United States Department of Energy
Southeastern Power Administration
1166 Athens Tech Road
Elberton, Georgia 30635

August 10, 2026

QUOTATION PREPARATION INSTRUCTIONS

The purpose of this section is to provide instructions on how to prepare the Other Documents, Technical Proposal and Price Quote. The information must be presented in a practical straightforward manner, providing concise delineation of the Quoter's ability to meet the requirements.

(a) General - Quotes are expected to conform to solicitation provisions and be prepared in accordance with this section. To aid in evaluation, the quote must be clearly and concisely written, as well as being neat, and logically assembled. All pages of each part must be appropriately numbered and each volume's page 1 shall include the name of the Quoter, the date, and the solicitation number.

Overall Arrangement of Quote - The Quoter must have access to the sam.gov website located at https://sam.gov. The overall quote must consist of three (3) separate volumes individually titled as stated below. The Quoter must submit each quote volume via email. **Quotes are due September 8, 2026, at 3:00 P.M. EST**.

VOLUME NUMBER	TITLE
Volume I	Other Documents
Volume II	Technical Proposal
Volume III	Price Quote

(b) Do not assume that because you have had similar contracts with the Federal Government, including the Department of Energy, evaluators will know of your performance under such contracts and will make assumptions regarding your quote based on that knowledge. Any quotes received in response to this solicitation will be reviewed strictly as submitted and in accordance with the evaluation criteria specified in RFQ Attachment 5 - Evaluation Criteria.

(c) Compliance and Quote Validity – The Quoter shall examine and follow all instructions. Failure to do so will be at the Quoter's own risk. Quotes that do not follow all instructions may be deemed "non-compliant" and disqualified from further evaluation. To qualify as responsive, each Quoter's submissions shall address all requirements identified in this section, as well as the evaluation criteria set forth in RFQ Attachment 5.

All acceptable quotes must demonstrate the Quoter's understanding of the requirements and associated risks. The Government may deem inadequate and unsatisfactory statements that

simply paraphrase the requirements, or which simply state that the Quoter understands, can or will comply with the specifications.

The quote shall be valid for 60 calendar days from the quote due date. Quoter shall make a clear statement that the quote is valid until such date in Volume I – Other Documents.

Volume I – Other Documents (No Page Limit)

NOTE: Volumes I – Quote and Other Documents must be submitted in either Microsoft Word or PDF file format (12 pt Times New Roman Font) for either file format).

No pricing information should appear in this Section. Instead all pricing data shall only appear in Volume III.

Volume I – Other Documents, Volume I must include the following documents (in the order listed):

(1) Organizational Conflicts of Interest: The resultant Task Order will be subject to the Organizational Conflicts of Interest (OCI) provisions of DEAR 952.209-8 (See Attachment 7) and DEAR 952.209-72 (See Attachment 8). The Quoter shall provide the disclosures as prescribed in DEAR 952.209-8 for the Prime/Team Lead, subcontractors, and consultants. See Attachment 8.

(NOTE: OCI disclosures for all subcontractors/consultants are the sole responsibility of the Prime contractor/Team Lead.)

(2) The Quoter must identify any exceptions, deviations or conditional assumptions to the terms and conditions of the RFQ. The Quoter is hereby advised that any exceptions, deviations, or conditional assumptions may render the quote ineligible for an award.

(3) A Certification Regarding Responsibility Matters (See FAR 52.209-5 (APR 2010)) and Information Regarding Responsibility Matters (See 52.209-7 (JAN 2011) required for Prime/Team Lead, team members, subcontractors and consultants.

(4) A statement of quote validation for at least 60 days from submittal date.

(NOTE: Failure to comply with submitting the aforementioned Volume I documentation may result in a determination of non-responsibility by the Contracting Officer, resulting in exclusion of the Quoter from award.

<u>Volume II – Technical Proposal</u> (Page Limit – 50 pages to include a 1 page Executive Summary/excluding Resumes and Letters of Commitment for Proposed Key Personnel, and Staffing Plan for Non-Key Personnel.)

NOTES: **Volume II – Technical Quote must be submitted in either MS Word or PDF file format.**

No pricing information should appear in this Section. Instead, all pricing data shall appear in Volume III.

Additional pages will not be evaluated. The font shall be no smaller than Times New Roman font size 12.

All the items and factors described below shall be addressed in the Technical proposal.

CRITERION 1 - TECHNICAL APPROACH

The Quoter shall discuss its proposed approach to accomplishing the work described in the RFQ Attachment 1 – Performance Work Statement. A technical analysis of the work described in the Performance Work Statement shall be provided in sufficient and precise detail to establish that the Quoter understands the technical scope and complexity of the work to be performed and that the Quoter has the technical capability to accomplish the work.

The Quoter shall also provide a statement in their Criterion 1 quote indicating their level of commitment to providing small business participation under the resultant Task Order, and shall express this commitment in the form of a percentage of estimated dollars.

The Quoter should provide a detailed Start-Up Plan that addresses the assumption of responsibilities from the incumbent contractor and ensures a seamless transition with no or limited impact on services, and an efficient transfer of on-going projects. The Quoter should identify potential start-up problems and methods to avoid or mitigate the impact of such problems on the start-up process.

CRITERION 2 – STAFFING AND KEY PERSONNEL

A. Key Personnel – The Quotes shall identify proposed key personnel, and describe the relevant work experience; education, technical experience, and GAGAS requirements relative to the position qualification requirements of Attachment 3 Position Descriptions.

B. As specified below, the Quoter shall submit resumes and supporting documentation to demonstrate the professional and technical qualifications for their proposed Key Personnel candidates. Key Personnel positions for this effort are as follows:

    1) Managing Director;

2) Concurring Review Partner;
3) Senior Manager.

Resumes (Key Personnel Candidates): The Quoter shall provide written resumes in the format shown in Attachment 6 – Sample Resume Format for the proposed Key Personnel Candidates. The resumes shall describe the education, technical expertise, and relevant experience of Key Personnel in accordance with Attachment 3- Position Descriptions, and Attachment 1 – Performance Work Statement, and should be commensurate with the solicitation's position requirements. Resumes shall describe the suitability of the proposed Key Personnel to the proposed position based on the relevant experience, leadership, and qualifications. Resumes shall describe how work experience relates to the resultant Task Order's scope, and the proposed candidates' capability to function effectively in the proposed position. Only one (1) resume may be submitted for each Key Personnel position, and only one (1) person may be proposed per position. The Key Personnel identified by the Quoter will be subject to the clause entitled, DEAR 952.215-70 Key Personnel. Resumes must include dates for all experience stated. No resume for Key Personnel **shall exceed three (3) pages in length**. Please provide an org chart with your submission.

Resumes for proposed Key Personnel candidates shall be prepared to facilitate evaluation of the individual's work experience, education, and professional development directly related to the corresponding Position Qualifications in Attachment 3, and to the Performance Work Statement. Of particular importance are the extent, depth, and quality of their relevant work experience; as well as the quality and applicability of their education, technical experience, and professional development as they relate to their proposed positions in the performance of this Task Order.

Letters of Commitment: The Quoter shall provide signed Letters of Commitment for each Key Personnel candidate. Letters of Commitment shall be provided in the format shown below for the Key Personnel. The Letter of Commitment must reflect the individual's unconditional agreement to accept the position for a minimum of one (1) year from the date Task Order performance begins if the Quoter is awarded the Task Order. Resumes with letters of commitment are to be submitted in Volume II. However, this information is excluded from the Volume II page limitations.

For each Key Personnel candidate proposed, the Quoter must submit a Letter of Commitment which follows a format similar to the following shown below:

LETTER OF COMMITMENT FOR AVAILABLITY OF KEY PERSONNEL

I hereby certify that the resume submitted as part of the quote is true and correct, and _____(insert name of individual proposed) will accept the proposed position of _____(insert name of proposed position) if_____(insert name of Quoter) receives the award and will perform in the proposed position for a minimum of one (1) year beginning on the date the Notice to Proceed for the Task Order is issued.

_____	_____
Date	**(Position)**
_____	_____
Signature	**(Name of Proposed Key Personnel)**

(**NOTE**: Failure to submit Letters of Commitment for Key Personnel candidates will adversely affect the Government's evaluation of the quote and may make the quote ineligible for award).

C. Non-Key Personnel Staffing Plan – The Proposal shall describe its ability to staff, train, and retain a highly-skilled and qualified workforce over the life of the Task Order, including its ability to consistently meet or exceed the required degree of education and experience in range of disciplines described in Attachment 3 – Position Descriptions. Quoters need not identify proposed non-key personnel.

D. Start-Up Plan: The Quoter should provide a detailed Start-Up Plan that addresses the assumption of responsibilities from the incumbent contractor and ensures a seamless transition with no or limited impact on services, and an efficient transfer of on-going projects. The Quoter should identify potential start-up problems and methods to avoid or mitigate the impact of such problems on the start-up process.

E. Quality Assurance Approach: The Quoter should discuss how it will monitor its performance through a proposed Quality Assurance Plan (QAP). The QAP shall focus on the Quoter's understanding of the PWS through identification of appropriate metrics (including, but not limited to schedule performance, management performance, technical performance, task assignment, product quality, and cost control), realistic and appropriate monitoring methods identified for each metric, and appropriate frequency of monitoring for each metric. The QAP of the contractor selected for award will be incorporated into the Task Order Terms and Conditions.

CRITERION 3 – CORPORATE EXPERIENCE

The Quoter shall provide up to three (3) examples of relevant experience performing the task areas outlined in the PWS. Each example submitted shall be for financial statement audit with a

minimum overall contract value of $500,000, and a period of performance that is current or expired within the past three (3) years from the date of the instant RFQ closing. To the maximum extent practicable, Quoters should limit experience examples to their largest Federal clients, and/or utility programs, and should focus submissions on experience examples that clearly reflect the nature of this solicitation's requirements (e.g. specific PWS task areas, geographic distribution of the workforce, period of performance, etc.). Quoters should consider all RFQ Attachments in developing their relevant experience submissions.

Examples of relevant work experience shall only be provided for Prime Contractor. Please include the contact's name; contact email address; phone number; agency; contract or task order number; contract or task order value; and a brief description of the work performed for each reference.

(**NOTE**: Quoters are cautioned that in providing a submission for Criterion 3, the Quoter is solely responsible for describing the relevancy of its experience to the requirements in the subject solicitation, and demonstrating that the relevant experience described would benefit performance of the subject effort. Information submitted in response to this criterion should deal with the technical content of the Quoter's experience and reflect the various contractual and technical aspects of this solicitation.)

Criterion 4 – Past Performance

The Quoter shall provide up to three (3) examples of recent and relevant past performance utilizing the attached Past Performance Questionnaire (PPQ). Past Performance Questionnaires are to be completed by the referenced entity and returned directly to the Government no later than one (1) week prior to the date for receipt of quotes (September 1st, 2026)**.** Recent past performance is any contract completed within the previous five years from the solicitation closing date. Relevant past performance is defined as a reference that is similar in size (dollar value and duration), scope (substantially similar to the requirements of this PWS), and complexity to this requirement.

Past Performance Questionnaire. The Offeror shall provide the Past Performance Questionnaire contained in Attachment 9, Past Performance Cover Letter and Questionnaire, to the appropriate contract client reference for completion. The Offeror shall request that clients return the Past Performance Questionnaire directly to Southeastern Power Administration by electronic means to the email address identified below no later than one (1) week prior to the date for receipt of quotes to:

Juvonna.mattox@sepa.doe.gov
&
tabitha.rambert@sepa.doe.gov

Southeastern may contact some, or all, of the references provided by the Offeror and may solicit past performance information from any other available sources including the Contractor Performance Assessment Reporting System (CPARS).

Volume III – Price Quote (No Page Limit) (Criterion 4)

(NOTE: Volume III must be submitted in MS Excel file format.)

In preparing the price quote, the following guidelines are to be utilized:

1. The Quoter shall submit pricing for the subject solicitation on a Firmed Fixed Price basis in accordance with FAR 16.202.

2. The submission shall contain the total price to the government, including option years. The price for the base year and each option year shall be listed individually.

3. A Standard Form (SF) 1449 Solicitation/Contract/Order for Commercial Items shall be included. (SF 1449 form) The Quoter shall complete the following blocks on the SF-1449: Blocks 17a, 24 (an amount for base year and each option year), 30a, and 30c.