media presentation equipment. However, the contractor is responsible for providing its own media equipment, extension cords, surge protectors etc. and may arrive 30 minutes prior to the oral presentation start time to set up the equipment. If set up time is necessary, please coordinate with the contracting officer at least two (2) business days prior to the scheduled presentation.

The facility anticipated for the oral presentation will consist of a typical conference room and may include a white board or chalk board. However, the government reserves the right to change the location and /or accommodations as necessary.

4. Documenting the Presentation: The government reserves the right to document the presentation using video taping, audio tape recording, receipt of copies of contractor's slides/handouts, presentation notes or other means selected by the government.
5. Duration of Oral Presentation: The oral presentation shall not exceed 2.5 hours as follows (not including brief introductions of government and contractor personnel):
 - 1 Hour: Oral Presentation by contractor
(15 Min Break)
 - 30 Min: Question and Answer session
(15 Min Break)
 - 30 Min: Prepare Sample Task
 - 30 Min: Present Sample Task and questions and answers
6. Scope and content of discussions: Award selection is based on FAR Part 13 procedures. Therefore, a competitive range determination and "discussions" are not applicable pursuant to FAR 13.106-2.
7. Date, Time and Location of Oral Presentation: The government will provide this information in writing to each contractor selected from "Step 1."

**BEST VALUE
BLANKET PURCHASE AGREEMENT
FEDERAL SUPPLY SCHEDULE**

In the spirit of the Federal Acquisition Streamlining Act, NASA Langley Research Center and _____ (Contractor TBD) enter into a cooperative agreement to further reduce the administrative costs of acquiring commercial items from the General Services Administration (GSA) Federal Supply Schedule Contract(s) _TBD_____.

Federal Supply Schedule contract BPAs eliminate contracting and open market costs such as: the search for sources; the development of technical documents and solicitations; and the evaluation of bids and offers. Contractor Team Arrangements are permitted with Federal Supply Schedule contractors in accordance with Federal Acquisition Regulation (FAR) Subpart 9.6.

This BPA will further decrease costs, reduce paperwork and save time by eliminating the need for repetitive, individual purchases from the Schedule contract. The end result is to create a purchasing mechanism for the **Government that works better and costs less.**

Signatures:

AGENCY

DATE

CONTRACTOR

DATE

VICTORY OVER RED TAPE

Revised 6/2000

Attachment 4
Draft BPA Agreement

BPA NUMBER: TBD

NASA Langley Research Center
BLANKET PURCHASE AGREEMENT (BPA)

Pursuant to GSA Federal Supply Schedule Contract Number(s) TBD, Blanket Purchase Agreements, the Contractor agrees to the following terms of a BPA exclusively with NASA Langley Research Center (LaRC):

- (1) The following contract services may be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the contract, except as noted below:

Type of Service

SPECIAL BPA DISCOUNT/PRICE

As specified by the Task Order (the Task Order Statement of Work (SOW) shall not exceed the scope of the BPA SOW.)

As proposed.

- (2) Delivery:

DESTINATION

DELIVERY SCHEDULE/DATES

NASA LaRC Research Center, Hampton, VA

As specified in applicable Task Orders

- (3) The Government estimates, but does not guarantee, that the volume of purchases through this agreement will be \$25M.
(4) This BPA does not obligate any funds.
(5) This BPA expires five (5) years from date of award or at the end of the contract period, whichever is earlier.
(6) The following office(s) is hereby authorized to place orders under this BPA:

OFFICE

POINT OF CONTACT

Office of Procurement OP/SDC
Mail Stop 126
9A Langley Blvd, Bldg 1195
Hampton, VA 23681-2199

Lionel Nadeau, Contracting Officer, (757) 864-2434 or
other authorized NASA LaRC Contracting Officer

- (7) Orders will be placed against this BPA via Electronic Data Interchange (EDI), FAX, paper, or oral communications.
(8) Unless otherwise agreed to, all deliveries under this BPA must be accompanied by delivery tickets or sales slips that must contain the following information as a minimum:
(a) Name of Contractor;
(b) Contract Number;
(c) BPA Number;
(d) Model Number or National Stock Number (NSN);
(e) Task/Delivery Order Number;
(f) Date of Purchase;
(g) Quantity, Unit Price, and Extension of Each Item (unit prices and extensions need not be shown when incompatible with the use of automated systems; provided, that the invoice is itemized to show the information); and
(h) Date of Shipment.

- (9) The requirements of a proper invoice are as specified in the Federal Supply Schedule contract. Invoices will be submitted to the address specified within the task/delivery order transmission issued against this BPA.

- (10) The terms and conditions included in this BPA apply to all purchases made pursuant to it. In the event of an inconsistency between the provisions of this BPA and the Contractor's invoice, the provisions of this BPA will take precedence.

*IMPORTANT -- A new feature to the Federal Supply Schedules Program permits contractors to offer price reductions in accordance with commercial practice. Contractor Team Arrangements are permitted with Federal Supply Schedule contractors in accordance with FAR Subpart 9.6.

Revised 6/2000

Attachment 4
Draft BPA Agreement

ADDENDUM to BPA Agreement # (TBD)

Competing Task Orders:

If multiple Agreements are awarded, the government reserves the right not to compete an individual task order among each of the awarded BPA contractors. The circumstances of the task order will determine whether or not competition is pursued (e.g. logical follow-on to prior task order, unique skills or qualifications of a particular contractor, urgency of requirement that precludes competition, etc.)

Accounting and Financial System: Throughout the period of this Agreement, the contractor shall employ a GSA-approved accounting and financial system capable of accurately segregating and reporting costs unique to each Task Order.

Applicable NASA Policy Directives: The following NASA Policy Directives are applicable to the BPA Agreement and resulting Task Orders:

7120.5B - NASA Program and Project Management Processes and Requirements
8000.4 - Risk Management Procedures and Guidelines NASA Cost Estimating Handbook

The successful contractor(s) awarded an Agreement will be responsible for compliance with the procedures and policies contained in the policy directives in conducting the independent assessments associated with the task orders.

The Policy Directives are available at the following IPAO web:

<http://jpao.larc.nasa.gov>

The directives are listed under the heading: "[Link to the NASA Data Sources](#)"

The following NASA LaRC clauses apply:

**(LIMITED) RELEASE OF CONTRACTOR CONFIDENTIAL BUSINESS INFORMATION (CBI)
(LaRC 52.204-104) (JAN 2002)**

(a) NASA may find it necessary to release information submitted by the Contractor, either in response to this solicitation or pursuant to the provisions of this contract, to individuals not employed by NASA. Business information that would ordinarily be entitled to confidential treatment may be included in the information released to these individuals. Accordingly, by submission of this proposal, or signature on this contract or other contracts, the Contractor hereby consents to a limited release of its Confidential Business Information (CBI).

(b) Possible circumstances where the Agency may release the Contractor's CBI include, but are not limited to, the following:

(1) To other Agency contractors and subcontractors, and their employees tasked with assisting the Agency in handling and processing information and documents in the evaluation, the award or the administration of Agency contracts, such as providing both preaward and post award audit support and specialized technical support to NASA's technical evaluation panels;

(2) To NASA contractors and subcontractors, and their employees engaged in information systems analysis, development, operation, and maintenance, including performing data processing and management functions for the Agency.

(c) NASA recognizes its obligation to protect the contractor from competitive harm that could result from the release of such information to a competitor. Except where otherwise provided by law, NASA will permit the limited release of CBI under subparagraphs (1) or (2) only pursuant to non-disclosure agreements signed by the assisting contractor or subcontractor, and their individual employees who may require access to the CBI to perform the assisting contract.

Attachment 4
Draft BPA Agreement

The following NASA FAR Supplement clauses apply:

1852.209-71 Limitation of Future Contracting.

LIMITATION OF FUTURE CONTRACTING (DECEMBER 1988)

- (a) The Contracting Officer has determined that this acquisition may give rise to a potential organizational conflict of interest. Accordingly, the attention of prospective offerors is invited to FAR Subpart 9.5--Organizational Conflicts of Interest.
- (b) The nature of this conflict is that the statement of work requires the contractor to provide an independent and objective assessment of potential projects under consideration by the NASA Headquarters Independent Program Assessment Office. As such, the contractor's objectivity may be adversely affected if it is not restricted from competing on projects for which it has conducted a project assessment analysis.
- (c) The restrictions upon future contracting are as follows:
- (1) If the Contractor, under the terms of this Agreement, or through the performance of tasks pursuant with this Agreement, is required to perform an objective project assessment, the Contractor shall be ineligible to compete for work arising from the project for which it had performed an assessment as a prime, team partner or first-tier subcontractor. The restriction applies whether the contractor seeks to compete as a prime, team partner or first-tier subcontractor. This restriction shall remain in effect for a reasonable time, as agreed to by the Contracting Officer and the Contractor, sufficient to avoid unfair competitive advantage or potential bias (this time shall in no case be less than the duration of the initial contract of the associated project).
 - (2) To the extent that the work under this contract requires access to proprietary, business confidential, or financial data of other companies, and as long as these data remain proprietary or confidential, the Contractor shall protect these data from unauthorized use and disclosure and agrees not to use them to compete with those other companies.

(End of clause)

Attachment 5
IPAO BPA Sample Task Order

Phoenix Program Assessment Task

Tasks Requirements

Contractor to provide the Independent Program Assessment Office (IPAO) support personnel (eight) to serve on the Phoenix Program Independent Implementation Review (IIR) Team. NASA's IPAO requests that Contractor support be knowledgeable in space nuclear systems (e.g. power generation, power conversion, propulsion, safety, launch approval); spacecraft systems design, development, test, integration, launch and operations; NASA program and project requirements and management; NASA business management systems. One of the support personnel provided by the Contractor is to serve as the Phoenix Program IIR Co-Chair. Duties of the Co-Chair include working with the IPAO's Co-Chair in performing the tasks of planning, conducting, and reporting the results of the review as follows:

Review Planning

Coordinate with NASA HQ Code S and B and Program on known risk areas
Coordinate Terms of Reference with NASA HQ Code S and AE
Coordinate the date and agenda for the review with the Program

Review

Research/review/analyze appropriate project documentation
Facilitate team discussion
Assure conduct of comprehensive review
Assure that all checklist items are reviewed
Document team findings in the report
Allow for minority reports

Reporting

Present report to IPAO Peer Review Panel
Present report to Project/Program Manager
Present report to Enterprise and or Agency PMCs

Prepare draft PMC minutes and deliver to Executive Secretary, if requested

Closeout

Complete IPAO Quality Survey

Duties include:

- a. Coordinate the research/review/analysis of project material prior to the review
- b. Attendance at a 3-4 day detailed program review meeting (10/9-12/03)
- c. Assessment of Program progress
- d. Contribution of knowledge applicable to Program
- e. Participate in review team discussions/telecons as required

Contractor support also will:

- a. Attend a one day Phoenix Program Review to be held at NASA HQ's on 11/19/03
- b. Assess the Phoenix Program's readiness to proceed to initial project formulation based on material presented at the review
- c. The deliverable for this task is a written report to IPAO's Independent Implementation Review Team Co-Chair

Deliverables

- a. Following attendance at the Phoenix Program Review, provide a written report to IPAO's Independent Implementation Review Team Co-Chair
- b. Report to NASA PMC results of the Phoenix Program Independent Implementation Review

Attachment 5
IPAO BPA Sample Task Order

Estimated Time

Total estimated work hours -- Not to exceed 280 hours per person

Start Date: 9/1/03
End Date: 3/30/04