Welcome to the

SAMHSA IDIQ
283-07-1000
Pre-Proposal Conference
Monday September 25, 2006

SAMHSA IDIQ Domains

Domain	Title	Large	Small
1.	PILOT AND EVALUATION PROJECTS	I - L	I - S
2.	STATISTICAL PROJECTS	II - L	II - S
3.	PROGRAM RELATED PROJECTS	III - L	III - S
4.	POLICY FORMATION AND ANALYSIS PROJECTS	IV - L	IV - S
5.	COMMUNICATIONS, AWARENESS,EDUCATION PROJECTS	V - L	V - S
6.	ANALYTICAL PROJECTS	VI - L	VI – S
7.	TECHNICAL ASSISTANCE AND TRAINING PROJECTS	VII – L	VII – S
8.	DATA STRATEGY PROJECTS	VIII – L	VIII- S
9.	WEB AND EXTRANET SITE PROJECTS	NO	IX – S
10.	PLANNING AND IMPLEMENTATION SUPPORT AND REPORT PREPARATION– SDB	NO	X - S

NAICS Codes for Domains

1	PILOT AND EVALUATION PROJECTS	541690	$6.5 mil
2	STATISTICAL PROJECTS	541519	$23 mil
3	PROGRAM RELATED PROJECTS	541990	$6.5 mil
4	POLICY FORMATION AND ANALYSIS PROJECTS	541990	$6.5 mil
5	COMMUNICATIONS, AWARENESS, EDUCATION PROJECTS	541990	$6.5 mil
6	ANALYTICAL PROJECTS	541519	$23 mil
7	TECHNICAL ASSISTANCE AND TRAINING PROJECTS	541990	$6.5 mil
8	DATA STRATEGY PROJECTS	541513	$23 mil
9	WEB AND EXTRANET SITE PROJECTS	541512	$23 mil
10	PLANNING AND IMPLEMENTATION SUPPORT AND REPORT PREPARATION	541614	$6.5 mil

Current IDIQ Contractors

- **CSAT IDIQ Contractors – All Domains**

270-2003-00001 Johnson, Bassin and Shaw

270-2003-00002 Northrup Grumman

270-2003-00003 American Institute Research

270-2003-00004 The CDM Group

270-2003-00005 Health Systems Research

270-2003-00006 Westat

270-2003-00007 Caliber Associates

270-2003-00008 ACS

270-2003-00009 Abt Associates

270-2003-00010 ORC/Macro
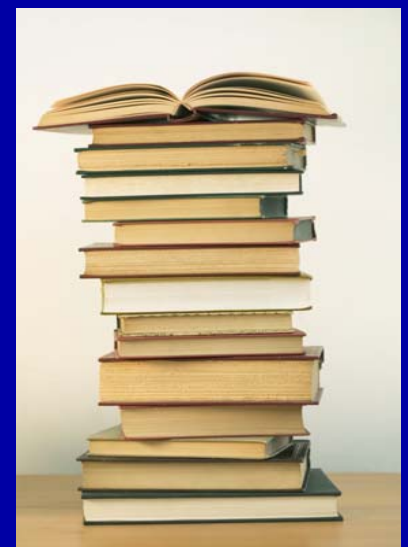
270-2003-00011 Battelle

270-2003-00012 SAIC

270-2003-00013 Synectics

270-2003-00014 John Snow, Inc

Current IDIQ Contractors - continued

- *CMHS IDIQ Contractors*
- *Domains 1 Pilot, Analytical, and Evaluation Projects, - 7 Contractors*
- 280-2003-00015 Mathematica Policy Research
- 280-2003-00016 OCR/Macro
- 280-2003-00017 Westat
- 280-2003-00018 Northrup Grumman
- 280-2003-00019 The Gallup Organization
- 280-2003-00020 Policy Research Associates
- 280-2003-00021 Human Services Research Inst
- **Domain 2 Statistical Projects - 8 Contractors**
- 280-2003-00015 Mathematica Policy Research
- 280-2003-00016 OCR/Macro
- 280-2003-00018 Northrup Grumman
- 280-2003-00021 Human Services Research Inst
- 280-2003-00026 Research Triangle Institute
- 280-2003-00027 The Lewin Group
- 280-2003-00029 Abt Associates
- 280-2003-00030 Social & Scientific Systems

Current IDIQ Contractors - continued

- CMHS IDIQ Contractors - continued
- ***Domain 3* Program Related Projects, *- 7 Contractors***
- 280-2003-00016 OCR/Macro
- 280-2003-00018 Northrup Grumman
- 280-2003-00019 The Gallup Organization
- 280-2003-00028 IQ Solutions
- 280-2003-00031 Betah Associates
- 280-2003-00037 Cosmos Corporation
- 280-2003-00038 Synectics
- ***Domain 4* Policy Formation and Analysis Projects,*- 10 Contractors***
- 280-2003-00015 Mathematica Policy Research
- 280-2003-00016 OCR/Macro
- 280-2003-00018 Northrup Grumman
- 280-2003-00027 The Lewin Group
- 280-2003-00028 IQ Solutions
- 280-2003-00029 Abt Associates
- 280-2003-00032 NASMHPD
- 280-2003-00041 Development Associates
- 280-2003-00042 American Institute Research
- 280-2003-00043 Systems Assessment &Research

Current IDIQ Contractors - continued

- CMHS IDIQ Contractors - continued
- ***Domain 5* Communication, Awareness, & Education Projects*,- 9 Contractors***
- 280-2003-00016 OCR/Macro
- 280-2003-00017 Westat
- 280-2003-00018 Northrup Grumman
- 280-2003-00019 The Gallup Organization
- 280-2003-00027 The Lewin Group
- 280-2003-00028 IQ Solutions
- 280-2003-00034 MasiMax Resources
- 280-2003-00036 Educational Services
- 280-2003-00039 Casals & Associates
- ***Domain 6* Consumer, Family, and Provider Projects*,- 4 Contractors***
- 280-2003-00018 Northrup Grumman
- 280-2003-00019 The Gallup Organization
- 280-2003-00033 NAMI
- 280-2003-00035 Health Systems Research

Current IDIQ Contractors - continued

- CMHS IDIQ Contractors – continued
- ***Domain 7* Logistical Support for Meetings, Technical Assistance, and Report Preparation (SDB Set-Aside) *,- 8 Contractors***
- 280-02-0100 DB Consulting
- 280-02-0200 Westover Consultants
- 280-02-0300 Magna Systems, Inc
- 280-02-0400 AFYA
- 280-02-0500 McFarland & Associates
- 280-02-0600 CRP, Inc
- 280-02-0700 Encore Management Corp
- 280-02-0800 McKing Consulting Corporation

Clarifications to be made

- ## Page 70 of the RFP states:

In no instance shall two or more IDIQ contract awardees form a "team" or "joint venture" to bid upon any <u>task order</u>, whether or not the awardees are approved for the same or different domains.

Change to read:

In no instance shall two or more IDIQ PRIME contractors form a "team" or "joint venture" to bid upon any <u>task order (RFTOP),</u> if they are awardees in the same domain. <u>To clarify: 2 PRIMES in the same domain shall not join together to propose on a RFTOP.</u>

For Example: Domain 1L ABC and Domain 1L XYZ cannot propose <u>Jointly</u> on the RFTOP issued to Domain 1L.

Clarifications / Corrections

- Domain X – Set Aside for Small Disadvantaged Businesses –

  On Page 62 the chart stipulates that Domain X is for 8(a). This is revised to reflect that Domain X is Set Aside for Small Disadvantaged Business both 8(a) and Non 8(a). Domain X is SDB

  NOTE: Offerors are required to submit an SBA SDB Certification Letter in their Original Business Proposal.

Clarifications / Corrections

- ▪ Technical Approach, Page 84 of the RFP, 1st paragraph, states:

  The Offeror if proposing Domains 1, 2, 3, 4, 5, 6 and 7 should demonstrate their understanding of consumers and family members of people with mental illnesses and substance abuse disorders as sources of experience and expertise critical to the success of SAMHSA activities. …

Change to read:

The Offeror <u>when</u> proposing <u>on</u> Domains 1, 2, 3, 4, 5, 6, 7, <u>8, 9</u> and <u>10</u> should demonstrate their understanding of consumers and family members of people with mental illnesses and substance abuse disorders as sources of experience and expertise critical to the success of SAMHSA activities.

PRIME or Sub – what's up??

A PRIME contractor can subcontract with any business in any Domain <u>except</u> the Domain area that they are a PRIME.

If that PRIME is a large business they can be a subcontractor under a Small Business domain and visa versa.

A PRIME contractor <u>cannot</u> be a sub under the same domain area that they are a PRIME.

PRIME / Sub – that is the Question!

- **Domain 1- L**
  PRIME Company A
  Subs with Company Z

- **Domain 1- S**
  Prime Company Z
  Subs with Company A

Domain 2 – L
PRIME Company B
Subs with Company A

Domain 2 – S
PRIME Company X
Subs with Company A

Domain 2 – L
PRIME Company A
Subs with Company C

Domain 2 – S
PRIME Company Y
Subs with Company C

Can a Subcontractor- Sub to more than 1 Prime?

- **Yes, a Subcontractor can subcontract to more than 1 PRIME.**

For Example – Domain 1L

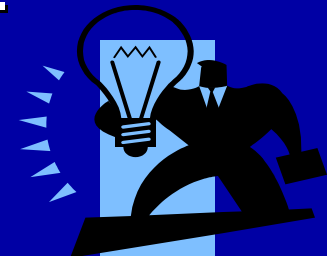| *PRIME A	*PRIME B	*PRIME C
Sub Z	Sub Z	Sub Z

In this example all PRIMES are awarded contracts. The RFTOP is issued to DOMAIN 1L and PRIMES A, B & C want to propose.

Can a Subcontractor- Sub to more than 1 Prime? - continued

Sub Z will need to prepare 3 proposals. Each company might use sub Z differently - PRIME A (will use Z - 25%); PRIME B (will use Z - 50%) and PRIME C (will use Z - 75%).

What if Sub Z says to PRIME A that they can't propose with them for various reasons? Then PRIME A may view Sub Z as not committed to them. If that occurs frequently, PRIME A might decide not to have Z as their Subcontractor.

How is the Request for Task Order Proposal (RFTOP) issued

- Physically it is issued by the Contracting Officer usually by email.

- The <u>Project</u> (SOW) is the deciding factor in the domain number selection and area.

- Depending on the project – the RFTOP can be issued to 1) Domain #L; 2) Domain #S; or 3) Domain # L & S.

RFTOP to both Domain # L & S

- What if a business is a <u>PRIME</u> under a domain area (L) and a <u>sub</u> under the domain area (S)?

  It is the decision of the PRIME contractors how they decide to propose on the individual RFTOP's.

  For example in this situation Domain 1L PRIME A (sub Z) and Domain 1S PRIME Z (sub A).
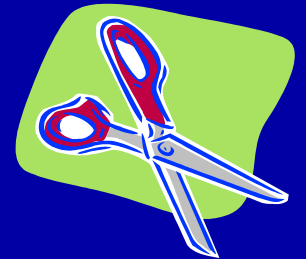 **PRIME A (sub Z) could send in a proposal** and
  PRIME Z (sub A) could send in a proposal.

  That would be **2** separate proposals – each proposal will be treated equally and negotiated with if applicable.

What Domains are missing from the RFI?

- Domain VI – Consumer, Family and Provider Projects; and

- Domain VIII – Automated Database Management Information System Projects

  These 2 domains are removed because the work in these 2 domains is incorporated in all the domains.
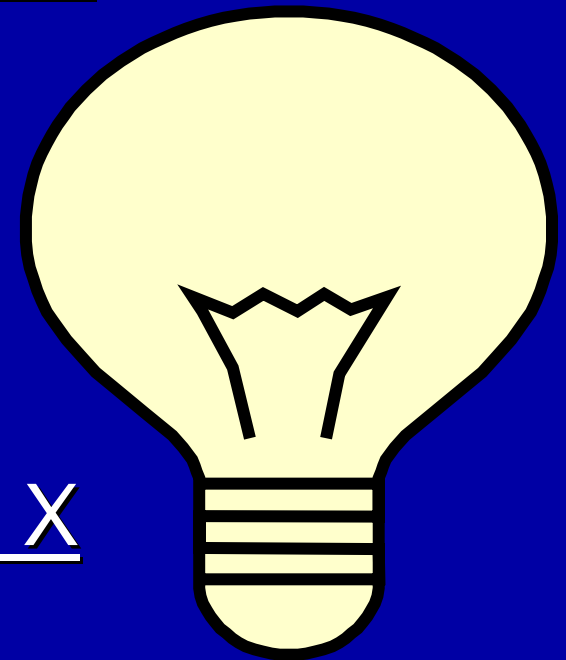
What to submit

** <u>DOMAINS – I, II, VI, VIII, and IX</u>
- Technical Proposal
- Oral Proposal
- Business Proposal

** <u>DOMAINS – III, IV, V, VII and X</u>
- Technical Proposal
- Business Proposal

Notice of Intent – Attachment 9

- **MUST BE RECEIVED BY OCTOBER 3, 2006**
- **BY FAX 240-276-1510**

- If you <u>**DO INTEND TO SUBMIT A PROPOSAL**</u> please provide the following:

- COMPANY/INSTITUTION NAME:
- TYPED NAME AND TITLE:
- <u>EMAIL ADDRESS</u>
- COMPANY PHONE NUMBER:
- COMPANY FAX NUMBER:
- COLLABORATORS/CONSULTANTS/SUBCONTRACTORS
- (PROVIDE NAME(S) AND ORGANIZATION in chart)
  DOMAIN NUMBER's and Area (for example DOMAINS I-L, II-L, VI-L, VIII-L and IX-L)

- **Please provide the <u>Domains</u> you will be proposing and the subcontractors by Domain. Using the chart on the intent notice place a checkmark in the Domain number that the subcontractor will be proposed in or you can use your own method to illustrate the team by Domain.**

Proposal Intent Info - continued

Subcontractor	Domain 1L	Domain 2L	Domain 6L	Domain 8L	Domain 9L
ABC	X		X		X
XYZ		X		X	
McFlurry			X		
Big Mac		X	X	X	

Page Limitations

DOMAINS I, II, VI, VIII, & IX	
Table of Contents	2
Introduction	2
Staff Mgmt Plan	10
Key Personnel	20
Corporate Qualifications / Mgmt Cap / Facilities/Equip	10
Technical Approach	10/domain
Overview	5
Presenter page	1
Appendices	45
Total Pages if all 5 Domains are proposed	145 pages

DOMAINS III, IV, V, VII & X	
Table of Contents	2
Introduction	2
Staff Mgmt Plan	10
Key Personnel	20
Corporate Qualifications / Mgmt Cap / Facilities/Equip	10
Technical Approach	15/domain
Overview	X
Presenter page	X
Appendices	45
Total Pages if all 5 Domains are proposed	164 pages

Domains I, II, VI, VIII & IX Technical & Oral Proposals

<u>As stated in the RFP Pages 63 thru 67…</u>

- The written portion of the technical proposal for Domains I, II, VI, VIII and IX shall address the offeror's Staff Management Plan; Key Personnel Documentation; Corporate Qualifications/Management Capability/Facilities/Equipment; and the offeror's Oral Proposal Technical Approach Documentation which is a 5 page overview, 10 pages per domain*, 1 page presenter summary. No other written documentation will be accepted.   * **1 slide per page**

- The offerors that have submitted their intents for these domains will be contacted and given an Oral Presentation Time. The schedule is as follows for the Oral Presentation (as is stated on page 66 of the RFP):

- The offeror will be allowed <u>5 minutes</u> for set up;

- When informed when to start the offeror will have <u>45 minutes</u> to present (for all Domains proposed);

- There will be a <u>10 minute </u>break to allow the Evaluation Panel to Caucus;

- Then there will be a <u>15 minute</u> Clarification ONLY Question and Answer period.

Domains III, IV, V, VII & X Technical Proposals

<u>As stated in the RFP on pages 67 thru 71 …</u>

- The Technical Proposals shall be so detailed, specific and complete as to enable the Government to make a thorough evaluation of the proposal, and a sound determination that each proposal will have a reasonable likelihood of meeting the requirements of the Government as set forth in the Statement of Work.

- The offeror shall address Staff Management Plan; Key Personnel; Corporate Qualifications / Management Capabilities / Facilities / Equipment within the stipluated page limitations

- The documentation provided for the first three criteria (mentioned above) will be reviewed and evaluated across all domains proposed.

- To clarify the information on pages 68 thru 71.. The Technical proposal needs to be formatted in the same outline as the Technical Evaluation Criteria. The order should be 1) Staff Management Plan; 2) Key Personnel; 3) Corporate Qualifications / Management Capabilities / Facilities / Equipment and 4) Technical Approach.

- The subparagraphs / areas on these pages are guidelines and are incorporated into the criteria areas mentioned above, for example subparagraph d. <u>Personnel/Staff Qualifications</u> would fall under criteria 2 above and <u>Staffing Management Plan</u> would fall under criteria 1 above, subparagraph e <u>Use of Subcontractors</u> could be across criteria 1 & 2 above depending on your proposal; subparagraph f <u>Corporate Qualifications and Experience</u>, and subparagraph g <u>Corporate Equipment and Facilities</u> would fall under criteria 3 above.

Domains III, IV, V, VII & X Technical Proposals

- The offeror should have resumes (limited to 2 pages) for all Key Personnel and Letters of Commitment for personnel not currently employed, consultants and subcontractors. Further clarification can also be located on page 64 of the RFP.

- Subparagraph c. <u>Discussion of Domains</u> mentions the hypothetical situation and is focused mainly on the technical approach (of course the other areas will be addressed in the hypothetical). However the 15 pages are mainly the technical approach.

- Discussing the domains, the offeror shall present this section as a **separate section for each domain that is being proposed**. The narrative for each domain shall be no more than 15 pages. The technical discussion should cover the areas set forth in the Technical Evaluation/Award Criteria. The offeror must illustrate an understanding and grasp of the major policy, program and analytical issues that should be of significant interest to senior program officials in the Substance Abuse and Mental Health Services Administration over the course of the next 5 years.

- For each domain proposed, the offeror shall construct a hypothetical assignment. The hypothetical assignment may be based on any of the subtopics that are listed under the domain in Section C. This discussion should be detailed enough to demonstrate the offeror's understanding of the domain. The hypothetical assignment should be a truly hypothetical assignment that demonstrates the offeror's capacity and understanding. It should not be a restatement of current or prior work by the offeror, or a restatement of a previous Government Request for Proposal.

Technical Review

- We are required by statute to have the proposals "Peer Reviewed", which is a panel of individuals from the field.
- The <u>process</u> of the technical review for both the oral and written review will "technically be the same".

<u>As stated in the RFP on page 82:</u>

- Offerors will be evaluated for technical acceptability in each policy domain that is proposed.
- The criteria points awarded for Staff Management, Key Personnel, Corporate Qualifications / Management Capability / Facilities/Equipment will be awarded equally to each domain proposed.
- Each proposed domain will be evaluated separately by criterion #4 Technical Approach with a maximum of 40 points.
- The points awarded for criterion #4 Technical Approach will be added to the points awarded to the other three criteria.
- Each proposed domain has a possible maximum score of 100 points.

Example of Technical Score

ABC Corp	Domain 3	Domain 4	Domain 5	Domain 7	Domain 10
Staff Mgmt Plan (10)	8	8	8	8	8
Key Personnel (25)	21	21	21	21	21
Corp Qual / Mgmt Cap / Facilities /Equip (20)	15	15	15	15	15
Tech Approach – Domain (40)	20	24	36	31	39
Total (100)	64	68	80	75	83

Business Proposals

Instructions detailing the following, start on Page 71 of the RFP

- Cover page which includes: Name of offeror, subcontractors, RFP No. and title, Original or Copy and Domain # and area.

- The proposal shall list the names and telephone numbers of persons authorized to conduct negotiations and to execute contracts.

- The offeror's TIN and DUNS numbers must be stated.

- A labor rate for all the labor categories listed in Section B.4 Labor Categories should be provided in a spreadsheet format (Excel preferred). The estimated cost for all Key Personnel who will be assigned for direct work on this project should be included along with payroll documentation. **Give the name, title, hours, percent of effort, salary and fringe benefits for each employee.**

- _The offerors should propose all categories if possible, the reason being is that if each offeror is trying to determine which labor categories are included in the domains that they have proposed they might exclude a labor category that the Government has considered in that particular domain._

Business Proposals - continued

- Indicate how you have computed and applied indirect costs, and provide a basis for evaluating the reasonableness of the proposed rates. **Where a rate agreement exists, a copy of the agreement must be provided for the Prime and Subcontractors proposed. If no rate agreement exists, please indicate the cognizant contracting officer, name, address and phone number.** *The offerors without a rate agreement will have 90 days to submit their rate information to NIH for approval if they receive an award.*

- Section K, "Representations and Certifications" Contractor and subcontractors must acknowledge completion of electronic Representations and Certifications as part of their **Original Business Proposal only.**

- Offerors shall submit information on SDB participation in their Original Business Proposal in one clearly marked section. NOTE: **This is a separate requirement from that for a Subcontracting Plan under P.L.95-507**.

- Acknowledgement of Section 508 Compliance

- SDB's must submit in their Original Business Proposal their SBA SDB Certification Letter – for Domain X specifically.

Business Proposals - continued

- The offeror will need to submit a Business Proposal for each Technical Proposal submitted.

- For example: If ABC submits a Technical Proposal (#1) for Domains 1, 2, & 9 and submits a Technical Proposal (#2) for Domains 3, 4, & 5 – then ABC will need to submit a Business Proposal for Technical Proposal (#1) and a Business Proposal for Technical Proposal (#2). There could be potentially different subcontractors proposed for each of the Domains proposed and the Business Proposals might have slightly different information. Each proposal will state on the front cover the Domain numbers and areas that is applicable to that proposal.

- Any reference in the RFP regarding "a cost and price proposal shall be provided for each of the hypothetical assignments the offeror submits. The proposal should detail labor hours and rates, indirect costs, other direct costs and fee (including base and award) for the hypothetical assignment" is deleted. The Offeror shall submit 1 proposal for any Domains proposed under 1,2,6,8 & 9 and a 2nd proposal for any Domanis proposed under 3,4,5,7,& 10 – not per hypothetical situation.

Reminder

- In the RFP on pages 58, 63 & 68 it states the following information shall be included on the **Cover Page**:

- Name of offeror

- Subcontractors proposed

- Authors of technical proposal

- RFP Title & RFP number

- **Domain #** and **area** (i.e, L or S)

Anticipated Number of Awards

Domains	# of Awards	Domains	# of Awards
I – L	10	I – S	10
II – L	10	II – S	10
III – L	10	III – S	10
IV – L	10	IV – S	10
V – L	10	V – S	10
VI – L	10	VI – S	10
VII – L	10	VII – S	10
VIII - L	10	VIII – S	10
		IX – S	10
		X - S	10

Contract Awards

- The awardees will receive 1 Contract Award for the SAMHSA IDIQ and that award will stipulate the Domain numbers and areas that they have received an award in.

- The information from the offerors business proposal(s) (depending on the domains a company could have submitted 2 Business Proposals) will be combined into the contract award.

- For example – In the contract award under Advanced Understanding the only subcontractors that will be listed are those that were approved in the review process for those domains that the contractor was awarded.

Example for Advance Understanding – list of subcontractors

- PRIME ABC submits 2 technical & business proposals with the following organizations:
- Subs with XYZ – domain 1L
- Subs with NOP – domain 2 L
- Subs with RST – domain 3 L
- Subs with TLC – domain 4 L

- ABC was awarded a contract for Domains 1L and 4L therefore the Advance Understanding lists only
- Subcontractor XYZ
- Subcontractor TLC

Information required for RFTOPs and not required on the IDIQ

- Subcontracting Plans will be required on the RFTOPs that are issued to the Large Business Domains or the Domain L's.

- IT Total Estimate Cost Worksheets will be required on all RFTOPs. Please remember the worksheets are required for the Prime, and each Sub that is proposed, in addition to a combined IT Worksheet.

Questions

&

Answers

Thank You

for attending the SAMHSA IDIQ Pre-Proposal Conference

GOOD LUCK !!!