

Community Development Financial Institutions (CDFI) Fund
RFQ-CDF-23-SOPS Amendment 1

Amendment 1 – Solicitation Questions and Responses

1. What documentation does the government require to support the claims listed in a-d? Is a simple written statement confirming each acceptable? (Quote Package, Vol. 1 (RFQ p. 21))

Response: Yes, a written statement confirming each of the required items within Volume 1 is sufficient. Please note that, in order to confirm item c., we will need you to provide your company's UEI number. Additionally, note that this volume shall include the responses to clauses 52.209-2, 52.204-26, and 52.204-24.

2. Is there a limit to the age of relevant experience/past performance examples? (Quote Package, Vol. 3 (RFQ pp. 21-22))

Response: Experience should be within the past 10 years. Page 21 of the solicitation has been revised to reflect this information.

3. Will the government accept past performance examples where the prime was a subcontractor, or do all examples need to be prime past performance? (Quote Package, Vol. 3 (RFQ pp. 21-22))

Response: Subcontracting past performance is acceptable.

4. Does the government wish to see an example resume for each proposed individual? (Quote Package, Vol. 5 (RFQ p. 22))

Response: Yes, please provide resumes for the proposed personnel. Please note, when submitting information about personnel, please ensure you're aware of the PII notice on Page 20 of the solicitation.

5. Clause 52.212-2 does not appear to list the order of importance of evaluation factors. Are we to assume the order of Volumes is the order of importance? Will the government clarify how each factor is relatively weighted? (RFQ p. 27)

Response: Correct; the volumes are listed in order of importance within each library, then each library is listed in order of importance. Since this is being solicited under FAR Part 8.405, there is no requirement to weight the evaluation criteria.

6. Does the exclusion of price quote from page count apply to both Volume 7 and Volume 10? (RFQ p. 20)

Response: Correct; both Volume 7 and Volume 10 are excluded from the page count. Please refer to the revised Page 20 of the solicitation reflecting this clarification.

7. Will the government exempt resumes from the 40-page maximum, if they are required? (1.0 Background (RFQ p. 20))

Response: Yes, resumes are excluded from the page count. Please refer to the revised Page 20 of the solicitation reflecting this clarification.

8. How many processes, SOPs, and templates currently exist, and how many need to be created? (1.0 Background (Attachment 4, p. 1))

Response: There are around 25 SOPs, processes and templates that currently exist for the Operations team. We are estimating 10 or more to be developed, however this number may change.

9. Is the government able to categorize the levels of complexity within these documents (# steps, page count, or similar measure?) and provide an estimated count for each category? (1.0 Background (Attachment 4, p. 1))

Response: No. The documents can be anywhere from 3-40 pages long.

10. What specific internal and external mission-, compliance-, and risk-related requirements must these documents meet? (1.0 Background (Attachment 4, p. 1))

Response: We must stay in compliance with all DO audit requirements.

11. How large is the audience that consumes the documents? (1.0 Background (Attachment 4, p. 1))

Response: Around 100 staff members will consume the documents.

12. It appears the government is asking for mockups and a development plan for SharePoint sites, but not execution support. When and who would implement the recommended changes? (Section 6.6 SharePoint Sites Development)

Response: The Contractor must work with the CDFI Fund to develop, implement, and execute the recommended changes on our SharePoint sites once the mock ups have been reviewed and approved by CDFI Fund.

13. 'Sites' is written as plural. How many sites are expected? Are those sites independent or tied to Microsoft Teams or channels? (Section 6.6 SharePoint Sites Development)

Response: The Operations team currently has around 35 sites in SharePoint. This is subject to increase. They are all tied to our internal home page for our organization.

14. Are there any security requirements that restrict what can be seen by groups? (Section 6.6 SharePoint Sites Development)

Response: Yes, our IT team sets security requirements for each of our SharePoint sites.

15. Would the government elaborate on the 'clearance processes and guidelines' noted in the RFQ, and how these are different than the SOPs? (6.4. Review and Update or Create CDFI Fund Clearance Processes & Guidelines (RFQ p. 10))

Response: The clearance processes and guidelines will take more time to understand due to the different entities that are involved; SOP are more standard internal processes.

16. Does this include a review of any existing document management system (DMS) used to store, access, and control the existing SOPs, guidelines, templates, & clearance processes? If the DMS is not SharePoint, what is it? (6.2 As Is Assessment)

Response: Existing SOPs, guidelines, and templates are stored on SharePoint as well as our organizations network drives. The contractor will be given access to any existing documents related to this task order.

17. Does the government anticipate issuing multiple, simultaneous task orders? (General)

Response: Yes.

18. Would the government consider making this a small business set-aside? (General)

Response: In accordance with FAR Part 8.405-5, there is no requirement to set this aside for small businesses. Given the complexity of this requirement, a small business set-aside presents the concern that there won't be adequate competition.

19. Would the government confirm that travel will be reimbursed at actual costs in accordance with the Federal Travel Regulation (FTR). (RFQ-CDF-23-SOPS – 9.0 TRAVEL PROCEDURES)

Response: As stated on Page 2 of the solicitation under TRAVEL PROCEDURES, the method for travel reimbursement will be determined at the task order level. If the amount of travel needed can be defined prior to the start of the task order (e.g. one trip to DC for two individuals on XX dates), then the Government will request that the Contractor quote a firm-fixed-price for travel expenses. If travel is anticipated but cannot be defined prior to the start of the task order, then any necessary travel expenses will be reimbursed in accordance with the Federal Travel Regulation (FTR) and FAR Part 31.205-46.

20. Would the government clarify if the Key Personnel required at the BPA Level is a Project Manager of Program Manager?

The question is being asked as page 11 refers to a Project Manager and page 22 refers to a Program Manager.

Page 11: The Contractor shall designate one (1) Project Manager and any other key personnel required to successfully fulfill the required services.

Page 22: The offeror's BPA key personnel/staffing volume must include a designated Program Manager who sufficiently meets or exceeds the qualifications as outlined in Section 7.0 of the solicitation

(RFQ-CDF-23-SOPS – 8.0 KEY PERSONNEL AND PERSONNEL MINIMUM QUALIFICATIONS / Quote Package Format)

Response: The Key Personnel required at the BPA level is a Project Manager. Please refer to the revised Page 22 of the solicitation reflecting this correction.

21. Would the government clarify if the Cover Letter is a standalone document or if it should be included in Volume 1? (RFQ-CDF-23-SOPS Page 20)

Response: A cover letter is not necessarily required; however, many offerors choose to include a cover letter in their submission which provides a brief introduction to the company and outlines overarching company information, such as a point-of-contact, UEI number, etc. As stated on Page 20 of the solicitation, the cover letter is excluded from the overall page count limitation. Additionally, individual volumes may have cover pages, which are also excluded from the overall page count limitation.

22. Would the government confirm they are not requiring education documentation to be submitted as part of the proposal response? (RFQ-CDF-23-SOPS Page 22)

Response: As stated in the Volume 5 and Volume 9 instructions on Page 22, these volumes of the proposal must include adequate detail to support that the proposed personnel possess the required qualifications.

23. Would the government clarify if they are looking for specific artifacts to demonstrate that the company is not found on the debarred or suspended list, or quoted for debarment or prohibition list OR if a confirmation statement is sufficient? (RFQ-CDF-23-SOPS Page 21)

Response: Please refer to the response to Question 1.

24. Would the government confirm that if the response to Volume 1 - Administrative Matters, Statement d, confirms the offeror "is not" any of the attributes identified in FAR Clause 52.209-2, that the offer does not need to include in its response a complete FAR Clause 52.209-2? (RFQ-CDF-23-SOPS Page 21)

Response: Please refer to the response to Question 1.

25. Would the government confirm that each Volume within a Library is a separate stand alone PDF or Excel file? (RFQ-CDF-23-SOPS Page 21)

Response: As stated on Page 21 of the solicitation, "Offerors shall submit their quotation packages in two (2) distinctly separate libraries, with ten (10) distinctly separate volumes..." The documents do not need to be in individual PDF documents as long as the libraries and volumes are distinctly separate. However, please note that a single PDF with all libraries and volumes in one document may exceed our email server's file size limitation of 8MB and .zip files are prohibited (Page 20), so if necessary, offerors are permitted to send multiple emails numbered accordingly (e.g., Email 1 of 4, Email 2 of 4, etc.).

26. Would the government clarify if any Nondisclosure Agreements (NDA) need to be submitted with the Proposal response or if the NDAs are required following award? (Non-Disclosure Agreement)

Response: NDAs do not need submitted with the offeror's proposal. NDAs will be collected from the awardee after contract award.

27. Would the government clarify if they anticipate each labor category being full-time that is identified in Attachment 5? (Attachment 5 - Initial BPA Order Pricing Sheet)

Response: The labor categories included in Attachment 5 are simply labor categories that may be used at the task order level. The level-of-effort required for each labor category must be determined by the offeror based on the proposed method for fulfilling the task order requirements.

28. Would the government provide the estimated hours per labor category?

If not, will the government provide the anticipated workload by task in order to accurately provide a fixed price quote? (Attachment 5 - Initial BPA Order Pricing Sheet)

Response: As stated in the response to Question 27 above, the labor categories specified in Attachment 5 are simply the categories that may be utilized, but the level-of-effort required by each labor category must be determined by the offeror based on their proposed methods for fulfilling the task order requirements.

29. Offeror assumes these responses should be included in Volume 1. Please confirm. (Representations, page 19, 23, 24, and 25.)

Issue: There are 3 FAR representations located on the above referenced pages that require a response from the Offeror. They are FAR 52.299-2, FAR 52.204-26, and FAR 52.204-24.

Response: Please refer to the response to Question 1.

30. Would the Government please remove this volume from the 40 pages of page limited content and allow the 40 pages to be used for scorable content. (Volume 1 Administrative matters)

Issue: This volume's content is contractual and contact information which cannot be embellished in any way that influences the final evaluated score.

Response: The Government agrees to remove Volume 1 from the page count limitation. Page 20 of the solicitation has been updated accordingly and is attached.

31. Was this work previously performed by INTEGRAL CONSULTING SERVICES INCORPORATED (Task Order #: 20340621F00009, Contract #: 47QRAD19D3002) and has expired on September 30, 2021?

Response: This is correct. The work required under this BPA will be essentially the same as the work performed under the order referenced above, but on a broader scale.

32. The RFQ notes that "Within the CDFI Fund there are ten (10) programs and six (6) business units." Can CDFI provide a count of the number of processes/SOPs within each program and/or business unit that will be a part of this effort?

Response: We are not able to provide the specific numbers for each program/business unit at this time; this will vary between departments. For the Operations team, we currently have a minimum of 32 SOPs documents which is subject to increase.

33. The RFQ notes: "The CDFI Fund has made a number of changes to streamline and improve its processes." Can CDFI provide background on what type of streamlining and process improvement support has been provided to date and who has provided such support?

Response: All of the streamlining has been done internally which is why we are looking to procure support to verify and confirm our approach. Process improvement have been supported by a current IT contractor for some of the program office and business units however needs to be documented.

34. Is there an incumbent contractor for this effort or is this a new solicitation?

Response: Please refer to the response to Question 31.

35. Will CDFI consider extending the RFQ submission date?

Response: Yes, we are extending the submission date to 03/08/2023. Please see the revised solicitation Page 1 and Page 21.

36. Volume 3- Will the government accept any less than 3 past performance references for RFQ submission? (RFQ Pg. 21)

Response: No, offerors must provide a minimum of three past performance references.

37. What applications should be used in preparing and submitting the proposals?

Response: Please refer to Page 20 of the solicitation which specifies the acceptable and unacceptable proposal formats.

38. Will separate folders containing each of the 2 different sets of volumes be acceptable, especially for the purposes of the two distinctly libraries?

Response: Please refer to the response to Question 25.

39. What workload is expected in order to submit a quote for the Initial BPA Order required of volume 10, especially considering the requirements of Attachment 4 (Initial BPA Order PWS) that rely on the recommendations from the Contractor to create and/or update SOPs, guidelines and clearance processes, and templates based on the Contractor's review?

Response: The workload we are expecting from the contractor is to review our current SOPs, guidelines, and templates and be familiarized with our processes. After reviewing, if there are recommendations to add, the contractor should work with the applicable program to update the documents and make them available on our internal SharePoint site(s). We expect the contractor to develop and produce new SOPs, guidelines and templates that do not currently exist, due to the growth of CDFI.

40. What are the number of SOPs, processes and guidelines, and templates available to be reviewed as part of the Initial BPA Order?

Response: Please refer to the response to Question 32.

41. Are the creations and/or updates of the SOPs, processes and guidelines, and templates recommended by the Contractor and approved by CDFI Fund to be performed as a requirement of the Initial BPA Order and included in that price?

Response: Yes, that is correct.

42. Given the work effort will be performed under a firm-fixed price BPA, will the government please provide a listing of the anticipated maximum number of SOPs, templates, and guidelines to be reviewed and assessed for each program and business unit? (RFQ PWS/ Initial BPA Order PWS, Section 6.2/6.3/6.4/6.5)

Response: Please refer to the response to Question 32.

43. Will the government please confirm if internal control documentation will be included in the documents provided for review and assessment? (RFQ PWS/ Initial BPA Order PWS, Section 6.2/6.3/6.4/6.5)

Response: Yes, we are requesting SOPs be built for our internal control documents as well as meeting with the programs.

44. Will the government please clarify whether the contractor should plan to conduct walkthroughs of the SOPs, templates, guidelines, and clearance processes under review with the relevant stakeholders to assess the completeness and accuracy? (RFQ PWS/ Initial BPA Order PWS, Section 6.2/6.3/6.4/6.5)

Response: Yes, each program will have SOP processes that will need to be built and reviewed for accuracy for their program. The walkthroughs will help both parties to know what is expected.

45. Will the government provide any CDFI related requirements needed for updating/creating the templates? (RFQ PWS/ Initial BPA Order PWS, Section 6.5)

Response: Yes.

46. In order to better understand CDFI's current SharePoint setup and tailor the support, will the government please provide clarification / update whether CDFI's current SharePoint setup is on-premise or online? (RFQ PWS/ Initial BPA Order PWS, Section 6.6)

Response: SharePoint is an online system.

47. Are there plans to migrate the current SharePoint set-up? (RFQ PWS/ Initial BPA Order PWS, Section 6.6)

Response: Not at this time.

48. In order to accurately respond to the Contract Minimum Qualifications section, will the government please clarify what is meant by "policy and procedures that are assessed against existing policy and procedures" in the following statement? (BPA RFP, Section 7.0)

"Have five (5) years of experience in managing operational activities which constitutes policy and procedures that are assessed against existing policy and procedures, and/or guidance, either at a local, State, or Federal level"

Response: We want the incoming contractor to review our current policies and procedure and develop and recommend what we already have in place based on the program requirements.

49. Currently the performance work statement under the BPA and the performance work statement under the initial task order are nearly identical - will the government provide clarification how the vendor should differentiate the content in Library I/Volume 2 and Library II/Volume 8? (RFQ Quote Package Page 21)

Response: Please refer to the response to Question 44.

50. For the BPA and initial task order level pricing documents - will the government provide clarification whether the provided excel templates suffice as response under Library I/Volume 7 and Library II/Volume 10? (RFQ Quote Package Page 21)

Response: The Volume 7 – BPA Pricing instructions on Page 22 state, “At a minimum the offeror’s BPA pricing volume shall contain a completed Attachment 1...” and the Volume 10 – Task Order Cost/Pricing instructions on Page 23 state, “Additionally, at a minimum, the offeror’s task order cost/pricing volume must contain a completed Attachment 5...” Therefore, offerors are permitted to submit Attachments 1 and 5 as their minimum responses for Volumes 7 and 10. However, these volumes must also provide adequate information to support the pricing/cost proposed, so if additional clarification/information is necessary to support the proposed pricing/cost, the offeror should submit a written narrative for these volumes.

51. Currently the performance work statement under the BPA and the performance work statement under the initial task order are nearly identical - will the government provide clarification that all work effort will be completed in the base year as part of the initial task order or do they anticipate diminishing levels of effort during subsequent BPA option years? (RFQ page 3 Section 15)

Response: There will be several task orders under this BPA during the option years.