OASIS+ EVALUATION STRATEGY - DRAFT

Evaluation Overview:
To receive a Domain award, the offer must meet or exceed a specified qualification threshold. The Offeror has the discretion to use any combination of qualifications detailed in the qualification matrix to achieve the threshold. The qualifications matrix includes both project experience and other relevant qualifications (e.g., corporate level qualifications, applicable certifications). The relative weighting of criteria are designed to ensure all awardees are capable of providing high quality, best-in-class services to support the range of requirements anticipated, based on comprehensive customer feedback about the criteria's benefit to the Government.

To the maximum extent possible, qualifying criteria will be standardized across Domains to minimize the burden to industry. Domain-specific factors focus on mission critical requirements for that Domain's scope.

Project Verification:
GSA intends to provide Offerors with maximum flexibility in verifying the claimed criteria, with multiple methods permitted to demonstrate a qualification is met. Allowable methods for verification would include:

- The most recent **FPDS-NG** contract action report - may be used to verify dollar value, Product Service Code (PSC), North American Industry Classification System (NAICS), period of performance, place of performance, etc.

- Official contract documentation, such as:
    - Awarded contract documents, including: Statements of Work (SOWs), Performance Work Statements (PWSs), Statements of Objectives (SOOs), subcontracting plans, staffing plans, Contract Data Requirements Lists (CDRLs), etc.
    - Approved/paid invoices
    - Subcontracting Agreements, provided they reference the specific contract

- Customer verification that the project meets the claimed criteria: from a Warranted Contracting Officer with cognizance over the submitted project. For a commercial project, customer verification must come from a Corporate Officer of the customer with cognizance over the submitted project. If access to the cognizant Contracting Officer is unattainable, the Government will accept verification from the Contracting Officer's Representative (COR) directly associated with the project provided the COR's point-of-contact information (POC) is provided.

Ultimately, the Offeror is responsible for clearly demonstrating that the claimed criteria are met. GSA will remove from consideration any proposal element where the Offeror does not clearly demonstrate that the claimed criteria is met, based on being non-responsive (non-compliant) to the solicitation requirements.

Criteria in the Qualifications Matrix fall into the following categories:

(1) Qualifying Project Experience: the Offeror may propose using a maximum of 5 Qualifying Projects (QPs). The Offeror is limited to only 5 QPs to achieve QP-based criteria. A number of criteria in the qualifications matrix are derived from these QPs. QPs must:
    (a) Be: (1) a single contract - including prime contracts, subcontracts, and commercial contracts; (2) a single task order awarded under an Indefinite delivery, indefinite quantity (IDIQ) or Blanket Purchase Agreement (BPA), including single or multiple award; or

(3) a task order under a Federal Supply Schedule contract (FAR 8.405-2) or BPA (FAR 8.405-3).

(b) Meet or exceed a **minimum <u>annual</u> value** of $250K ($150K if performed by a Protege in an SBA-approved Mentor-Protege JV)

(c) Have some portion of direct labor performed **within the past 5 years** from the date the solicitation closes

(d) Have **satisfactory or above past performance** (on 5 point scale, average of scores ≥ 3.0) based on the latest Contractor Performance Assessment Report (CPAR) if available, or a Past Performance Questionnaire if no CPAR is available.

Relevance: With respect to Relevance of QPs (reflected in items 1 and 6 in the Domain Qualifications Matrix), that criterion is based on Relevance to the specific Domain's scope as detailed in Section C.
- Relevant work does not need to be the primary purpose of the project, but the offer must clearly demonstrate (i.e., via a distinct CLIN) that the relevant portion of work meets minimum criteria for QPs (e.g., >$250K annual value). For example:
  - A $4M (annual value) integrated consulting project with $250K of engineering support. The offer provides contract documents validating that the engineering scope meets the qualifying criteria, such as: a distinct $250K engineering Contract Line Item (CLIN) or deliverable, approved invoices with engineering Labor Categories (LCATs) totaling $250K, a staffing plan incorporated into the contract with $250K of engineering LCATs.

- Relevant criteria validation will be automated as much as possible - such as through FPDS-NG data - but allow for other verification methods detailed above (e.g., contract documentation, customer verification) if system data doesn't demonstrate relevance.
  - For example, a project-specific PSC of R425, Support - Professional: Engineering/Technical or NAICS of 541330 - Engineering is considered relevant to the Technical & Engineering Domain without any further documentation.

(2) <mark>**Federal Experience:**</mark> these qualifications do not need to come from the QPs, and can be obtained through other projects if applicable. These qualifications will generally apply across OASIS+ Domains.

(3) <mark>**Government-approved systems and rates:**</mark> these qualifications are based on systems and rates approved by a cognizant Federal Agency. These qualifications will generally apply across OASIS+ Domains.

(4) <mark>**Other certifications:**</mark> these qualifications are based on certifications issued by third party (i.e., non-Governmental) organizations.These qualifications will generally apply across OASIS+ Domains.

An example of a potential Qualifications Matrix for the Technical & Engineering Domain is detailed below. The "Max #" column indicates the maximum number of instances where the Offeror may claim evaluation credit for that specific criterion. For example, if an Offeror has 3 QPs that demonstrate the use of emerging technology, they can only claim credit for 1 of them. Qualifications with higher maximum allowable instances reflect those expected to provide greater benefit to the Government for the services anticipated in that Domain.

One QP can meet multiple criteria - for example (per the following matrix): a relevant QP (4 credits) with an annual value of $6M (2 credits) spanning 12 different LCATs (1 credit) with Top Secret clearances (1 credit) and involving surge support (1 credit) for a total of 9 credits associated with that QP.

The below matrix is only an example of potential qualifying criteria. GSA is currently completing comprehensive customer engagement, including surveys and focus groups, for each Domain to ensure the qualifications are representative of customer needs in that mission space.

Small/Socioeconomic Considerations:
Note that the below example matrix is developed for small business offerors responding to the Total Small Business Set Aside solicitation. Qualification standards for each IDIQ will be designed to achieve targeted socioeconomic representation. To the maximum extent possible, qualifying thresholds will be standardized across socioeconomic IDIQs to facilitate streamlined submission and evaluation. However, qualifying criteria for underrepresented socioeconomic IDIQs (e.g. HUBzone) may be adjusted to achieve adequate representation.

Unrestricted Considerations:
Alternatively, Unrestricted solicitations may require a higher qualifying threshold and additional qualifying criteria, such as: past performance exceeding subcontracting goals, greenhouse gas (GHG) emissions disclosures, experience performing IAW applicable labor laws (e.g., Service Contract Labor Standards, Collective Bargaining Agreements), experience with and/or plan to support other priorities (e.g., AbilityOne and minority-owned SBs).

Example Qualifications Matrix: SB Set Aside, Technical & Engineering Domain

#	Capability	Qualification	Max #
1	QP - Relevance	Relevant QP: Each Relevant QP receives 4 evaluation credits; each non-Relevant QP receives 0 credits for this item, but can receive credit for items 2, 3, 4, and 5.	20
2	QP - Scale	Offeror receives one credit for each QP that demonstrates any one of the following: __Annual value over $1M or 5 FTEs __Annual value over $5M or 25 FTEs (this credit is in addition to the credit for $1M / 5 FTEs) Note that credit is provided for total annual project value and/or FTEs, not just the portion Relevant to this Domain.	6
3	QP - Integrated	Offeror receives one credit for each QP that demonstrates any one of the following: __Performance spanned > 10 different Labor Categories or performance spanned 3 or more distinct functional areas. Generally, functional areas are those services-related subcategories defined by the Category Management Leadership Council, such as tech. & engineering, R&D, financial services, etc. __Managing 5 or more subcontractors/teaming partners	4
4	QP - Management & Staffing	Offeror receives credit for each QP that demonstrates any one of the following: __Surge Capability: providing surge support (+10% level of effort increase) with < 30 days lead time. To qualify, the vendor must demonstrate that the surge requirements were actually requested by the Government (unexercised options wouldn't qualify) __Retention: QP where (A) there was no turnover of key personnel (KP), provided 3 or more KP are designated in the contract OR (B) the turnover rate was less than 10% for all direct labor supporting the contract per year of contract performance. __Providing services that involve 5 or more personnel with individual security clearances (Secret, Top Secret, TS-SCI)	4
5	QP - Innovation	Offeror receives credit for a QP demonstrating any of the following uses of emerging technology: __Model Based Systems Engineering / Digital Engineering (ref.) __Robotic Process Automation __Distributed Ledger Technology __Immersive Technology (virtual/augmented reality)	1
6	QP - Relevant Past Performance	Offeror receives 1 credit for each Relevant QP with an average Past Performance rating above acceptable (e.g., >3.0 on a 5 point scale). Offeror does not receive credit for a QP with satisfactory ratings, neutral (i.e., lack of past performance information), or non-relevant QPs (regardless of the PP score), but they can still use those QPs to claim other QP-based credit IAW criteria 2 through 5.	5
7	Federal Experience: Competition	Offeror receives credit for competitive task orders in MA-IDIQ environment (1 for each award). At least 2 task order proposals were received to be considered competitive.	4
8	Federal Experience: Multiple Agencies	Offeror receives credit for having any of the following qualifications: __Providing services in support of 3 or more distinct Federal Agencies (reference)	1
9	Government-Approved Systems	Offeror receives one credit for having the following Government-Approved system: __Accounting System	2
10	Government-Approved	Offeror receives credit for having one of any of the following Government-Approved systems: __Approved Rates (e.g., Forward Pricing/Billing) __Purchasing System	1

	Systems & Rates		
11	Government-Approved Systems	Offeror receives credit for having one of any of the following Facility Clearance Levels: __Top Secret __Secret FCL	1
12	Other Certifications	Offeror receives credit for having one of any of the following certifications: __Capability Maturity Model Integration (CMMI) - Level 3 __ISO 27001:2013 (Information Security) __ISO 9001:2015 (Quality Management) OR __ISO 22301 Business Continuity	1
		TOTAL CREDITS AVAILABLE	50
		DRAFT SB Qualification Threshold	**36**

Industry Feedback: Specific areas of the qualifications matrix where GSA is seeking industry feedback are:

- **Surge Capability:** Agency customers have expressed the importance of having contractors with the capability to provide surge support. This relates to the ability to fulfill additional urgent requirements not identified at the time of award (in terms of specific schedule and/or quantities) with minimal advance notice through reachback support. GSA is seeking feedback from industry on objective, verifiable, and non-burdensome methods for vendors to demonstrate this capability. To provide feedback on this issue, please click here.

- **Retention:** Agency customers have overwhelmingly indicated that high personnel turnover negatively impacts successful performance and achievement of mission objectives. High turnover, particularly for key personnel, causes performance delays and places a significant burden on Government resources needed to onboard new personnel (e.g., through security clearances, in IT systems, badging offices, etc.). Because an ability to retain personnel throughout performance is a priority qualification for customers, GSA is seeking feedback from industry on objective, verifiable, and non-burdensome methods for vendors to demonstrate this capability. To provide feedback on this issue, please click here.

- **Emerging Technology:** Agency customers have expressed the importance of ensuring cutting edge services providers are available on the contract to ensure that the IDIQ is on the forefront of innovation. The definition of what constitutes "emerging technology" would be tailored to each Domain and detailed in the solicitation, although many of the emerging technologies considered will cross Domains. GSA is seeking feedback from industry on specific emerging technologies employed for each of the Phase 1 Domains, as well as objective, verifiable, and non-burdensome methods for vendors to demonstrate this capability. To provide feedback on this issue, please click here.