GS2150-2 Proposal Format and Submission Instructions (Step 2) (Modified)

a. Proposals shall be transmitted via email on or before the closing date to the Contracting Officer, Charlan Fejarang, at charlan_fejarang@ios.doi.gov.

b. Offerors are encouraged to transmit as early as possible so that the contracting officer can verify successful transmission and receipt of the eFiles by the closing date and time. Email submissions not received on or before the closing date/ time will be considered late. Date and time determinations will be based on the system email date/time of the Contracting Officer's email account.

c. FAR 52.212-1 general proposal instructions are incorporated by reference. Please note those instructions.

e. Proposal Organization: Proposals shall be submitted in two volumes, "Volume I - Technical/Management" and "Volume II - Business/Price"; as detailed below. Proposals shall be submitted electronically in PDF format, with separate Electronic Files (eFile) for each item as shown in the table below. Files may be combined into zip files for ease of transmission; however, do not combine Volume I and Volume II eFiles in the same zip. The eFile filenames shall follow the convention shown below. The table below summarizes the organization of the proposal and page limitations. The narrative section below the table describes additional detail about each element in the table as a guide to the content and organization.

f. Proposals submitted must address the full scope of the solicitation and address the necessary requirements of the SOW and the instructions herein. Proposals, which address only part of the solicitation, have major omissions, or do not separate price information from the technical section as required, will be considered unacceptable. Proposals must affirmatively state acceptance of all SOW requirements and contract terms and conditions.

g. Proposals must conform to the page limitations listed. Fonts shall be Times New Roman and no smaller than 11 point for narrative sections of the proposal, in both native and PDF-converted final format. All eFile submittals shall be converted to PDF format prior to submission to avoid inadvertent file modification by the government (e.g. word, rtf, etc.). For the Volume II spreadsheet files, submit the files in both PDF as well as native Excel format where Excel files are indicated.

h. Volume 0 is considered to have already been submitted under the Step 1 procedure and has already occurred. For Step 2, there will be two additional volumes, Volume I and Volume II.

i. Volume I will contain submittals for the remaining (post-Step 1) Factor A Experience subfactors; as well as Factor B Technical/Management and Factor C Past Performance submittals.

j. Volume II will contain the business and pricing proposals. Offerors are cautioned to ensure that no pricing information is embedded or included in their Volume I submission. Such information will be redacted prior to providing the proposal to the technical evaluation team. Any such

redactions could adversely affect the readability and cohesiveness of the applicable eFile involved, to the detriment of the offeror.

k. For purposes of our evaluation, the Step 1 instructions (GS2150-1 (b)) defined the term "prime" as the prime contractor for a prime/sub team; or the "managing partner" firm (aka managing venturer) for a JV team. And the term "subcontractor" was defined as team members and JV partners "other than the prime". This definition is still operative for Step 2. The terms "prime" and "sub" are used herein for proposal instruction purposes only, as an aid to guide our information requests for particular target information given the differences in possible team arrangements and the associated differences in roles and responsibilities involved. We intend to consider work done and qualifications held individually by each team member or JV partner as the case may be, as well as any work done by the team or JV itself in the past (within the limits of page counts and information requested).

l. There are many ways of obtaining experience, past performance and reference information, and we reserve the right to consider relevant information not listed in your proposal that the USGS may be aware of or is otherwise obtained or developed from other government or public sources.

m. The tables below depict the efile names for the various sections of the proposal as depicted in the instructions. The tables reflect the evaluation factors along with the submission requirement and page limits. Detailed instructions for each section follow the table.

STEP 2 Submission Table Summary.

Volume I	**Technical and Management Proposal**	**eFile Name**	**Submission Instructions**
Factor A	Experience	eFile A<*Offeror Name*>	(Note: all files converted to pdf format, unless otherwise indicated)
Subfactor A.1	"Prime" contractor's experience	N/A This was Volume 0 information from Step 1 and is data already submitted. Do not resubmit.	Not applicable in Step 2. "Prime" contractor/managing venturer information already submitted under Step 1. **Do not resubmit.**
Subfactor A.2	Prime contractor's key personnel (KP) experience	A2-Part1-Key Personnel (KP) <*Offeror Name*> A2-Part2-KP resumes <*Offeror Name*>	Key Personnel (KP) Rationale (3 pages max) KP Resumes (2 pgs max per KP), plus 1 pg max for LOI/commitment doc if applicable

Subfactor A.3	Other team members' experience Other team members' key personnel	A3-Part 1-Sub-CaseStudy#x Other <*Offeror Name*> A3-Part2 -KP-Other <*Offeror Name*>	Up to 3 Additional relevant cases. Step 1 case studies 1 and 2 already submitted. These would be Cases 3,4,5 with same format/instructions as in Step 1. KP Resumes (2 pgs max per KP), plus 1 pg max for LOI/commitment doc if applicable
Factor B	Technical/ Management		(Note: all files converted to pdf format, unless otherwise indicated)
Sub-Factor B.1	Offeror and Offeror's Team Structure Technical/Management B.1.1, B.1.2, B.1.3	 eFile B.11-3 <Offeror Name>	Do not Resubmit Step 1 Team Intro and Team Agreements. Narrative 10 pages max; with 2 pages max chart/graph/table. 12 pages max combined submission.
	B.1.4 – Small Business Participation Plan	eFile B14 SBPP <*Offeror Name*>	3 pages max (inclusive of any table/graph/chart)
	B.1.5 – SDVOSB Certification/ Compliance	eFile B15 SDVOSB Comp <*Offeror Name*>	2 pages max (+ "Exhibit" attachment(s) if necessary)
	B.1.6 – Professional Compensation Plan	eFile B16 PECP <*Offeror Name*>	10 pages max (inclusive of any table/graph/chart) SUBMIT WITH VOLUME II

B.2	Task Order Technical Approach and Staffing		
Sub-Factor B.2.1	TO#1 –	eFile B21-TO1Technical <*Offeror Name*> .pdf	Technical, Management and Staffing Proposal for Task Order #1 (Limit 5 pages) (Note: Pricing submitted with Vol II)
Factor C	Past Performance	Past Performance Questionnaires PPQ's	Submitted directly to Contracting Officer by third parties (selected by offeror)
Volume II	**Business/Price Proposal**		
Business	Business Proposal	eFile D1<*Offeror Name*>	Cover Letter and statements re: acceptability of government's terms and conditions
	Forms	eFile D2Forms<*Offeror Name*>	Completed (and signed) SF 1449, and SF 30's (if appropriate), with applicable signature pages scanned to pdf after signature.
	Reps and Certs	eFile D3Reps<*Offeror Name*>	SAM Responsibility and Qualifications
	B.1.6 – Professional Compensation Plan	eFile B16 PECP <*Offeror Name*>.pdf	10 pages max (inclusive of any table/graph/chart)
	Exhibit A	eFile E1-ExA—Exhibit A <*Offeror Name*> .pdf File E1-ExA-Exhibit A <*Offeror Name*> .xls	Submit two files. One pdf, and one the filled-in and populated excel file. Exhibit A – Contract Prices (Labor Category Price Matrix). Provide both pdf and excel file versions.

	TO#1	eFile E3a TO1-pricing <*Offeror Name*> . xls File E3b- TO1 BOE <*Offeror Name*> .pdf	TO#1 Price Proposal (P3a - Spreadsheet Matrix – 1 Excel File; P3b - basis of estimate/rationale as applicable (required)
		eFile E7<*Offeror Name*>	FAR required "Commercial Pricing" supporting detail (See Provision GS2180). See Provision GS2180 at the end of these instructions for this file

Step 2 Instruction Table 1

n. Step 2 Submission Narrative Instructions (follows format of table above):

Volume I – (Experience, Technical/Management, Past Performance)

A. Factor A: Experience

The Government will examine the recent, relevant experience of the offerors. The evaluation will be a subjective assessment of the offeror's relevant experience of work performed of similar nature, scope, complexity, and difficulty to that which must be performed under this contract. The evaluation factor speaks to experience both in performing the work as well as managing the work at the scale and complexity called for in our requirement.

"Recent contracts" are considered to include work done within the last three years. For this procurement, a significant subcontractor is defined as a subcontractor that will be performing at least 10% of the total proposed labor hours.

How do the cited examples compare for things such as:

- Contract size, staffing size, contract scope, period of performance, as well as the variety and level of complexity of professional scientific support and IT services and support provided.
- Simultaneous performance on multiple separate task orders, for different task managers, in different SOW skill pools, and in different parts of the country.
- To what degree did you support a nationwide geographically diverse suite of ground motion monitoring networks consisting of more than 2000 distinct locations, their telemetry infrastructure, data acquisition and processing, and scientific production generation and dissemination.

- and to what degree did your effort involve dynamic staffing involving multiple task orders large and small across the portfolio in terms of start, stop, or adjust, based on shifting priorities, funding, or agency technology decisions.

Information submitted should include:

A.1 - Prime contractor's experience

In Step 1, offerors submitted experience case studies for the two cases the offeror deemed most relevant. In Step 2 the offeror will submit experience case studies for up to three more cases. ***Do not repeat or resubmit the information you provided in Step 1.***

There will be a maximum of 5 total case studies for the experience Factor. Two have already been submitted. This leaves 3 more that MAY be submitted, either: a – one more from the prime, and two more from the subs; or b – no more from the prime, and three more from the subs. As this decision affects your submission under Subfactor A-3 below, this instruction and the A-3 instruction must be read together when deciding what to submit. (Again, the terms "prime" and "sub" are as defined above).

A.2 - Prime contractor's key personnel experience

Part 1 – Project Key Personnel (KP) Rationale (3 pages max). Describe up to eight skill-sets that you have identified as key or critical for your team to support our SOW requirements, and describe why you deem these as critical and the significance of this to our requirements. Eight is a "total team number" that you believe would be important, key, or critical to support your overall team's approach (not necessarily just the prime's personnel). This is "up to" eight (with any mix between prime and sub firms). Note that eight is a number chosen to limit the scope of our evaluations to a reasonable number. Eight are not required and we are not dictating eight or implying that eight is necessarily the correct number given your team's proposed approach.

Part 2 – Prime KP persons. Attach resumes (2 pages max) for each of identified prime contractor's KP being proposed, which could be any number of the eight, but not exceeding eight. Where one or more of the eight is contributed by other team member firms, those KP submittals would be made under A-3 (below).

In addition to the individual KP person's technical qualifications, the resume shall also reflect the person's current employer and immediate prior employer (if not an existing employee of the offeror for at least 12 months). Where an individual is not a current employee of the offeror firm, attach a letter of intent (LOI) or similar indication of commitment to join your firm after contract award.

A.3 - Other team members' experience and key personnel.

Part 1. Firm experience. In Step 1, offerors were to submit two "prime" experience case studies, that the prime deemed most relevant for this requirement. For Step 2, the offeror will submit experience case studies for up to three more cases. As described in the A-1 above, these 3 additional cases may consist of either 1 "prime" and 2 "sub" cases; or 3 "sub" cases. The team may choose any combination which they feel is most suitable for their team membership and the requirements of our contract. Do not resubmit information from Step 1. Again, prime and sub are as defined above.

Part 2. Other team members' KP persons.

A-1 Part 1 of your proposal, as instructed above, describes the procedure for identifying up to eight KP's for the team. To the extent your approach contemplates one or more of the eight will be utilized from team members other than the prime, those individual resumes would be submitted in this section. The maximum KP resumes from A-1 and A-3 combined is 8. The same resume instructions apply as above in A-2 Part 2.

Additional Factor A - Notes:

KP note: KP's identified in A-2 or A-3 shall also be entered into the appropriate name/role fields in the GS1330 Key Personnel clause in the contract Section 2 with your offer.

Past Performance Note. As part of the offeror's proposal submittal under Factor C - Past Performance (described below), offerors will be submitting Attachment PP, "Reference Information Sheets" and, if applicable, Past Performance Questionnaires (PPQs). The information submitted there would be for the same contract references/case studies associated with the Experience case studies.

B. Factor B: Technical/ Management

B.1.1, B.1.2 & B.1.3 Technical/Management

Introductory team and team structure information was previously submitted in Step 1, and will be evaluated in conjunction with Factor B information. As stated in Step 1, this information carries over into Step 2 and will be further evaluated as part of your proposed team approach. Do not resubmit Step 1 information.

Offeror will submit a narrative (up to 12 pages) addressing the general management and technical approach that will be taken to address the totality of our SOW requirements. The narrative would cover the necessary information and details necessary for the government to make a meaningful review and evaluation of your proposed technical approach, understanding of our requirements and the themes embodied in the evaluation criteria Sections B.1.1 Team Utilization and Management; B.1.2

Technical/Management Approach; and B.1.3 Transition Plan and Staffing. An offer that merely reiterates the contract SOW, while asserting the work will be done may not provide sufficient information necessary to evaluate a proposed approach, infer a level understanding of the task, or generate confidence in the offeror's ability to perform and manage the effort.

B.1.4 Small Business (SB) Participation proposal.

No more than 3 pages. Provide your small business participation proposal which states your team's commitment to utilization of small business in the performance of the contract, and the percentage of work/contract dollars anticipated to inure to SB participants of your team; as well as anticipated dollars which would inure to a lower tier contractor. The plan will identify the SB status of team members, and the anticipated workshare of each team member, and the anticipated workshare to other subcontractors). Under the limitation of subcontracting clause, the minimum SB participation that would be allowable under the clause is 51%. This means that in theory, approximately 49% of the work and contracted dollars *could* pass to other than SB. This scenario is undesirable to the Department's small business goals.

To avoid or mitigate this scenario, the SB Participation proposal will describe the approach to assuring the maximum SB dollars pass through the contract to SB to the maximum degree practical given your team structure. Your SB participation proposal depicts your plan to enhance the SB participation toward 100% vs the 51% minimum. The proposal may be in narrative or tabular form and must clearly show the size status of all anticipated participants over the proposed 5-year contract period, and the SB participation percentage at the total contract level (not task order by task order).

B.1.5 - SDVOSB Set Aside.

The offeror should provide information regarding the offeror's SDVOSB business status, and discussion of any issues relative to the requirements of the SDVOSB programs as it applies to the proposed effort here, particularly regarding subcontracting and SDVOSB participation/workshare requirements. The offeror should discuss how it intends to review, monitor, manage and report on these requirements during contract performance. JV offerors shall also provide copies of JV Agreement Exhibits which state the parties' agreement(s) as to participation and division of work, and roles and responsibilities of each partner to the Agreement which is often listed as Exhibit A or B to such agreements. (Note: If this was previously submitted under Step 1, do not repeat the submission here).

B.1.6 Professional Employees Compensation Plan (10 pages max)

Offerors shall submit for evaluation a total compensation plan setting forth proposed salaries and fringe benefits for professional employees working on the contract. Supporting information will include data, such as recognized national and regional compensation surveys and studies of professional, public and private organizations, used in establishing the total compensation structure.
Plans indicating unrealistically low professional employee compensation may be assessed adversely as one of the factors considered in making an award. The plan will be evaluated and will supplement the technical and management evaluations of Volume I, and pricing evaluations in Volume II. (As this file may contain pricing information, please submit this efile with Volume II.

B.2 Task Orders – Technical Approach and Staffing.

Offerors are cautioned that this is not a "sample" task order. TO#1 will be ordered immediately upon award of a contract to the successful offeror. Therefore, the Volume I task order proposal, and the Volume II task order pricing proposal together represent the offeror's offer to perform the subject effort on a FFP basis.

B.3.1 Task Order #1 Firm-fixed Price - (TO#1 – Scientific Software Developer). The government will evaluate the offeror's proposed technical and staffing approach to fulfill the requirements of the task order. The government will evaluate:

- Proposed technical approach and understanding of requirement
- Proposed staffing plan and key personnel (if any) proposed
- Appropriateness of proposed staffing (quantity, mix, skill levels, etc.) to technical requirement.

For each TO SOW task area, offerors should provide pertinent information regarding their technical approach, methods, scheduling, personnel skill levels necessary, typical problems and issues, etc. The description of technical approach should be to a sufficient level of detail to demonstrate an understanding of the requirements, and technical approach to fulfilling the requirements, typical solutions to typical problems, etc. An offer that merely reiterates the Task Order's PWS or SOW, while asserting the work will be done may not provide sufficient information necessary to evaluate a proposed approach, or infer a level of understanding of the task or generate confidence in the offeror's ability to perform the effort.

Factor C: Past Performance.

The proposal shall have a minimum of three, and maximum of five, recent and relevant contract past performance references of similar scope and size. The up to five references are the five Experience Factor case studies submitted. For these references, Offerors shall contact their references and request that each reference complete solicitation Attachment PPQ "Past Performance Questionnaire" and email the completed survey form directly to Charlan Fejarang at charlan_fejarang@ios.doi.gov by the due date of this solicitation.

The Government will consider questionnaires received after the due date of the solicitation to the extent the PPQ evaluation is not unduly delayed by the late receipt. PPQ's received more than 10 days AFTER the closing date will be considered to unduly delay the evaluation and will not be considered.

There are many ways of obtaining experience, past performance and reference information, and we reserve the right to consider relevant information not listed in your proposal that the USGS may be aware of or is otherwise obtained or developed from other government or public sources.

Volume II: Business and Price Proposal

The business and pricing proposal is submitted as a separate volume. Technical evaluation of the proposals (Volume I) are conducted with no knowledge of the associated pricing (Volume II), so that the pricing does not influence the technical evaluations. Offerors are cautioned to ensure that no pricing information is embedded or included in their Volume I submission. Such information will be redacted prior to providing the proposal to the technical evaluation team; and therefore any such redaction could adversely affect the cohesiveness of the applicable eFile involved, to the detriment of the offeror.

Business and Pricing Proposal

These eFiles primarily address contractual and business issues relating to the proposal and anticipated award.

a. Cover Letter & Introductory Narrative (Limit 2 pgs). The Introductory Narrative may also be considered as an Executive Summary, and as such is an optional submission. Pricing information shall not be included in this document. This document will not be evaluated.

b. Completed (and signed) SF 1449, and SF 30 (if appropriate), as required under FAR Part 12. (Please note that typing a person's name into the signature block is not a "signature"). Sign and scan the physical signature page, or otherwise apply a valid digital signature.

c. FAR Provision 52.204-19, Contractor Certifications and Representations (reps and certs), for applicable prime and subcontractors, are required for eligibility for award.

d. Professional Employee Compensation Plan. Submit your PECP in Volume II, as instructed under B.1.6 above and the cited FAR clause.

e. Pricing - Exhibit A – Contract Prices (Labor Category Price Matrix).

(1) This is an excel spreadsheet to be completed by the offeror which reflects the fully burdened price, per hour, by labor category. "Fully burdened" means that price includes any and all fringe, overhead, indirect, G&A, profit, etc. A separate column for each year in the projected five year period of performance is included. Offerors are not required to have different prices for each year; however, they may do so based on their own business practices and estimates of future rates necessary to staff the project. Future task orders would be placed based upon these rates. Based on the current schedule "Year 1" would coincide with "8/1/26 – 7/31/27"; Year 2 would be "8/1/27 – 7/31/28". The Exhibit A prices for any resultant contract will bear "Year 1", "Year 2", etc.

(2) The Exhibit A pricing matrix is accompanied by "Exhibit A1 - Labor Category Definitions". The Exhibit A labor categories represent all of the potential or possible categories that may be ordered under the contract. It is possible that some (or many) of these categories may never be ordered, depending upon the USGS requirements over the life of the contract.

(3) In light of the fact that work may occur at multiple USGS locations (e.g., Pasadena, CA; Moffett Field, CA; Seattle, WA etc.), in addition to the contractor's own facility(ies), it is recognized that rates may vary based on geographic location. Nonetheless, the government desires to have a single price matrix for the entire contract, rather than multiple matrices for multiple locations, or multiple rates depending on which team member is involved.

f. Pricing - “Ramped-Up” Price (RUP) Matrix.

(1) This spreadsheet will be completed based on the pre-filled number of hours provided by the government. The spreadsheet is provided as part of the electronic solicitation package. The prices will be the actual prices proposed by the offeror in Exhibit A, for the applicable labor categories involved. The spreadsheet will self-calculate once the rates are applied from Exhibit A. The government has assumed one “full time equivalent” (FTE) person is equal to 1,904 direct hours per year for this pricing exercise.

(2) This matrix is a scenario-based level of effort, based upon assumptions leading to a possible outcome requiring multiple FFP task orders to provide services during the contract’s period of performance. It assumes a number of individual task orders are being performed simultaneously by the contractor during the specified time period. The time frame involved is a 24 month period spanning the entirety of Years 2 and 3. Note this is only a possible scenario - it is not an indication or guarantee of an actual level of effort, or actual labor mix that WILL be performed under the contract. The actual number and size of orders is unknown; however past experience indicates that they will be required.

(3) The Ramped-Up Pricing matrix will result in a total price value for the labor mix and period of performance laid out in the matrix. This matrix is for price evaluation purposes only. The price derived from this matrix will enable the Government to evaluate all offerors’ prices for identical work under possible task orders on an equal basis for purposes of price comparison.

g. Pricing – Task Order Price proposals will all follow the same format with the same instructions. The following instructions apply to all task order proposal. Provide a task order pricing matrix (spreadsheet in excel format) as one file, as shown below.

Price Proposal. Spreadsheet Matrix – 1 Excel File; plus basis of estimate/rationale as required. The proposed price for the task order will be based upon the number of hours estimated by the offeror, in the labor categories selected by the offeror to accomplish the performance-based work statement of the task order. Hours are filled in by the offeror based on their estimates to perform the work. Labor categories necessary to perform the work are determined by the offeror. Rates for the labor is taken from the offeror’s Exhibit A prices for “Year 1” effort. The spreadsheet will be submitted as eFile P3a for this section. It is expected that this spreadsheet will list the Exhibit A labor categories, total hours for the labor category for the period, price per hour, and extended total in the following format:

(Example only)

Lcat #	Description	Hours	Rate	Total
72	Network Planning Analyst – Intermediate	1920	$100.00	$192,000.00
88	Quality Assurance Analyst (Intermediate)	1920	$95.00	$182,400.00
	Total	3840		$374,400.00

Supporting their price matrix, the offeror will provide any explanatory material supporting their proposed price, rationale for particular labor categories or levels of effort, etc. (i.e., Basis of Estimate, or BOE). The proposed prices and rationale should be consistent with the Task Order's technical and management proposal, and the proposed hours and levels of effort should be consistent with commitments, levels of expertise, key personnel, etc. that are stated in the technical portion of the task order proposal. The BOE may be as footnotes within the spreadsheet itself, or as a separate pdf which addresses the assumptions embodied by the offered price.

Efile structure for Task Order pricing:

TO#1: E3a-TO1 <*OfferorName*>.xls (spreadsheet as described above)

E3b-TO1 <*OfferorName*> .pdf (BOE information, if not embedded in excel file)

h. Commercial Pricing Information. (see provision GS2180, "Commercial Pricing Information"). Provide supporting information, as applicable, as described in the referenced provision with respect to the commercial pricing of the services being offered. If not applicable, submit a statement to that effect and provide rationale as to why such information would apply in this instance.

(End of provision)

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(a) Certified cost or pricing data are not required for this procurement; however, the Contracting Officer is required to determine the reasonableness of pricing. To assist in determining whether the prices offered are "fair and reasonable," you are requested to submit the following information in support of your Exhibit A labor category pricing matrix.

(1) A copy of the current catalog or established price list for the supplies/services covered by the offer; or information where the established price list may be found.

(2) A copy or description of current discounting and rebate policies.

(3) A statement that offered products or services are sold in substantial quantities to the general public at the prices listed in the above-mentioned catalog or established price list. For services, provide a statement that the offered services are customarily provided by the offeror using personnel regularly employed and (if applicable) equipment regularly maintained principally to provide such services.

(4) A statement that the prices quoted herein, including consideration of any discount or rebate arrangements, do not exceed prices charged the offeror's most favored customer for like services in similar quantities under comparable conditions. List any sales within the past 12 months at prices lower than offered here, with explanation of differences (f.o.b. terms, sales to resellers, etc.). The offeror need not include sales to affiliates.

(b) By submitting a proposal, the offeror grants the contracting officer or an authorized representative the right to examine, at any time before award, those books, records, documents, and other records directly pertinent to the information requested or submitted.

(End of Provision)