

Addenda to 52.212-2, Evaluation – Commercial Products & Commercial Services

1.0 Basis for Contract Award. This acquisition is a competitive, 100% small business set-aside, best value subjective tradeoff source selection conducted in accordance with (IAW) FAR 13.5 Simplified Procedures for Certain Commercial Items. A contract will be awarded to the Offeror whose:

- (1) Proposal conforms to the solicitation's requirements and is a Small Business;
- (2) Proposed technical subfactors receive a rating of "Acceptable" for Subfactors 1 thru 5;
- (3) Proposal receives a Performance Confidence assessment rating of "Substantial Confidence", "Satisfactory Confidence", or "Neutral Confidence";
- (4) Proposed Price is determined fair and reasonable and balanced;
- (5) Is determined to be responsible IAW FAR Subpart 9.1; and
- (6) Proposal is determined by the Contracting Officer (CO) to represent the best value to the Government.

1.1 Solicitation Requirements, Terms and Conditions: Offerors are required to meet all solicitation requirements, such as terms and conditions, representations and certifications, and technical requirements, in addition to those identified as factors or sub factors. Failure to comply with the terms and conditions of the solicitation may result in the Offeror being ineligible for award. Offerors must clearly identify any exception to the solicitation terms and conditions and must provide complete supporting rationale. The Government reserves the right to determine any such exceptions unacceptable.

1.2 This is a competitive best value subjective tradeoff source selection and, for those Offerors who are determined to be technically acceptable, a tradeoff may be made between past performance and price, with past performance being significantly more important than price, but price is a factor in the best value tradeoff. All evaluation factors other than price, when combined, are significantly more important than price. This may result in an award being made to a technically acceptable higher priced Offeror, where the decision is consistent with the evaluation factors and subfactors, and the Contracting Officer reasonably determines that the superior past performance of the higher priced Offeror outweighs the price difference. The Government may trade up from a Performance Confidence rating of "Neutral Confidence" or "Satisfactory Confidence" in Past Performance resulting in an award being made to a higher priced "Technically Acceptable" Offeror with a Performance Confidence of "Substantial Confidence". The Government will not award a contract to an Offeror that is rated as having "Limited Confidence" or "No Confidence." Only proposals rated "Technically Acceptable" are eligible to receive an award.

1.3 The Government intends to award one (1) contract without discussions with respective Offerors; therefore, the initial offer should contain the Offeror's best terms from a price and technical standpoint. Proposals will be evaluated based solely on the factors and subfactors contained in this solicitation. After initial evaluation of each Offeror's Technical, Past Performance, and Price, award may be made to the Offeror that represents the best value to the Government without entering into discussions. If award will be made without conducting

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discussions, Offerors may be asked to clarify certain aspects of their proposal (e.g. the relevance of an Offeror's past performance information and adverse past performance information to which the Offeror has not previously had an opportunity to respond) or to resolve minor or clerical errors. The CO reserves the right to award a contract without the opportunity for proposal revisions.

2.0 Evaluation Process. Selecting an Offeror for award will be based on evaluation of proposals against three primary factors: (1) Technical, (2) Past Performance, and (3) Price. Factors and Subfactors are detailed below. A proposal that does not meet the requirements of the solicitation may not be eligible for award.

2.1 A team of Government personnel will evaluate proposals. The content of written proposals, as well as information derived from discussions, if discussions are held, will be evaluated to determine the Technical acceptability or unacceptability of an Offeror's ability to supply the services that meet the user's needs. Each proposal will be evaluated against the solicitation and its stated evaluation factors and subfactors for award. Proposals will not be compared or measured against each other during the initial evaluation. The Government's Technical evaluation will focus on compliance with solicitation requirements and other factors identified in the solicitation.

Factor 1. Technical

- i. Subfactor 1: Providing training curriculum, Leaders Training videos and Total Force training videos (PWS paragraphs 2.2 thru 2.2.2.4 and 2.4 thru 2.4.1.3)
- ii. Subfactor 2: Providing Leaders Training support materials, Total Force Talking Point Papers, and Total Force Informational & Infographic Handouts (PWS paragraphs 2.3, 2.4.2, and 2.4.3 thru 2.4.3.3)
- iii. Subfactor 3: Providing virtual Train-the-Trainer sessions, Continuing Education Opportunities (in-person and virtually), and Virtual Special Presentations (PWS paragraphs 2.7, 2.8, and 2.9)
- iv. Subfactor 4: Program Management Approach (PWS paragraphs 2.1 thru 2.1.3, 4.0, 6.2.2, 6.3 thru 6.4.2)
- v. Subfactor 5: Performance Management/Quality Contractor (QC) Approach (PWS paragraphs 3.0 and 6.5 thru 6.5.2).

Factor 2. Past Performance

Factor 3. Price

2.2 Relative Order of Importance of Factors and Subfactors. The relative importance of each factor and subfactor is as follows: Technical is more important than Past Performance or Price.

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Past Performance is more important than Price, however, Price is a factor in the best value tradeoff.

Within the Technical Factor, Subfactors 1 through 5 will be evaluated using Acceptable/Unacceptable (A/U) ratings, are equal in importance, and will not be included in the tradeoff process.

3.0 Evaluation of Offeror's Proposal.

3.1 Factor 1 – Evaluation of Technical

3.1.1 The Government will evaluate all proposals for technical acceptability. The Technical factor and subfactors listed in 2.1 above will be evaluated using the rating and descriptions listed below:

Technical Ratings	
Rating	Description
Acceptable	The proposal meets the requirements of the solicitation.
Unacceptable	The proposal does not meet the requirements of the solicitation.

3.1.2 The Technical factor has five (5) subfactors and each subfactor will receive a rating that will then support an overall rating for the Technical factor. For the technical proposal to be rated as “Acceptable”, all technical subfactors must be rated acceptable. If any technical subfactor is rated “Unacceptable” the overall proposal will be rated as “Unacceptable”. The technical proposal will be evaluated for the following technical subfactors:

Subfactor 1 – Providing training curriculum, Leaders Training videos and Total Force training videos (PWS paragraphs 2.2 thru 2.2.2.4 and 2.4 thru 2.4.1.3)

Standard: The Offeror shall propose an approach that demonstrates an understanding of the process and procedures required to develop training curriculum and to design and produce Leaders Training videos (PWS paragraphs 2.2 thru 2.2.2.4) and Total Force Training videos (PWS paragraphs 2.4 thru 2.4.1.3)

The standard has been met when: The Offeror adequately demonstrates an understanding of the process and procedures required to develop training curriculum and to design and produce Leaders Training videos and Total Force Training videos IAW the PWS.

Subfactor 2 – Providing Leaders Training support materials, Total Force Talking Point Papers, and Total Force Informational & Infographic Handouts (PWS paragraphs 2.3, 2.4.2, and 2.4.3 thru 2.4.3.3)

Standard: The Offeror shall propose an approach that demonstrates an understanding of the process and procedures required to provide Leaders Training Support Materials (PWS paragraph

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2.3), Total Force Talking Point Papers (PWS paragraph 2.4.2), and Total Force Informational Handouts (PWS paragraphs 2.4.3 thru 2.4.3.3)

The standard has been met when: The Offeror adequately demonstrates an understanding of the process and procedures required to provide Leaders Training support materials, Total Force Talking Point Papers, and Total Force Informational Handouts IAW the PWS.

Subfactor 3 – Providing virtual Train-the-Trainer sessions, Continuing Education Opportunities (in-person and virtually), and Virtual Special Presentations (PWS paragraphs 2.7, 2.8, and 2.9)

Standard: The Offeror shall propose an approach that demonstrates an understanding of the process and procedures required to provide virtual Train-the-Trainer Sessions (PWS paragraph 2.7), Continuing Education Opportunities (in-person and virtually) (PWS paragraph 2.8), and Virtual Special Presentations (PWS paragraph 2.9)

The standard has been met when: The Offeror adequately demonstrates an understanding of the process and procedures required to provide virtual Train-the-Trainer Sessions, Continuing Education Opportunities (in-person and virtually), and Virtual Special Presentations IAW the PWS.

Subfactor 4 – Program Management Approach

Standard: The Offeror shall propose an approach that demonstrates management capability and methodology for accomplishing deliverables and work requirements identified in the PWS with the appropriate skills, personnel, equipment, tools, materials, and supervision, in appropriate quantities, and at the appropriate time. (PWS paragraphs 2.1 thru 2.1.3, 4.0, 6.2.2, 6.3 thru 6.4.2.)

The standard has been met when: The Offeror adequately demonstrates management capability and methodology for accomplishing deliverables and work requirements identified in the PWS with the appropriate skills, personnel, equipment, tools, materials, and supervision, in appropriate quantities, and at the appropriate time IAW the PWS.

Subfactor 5 – Performance Management/Quality Control (QC) Approach

Standard: The Offeror shall propose an approach that demonstrates the capability to meet PWS requirements without introducing unacceptable risk to the program or mission. The proposed approach shall provide an internal QC strategy that defines clear processes to ensure that the requirements of the contract and performance thresholds are met and includes methods to effectively identify, prevent and ensure non-recurrence of defective services with special emphasis placed on the services listed in the PWS. (PWS paragraph 3.0 and 6.5 thru 6.5.2)

The standard has been met when: The Offeror adequately demonstrates the capability to meet PWS requirements without introducing unacceptable risk to the program or mission and adequately defines clear processes to ensure that the requirements of the contract and performance thresholds are met and includes methods to effectively identify, prevent and ensure

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non-recurrence of defective services with special emphasis placed on the services listed in the PWS.

3.2 Factor 2 – Evaluation of Past Performance

3.2.1 Evaluation Process. Past Performance will be evaluated as an indicator of an Offeror's ability to perform the contract successfully, and as a measure of the Government's confidence in the Offeror's ability to perform successfully. This will be accomplished through a confidence assessment rating based on the Government assessment of the Offeror's (to include any proposed subcontractor's teaming partners, and/or joint venture partners) past performance history that is relevant to the requirements of this solicitation.

3.2.2 The Past Performance evaluation considers each Offeror's demonstrated recent and relevant record of performance of services that are similar to the solicitation requirements and the quality of the Offeror's performance record. In conducting the Past Performance evaluation, the Government reserves the right to use both the information provided in the Offeror's Past Performance proposal volume, and information obtained from other sources available to the Government to include, but not limited to: the Contract Performance Assessment Rating System (CPARS), Federal Awardee Performance and Integrity Information System (FAPIIS), SAM.gov, other government and commercial sources, and references other than those identified by the Offeror.

3.2.3 Recency is defined as at least 6 months of the effort's period of performance must have been performed during the past five (5) years from the date of issuance of this solicitation. Performance efforts that do not meet these criteria will not be evaluated for relevancy or performance quality.

3.2.4 Relevant performance includes performance of efforts involving requirements that are similar in scope, magnitude, and complexity to the effort described in the Solicitation. For each Past Performance effort submitted (no more than four (4) contracts), relevancy will be determined by the similarity to the scope, magnitude of effort and complexity of the Offerors' performance. An aggregate relevancy rating will be determined based on the Relevancy Assessment Matrix (See Section J, Attachment 9). Relevancy will be assigned a rating as outlined in table below. Performance efforts that are determined to be Not Relevant will not be further evaluated. The Government will use the past performance relevancy ratings and descriptions as outlined below.

Relevancy Ratings	
Adjectival Rating	Description
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires.

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Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

3.2.5 Performance Quality Assessment. The Government will consider the performance quality (how well the contractor performed on the contracts) of recent, relevant efforts. The quality assessment may include adverse information. Adverse is defined as past performance that supports an unsatisfactory or marginal rating on any evaluation element or any unfavorable comment. For adverse information identified, the evaluation will consider the number and severity of the problem(s), mitigating circumstances, and the effectiveness of corrective actions that resulted in sustained improvements. Process changes will only be considered when objectively measurable improvements in performance have been demonstrated. Offerors may have the opportunity to address adverse past performance information obtained from references i.e., PPQs on which the Offerors have not had a previous opportunity to comment, if that information makes a difference in the Government's decision to include the Offeror in or exclude the Offeror from the competitive range. This allows the Offeror a fair opportunity to rebut any negative information that may not be due solely to the poor performance of the contractor, or that may not have been adequately resolved since the date of the information provided. The Government will use the performance quality ratings and descriptions as outlined below.

Performance Quality Assessment	
Rating	Description
Acceptable	Offeror's available past performance evaluations (PPQs and/or CPARs) were rated Satisfactory or above in all areas.
Unacceptable	Offeror's available past performance evaluations (PPQs and/or CPARs) were not rated Satisfactory or above in all areas.

3.2.6 Past Performance Evaluation Confidence Ratings: The Government will evaluate past performance and assign an overall confidence rating, as outlined below, based on an Offeror's recent and relevant past performance. Any proposed subcontractors, teaming partners, and/or joint venture partners, in the aggregate, must also demonstrate the past performance, experience, and qualifications necessary to perform the contract. The relevancy rating will be based on the scope, magnitude, and complexity of up to four (4) recent contracts. As a result of the relevancy assessments and the quality of reported performance of the recent contracts evaluated, Offerors will receive a past performance confidence rating as outlined in table below:

Past Performance Confidence Ratings	
Rating	Description
Substantial Confidence	Based on the Offeror's recent/relevant performance record, the Government has a high expectation that the Offeror will successfully perform the required effort.

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Satisfactory Confidence	Based on the Offeror's recent/relevant performance record, the Government has a reasonable expectation that the Offeror will successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available, or the Offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. The Offeror may not be evaluated favorably or unfavorably on the factor of past performance.
Limited Confidence	Based on the Offeror's recent/relevant performance record, the Government has a low expectation that the Offeror will successfully perform the required effort.
No Confidence	Based on the Offeror's recent/relevant performance record, the Government has no expectation that the Offeror will be able to successfully perform the required effort.

Note: In the case of an offeror without a record of relevant past performance or for whom information on past performance is not available or so sparse that no meaningful past performance rating can be reasonably assigned, the offeror may not be evaluated favorably or unfavorably on past performance (see FAR 15.305(a)(2)(iv)). Therefore, the offeror shall be determined to have unknown past performance and will be assigned a performance confidence rating of "Neutral". A strong record of relevant past performance may be considered more advantageous to the Government than a "Neutral Confidence" rating.

3.3 Factor 3 – Evaluation of Price

3.3.1 Price evaluation will be conducted with the expectation of adequate price competition per FAR 15.403-1(c)(1)(i); therefore, certified cost or pricing data is not required. However, if at any time during this competition the CO determines that adequate price competition no longer exists or that price reasonableness or balance cannot be determined, Offeror(s) may be required to submit data other than certified cost or pricing data, as appropriate, for the CO to determine price reasonableness and balance. The Government will evaluate the price information submitted by an Offeror as required per 52.212-1 of the RFP, to determine if the proposed prices are fair, reasonable, and balanced as determined by one or more of the price analysis techniques described in FAR 13.106-3(a)(2) based upon an Offeror's proposed approach.

3.3.2 Total Evaluated Price (TEP). The TEP for each Offeror evaluated will be determined by first multiplying the quantities in Attachment 2 – Price Proposal Spreadsheet by the fully-burdened unit prices (rounded to the nearest whole dollar amount) inserted by the Offeror for each FFP CLIN. The extended total amount for each FFP CLIN should exactly equal the quantity multiplied by the unit price. The TEP will not include the Not-to-Exceed cost reimbursable CLINs. The sum of the extended total amounts for all FFP CLINs for the Base Period and all four (4) option periods will equal the TEP.

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3.4 FAR 52.217-8, Option to Extend Services, will be incorporated into the resultant contract. Upon exercise, the clause will extend the terms and conditions of the contract period being extended at the rates specified in the contract for a period not to exceed 6 months. Per FAR 17.207(f), all pricing period prices for the FFP CLINs will be evaluated during the initial contract award process and determined fair and reasonable. Therefore, in the event the Government requires continued performance beyond the awarded contract performance period, the Government's evaluation of prices proposed for all pricing periods will be considered fair and reasonable as applied to an extension of services (IAW FAR 52.217-8). Should an extension of services be required, rates will be adjusted only as a result of revisions to applicable prevailing Department of Labor wage rates. Costs associated with the Cost Reimbursable CLINs will be evaluated and negotiated after contract award as needed.

3.5 Reasonableness: For the offerors being evaluated, prices and data other than certified cost or pricing data submitted in the Volume II Price Proposal, as required by Addendum to FAR 52.212-1, will be evaluated for price reasonableness, pursuant to FAR 12.209 based upon each offeror's proposed approach. For additional information, see FAR 31.201-3. If the CO determines that adequate price competition no longer exists, the CO may request and evaluate additional data other than certified cost or pricing data, as appropriate, to make a determination of price reasonableness.

3.6 Unbalanced Pricing: The Government may also determine a proposal is unacceptable should the proposed prices be materially unbalanced. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line item or sub-line item appears to be significantly overstated or understated as indicated by the application of price analysis techniques. An offer may be rejected if the CO determines that the lack of balance poses an unacceptable risk to the Government.

(b) Options. The Government will evaluate offers for award purposes by adding the total price for all options to the total price for the basic requirement. The Government may determine that an offer is unacceptable if the option prices are significantly unbalanced. Evaluation of options shall not obligate the Government to exercise the option(s).

(c) A written notice of award or acceptance of an offer, mailed or otherwise furnished to the successful offeror within the time for acceptance specified in the offer, shall result in a binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer (or part of an offer), whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award.

(End of provision)

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