

**Office of Administrative Services, Central Office Contracting Division
U.S. General Services Administration (GSA)**

STATEMENT OF WORK (SOW)

1.0 TITLE OF PROJECT

Per the Federal Acquisition Regulation (FAR) Subpart 37.602, the U.S. General Services Administration (GSA) is writing a Statement of Work for **Consultation, Facilitation, and Program/Project Management Professional Services** focused on business transformation support for the GSA Offices of the Chief Financial Officer, Chief Information Officer, Chief People Officer, and Administrative Services (hereafter CXO Organizations). Under Acting Administrator Dan Tangherlini's direction, GSA is consolidating several Administrative Service, Financial Management, Human Capital, and Information Technology functions currently embedded across the GSA Enterprise into one of the four offices as indicated above. The scope of contractual support will be the GSA Office of the Chief Financial Officer (B), the Office of the Chief Information Officer (I), the Office of the Chief People Officer (C), and the Office of Administrative Services (H).

The contractor is expected to provide specialized expertise and experience with organizational (public and/or private sector) consolidation that is focused on the following areas:

- Communications and change management
- Project management and tracking
- Organizational design theory and practice
- Functional design theory and practice
- Business process modeling and re-engineering expertise
- Strategic planning
- Organizational and business transformation expertise

Please note that the Office of the Chief Financial Officer (OCFO) is **out of scope** for Required Task 1. OCFO is **in scope** for all identified Optional Tasks associated with this contract.

1.1. BACKGROUND

The consultation services requirements specified in this Request for Proposal (RFP) are to provide business transformation consultation services to the U.S. General Services Administration (GSA).

As a result of the Acting Administrator's Top to Bottom reviews of GSA's offices, these four staff offices were asked to each develop a plan to consolidate and transform their respective GSA functions so to strengthen accountability with the expected outcomes of greater efficiency and enhanced service delivery.

There are four principles to the GSA consolidation to provide a foundation and to guide implementation. The consolidation principles are:

- Optimize resources, such as the workforce size, skills, distribution and agency spend across the functional portfolio of the four referenced organizations;

- Strengthen management controls such as the reporting structure, employee performance, governance, budgeting, financial controls, and accountability through the function's centralized office;
- Transform CFO, CIO, CPO, and OAS service delivery in GSA to provide greater value for the customer, the two GSA Services (i.e., the Public Building Service and the Federal Acquisition Service, also known as the business lines), and GSA Staff Offices.
- Achieve efficiencies through use of technology standards, consolidated acquisitions, and centralized functional planning and management. The expected result is service delivery that is efficient, flexible and agile at reduced overall agency spend.

The scope of the consolidation is GSA Enterprise-wide, and may take up to three years to achieve full implementation. The intent is to ensure that other GSA components can focus on their missions and streamline internal service delivery operations, eliminating duplication of efforts, and apply functional and service delivery best practices and policies.

2.0 OBJECTIVES

At the conclusion of this contract, GSA seeks the following outcomes:

- 2.1. Functional resources within the CXO Organizations are optimized (e.g., administration workforce size, skills and competencies, organizational and/or geographic distribution, and agency spend);
- 2.2. Internal management controls such as the reporting structure, definition of accountability, and clear governance and financial control structures are strengthened across identified consolidated offices;
- 2.3. The CXO Organizations' service delivery across the GSA Enterprise is transformed and provides greater value to the customer and achieves efficiencies through centralized planning, management, and expertise;
- 2.4. The finalized CXO Organizations' Concept of Operations and Implementation Plans clearly delineate 1) dollar savings given current state spend profile; 2) how specific organizational facets defined in the Concept of Operations will improve capability given GSA's current state; 3) mechanisms to prevent recurrence of "shadow" decentralized administrative service delivery; 4) documentation of IT Systems transition and/or retirement; 4) documentation of contractual spend consolidation across.
- 2.5. GSA workplace guidelines, policies, performance measures, and communication materials related to the occupancy of GSA Headquarters at 1800 F Street, NW are scalable and can be leveraged to develop broader strategies related to occupancy of all GSA and Federal office space nationwide.

3.0 CONTRACT TYPE AND PERIOD OF PERFORMANCE

The contract shall be a Firm-Fixed Price contract under the Mission Oriented Business Integrated Services (MOBIS) Schedule 874, Special Item Numbers (SINs) 874-1 Consulting Services, 874-2 Facilitation Services, 874-6 Acquisition Management Support, and 874-7 Program and Project Management. The contractual period of performance shall be from January 28, 2013 to January 27, 2016. This firm-fixed price contract will have a base performance year that will span from January 28, 2013 to January 27, 2014. Two option years will span from January 28, 2014 to January 27, 2015 and from January 28, 2015 to January 27, 2016, respectively. GSA estimates that the percentage of work against the identified SINs equates to approximately 30% SIN 874-1, 30% SIN 874-2, 10% SIN 874-6, and 30% SIN 874-7.

- 3.1 The Contractor may and are encouraged to use subcontractors to perform portions of the proposed work within the confines of the applicable Federal Acquisition Regulations incorporated within this contract. Note, all contractor team members **must** have an active Mission-Oriented Business Integrated Services (MOBIS) Schedule 874 Contract. At minimum, all contractor team members **must** have at least one of the required Special Item Numbers (SINs) (874-1 Consulting Services, 874-2 Facilitation Services, 874-6 Acquisition Management Support, or 874-7 Program and Project Management) as part of their schedule contract. Interested contractors are encouraged to seek team members to cover the required MOBIS SINs should the individual contractor's MOBIS schedule contract does not meet all requirements. Note, the final vendor team **must** have all three required MOBIS SINs.

4.0 GSA CXO OPERATING ENVIRONMENT

4.1 Operating Background

Office of the Chief Financial Officer

The GSA OCFO has responsibility for all financial policies and processes, including budget formulation and execution, procure –to-pay processes and bill-to-collect processes. Additional responsibilities include working with external auditors during the annual audit process and external financial reporting.

Despite having this comprehensive responsibility, the services and staff offices have created budget and financial management organizations that liaise with the GSA OCFO and manage the internal budget formulation and execution activities.

In April 2012, the Acting Administrator signed an order immediately creating the Office of PBS Financial Services and the Office of FAS Financial Services under the OCFO. The Office of PBS Financial Services has been operating in this mode since April, whereas the Office of FAS Financial Services has not yet been officially transitioned and operationalized in the OCFO. Additionally, no significant changes have been made to the legacy OCFO organization as a result of these transitions.

As a part of other consolidation discussions, OCFO identified approximately 30 individuals performing budget and financial management work in the staff offices, and those functions will also be brought into OCFO.

Consolidation of the various OCFO functions must be balanced with the many differences in

structure and business model between the two primary business lines, as well as the ways in which work is executed in the regional offices. OCFO also needs to establish a customer service model with the staff offices to meet their business needs.

The value proposition for the OCFO consolidation is increased consistency and visibility into financial planning, budgeting, executing, and reporting in a way that is repeatable and transparent internally and externally. Policies will be transmitted efficiently and enforced consistently, savings and efficiencies will be realized and measured, and the quality of service to the business units will be higher. OCFO should be able to generate these results with fewer resources over time than are currently dedicated to financial management.

Office of the Chief Information Officer

In 2006, GSA consolidated its IT infrastructure support. This consolidation included combining 39 separate IT infrastructure contracts into a single contract that resulted in \$19M in savings, improved operational efficiency and usability, and reduced IT management overhead. It also resulted in GSA having a single enterprise-wide network, help desk, end-user device support, and basic IT services such as email. In 2010, GSA moved to cloud platforms for email, collaboration, and back-office workflow resulting in further cost savings and service improvements. During this same time period, the SSOs took steps to improve the efficiency of their IT operations. For example, Public Buildings Service (PBS) developed and implemented an IT governance model for the PBS national IT portfolio that has led to about \$15M in savings as a result of establishing investment priorities and eliminating low-value systems.

Although GSA IT has been a leader in leveraging innovative technologies to change the way GSA does business, it still has ample opportunity for additional consolidation and improvement. For example, PBS currently manages approximately 40 national applications; 500 regional servers supporting web, database, and information services; and contracts for 40 hardware and software vendors. Similarly, the Federal Acquisition Service (FAS) is supported by more than 600 contractors. Despite moving to a cloud-based software and infrastructure environment in Salesforce, GSA still operates approximately 22 contracts for Salesforce software development. GSA also manages multiple business intelligence/data management platforms and configuration management tools that perform similar or duplicate business functions. Further, a line-item review of SSO budgets identified a substantial amount of unreported IT spend that was occurring outside governance oversight and management controls.

Historically, GSA has used a decentralized management and service approach for business systems. This decentralized approach has presented challenges in enforcing governance and accountability across the lines of business. Without a centralized IT structure, GSA has difficulty 1) coordinating and managing IT risks and operations; 2) delivering consistent IT services aligned to Agency strategy; 3) providing reliable, consistent, and accessible data to support decision making; and 4) setting priorities on investment decisions. See Appendix 1 for additional information on supporting the current challenges.

Additional IT consolidation within GSA is expected to lead to service improvements and significant cost savings. This is a rare opportunity to provide high-value IT services by spending less, and will enable innovation and self-funding of investments.

Office of the Chief People Officer

The Office of the Chief People Officer's (CPO) primary responsibility is to help GSA recruit, motivate, develop, retain, and reward our most valuable resource: our employees. CPO is a centralized organization with dispersed regional servicing offices in the field. CPO is currently organized under six offices:

- The Office of Human Resources Services provides a full range of human capital management solutions in areas such as staffing, labor relations, performance management and classification. Provides local support to all 11 GSA Regions through a geographically dispersed servicing model..
- The Office of Human Capital Management provides policy and support to GSA's strategic management of human capital through enterprise-wide advisory services.
- The Office of Information Management provides information management support to CPO and manages the operation and development of the Comprehensive Human Resources Integrated System (CHRIS) and the Human Resources Consolidated Processing Center (CPC).
- The Office of Executive Resources provides human resources services in support of GSA's Senior Executives
- The Office of Program Performance provides the management support services for CPO such as strategic and business planning, resource management, competitive sourcing, emergency management, contracting support, and communications.
- The Business Management Office for the Human Resources Line of Business provides overall direction, coordination, strategy, and communication for GSA's HR Line of Business Shared Services

Historically some Human Capital functions such as workforce planning, employee engagement and intern program management have been performed in the services and staff offices outside of CPO. In order to reach optimal operational and cost efficiencies, GSA plans to consolidate and centralize all Human Capital functions within CPO.

Office of Administrative Services

From facilities management to motor vehicle management to tracking responses to Inspector General audits, OAS' internal functions support GSA's mission-related activities. However, over the past 20 years, rather than creating a centralized agency-wide office, GSA components have established separate administrative service delivery capabilities. This decentralized approach has led to instability and uncertainty about who is responsible for what in GSA, leading to ambiguous accountability.

In late 2011, GSA moved toward consolidating administrative functions within OAS, assigning it the mission of being the "GSA for GSA." The following internal support functions now comprise OAS:

- ◆ Executive Secretariat (Correspondence and FOIA)
- ◆ Administrative Operations and Policy Division (includes fleet management, personal property management, directives management, mail management, forms management, assistive technology, print management, parking)

- ◆ Government Accountability Office and Inspector General (GAO/IG) Audit Response Division. Travel Policy and Charge Card Program Division
- ◆ Central Office Contracting (*added in April 2012*)
- ◆ 1800 F Transformation
- ◆ Facilities and Workspace Management (*Program responsibilities and functions were transferred to OAS, however, fully committed resources are not yet established*)

The current OAS service delivery model is not unified. The office was formed in FY11 by reorganizing existing units from other various areas of GSA, but the programs and services they provide still differ in their method of delivery. Some are already highly centralized in organization and operation. Others, however, are much more decentralized, with policy development, program implementation and execution, and accountability lying within Regional and Service and Staff Offices (SSOs). To reach optimal operational and cost efficiencies, GSA plans to consolidate and centralize Administrative Services within OAS. These functions are often implemented as collateral duty with inconsistent funding, dedication and staffing levels.

4.2 Government-Provided Background Information

GSA will provide the Contractor with the following information to prepare for this contract:

- The appropriate GSA personnel will be available for meetings and interviews at the outset of the project, and throughout the project as the COR(s) identifies the need;
- The paperwork to gain and maintain access to GSA facilities;
- The flexibility to deliver support via web access and telephone as appropriate;
- The documentation that defines the GSA IT Standards Profile as this will allow the Contractor will to IT technologies that are part of the profile;
- Raw data and analytical reports from the GSA Workplace Survey conducted in May 2011;
- Information regarding the scope and utilization of the Agilequest “Book It” hoteling software solution currently utilized by GSA;
- Information on the existing state of all CXO Organization functional execution at GSA, including information on funding and staffing levels, as well as any existing standard operating procedures and/or regulations.

5.0 SCOPE OF WORK

The technical requirements of this contract require extensive consultation, facilitation, and program management support across the GSA Enterprise. GSA Central Office, Federal Acquisition Service (FAS), and Public Buildings Service (PBS) organizations not only are CXO Organization’s stakeholders, these major GSA components currently have portions of CXO organizational service delivery capability. Several data packages exist that document the current state of CXO Organizational Operations, and the respective service capabilities within GSA Central Office, FAS, and PBS. The Government requires expert professional services support to help CXO ORGANIZATIONS facilitate design and development sessions across the GSA Enterprise, oftentimes within tense work environments. No operational concept should be considered “off the table” until substantive and diligent discussion has occurred with CXO Organizational stakeholders.

The contractor team for each function must be experienced in that functional area’s consolidation related activities (e.g., Financial Management, Human Capital Management,

Information Technology, and Administrative Services). The contractor teams will provide project management, change management, financial analysis and technical analysis support services. The contractor teams will work in coordination with GSA core team members in each functional area. Activities would cover consolidation funding, personnel, procurement, contracts, governance, service level agreements, rates, infrastructure, rollovers and transitions, among others. There will be additional specific support areas for each of the four functional consolidations. For instance, for IT it would include software inventory, portfolios, applications inventory reconciliation, vendor analysis, enterprise architecture, disaster recovery and IT decommissioning. Each functional consolidation will have key transition team activities.

The key consolidation transition team activities presented here are representative of all CXO Organizational consolidations:

- Plan and facilitate the execution of each consolidation phase. This will involve developing a plan that identifies the key consolidation activities, establishing critical performance measures, and setting up a consolidation dashboard to communicate and report progress.
- Conduct a review and analysis of agency functional area spending to support consolidating the functional area budget and to identifying near-term savings, efficiencies, and consolidation opportunities.
- Conduct an inventory of the agency functional area workforce and organizations to support, plan and optimize functional area staff realignment and consolidation.
- Conduct a functional area review and a TIME (Tolerate, Investment, Migrate, and Eliminate) analysis to identify near-term savings opportunities.

The Government requires that contractors develop a Technical Proposal (Volume 1) that is responsive to 1) the objectives as noted in Section 2 of this Statement of Work; 2) the Required and Optional Task descriptions as noted in Section 5 of this Statement of Work. In writing a Technical Proposal (Volume 1), vendors are reminded to focus on answering **“how”** their proposed team will accomplish the Objectives (Section 2), Required Tasks, and Optional Tasks (Section 5). Mere statements of “the team will comply”, “will do”, and/or “will complete” absent of explicit definition of how the work will be completed will be construed as non-compliance with procurement requirements and will lead to immediate disqualification.

5.1 Required Task 1: Develop CXO Organizational Future State Concept of Operations (CONOPS)

The Government requires that contractors work with each CXO Organization to develop a future-state concept of operations for all functions consolidated. In addition, the Government requires support activities to execute designed CXO Organization’s operational concept(s).

- *5.1.1: Future State Concept of Operations for each CXO Organization*
 - The contractor shall develop a concept of operations for functional service delivery for the CPO, and OAS Organizations. The contractor is responsible for:
 - Developing various options to structure for the CPO, and OAS Organizations

- Developing methods to collaborate within and across CXO Organizations
 - Identifying how the CPO, and OAS Organization's IT Systems' portfolio will be impacted by the future state CONOPS
 - Reviewing identified functional activities and definitions and review against leading industry practices for completeness and functional innovation/modernization
 - Conducting an inventory of agency functional area staff and organizations
 - Developing a future state staffing plan that identifies 1) the number of positions performing a specific function; 2) the competencies, knowledge, skills, and/or abilities of each position; 3) the recommended level of the position; and 4) a recommendation regarding whether or not to in-source, co-source, or out-source functional performance
- *5.1.2.: Communications, Change Management and Project Management:*
 - The contractor shall develop and execute a communications plan for each functional office in relation to their Concept of Operations. The contractor is responsible for:
 - Determining the goal,
 - Identifying the audience,
 - Developing the messages,
 - Recommending the appropriate communication channels,
 - Identifying activities and materials,
 - Establishing partnerships,
 - Implementing the plan and evaluating the effectiveness of the communications, with recommendations on corrections if needed.
 - The contractor shall develop and execute a change management plan for each functional office in relation to their consolidation plans. The contractor is responsible for:
 - Analyzing and addressing mission, strategic, operational, technological and personnel changes.
 - Benefits management and realization
 - Education/training recommendations for new organization
 - Mitigating risks from change; ie) employee resistance
 - Monitoring the implementation
 - The contractor shall plan and facilitate execution of each phase of the consolidation utilizing project management skills. The contractor is responsible for:
 - Planning and resourcing a consolidation program team
 - Developing the plan and investment needed to complete each phase
 - Establishing critical performance measures for each phase
 - Establishing a road-map of activities to achieve end state for each phase
 - Setting up a consolidation dashboard for transparency and reporting
 - Identifying key consolidation activities
- *5.1.3 OCIO Refinement of ConOps*

- *The contractor shall assist in refining current ConOps in the OCIO organization. Contractor shall assist in like activities for refinement as listed in 5.1.1. The contractor is responsible for:*
 - Refining options to structure the CIO Organization
 - Assist in developing methods to collaborate within and across CXO Organizations
 - Reviewing identified functional activities and definitions and review against leading industry practices for completeness and functional innovation/modernization
 - Assist in inventorying of agency functional area staff and organizations
 - Assist in refining a future state staffing plan

Please note that the Office of the Chief Financial Officer (OCFO) is **out of scope** for Required Task 1. OCFO is **in scope** for all identified Optional Tasks associated with this contract. Work has already begun within OCIO and therefore 5.1.1 is out of scope and in scope for 5.1.2 and 5.1.3.

5.2 Required Task 1 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Contract Award (ACA)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days ACA, and every 10 business days thereafter during the period of performance.
Operational Baseline and Recommendations for Future State Concept of Operations (CONOPS) for the CIO, CPO, and OAS Consolidation Teams	A MS Word or PowerPoint document that 1) synthesizes all identified datapoints; 2) provides directional analysis that supports several possible CONOPS options; 3) provides recommendations for GSA Review, Finalization, and Approval	Twice during the period of performance (Draft and Final versions) for the CIO, CPO, and OAS Consolidation Teams for a total of Three Draft and Three Final Deliverables	Draft CXO Organization Operational Baseline and Recommendations for Future State Concept of Operations: 45 business days ACA Final CXO Organization Operational Baseline and Recommendations for Future State Concept of Operations: 65 business days ACA
CXO Consolidation Implementation Plan	A MS Project document that defines all implementation requirements, activity sequence(s) and dependencies, and resource and collaboration requirements across all CXO Organizations	Twice during the period of performance (Draft and Final versions)	Draft Administrative Services Consolidation Implementation Plan: 100 business days ACA Final Administrative Services Consolidation Implementation Plan: 130 business days ACA

5.3: Optional Task 1: CXO Organizational Financial Consolidation

- The contractor shall assist in developing the consolidated budget governance structures in each CXO Organization in coordination with the GSA Office of the Chief Financial Officer. Should the Government exercise this optional task, the contractor would be responsible for:
 - Developing a short-term budget approach
 - Building the budget model/concept: chargeback, statutory funds management, accountability to business, funding base operations
 - Addressing dependencies and consistency with CFO funding model
 - Addressing legal requirements

5.4: Optional Task 1 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
GSA CXO Organization Budget Plan	A MS Word or PowerPoint document that 1) defines and describes a near-term and long-term budget and financial management approach; 2) defines the chargeback approach CXO Organizations will use to cover operating costs; 3) is consistent with the CFO funding model and meets such regulations like OMB Circular A-11, A-123	Twice during the period of performance (Draft and Final versions)	Draft GSA CXO Organization Budget Plan: 45 business days AEO Final GSA CXO Organization Budget Plan: 65 business days AEO

5.5: Optional Task 2: CXO Staff Alignment and Transition

- The contractor shall develop a staffing plan by taking multiple action and assessment steps in order to reach staffing levels consistent with the benchmarks. Should the Government exercise this option, the contractor would be responsible for:
 - Developing a strategy for right-sizing GSA’s staff where identified in Required Task 1: Develop CXO Organizational Future State Concept of Operations (CONOPS)
 - Mapping staff to functions and address critical skill gaps: training, recruitment, and re-allocation of resources.
 - Planning for any transfers of staff reporting authority to functional area executives
 - Conducting an inventory of agency functional area staff and organizations

5.6: Optional Task 2 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
GSA CXO Organization Plan	A MS Word or PowerPoint document that 1) Developing a strategy for right-sizing GSA's staff where identified in Required Task 1; 2) Maps staff to functions and addresses critical skill gaps: training, recruitment, and re-allocation of resources; 3) Plans for any transfers of staff reporting authority to functional area executives	Twice during the period of performance (Draft and Final versions)	Draft GSA CXO Organization Plan: 45 business days AEO Final GSA CXO Organization Plan: 65 business days AEO

5.7: Optional Task 3: GSA Office of the Chief Information Officer Service Consolidation

- This option can be executed among any of the 5 service areas of focus: (1) Platform Management and Application Framework, (2) Infrastructure, (3) Security, (4) Customer Management, or (5) Planning and Governance. The contractor shall establish a baseline of functional services for each office and develop and execute a plan for rationalizing services and staff (1) Should the Government exercise this option, the contractor could be responsible for the following:
 - Assist in refining the “as-is” inventory and “to-be” vision for services offered in the five functional areas defined.
 - Assist in the refining of a plan and timeline using the “to-be” vision for rationalizing services and staff. Execute the IT Service consolidation plan for various service areas in the request such as those listed above, to include developing individual project plans for each service migration and assisting GSA in rationalizing those services along the established timeline.

5.8: Optional Task 3 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
Inventory of services – “As-Is”	A MS Word or Excel document that inventories the services as offered by GSA today.	Twice during the period of performance (Draft and Final versions)	Draft Inventory of Services 30 business days AEO Final Inventory of Services 45 business days AEO
Service Consolidation Plan	A MS Word document that includes a service consolidation plan which includes the “To-Be” vision and a strategy for rationalizing services and staff.	Twice during the period of performance (Draft and Final versions)	Draft Service Consolidation Plan: 60 business days AEO Final Service Consolidation Plan: 90 business days AEO
Individual Service Project Plans	MS Project or Word document, to include phases from established project management guidelines.	Once during period of performance	Interim Service Project Plans: 150 business days AEO Final Service Project Plans: 180 business days AEO

5.9: Optional Task 4: GSA Office of the Chief Information Officer Portfolio Consolidation

- This option can be executed among any of the five business areas of focus: Acquisition, HR/FM, Workspaces, Supply Chain and Transportation or Government-wide Solutions. Should the Government exercise this option, the contractor could be responsible for the following:
 - Inventory the current set of portfolios for each office, as well as outlying projects, and map business functions to business capabilities. From this inventory the contractor shall develop a rationalization and transition plan for each portfolio.
 - Execution support and implementation steps for standing-up the Governance framework.
 - Refine the governance implementation plan and provide execution support and implementation steps for standing up the governance model. Included in these plans will be a service delivery model, and an integration plan with financial management model.

- Provide execution support for business application portfolios.

5.10: Optional Task 4 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
Portfolio Inventory	A MS Word or Excel document that inventories the portfolios by office and maps business function to business capabilities.	Twice during the period of performance (Draft and Final versions)	Draft Portfolio Inventory: 30 business days AEO Final Portfolio Inventory: 45 business days AEO
Portfolio Rationalization Plan	A MS word or Excel document that provides the plan and timeline for rationalizing GSA's IT Portfolio.	Twice during the period of performance (Draft and Final versions)	Draft Portfolio Transition Plan: 60 business days AEO Final Portfolio Transition Plan: 90 business days AEO
Portfolio Transition/Integration Plan with Financial Model	A MS Word document that includes a transition plan for the "future state" portfolio.	Twice during the period of performance (Draft and Final versions)	Draft Portfolio Transition Plan: 90 business days AEO Final Portfolio Transition Plan: 120 business days AEO
Governance Implementation Plan	A MS Word or Excel document that provides implementation steps for standing up the governance model.	Twice during the period of performance (Draft and Final versions)	Draft Portfolio Transition Plan: 160 business days AEO Final Portfolio Transition Plan: 180 business days AEO
Service Delivery Model	A MS Word or Excel document that provides the model for delivering services within GSA's IT Portfolio.	Twice during the period of performance (Draft and Final versions)	Draft Portfolio Transition Plan: 160 business days AEO Final Portfolio Transition Plan: 180 business days AEO

5.11: Optional Task 5: GSA Office of the Chief Information Officer Contract Consolidation

Should the government exercise this option, the contractor shall provide services in establishing and standing up a Vendor Management Office (VMO) within GSA. Tasks shall include establishing an acquisition process and governance procedures, utilizing industry best practices. The vendor will not assist in VMO activities, but rather, draw from industry practices to establish the correct representation from various business units and how the VMO fits into the organization and procurement process.

5.12: Optional Task 5 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
VMO Governance and Start-up Plan	Description of Deliverable 1	Twice during the period of performance (Draft and Final versions)	Draft VMO Plan: 60 business days AEO Final VMO Plan: 90 business days AEO

5.13: Optional Task 6: CPO Business Transformation Support

- Should the Government exercise this option, the contractor shall provide services in support of business transformation in CPO. Tasks shall include establishing an efficient and flexible CPO future state organization and operating model The future state operating model will enable GSA to eliminate redundant functions, reduce HR spend, and using the realized efficiencies to create additional capabilities for strategic human capital management solutions. This support shall include:
 - Development of Service Level Agreements and Performance metrics including implementation strategy and plans to enabler greater oversight and accountability
 - Development of Account Management Strategy, Roles, and Standard Operating Procedures including implementation strategy and plans
 - Development of Cost Benefit Analysis to include Realized and Intangible Cost Savings and ROI from the transformation
 - Assessment of Current State Competencies and Gap Analysis with a transition and implementation strategy for the future state organization

5.14: Optional Task 6 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
Future State SLA and Metrics and Implementation Strategy and Plan	A MS Word or PowerPoint document that achieves the goals as stated in 5.13 above, stipulates Future State Service Level Agreements and Performance metrics and an implementation approach, and identifies implementation "mile" and "inch" stones to allow for an activity-by-activity accounting of implementation progress and completeness.	Twice during the optional Task 6 period of performance	Draft Deliverable 1: 60 business days AEO Final Deliverable 1: 70 business days AEO
Account Management Strategy and Implementation Strategy and Plan	A MS Word or PowerPoint document that achieves the goals as stated in 5.13 above, stipulates Account Management Strategy and an implementation approach, and identifies implementation "mile" and "inch" stones to allow for an activity-by-activity accounting of implementation progress and completeness.	Twice during the optional Task 6 period of performance	Draft Deliverable 1: 90 business days AEO Final Deliverable 1: 100 business days AEO
Cost Benefit Analysis	A MS Word or PowerPoint document that achieves the goals as stated in 5.13 above, stipulates Cost Benefit Analysis	Twice during the optional Task 6 period of performance	Draft Deliverable 1: 180 business days AEO Final Deliverable 1: 190 business days AEO
Competency Assessment and Gap Analysis and Implementation Strategy and Plan	A MS Word or PowerPoint document that achieves the goals as stated in 5.13 above, stipulates Competency Assessment and Gap Analysis and an transition strategy and approach, and identifies implementation "mile" and "inch" stones to allow for an activity-by-activity accounting of implementation progress and completeness.	Twice during the optional Task 6 period of performance	Draft Deliverable 1: 60 business days AEO Final Deliverable 1: 70 business days AEO

5.15: Optional Task 7: GSA-occupied Workplace Standard Policies, Procedures, and Processes

Should the government exercise this option, the contractor shall support the Office of Administrative Services to develop standard operating policies, procedures, and processes leveraging the following information:

- Raw data and analytical reports from the GSA Workplace Survey conducted in May 2011
- Raw data from badging and occupancy studies conducted at 1800F Street, One Constitution Square, Willow Wood Plaza and Crystal City
- Information regarding the scope and utilization of the Agilequest “Book It” hoteling software solution currently utilized by GSA
- Past leadership visioning information, including known goals and parameters of the project
- Copies of the Tenant Needs Assessment produced by Gensler Architects in Spring 2012
- Floor and furniture plans for the renovated 1800 F Street, including building blocking and stacking plans
- Background materials already gathered regarding “smart occupancy” related to 1800 F

5.16 Optional Task 7 Contractual Deliverables

Deliverable	Description	Frequency	Expected Delivery Dates after Exercising of Option (AEO)
Bi-weekly Status Reports	A MS Word or PowerPoint document that provides an accounting of accomplished work for the previous two weeks, a work plan for the succeeding two weeks, any anticipated or real risks from completed or planned work, and identification of any GSA action items to adhere to contract project plan.	Every 14 calendar days during the period of performance	10 business days AEO, and every 10 business days thereafter during the period of performance.
GSA Workplace Standard Policies, Procedures, and Processes	A MS Word or PowerPoint document that defines all salient physical workplace standard operating policies, procedures, and processes	Twice during the period of performance (Draft and Final versions)	Draft GSA Workplace Standard Policies, Procedures, and Processes: 100 business days AEO Final GSA Workplace Standard Policies, Procedures, and Processes: 125 business days AEO

6.0 PERSONNEL

6.1 Assignments

The contractor’s project manager shall consult with the Contracting Officer’s Technical Representative (COTR) on the appropriate qualifications and experience consistent with the contract labor category descriptions and the current requirements of the contract. The contractor shall not proceed with the assignment of individuals to this contract without the Contracting Officer’s and the COTR’s concurrence.

6.2 Personnel Skill and Competency Requirements

Due to the complex technical requirements for the duration of the contractual period of performance, the government is stipulating three skill and competency requirements **for all proposed personnel (irrespective of key or non-key status)**. All proposed team members, whether bid key or non-key, must demonstrate:

- 6.2.1 **Clear, professional and effective written and visual communication** of complex concepts and planning principles;
- 6.2.2 A **working knowledge** of and experience with innovative approaches and best practices related to function-based organizational consolidation and streamlining;
- 6.2.3 **Direct experience** with developing comprehensive organizational restructuring plans.

6.2 Resumes

Bidders must identify their proposed contract core team for the purposes of SOW response evaluation. This core team should represent the individuals with whom the government shall work on contract contractual and performance matters throughout the contract's period of performance. A minimum of **two (2)** proposed core team members must be proposed as key personnel.

Resumes and references must be approved before personnel can perform on this contract. The government reserves the right to interview any proposed non-key or key personnel throughout the contractual period of performance. Resumes are limited to not more than **three (3)** typed pages long, not smaller than 10-point font single spaced.

6.3 Substitutions

Key personnel in key positions may be substituted with individuals providing the following criteria is met: contractor(s) provide 2 weeks notice, resumes and references of replacements with same skill sets, education, certifications, or better. Approval for substitution of key personnel must be received from the Contracting Officer and the COTR.

7.0 OTHER DIRECT COSTS (ODC's)

All ODCs are subject to prior approval in writing by the COTR.

7.1 Materials

There should be no ODCs other than travel.

7.2 Travel

Although travel is not anticipated during the contractual period of performance, the Government shall reimburse the Contractor for all official long distance travel expenses, except local travel costs in the Washington, DC Metropolitan Area. If required, all travel shall be approved by the, COTR and billed in accordance with Federal regulations (see Federal Acquisition Regulation 31.205-46 – Travel Costs). The Contractor shall submit official long distance travel requests to

the COTR for approval at least one (1) week in advance of travel. The Contractor shall submit travel expenses for reimbursement on an incident basis, separate from invoices for services.

8.0 COMPLIANCE REQUIREMENTS

8.1 Section 508 Compliance Requirements

All electronic and information technology (EIT) procured through this Contract **must** meet the applicable accessibility standards at 36 CFR 1194, unless an agency exception to this requirement exists. The 36 CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended and is viewable at <http://www.access-board.gov>. All deliverables shall be Section 508 compliant.

8.3. Security- Unclassified

The Federal Acquisition Regulation (FAR) Council requires that all federal entities ensure that all Contractors have current and approved security background investigations that are equivalent to investigations performed on Federal employees. As outlined in GSA CIO P 2100.1C – GSA Information Technology Security Policy, Standard Operating Procedure for GSA HSPD-12, Personnel Security Process dated November 18, 2005, and the Homeland Security Presidential Directive – 12 (HSPD-12). The following is required.

Briefly GSA's guidance states:

Effective October 27, 2005, all new GSA associates and contract employees must have a National Agency Check with written Inquiries (NACI); National Agency Check with written Inquiries and Credit (NACIC) for contract employees; or equivalent investigation initiated. Successful results from the FBI National Criminal History Check (i.e. fingerprint check) portion of the NACI/NACIC must be received for issuance of an identity credential for access to GSA facilities and IT systems.

The Contractor shall obtain approved background investigations to accomplish its support to GSA. Contractor personnel shall be required to have the appropriate level of investigation and/or security clearance for each selected site and information system. Contractor personnel shall also be required to submit a Request for User ID when access is required to a Government computer, to include the submission of proof, to GSA, that a favorable National Agency Check has been completed. The Contractor may be required to have access to live data and/or sensitive information and resources during performance of this authorized access to such information and shall be required to sign a non-disclosure agreement. The Contractor shall observe and comply with the security provisions in effect at each selected site. Any required identification badges shall be worn and displayed at all times. Contractor personnel shall submit a Request for Deletion of User ID when access is no longer required.

The results of these clearances shall be provided to the Federal Government ISSM or ISSO upon request, but consistent with maintaining privacy of the individuals. All personnel with access to root or pseudo root access of servers and data base administrators shall meet these requirements.

9.0 SPECIAL INSTRUCTIONS

9.1 Contractor Furnished Equipment

All on-site individuals participating in providing services on-site are required, while clearances are being processed, to arrive at GSA with a working laptop that has the Microsoft Office Suite (Word, Excel and PowerPoint) a wireless card and account, and an email account (corporate or free) for use while their clearances are being processed. It is a requirement that these resources be available to the person until their clearances are completed. The clearance process can range from two weeks to several months. Once clearances are completed, if access to the GSA network is required, a Federal government laptop shall be provided. Only Federal government laptops may be plugged in the GSA networks. However, contractors may use corporate or personal laptops within the building to access the Internet via wireless capabilities. On-site personnel are required to arrive at GSA with their own laptop resources.

9.2 Procedures for Payment (Invoices)

Billing and payment shall be accomplished in accordance with the FSS Schedule contract, the contract, or the individual Contract. The contractor may invoice only for hours and/or unique services ordered by GSA and actually used in direct support of the program office.

- The Contractor shall submit an original invoice for payment to GSA Financial Operations & Disbursement Division.
- A duplicate invoice with supporting documentation is sent to the Contracting Officer's Technical Representative (COTR) who shall confirm deliveries or performance made against the invoiced line items to ensure that the correct amounts have been billed and documents any price deductions. The COTR shall then certify (using the COTR stamp) and provide signature indicating that the invoice is valid for payment. A Receiving Report must be completed authorizing the GSA's payment office to process payment of the invoice. The Receiving Report must be accompanied by a copy of the government's document/documents accepting the covered services. Invoices are authorized for payment upon the Government's receipt and acceptance of deliverables specified in the delivery order and the receipt of a valid invoice.

9.3 Submission of Invoices

Invoices shall be submitted no later than the 10th calendar day of the month following performance and must be accompanied by all status reports submitted during that period. The COTR must receive a copy of the invoice and all supporting documentation before or at the same time as the GSA Finance Office.

Invoices are authorized for payment upon the Government's receipt and acceptance of deliverables specified in the contract and the receipt of a valid invoice. Invoices, to be proper and payable, must include the following information:

1. Name and address of the Contractor
2. Invoice date and number
3. Contract Number, Order Number and Pegasys Document Number (Block 4 on GSA Form 300), any contract line item numbers, and the project title, *OCS USA.gov Support Services*

4. Description of the services provided including quantity, unit of measure, unit price and extended price of the item(s) delivered; period of service and/or dates that services were provided, etc.
5. Name and address of official to whom payment is to be sent;
6. Name, title, and phone number of person to be notified in event of defective invoice; and
7. Taxpayer Identification Number (TIN). The Contractor shall include its TIN on the invoice only if required elsewhere in this contract.

Please Note: Failure to send both copies could delay your payment.

1. The Contractor **shall submit an** original invoice **for payment to** GSA Financial Operations & Disbursement Division.

**GSA Financial Operations & Disbursement Division (Payment Office)
1500 E. Bannister Road, Room 1011
Kansas City, MO 64141**

2. A duplicate invoice with supporting documentation is sent to the Contracting Officer's Technical Representative (COTR) who shall confirm deliveries or performance made against the invoiced line items to ensure that the correct amounts have been billed and documents any price deductions. The COTR shall then sign the invoice and complete the Receiving Report to authorize the GSA's payment office to process payment of the invoices.

**Paul York (COTR)
GSA Office of the Chief People Office (C)
1500 East Bannister Road
Kansas City, MO 64131
(Voice) (816) 926-8126
(Email) paul.york@gsa.gov**

10. CONTRACT PERFORMANCE MEASUREMENTS

The following measures will be used to assess the Contractor's performance.

Performance Measures	Quality Expectations
a) Completeness	Deliverables shall be 100% complete and meet data requirements as specified in each tasks deliverable. All final deliverables will be reviewed by the GSA Program Manager for completeness.
b) Accuracy	Deliverables shall be 100% accurate based on the information available to the vendor. All final deliverables will be reviewed by the GSA Program Manager for accuracy.
c) Effectiveness	All deliverables must contribute to the overall success of the Contractual Task.

	Risks are identified early to the Program Manager and mitigation strategy is created for the risks. Any adjustments to the schedule in the final project plan shall be requested during a bi-weekly status meeting, approved by the GSA Program Manager, and reflected in an updated project plan.
d) Timeliness	All deliverables shall be on time and within schedule. Any delay in deliverables or change of the project plan will be approved by the GSA Program Manager.
e.) Communication	Communication with client/customers is professional and productive. Communication proactively to the GSA Program Manager identifies risks before they become broad issues.

11.0 **INSTRUCTIONS TO OFFERORS**

11.1 **Place of Inspection and Acceptance**

Inspection and acceptance of all work performance, reports and other deliverables under this contract shall be performed by the program office.

11.2 **Scope of Inspection**

11.2.1. All deliverables shall be inspected for content, completeness, accuracy, and conformance to contract requirements by the COTR. Inspection may include validation of information or software through the use of automated tools and/or testing of the deliverables, as specified in the contract. The scope and nature of this testing must be negotiated prior to contract award and shall be sufficiently comprehensive to ensure the completeness, quality and adequacy of all deliverables.

11.2.2. The government requires a period not to exceed fifteen (15) business days after receipt of final deliverable items for inspection and acceptance or rejection.

11.3 **Basis of Acceptance**

The basis for acceptance shall be compliance with the requirements set forth in the statement of work, the contract, the contractor's proposal and other terms and conditions of the contract. Deliverable items rejected shall be corrected in accordance with the applicable clauses. Reports, documents, and narrative type deliverables shall be accepted when all discrepancies, errors or other deficiencies identified in writing by the government have been corrected. The contractor shall provide delivery of electronic copies of each deliverable. Electronic copies shall be delivered via email attachment or other media by mutual agreement of the parties. The electronic copies shall be compatible with software applications used in the USA.gov

environment or as appropriate and mutually agreed by the parties. The contractor shall use best commercial practice for formatting deliverables under this contract.

11.3.1 If the draft deliverable is adequate, the Government may accept the drafts and provide comments for incorporation into the final version.

11.3.2 All of the Governments comments to deliverables must either be incorporated in the succeeding version or the contractor must demonstrate to the Government's satisfaction why such comments should not be incorporated.

11.3.3 **If the Government finds that a draft or final deliverable contains spelling errors, grammatical errors, improper format, or otherwise does not conform to the requirements stated within this contract, the document may be immediately rejected without further review and returned to the contractor for correction and re-submission.** If the contractor requires additional Government guidance to produce an acceptable draft, the contractor shall arrange a meeting with the COTR.

11.4 Deliverables

11.4.1 The Government shall provide written acceptance, comments, and/or change requests, if any, within seven (7) business days from receipt by the Government of the initial deliverable.

11.4.2 Upon receipt of the Government comments, the contractor shall have five (5) business days to incorporate the government's comments and or change requests and to resubmit the deliverable in its final form.

11.4.3 Written Acceptance/Rejection by the Government

The Government shall provide written notification of acceptance or rejection of all final deliverables within 15 business days. Absent written notification within this time period, final deliverables shall be construed as accepted. All notifications of rejection shall be accompanied with an explanation of the specific deficiencies causing the rejection.

11.4.4 Non-Conforming Products or Services

Non-conforming products or services shall be rejected. Deficiencies shall be corrected within 15 business days of the rejection notice. If the deficiencies cannot be corrected within this time period, the contractor shall immediately notify the COTR of the reason for the delay and provide a proposed corrective plan within 5 business days.

11.5 All Material Property of U.S. Government

All materials developed under the contract pursuant to the contract are property of the U.S. Government. Under no circumstances shall the contractor place a copyright on any of the materials that the contractor develops, provides and receives payment pursuant to the contract.

11.6 Period and Place of Performance

The contract period of performance shall be from January 28, 2013 to January 27, 2016.

Work shall commence on or about award date, anticipated to be on or about January 28, 2013.

The Contractor shall perform at the Government facility and on occasion at its facility with approval from the COTR. The government shall provide the necessary resources for the Contractor while working on-site. The government shall provide appropriate workspace and equipment in the offices of the CFO, CIO, CPO, and OAS at 1275 First Street, NE, Washington, D.C. On or about June 1, 2013, CFO, CIO, CPO, and OAS offices will move to the renovated GSA Headquarters Building at 1800 F Street, NW, Washington, DC. The government will continue to provide appropriate workspace and equipment in the offices of the CFO, CIO, CPO, and OAS as necessary once these organizations have moved to the 1800 F Street location.

11.7 Hours of Work

The daily work hours are flexible, but are normally 8:00 a.m. to 4:30 p.m. Contractor personnel are expected to keep the COTR and Government Project Team Members updated regarding work schedule and contractor team whereabouts.

11.8 Personal Services

The government has determined that the use of a small business set aside contract to satisfy this requirement is not in the best interests of the government, economic and other factors considered, and this contract is not being used to procure personal services prohibited by the Federal Acquisition Regulations (FAR) Par 37.104 titled "Personal services contract".

11.9 Privacy Act

Work on this project may require personnel to have access to Privacy Information. Personnel shall adhere to the Privacy Act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations.

11.10 Protection of Information

The contractor shall be responsible for properly protecting all information used, gathered, disclosed, or developed as a result of work under this contract. The contractor shall also protect all government data by treating information as sensitive. All information gathered or created under this contract shall be considered as Sensitive But Unclassified (SBU) information. If contractor personnel must remove any information from the primary work area they should protect it to the same extent they would their proprietary data and/or company trade secrets. The use of this data is subject to the Privacy Act shall be utilized in full accordance with all rules of conduct as applicable to Privacy Act Information.

11.11 Confidentiality and Nondisclosure

The preliminary and final deliverables and all associated working papers and other material deemed relevant by the agency that have been generated by the Contractor in the performance of this project, are the property of the U.S. Government and must be submitted to the Project Manager at the conclusion of the contract.

All documents produced for this project are the property of the U.S. Government and cannot be reproduced, distributed, or retained by the contractor without express permission of the Government. All appropriate project documentation shall be given to the agency during and at the end of this contract. The Contractor shall not release any information without the written consent of the Program Manager.

Personnel working on any of the described tasks shall be required to sign formal non-disclosure and/or conflict of interest agreements to guarantee the protection and integrity of government information and documents.

11.12 Organizational Conflicts of Interest

It is recognized by the parties that, in the course of the Contractor's activities, its personnel may require access to or be given custody of certain information (whether in its original or derived form) submitted to the Government on a confidential basis (such as other Government Contractors' business practices, designs, mission or operation concepts, sketches, management policies, cost and operating expenses, technical data and similar information) during the performance of the contract. The Contractor agrees that its employees with access shall use and examine this information exclusively in performance of the work required under this contract and for no other purpose whatsoever. The Contractor agrees to indoctrinate all personnel who shall have access to or custody of the information as to the nature of the confidential relationship under which the Government received such information and shall stress that the information shall not be disclosed to any other party or to Contractor personnel who do not have a need to know the contents thereof for the performance of this contract. All personnel shall also be informed that they shall not engage in any other action, venture or employment wherein this information shall be used for the profit or interest of any party.

Contractor personnel may be required to sign a non-disclosure agreement prepared by the Government prior to their receipt of any company proprietary or sensitive source selection data. In cases where Contractor personnel receive company proprietary data directly from a company, in the course of performing this delivery order, the Contractor, the Contractor's on-site personnel, and the company providing the data should enter into an agreement prohibiting the unauthorized use of the information for as long as the information remains proprietary. The Contracting Officer should be furnished copies of these non-disclosure agreements, prior to the Contractor's review of the company's proprietary data.

11.13 General Compliance Requirements

The GSA information systems are the property of the Government. The Contractor shall be responsible for adhering to all aspects of the Privacy Act and is prohibited from removing from the worksite any programs, documentation, or data without the knowledge and written approval of the PM.

11.14 Facility Access

All contractor personnel who work at the GSA facilities must have approval for facility access; the Contractor must supply the names of those employees selected to perform the work.

12. EVALUATION

12.1. Contract Acquisition Approach

GSA shall use less than formal source selection procedures to conduct this acquisition. However, the source selection procedures involve the use of a structured process that involves a Source Selection Organization responsible for the evaluation of the proposals and selection of a source for contract award. The Source Selection Organization shall include a Source Selection Authority (SSA), a Technical Evaluation Committee (TEC), and special advisors as required.

The TEC shall be responsible for the review and evaluation of the Technical proposal and past performance. The Contract Specialist shall be responsible for the review, analysis, and evaluation of the pricing proposal. The Contract Specialist shall submit all findings to the SSA for the final source selection decision. The SSA shall review the findings and make the final source selection decision.

Offerors are hereby notified that GSA may use acquisition support contractor personnel to support the Government's evaluation of proposals. These contractor employees shall have access to information contained in the Offeror's proposals and shall be subject, as are all other members of the source selection organization to the appropriate conflict of interest, standards of conduct, and confidentiality restrictions. Contractor personnel shall not have decision-making authority. GSA government personnel shall make all decisions in the evaluation process.

12.2. Basis for Award

Source Evaluation shall be conducted and selection shall be made in accordance with the guidelines provided in the Federal Acquisition Regulation (FAR) and GSA Acquisition Policy Letters, and the GSA Schedule for Best Value Awards. Award shall be made to the Offeror(s) whose proposal(s) represents the best value to the Government, price and other factors considered.

12.3. Evaluation Process

GSA shall perform a technical and business evaluation, based on the Offerors' written Technical (Volume 1) and Price (Volume 2) proposals, to assess the best value to the Government. The determination of best value shall be made by comparing the differences in the value of the Technical Proposal factors with the differences in the prices proposed. In making this comparison, the Government is more concerned with obtaining performance capability superiority rather than the lowest overall price. However, the Government shall not make an award at a significantly higher overall price to achieve only slightly superior performance capabilities. The Government shall assess the benefits of superior performance capability versus the added price. The degree of equality between Offerors' proposals shall be measured by the quantity, significance, and applicability of the superior features proposed, and not by the total scores achieved.

Each Offeror's Technical Proposal shall be evaluated against the following factors, which are listed below.

- Demonstrated Technical Capability and Personnel
- Past Performance
- Overall Value to the Government

Price proposals shall be evaluated to determine fairness and reasonableness. The Government shall use commercial or market price lists, Independent Government Cost Estimate (IGCE), or other information available to GSA in assessing the reasonableness of prices proposed.

12.4. Streamlining

Source selection can be a lengthy process, and therefore GSA reserves the right to streamline the process where it deems necessary in order to make timely award of a contract.

12.5. Award On Initial Proposals

The Government may award without discussions; however, the Contracting Officer (CO) reserves the right to hold discussions if required. Additionally, the government reserves the right to conduct oral presentations with selected offerors should additional information be required or otherwise assist the Technical Evaluation Committee in the evaluation of offeror proposals. Accordingly, each initial offer should be submitted on the most favorable price and technical terms that the Offeror can submit to the Government.

12.5.1. Evaluation Factors

The Government shall evaluate each proposal using the following evaluation factors listed in order of importance:

- Demonstrated Technical Capability and Personnel
- Past Performance
- Small Business Concern
- Price including discount terms.

Demonstrated Technical Capability and Personnel are more important than past performance, small business concern or price.

The demonstrated technical capability factor shall be rated as noted in Section 5. Past Performance shall be rated as noted in Section 11.7. Past Performance includes relevance of experience and past performance quality.

12.6. Demonstrated Technical Capability and Personnel Factor Evaluation

The Demonstrated Technical Capability Factor assesses the ability of the Offeror to effectively demonstrate the knowledge, understanding, and technical ability to meet the requirements in the SOW as required in the contract. This assessment shall consider: the corporate visibility, emphasis, and involvement in the effective management of the work efforts and the Offeror's knowledge, understanding, and ability to comply with the SOW.

The following adjectival ratings shall be used to evaluate the Demonstrated Technical Capability Factor:

<i>Rating</i>	<i>Symbol</i>	<i>Definition</i>
Outstanding	O	The Contractor <u>meets and significantly exceeds</u> the technical requirements as stated in Section 5 of the SOW. The Contractor has demonstrated that they are <u>highly proficient, knowledgeable and experienced</u> in meeting the technical requirements specified.
Good	G	The Contractor <u>meets and exceeds</u> the technical requirements as stated in Section 5 of the SOW. The Contractor has demonstrated that they are <u>proficient, knowledgeable and experienced</u> in meeting the technical requirements specified.
Acceptable	A	The Contractor <u>meets</u> the technical requirements as stated in Section 5 of the SOW. The Contractor has demonstrated <u>limited knowledge or experience</u> in meeting the technical requirements specified.
Unacceptable	U	Less than marginal. Proposal has <u>many deficiencies and/or gross omissions</u> . The Offeror <u>does not meet many</u> of the technical requirements as stated in Section 5 of the SOW. The Contractor has <u>little or no working knowledge</u> of how to meet the technical requirements specified. (When applying this adjective to a proposal as a whole, the proposal must be so unacceptable in one or more areas that it would have to be significantly revised in order to attempt to make it other than unacceptable.)

12.7. Past Performance Factor Evaluation

The Past Performance Factor evaluation shall assess the relevance and breadth of the Offeror's experience and the quality of the Offeror's past performance. The Government is seeking to determine whether the Offeror has experience that shall enhance its technical capability to perform and whether the Offeror consistently delivers quality services in a timely and cost effective manner. In evaluating past performance, GSA shall take into consideration the relevant experience and past performance assessments from an Offeror's **public and private sector** customers. **For all past performance examples, offeror's must explicitly define the relevance to CXO Organizations.** GSA reserves the right to use other relevant past performance information it obtains through other sources including other agency databases, previous past performance experiences with offerors, and information contained in trade literature.

Relevance of Experience: The Offeror's experience shall be evaluated on the degree of relevance to the requirements of the SOW on the basis of similarity in size, scope, complexity, technical difficulty, contract type, and period of performance. Only recent experience (within the past three (3) years from the date of the SOW) shall be evaluated. Evaluations may include interviews with previous customers of offeror (including subcontractor's previous customers) and may include interviews with previous clients of proposed personnel.

Past Performance Assessments: The Offeror's past performance shall be evaluated on the basis of information contained in the Offeror's proposal and the information that the Government obtains through reference checks or other means. The past performance evaluation shall assess the Offeror's record of providing high quality services of a similar nature in a manner that ensures maximum accuracy, throughput, cost effectiveness and overall customer satisfaction.

If some of the Offeror's experience is relevant and the rest is not, only the relevant experience shall be evaluated for purposes of past performance. If no experience is relevant or the experience that is relevant cannot be evaluated due to a reference's failure to respond, a rating of neutral shall be assigned for past performance as defined below.

The Government shall evaluate the Past Performance Factor using the following adjectival ratings.

(Remainder of Page Intentionally Left Blank)

<i>Rating</i>	<i>Symbol</i>	<i>Definition</i>
Neutral	N	No past performance available for evaluation. Offeror has asserted that it has no directly related or similar relevant past performance experience. Proposal receives no merit or demerit for this factor.
Outstanding	O	Based on the Offeror's record of past performance, no issues, concerns, or risks are associated with receiving timely services and contract performance. Past performance surveys and the Offeror's experiences indicate that the Offeror is capable of exceeding the requirements of the orders issued under the contract. The Contractor should provide documented proof and explanation of the degree of such experience.
Good	G	The Offeror's record of past performance indicates there is very little risk associated with receiving quality products, timely services and full contract performance. Past performance surveys and the Offeror's experience indicate the Offeror shall meet or exceed the requirements of the orders issued under this contract. The Contractor should provide documented proof and explanation.
Acceptable	A	The Offer's record of past performance indicates that there is potential risk associated with receiving quality products, timely services, and contract performance. Past performance surveys and the Offeror's experience indicate the Offeror may have some problems during performance of orders issued under this contract.
Unsatisfactory	U	The Offeror's record of past performance indicates it shall be unable to perform successfully on orders issued under this contract.

12.8 Small Business Concern

Use of Small Business Concerns – no more than 3 pages

The offeror shall describe how it will utilize small business concerns. Offerors will be evaluated on whether they are small businesses or their subcontractors are small businesses.

Rating	Definition
Outstanding	Proposed Prime is a small business and/or 50% or more of the work is to be performed by small business concern subcontractors.
Acceptable	Proposed Prime is not a small business and 49% or less of the work, but at least a portion of the work, is to be performed by small business concern subcontractors
Fair	Proposed Prime is not a small business and subcontractors are other than small business concerns.

12.9. Price Factor Evaluation

Price shall be evaluated for price realism and reasonableness, as well as total evaluated price. The price analysis must take into account that the GSA Schedule price has been deemed fair and reasonable; however, the discounted price may be unrealistic if the base rate (the salary the employee receives) is insufficient to retain quality personnel and keep turnover to a reasonable level. The Government shall conduct its price analysis using one or more of the techniques specified in FAR 15.404-1(b).

GSA may choose not to enter into a contractual relationship with Offerors whose prices are not competitive or which offer no pricing discounts on items or services available at an undiscounted price on the GSA Schedule. Pricing proposed must be at or below the GSA Schedule price.

Proposals which are unrealistic in terms of technical commitment or unrealistically low in cost(s) [e.g. unrealistic base rates for one or more labor categories] and/or price shall be deemed to show an inherent lack of technical competence or failure to comprehend the complexity and risk of the contract requirements. This may be grounds for the rejection of the proposal. The Government shall reject any proposal that is unreasonable or materially unbalanced as to prices for basic and follow-on year quantities. An unbalanced proposal is one that incorporates prices significantly less than cost for some items and/or prices that are significantly overstated for other items.

13.0. INSTRUCTIONS TO OFFERORS

13.1. Introduction

This GSA Schedule contract Statement of Work (SOW) seeks to obtain consultative, facilitation, and program management support for the General Services Administration's Office of Administrative Services. GSA intends to acquire these services by awarding a competitive contract to one offeror (prime) or offeror team (prime and sub-contractors). **All contractors must be Management, Organizational and Business Improvement (MOBIS) Schedule holders (Schedule 874).** All services provided by the team member to the prime contractors must be within the scope of the team member's GSA contract and be consistent and fully compliant with the terms and conditions of the team member's GSA contract.

Offerors already possessing a contract with the General Services Administration should note that fact on their offer as well as any additional discounts to the Schedule price.

Offers shall be received by January 2, 2013, 10:00 a.m. Eastern Time (ET). Offers shall be submitted via electronic mail only to the Contracting Specialist, Kelly Weiss, at the address below. Submissions must show the name and address of the Offeror.

Kelly Weiss, Contract Specialist
U.S. General Services Administration
kelly.weiss@gsa.gov

13.2. Prospective Offerors Questions

Questions concerning this document must be received via e-mail to the Contract Specialist at the address above.

Any requests for additional information or explanations concerning this document must be received no later than (9:00 a.m. EDT) on Monday, December 10, 2012. Answers to questions shall be provided to all prospective Offerors, giving due regard to the proper protection of proprietary information. In order to receive responses to questions, Offerors shall cite the section, paragraph, number, and page number of the Statement of Work on which the question is based. GSA recommends that Offerors ensure that questions are written to enable a clear understanding as to the Offerors issues or concerns. Statements expressing opinions, sentiments, or conjectures are not considered valid inquires or comments for this purpose and shall not receive a response from GSA. Further, Offerors are reminded that GSA shall not address hypothetical questions aimed toward receiving a potential "evaluation decision" from GSA.

13.3 General Proposal Preparation Instructions

The proposal shall clearly demonstrate the Offeror's understanding of the overall and specific requirements of the SOW; convey the Offeror's capabilities for transforming their understanding into accomplishments for performing the contract.

The Technical Proposal shall not exceed forty (40) pages in length, inclusive of resume summaries and all other addendums, attachments, exhibits, etc. Resumes shall be a short summary of the professional and technical qualifications of the offeror's proposed personnel. As Technical Proposals are reviewed, evaluated and rank-ordered prior to reviewing Price Proposals, all technical information shall be in the Technical Proposal to be considered. This proposal must describe the offeror's proposed technical approach with explicit detail defining **how** the offeror's proposed approach will be executed at GSA. **Simple statements of compliance (i.e., "understood"; "will comply") without the detailed description of how compliance will be met may not be considered sufficient evidence that the proposed services can technically meet the requirements of this SOW.**

The government reserves the right to request oral presentations.

A deliverable schedule is also required per the technical needs specified in the Statement of Work. Past Performance reference and key personnel resume summaries shall also be included in the oral presentation page limitations.

The Contractor or Contractor Team selected, as a result of this SOW, shall be responsible for all contract requirements. In the event teaming or subcontracting arrangements are proposed for accomplishing the required work, the Offeror shall thoroughly describe the organizational relationships of the team members and subcontractors throughout the contract life, including the proposed contribution of each team member to the overall effort.

Changes to the proposal by the Offeror shall be accomplished by amended page(s). Any changes from the original page shall be indicated by a vertical line, adjacent to the change, on the outside right margin of the page. The Offeror shall include the date of the amendment on the lower right hand edge of the page. Proposal amendments will be allowed only prior to the due date for proposals. Proposal revisions shall be permitted only at the Contracting Officer's request.

Telecopied or facsimile proposals, or modifications or withdrawals of proposals are *not*

permitted and shall be disregarded if received.

Offerors whose proposals are no longer being considered for award or whose proposals were not selected for award shall be so notified in writing. Such notification shall state in general terms the basis of non-selection. Unsuccessful Offerors may request, in writing, a post-award debriefing.

The Contracting Office shall retain one copy of each proposal, successful or unsuccessful, any extra copies shall be destroyed.

13.4. Proposal Preparation Costs

The Government shall not be obligated to pay any costs incurred by any Offeror in the preparation and submission of a proposal in response to this contract. The Contracting Officer is the only person who can legally obligate the Government for the expenditure of public funds in connection with this procurement.

13.5 Proposal Content and Submission Instructions

13.5.1. Proposal Content

Offerors are cautioned to review the SOW and ensure that the proposal submitted *fully complies with any or all requirements* of same. Each proposal shall clearly demonstrate the Offeror's understanding of the overall and specific technical requirements of the SOW. The Offeror must provide the requested past performance and pricing information. Failure of the Offeror to address any or all requirements of the SOW in their proposal may result in the proposal not being considered for award by the Government. Clarity and completeness of the proposal is of the utmost importance. The proposal must be written in a practical, clear and concise manner. It must use quantitative terms whenever possible and must avoid qualitative adjectives to the maximum extent possible. Proposals must be legible, single-spaced, typewritten (on one side only), in a type-size not smaller than twelve (12) point proportional, on paper not larger than eight-and-a-half by eleven inches

Each Offeror must submit a proposal, which consists of four (4) parts:

(1) Demonstrated Technical Capability (Volume 1)

The Offeror shall describe the technical approach to performing the work identified in the SOW. The technical approach should include:

- The technical capability as it demonstrates the knowledge, understanding, and technical ability of all SOW technical requirements
- Resumes for all personnel the Offeror plans to assign to this contract whether full-time or part-time and identify the key personnel and non-key personnel. All personnel must meet all requirements as defined in Section 6 of this Statement of Work.

(2) Past Performance information (Volume 1, continued)

The Offeror shall describe previous experience in performance for technical projects similar in size, scope, technical difficulty, and complexity to the requirement being competed. **The Offeror shall cite not less than three (3) not more than five (5) projects performed within the last three (3) years.** For each relevant project, Offerors shall identify the following:

- Customer
- Contract Number/Contract Title
- Delivery Schedule/Period of Performance
- Description of the Work Performed
- Unique or Complex Characteristics of the Project
- Relevance to the GSA Requirement

The Offeror shall provide a list of references complete with points of contact; names and addresses that can be used by the Government to collect data on the Offeror's history of recent and relevant past performance. The references shall include at a minimum the projects identified above, but should not exceed a total of five (5) references. In order to facilitate the evaluation of the Offeror's past performance, the Offeror shall present the following information:

- a) Name and Address of Customer.
- b) Contract Number.
- c) Brief Description of Contract.
- d) Brief Description of Services Provided/Technologies Used.
- e) Name, address and current phone number for the Customer's Business Manager (Contracting Officer).
- f) Name, address and current phone number for the Customer's Technical Manager.

If the Offeror has no past performance, the Offeror shall submit a certification to the Contract Specialist indicating the Offeror has no past performance. The certification shall be in a separately sealed envelope clearly marked with the solicitation number and accompanied with the SOW volumes.

Proposed team Members and subcontractors anticipated to perform *more than 25%* of the work identified in this SOW, shall be required to submit the experience and past performance information described above.

(3) Small Business Concern (Volume 1)

The offeror shall describe how it will utilize small business concerns. Offerors will be evaluated on whether they are small businesses or their subcontractors are small businesses.

(4) Pricing (Volume 2)

The Offeror shall prepare a Price Proposal (Volume 2) that contains all information necessary to allow for a comprehensive evaluation of the prices proposed by the Offeror. The Price Proposal shall consist of pricing discounts with the proposed labor categories and hours, GSA Schedules and an accompanying narrative that fully describes all assumptions made by the Offeror.

The pricing shall identify each category of labor proposed for performance mapped to the applicable GSA Schedule labor category, provide the GSA Schedule price, show the proposed discounts for the rate, and the rate proposed for the particular labor category inclusive of the

discount. The pricing shall provide the total number of full time equivalents (FTEs) for each labor category. The Offeror is responsible for identifying the categories of labor and the FTEs proposed for each category.

EXAMPLE:

Labor Category:	Schedule Rate	Discount %:	GSA Rate:	FTE:	Total:
Program Manager	\$80.00	10%	\$72.00	1.0	\$138,240.00

The pricing information shall include the following:

- A completed Pricing Table that provides the level of data as noted in the above example
- Any and all assumptions associated with an Offeror’s Technical (Volume 1) and/or Price (Volume 2) Proposals

13.6. Proposal Submission

Proposals must be submitted in strict accordance with the instructions set forth herein. The Government may consider any failure on the part of an Offeror to comply with these instructions to be indicative of the type of conduct it can expect during contract performance. Therefore, Offerors are encouraged to contact the Contract Specialist in order to request any necessary clarifications or explanations of these instructions.

GSA requires that an Offeror submit an original and two (2) copies of the proposal, two (2) copies of the applicable FSS Schedule(s), and one (1) electronic copies of the entire proposal in Microsoft Word, PowerPoint, and/or Excel format.

Offers shall submit the proposal in two separate volumes: Volume 1 shall be the Technical Proposal, and consist of the following sections identified below:

- Demonstrated Technical Capability (NOTE: Resumes are included in this section)
- Past Performance

Offerors are reminded that Volume 1 shall NOT contain any pricing data and shall strictly adhere to the page limitations. The Contracting Officer shall review Volume 1 and exclude all pages in excess of the page limitations and delete pricing data (if any) prior to the proposal evaluation.

Volume 2 shall contain the Price Proposal and shall include the following sections:

- Pricing (including discount terms), labor categories, rates, and hours
- Any and all assumptions associated with an Offeror’s Technical (Volume 1) and/or Price (Volume 2) Proposals

There are NO page limitations for Volume 2.