E.1 INSTRUCTIONS FOR QUOTE SUBMISSION

Amendment 0001

The Government intends to make an award in connection with this solicitation to the responsible vendor whose quote conforms to the solicitation requirements and will be most advantageous to the Government by representing the best value as defined by FAR 2.101.

Small Business Set-Aside

This requirement is being solicited as a Total Small Business Set-Aside. Only quotes received from those vendors that are Small Business Concerns in accordance with the requirements of RFO 19 at the time of quote submission will be evaluated or considered.

Applicable NAICS: 561611 – Investigation and Personal Background Check Services
Small Business Size Standard: $25 Million

SDVOSB/VOSB Evaluation Factor

VAAR 852.215-70, Service-Disabled Veteran-Owned and Veteran-Owned Small Business Evaluation Factors (Jan2023) applies to this requirement. As such, credit will be granted in the evaluation of quoted prices for SBA-Certified Service-Disabled Veteran-Owned and Veteran-Owned Small Business concerns (SDVOSB and VOSB respectively) in the following amounts (rounded to the nearest cent):

- SDVOSB: 5% less than their quoted price
- VOSB: 3% less than their quoted price

Small Business entities proposing to use certified SDVOSB or VOSBs subcontractors will receive extra credit in the following amount:

- SDVOSB Subcontractor: 2% less than their quoted price
- VOSB Subcontractor: 1% less than their quoted price

Vendor quote must meet all requirements contained in VAAR 852.215-70 and 852.219-75 for SDVOSB/VOSB vendors and subcontractors in order to qualify for the above consideration.

All other acceptable Small Business quotes will be evaluated at their quoted price.

Questions

Questions pertaining to this solicitation shall be submitted via e-mail to the Contracting Officer at thomas.landers@va.gov. Questions will only be accepted before the time and date identified in Block 20 of the SF1449 document.

Submission of Quotes

All quotes shall be provided via email to the Contracting Officer at thomas.landers@va.gov and include the Solicitation Number (36C10D26Q0145) in the Subject Line.
All attachments shall be provided in Adobe Portable Document Format (.pdf) or Microsoft Excel Open XML Spreadsheet (.xlsx) format.

Quotes must be submitted no later than the time and date specified in Block 8 on Page 1 of the solicitation.

The government retains the right to accept quotes, or modifications to previously received quotes, after the date and time specified when the Contracting Officer determines that doing so is in the best interests of the Government.

Period of Acceptance

The vendor agrees that their quote will remain valid for a period of 45 days from the solicitation closing date.

Quote Acceptability

Quotes which fail to comply with all instructions within this solicitation will not be considered. Quotes received from vendors who do not hold current and active registration in the System for Award Management for All Awards at the time of submission will not be evaluated.

Vendors whose registration lapses prior to award will be removed from consideration for award. Quotes submitted by vendors determined to be Non-Responsible in accordance with the criteria provided in FAR 9.104 will not be considered for award, regardless of evaluation results.

Quote Content

Vendor quotes shall consist of two volumes. Each Volume shall contain a cover page that clearly identifies the Solicitation Number, Vendor Name, SAM Unique Entity ID, CAGE Code.

Quote Formatting

Quote should be in a professional, business appropriate font. Examples of appropriate font styles include Arial, Calibri, Georgia, Helvetica, Times New Roman, Tahoma, or Verdana. Font size of body text should be appropriate to the utilized font, but no smaller than Size 10. Margins shall be no smaller than 1.00 inches.

Volume I: Price Quote

Section I: Solicitation Documents

1. Cover page that clearly identifies the Solicitation Number, Vendor Name, SAM Unique Entity ID, CAGE Code.
2. Standard Form 1449, Solicitation/Contract/Order for Commercial Items
   - With Blocks 17a-b and 30a-c completed by the vendor and signed by an authorized representative of the company.
3. Standard Form 30, Amendment of Solicitation, ~~if amendments have been issued~~ for all amendments
   - With blocks 8 and 15a-c completed by an authorized representative of the company.
4. Representations and Certifications
   - All Representations and Certifications shall be completed electronically in the System for Award Management (SAM) http://www.sam.gov

- VAAR 852.219-75 Certificate of Compliance for Services and Construction (See Section D) must be included if vendor is seeking consideration under VAAR 852.215-70 as described in the above instructions "SDVOSB/VOSB Evaluation Factor"

Section II: Price/Cost Schedule

1. Prices will be listed in the corresponding places for Contract Line Items 0001 – 4001 in the Price Schedule. Vendor will provide Unit Price and Total Amount for all CLINs in the Price Schedule, as well as the Grand Total for all CLINs.
   - Pricing shall be fully burdened and represented in two decimal places only. Please verify that all calculations are correct before submission.
   - Quotes provided should represent the vendor's best and final pricing, and any provided discounts should be clearly noted.

Volume II: Technical Quote

Section I: Technical Ability – Page Limit: 10 Pages (Resumes/CVs, and Draft Management Plan not included in page limit)

1. Vendor shall provide adequate information that clearly demonstrates their technical ability to meet the requirements of the solicitation. This may include but is not limited to such items as a capability statement, resume/curriculum vitae (CV) for ~~proposed key~~ personnel, qualifications, licenses, or certifications which are relevant to performance of the requirements outlined in the Performance Work Statement/Statement of Work.
2. List any specific items that must be addressed or documents that must be included as part of their quote (See PWS Section 5 comments)

Section II: Past Performance

1. Past performance information is one indicator of a quoter's ability to successfully perform the contract. The recency and relevance of the information, source of the information, context of the data, and general trends in contractor performance shall be considered. The Government may make use of past performance information received from other sources including but not limited to the Contractor Performance Assessment Reporting System (CPARS)/ Federal Awardee Performance and Integrity Information System (FAPIIS) to evaluate past performance.
   - Vendors with no Past Performance shall be evaluated as "Neutral".
2. Vendor shall provide at least one, but no more than three, relevant and recent contract(s) where it performed as either the prime contractor or subcontractor in providing services of the nature outlined in this solicitation. Recency is defined as either a currently ongoing contract, or a contract completed within the previous 36 months.
   - Vendor shall provide a customer point-of-contact with phone number and email address for the contracts submitted, as well as adequate information by which to identify the contract (ie. Contract Number, Description, Location of performance, Period of Performance).

Quote Evaluation

Quotes will be evaluated for completeness and adherence to the solicitation requirements. Award will be based on an analysis of the following factors:

- Technical Ability
  - Understanding of the Requirements

    - Project Management Approach
    - Staffing, Expertise & Key Personnel Experience
- Past Performance
- Price

Technical Ability and Past Performance , when combined, are

- ~~Approximately~~ Equal to cost or price

The Government may perform a comparative evaluation (comparing offers to each other) to select the contractor that is best suited and provides the best value, considering the evaluation factors in this solicitation.

Technical Evaluation

1. Technical Approach & Understanding of the Requirements

The Government will evaluate the extent to which the offeror's technical approach demonstrates a clear, comprehensive, and feasible plan for meeting all requirements of the PWS.

The Government will assess how well the proposal:

- Demonstrates a clear, accurate understanding of all PWS requirements, including:
    - Electronic Address Search
    - Death Determination
    - Claims Outreach
    - In-Depth Expert/Genealogy Search
    - Reporting on Updated Information and Results
- Provides a well-defined workflow for processing both:
    - Designated Beneficiary Locator & Outreach cases
    - Alternate Beneficiary Locator & Outreach cases
- Describes the tools, databases, research methods, and verification techniques that will be used to locate beneficiaries accurately and efficiently.
- Addresses processes to ensure accuracy and timeliness consistent with the performance metrics in the PWS.

2. Project Management Approach

The Government will assess the offeror's ability to effectively manage the project through a detailed and compliant Contractor Project Management Plan (CPMP).

- Identifies milestones, risks, mitigation strategies, and reporting mechanisms.
- Demonstrates the ability to maintain the required 51% or greater prime contractor work share.
- Provides a structured plan for monthly progress reporting, including documentation methods, outreach logs, and reporting accuracy.
- Demonstrates capacity for timely issue resolution and consistent communication with VA stakeholders.

3. Staffing, Expertise & Key Personnel Qualifications

The Government will evaluate the qualifications, experience, and suitability of the offeror's staff and key personnel.

- Experience in beneficiary research, public records analysis, genealogy/next-of-kin research.
- Compliance with all PWS background investigation requirements.
- A comprehensive training plan covering cybersecurity, privacy, HIPAA, Rules of Behavior

- Evidence that staffing levels are sufficient to meet required case volumes.

4. Past Performance

The Government will evaluate the offeror's past performance to determine the extent to which the offeror has successfully executed work of similar size, scope, and complexity.

Specific examples of past performance, including clear descriptions of the work performed and outcomes achieved are required. Government and commercial sources will be accepted.

The evaluation will consider:

- Relevancy and recency of prior contracts comparable to the Beneficiary Locator Services requirements.
- Documented success in meeting timeliness, accuracy, completeness, and quality requirements.
- Evidence of consistent, reliable performance.
- Customer satisfaction indicators or other performance documentation showing strong historical execution.
- Quantity and complexity of past contracts performed, demonstrating the offeror's experience in similar work.
- Success rates from prior efforts, such as completion rates, accuracy percentages, timeliness metrics, or other validated performance indicators that reflect reliable execution.
- Vendor's ability to be determined "Responsible" in accordance with FAR 9.104
    - Note: The Government may make use of past performance information received from other sources including but not limited to the Contractor Performance Assessment Reporting System (CPARS)/ Federal Awardee Performance and Integrity Information System (FAPIIS) to evaluate past performance in establishing a determination of responsibility.

5. Price will be evaluated based on the following criteria:

- Price Reasonableness IAW RFO 12.204

Basis for Award

The Government intends to award a single award Firm-Fixed Price Purchase Order in connection with this solicitation to the responsible vendor whose quote conforms to the solicitation requirements and will be most advantageous to the Government by representing the best value as defined by FAR 2.101.

The offeror must receive a rating of satisfactory (or higher) for technical evaluation, and neutral or higher for past performance in order to be considered. Quotes that do not include the total amount of work specified in this solicitation will not be considered for award.