Attachment 006: Phase III – CSO AOI Commercial Solutions Proposal (CSP) Format

1. Instruction for Request for CSP, Phase III

Phase III of the CSO process is the Request for CSP. Offerors must ensure that the CSP is valid for at least 180 days from the submission date.

The CSP must be prepared in three separate Volumes as follows: Volume I Technical and Volume II Performance Work Statement (PWS) and Volume III Price. Each volume may have its separate related attachments. The Army reserves the right to request additional volumes as needed.

NOTE: Failure to submit CSP in the correct three-volume format will result in immediate and final removal from further consideration.

(a) Technical Proposal: The Technical Proposal page limitation shall be limited to 10 pages. The page limitation covers all information including indices, photographs, foldouts (counted as 1 page for each 8.5 by 11-inch portion) tables, charts, appendices, attachments, resumes, etc. Environmental documentation provided will not count towards the 10-page limitation. The document must be provided in Microsoft Word. Signed pages may be submitted in Adobe. Text shall be written in a 12-point, commonly used business font (i.e. Arial, Calibri, Times New Roman, Helvetica, etc.). Character spacing must be "normal," not condensed in any manner. Pages shall be single-spaced (must use standard single-space function in Microsoft Word), 8.5 by 11 inches, with at least one-inch margins on both sides, top and bottom. All text, excluding text in tables and charts (single-spaced), must adhere to all font size and line spacing requirements listed herein. Font and line spacing requirements do not have to be followed for illustrations, flowcharts, drawings, and diagrams. These exceptions shall not be used to circumvent formatting requirements and page count limitations by including lengthy narratives in such items.

(b) PWS: The same formatting rules for the Technical Proposal apply to the PWS, page limitation is also 10 pages

(c) Price Proposal: The Price Proposal does not have a page limit restriction (MS Excel Format). The Price Volume should display all active formulas so that an evaluator can trace the source of data and the method the result was derived.

(d) Markings and Restrictions: Proposed solutions containing data that is not to be disclosed to the public for any purpose or used by the Army except for evaluation purposes, shall include the following sentences on the cover page:

> *"This proposal includes data that shall not be disclosed outside the Army, except to non-Army personnel for evaluation purposes, and shall not be duplicated, used, or disclosed -- in whole or in part -- for any purpose other than to evaluate this proposal. If, however, an agreement is awarded to this Offeror as a result of -- or in*

connection with -- the submission of this data, the Army shall have the right to duplicate, use, or disclose the data to the extent agreed upon by both parties in the resulting agreement. This restriction does not limit the Army's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets]"

Restricted data should be marked as follows:

"Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal."

(e) General Information: The proposal should include as much detail as the offeror considers necessary to fully explain its proposed approach or method, including all assumptions utilized to develop its proposed solution. The proposal should reflect a clear understanding of the nature of the work being undertaken. It should discuss details of intellectual property (IP) and data rights assertions that may include, but are not limited to: royalty provisions, limited licenses (scope, duration, and manner), options, conditions, right-of-first refusal, and exclusive dealing terms, amongst others. Identify all Army Support Required for example, identify the type of support, if any, the offeror requests of the Army in general, equipment, data, and information or materials.

The Army will verify, upon receipt, that the proposal and PWS conform to the stated requirements. Any pages in excess of the stated page limitation will not be considered for evaluation purposes.

2. Technical Proposal Volume:

The technical volume shall include a detailed work plan indicating how each aspect of the solution will be accomplished. The technical volume should include as much detail as the offeror considers necessary to fully explain its proposed technical approach or method, including all assumptions utilized to develop its proposed solution and associated costs. The technical volume should reflect a clear understanding of the nature of the work being undertaken.
The technical volume must include information on how the solution will be organized, staffed, and managed. Information should be provided that demonstrates the offeror's understanding and management of important events or tasks. The technical volume must include a list of suggested deliverables and deliverable dates. Include ancillary and operational issues such as certifications, algorithms, and any engineering/software development methodologies to be used. You may refer to your Solution Brief that prompted this proposal request, but do not duplicate it in the Technical Proposal Volume. Provide additional details of intellectual property (IP) and data rights assertions that may include, but are not limited to: royalty provisions, limited licenses (scope, duration, and manner), options, conditions, right-of-first refusal, and exclusive dealing terms, amongst others. Identify all Army Support Required for example,

identify the type of support, if any, the offeror requests of the Army in general, equipment, data, and information or materials.

3. PWS Format:

A PWS must be included with the full proposal as part of the Phase III submission. The PWS is limited to 10 pages in length and must be a separate and distinct document suitable for incorporation into the resulting award. DO NOT INCLUDE ANY PROPRIETARY INFORMATION IN THE PWS. Pages should be numbered, and the initial page should have a date (document date) shown under the title.

The proposed PWS must accurately describe the work to be performed. The proposed PWS must also contain a summary description of the technical methodology as well as the task description, but not in so much detail as to make the PWS inflexible. The PWS should follow the following general guidelines:

i. Objective and Task descriptions must be definite, realistic, and clearly stated. Use the phrase “the contractor shall” whenever the work statement expresses a provision that is binding. Use “should” or “may” whenever it is necessary to express a declaration of purpose. Use “will” in cases where no offeror requirement is involved (e.g., power will be supplied by the Army).

ii. Do not use acronyms or abbreviations without first defining them. Place abbreviations and acronyms in parentheses following the first usage of the spelled-out phrase (e.g., I Statement of Work (SOW)).

iii. If presentations and meetings are identified in the offeror’s schedule, the offeror shall include the following statement in the PWS: “Conduct presentations and meetings at times and places specified in the contract schedule.”

iv. The desired project structure consists of solution-specific objectives focused on demonstrating the capability of the training, and solution-specific tasks, which cover schedules, reporting requirements and deliverables of the Integrated Product Team (IPT) effort.

The PWS should include the following sections:

a. *OBJECTIVE.* This section is intended to give a brief overview of the project and should describe why the work is being pursued and what the offeror intends to accomplish.

b. *SCOPE.* This section includes a statement of what the PWS covers. This should describe the capability area (CSO topic and/or Area of Interest) to be performed, goals, and milestones for the effort.

c. *SOLUTION-SPECIFIC TASKS.* This section contains a detailed description of tasks that are necessary to perform the requirement. These tasks will represent the work to be performed and shall be incorporated as an attachment to the award. This section should be developed in an orderly progression and presented in sufficient detail to establish the feasibility of accomplishing the overall solution objectives. This section should clearly distinguish solution-specific tasks and a schedule for completion. The PWS must define every task to be accomplished.

Note: The Army reserves the right to modify and negotiate the language in the PWS prior to any potential contract award.

4. Price Proposal Volume:

The offeror shall prepare the Price Proposal (with the exception of the pricing narrative information described below) using Microsoft Excel format. Include the respective AOI, Offeror name and the Project Title on all pages.

The following information should be contained in a cover sheet attached to the price proposal:

a. Full offeror name and address
b. Call number submitting proposal against (if Applicable)
c. Points of contact, name, title, and phone number
d. CAGE code
e. Unique Entity ID number

The price proposal must include pricing information sufficiently detailed to determine that the price is fair and reasonable. The price proposal must include a price build-up that includes direct and indirect cost components, materials, and other charges that substantiate the proposed price. The price build up should be supported by vendor quotes, supplier agreements or other information necessary to substantiate the proposed price. This can include but is not limited to commercial price catalog(s), previous commercial sales receipts, and/or other non-proprietary information to help the Army determine reasonableness and future budgetary cost estimates.

The Price Proposal shall include, at a minimum, unit prices, units of measure, and total proposed prices in support of the offerors proposed solution. The proposed prices shall be supported by a narrative detailing the offerors pricing methodology, proposed CLIN structure, and any other non-proprietary information to help the Army determine reasonableness and future budgetary cost estimates.

As a result of the CSO environment, proposals are considered commercial items, technologies, or services; therefore, the requirements of the Truth in Negotiations Act (TINA) are not applicable. However, if the Contracting Officer determines additional information is necessary to

support a determination of a fair and reasonable price, other than certified cost and pricing data may be requested.

In accordance with FAR 15.402 and 15.403-1, certified cost or pricing data are not required, as products and services acquired using a CSO are considered commercial products and commercial services. If after receipt of proposals the Contracting Officer determines additional information is necessary to support a determination of a fair and reasonable price, other than certified cost and pricing data or more detailed data may be requested.

The responsibility for providing adequate supporting data and attachments lies solely with the offeror. Further, the offeror must also bear the burden of proof in establishing reasonableness of proposed prices; therefore, it is in the offeror's best interest to submit a fully supportable and well-prepared price proposal.

NOTE: The cost of preparing proposals in response to this CSO is NOT considered a direct charge to any resulting AOI award or any other contract.