SECTION M - EVALUATION FACTORS FOR AWARD - ADMENDMENT # 0004

52.252-1 SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)
This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of the solicitation may be accessed electronically at the following address:

http://farsite.hill.af.mil/vffar1.htm

52.217-5	Evaluation of Options	JUL 1990

CLAUSES INCORPORATED BY FULL TEXT

52.222-46	Evaluation of Compensation for Professional Employees	FEB 1993

(a) Recompetition of service contracts may in some cases result in lowering the compensation (salaries and fringe benefits) paid or furnished professional employees. This lowering can be detrimental in obtaining the quality of professional services needed for adequate contract performance. It is therefore in the Government's best interest that professional employees, as defined in 29 CFR 541, be properly and fairly compensated. As part of their proposals, offerors will submit a total compensation plan setting forth salaries and fringe benefits proposed for the professional employees who will work under the contract. The Government will evaluate the plan to assure that it reflects a sound management approach and understanding of the contract requirements. This evaluation will include an assessment of the offeror's ability to provide uninterrupted high-quality work. The professional compensation proposed will be considered in terms of its impact upon recruiting and retention, its realism, and its consistency with a total plan for compensation. Supporting information will include data, such as recognized national and regional compensation surveys and studies of professional, public and private organizations, used in establishing the total compensation structure.

(b) The compensation levels proposed should reflect a clear understanding of work to be performed and should indicate the capability of the proposed compensation structure to obtain and keep suitably qualified personnel to meet mission objectives. The salary rates or ranges must take into account differences in skills, the complexity of various disciplines, and professional job difficulty. Additionally, proposals envisioning compensation levels lower than those of predecessor contractors for the same work will be evaluated on the basis of maintaining program continuity, uninterrupted high-quality work, and availability of required competent professional service employees. Offerors are cautioned that lowered compensation for essentially the same professional work may indicate lack of sound management judgment and lack of understanding of the requirement.

(c) The Government is concerned with the quality and stability of the work force to be employed on this contract. Professional compensation that is unrealistically low or not in reasonable relationship to the various job categories, since it may impair the Contractor's ability to attract and retain competent professional service employees, may be viewed as evidence of failure to comprehend the complexity of the contract requirements.

(d) Failure to comply with these provisions may constitute sufficient cause to justify rejection of a proposal.

M.1 GENERAL

a. Offeror's proposal, inclusive of teaming arrangements, that do not affirm a currently operating employee assistance program call center, will be rejected without further evaluation, deliberation or discussion. All offerors who submit a fully responsive proposal will be required to host a government site visit of one of the offeror's currently operating EAP call centers within the CONUS, selected by the Government from the offeror's list in Section L.

b. Award of the contract resulting from this solicitation will be made to the offeror whose proposal, conforming to the solicitation, represents the best value to the Government, cost/price and other factors considered. Other factors shall include all those evaluation factors and subfactors set forth in Section M.2. Accordingly, award may be made to other than the lowest priced offeror.

c. The Government intends to make a single award under this solicitation.

d. The offeror's proposal will be in the form prescribed by this solicitation and shall contain a response to each of the areas identified in Section L which affects the evaluation factors for award. All proposals will be evaluated in accordance with Section M.

e. Proposals will be evaluated to determine compliance with all requirements of the solicitation, including attachments and exhibits. The evaluation criteria will be applied in an identical manner. Each response will be evaluated strictly in accordance with its contents and the Government will not assume that the performance will include areas not specified in the offeror's proposal.

f. The Government intends to evaluate proposals and award without discussions. Accordingly, each initial offer should contain the offeror's best terms from a mission capabilities and cost/price standpoint. If the Government determines that it is advantageous to conduct discussions, it may establish a competitive range composed of the most highly rated proposals in accordance with the Federal Acquisition Regulation (FAR) 15.306. If the contracting officer determines that the number of highly rated proposals that otherwise would be included in the competitive range exceeds the number at which an efficient competition may be conducted, the contracting officer reserves the right to further limit the competitive range to the number of proposals that will permit such efficient competition.

g. The proposal must demonstrate to the Government's satisfaction that the offeror will provide an approach that satisfies each Factor and Subfactor. Proposal information provided for one Factor or Subfactor may be used to assess other Factor and/or Subfactors if the Government deems it appropriate. Strengths and weaknesses of the offeror's proposal, as well as performance risks, will be assessed in determining which proposal(s) is most advantageous to the Government. All minimum requirements must be met in order to receive at least a satisfactory rating. To receive consideration for award, overall evaluations of not less than "Satisfactory" must be achieved at the factor level.

h. With regard to any understatement of costs, the Government reserves the right to evaluate the cost proposals on the inclusion of all necessary and verifiable items of cost. Any proposal which is materially unbalanced as to costs/prices may be rejected as non-responsive. An unbalanced proposal is one, which is based on costs/prices significantly less than cost for some work, and costs/prices which are significantly overstated for other work.

M.2 EVALUATION CRITERIA

52.212-2 EVALUATION--COMMERCIAL ITEMS (JAN 1999)

a. This is a best value award, and the evaluation criteria for this award are specified below. The Government will use the offeror's proposal response as a representation of how the offeror will support the Government's requirements. The Government will compare the offeror's proposed plans and other areas of the offeror's proposal to evaluate the offeror's overall likelihood to successfully execute this requirement.

b. The following Evaluation Criteria, listed in descending order of importance, will be used for awarding the Military OneSource contract:

Factor 1: Mission Execution Capabilities
Factor 2: Mission Support Capabilities
Factor 3: Past and Current Performance
Factor 4: Subcontracting Plan

M.3 RELATIVE IMPORTANCE OF EVALUATION CRITERIA

a. Factor 1 is significantly more important than Factor 2.

b. All non-cost/price factors, when combined, are more important than cost.

c. The degree of importance allocated to Cost/Price will increase with the degree of equality of the proposals in relation to the other non-price factors.

M.4 EXPLANATION OF EVALUATION CRITERIA

The proposal must demonstrate, to the Government's satisfaction, that the offeror will provide a program that will ensure the successful accomplishment of the Performance Work Statement (PWS), overall program objectives, and the demonstrated ability to meet the solicitation requirements. Proposals will also be evaluated for unique and innovative methods, processes, and/or solutions that are beneficial to the Government.

The proposal must demonstrate the offeror's understanding, experience, and capability to execute and manage all aspects of call center operations and website requirements as a commercial EAP provider, as well as their capability to achieve all PWS objectives and requirements, the unique military aspects of this solicitation, and serve the client population of approximately 6 million service members and their families.

The following factors and subfactors will be used to evaluate the offeror's proposals:

Factor 1. Mission Execution Capabilities

Within Factor 1, Subfactors 1 and 3 are equal to each other, and more important than Subfactor 2.

Within Subfactor 1, emphasis will be given to sections a, b, and c.

Subfactor 1: Call Center /Website Operations (Task 1 PWS)

a. Call center
b. Website
c. Case Management
d. Reporting
e. Disaster recovery
f. General education/materials

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Subfactor 2: Non-Medical Counseling (Task 2 PWS)

a. situational/problem solving counseling
b. financial counseling
c. education/career/employment
d. health and wellness

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Subfactor 3: Site Visit

a. work environment of consultants
b. consultant access to resources
c. support and technical infrastructure

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Factor 2: Mission Support

Within Factor 2, Subfactor 1 is more important than Subfactor 2.

Subfactor 1: Military OneSource Mandated Program Support Centers (Task 3 PWS)

a. Wounded Warrior
b. Spouse Career
c. Joint Family Support Assistance Program
d. Military OneSource Center

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Subfactor 2: Program Oversight (Task 4 PWS)

a. Program and Relationship Management
b. Quality Assurance
c. Advertising Plan

Factor 3: Past and Current Performance

The purpose of the past and current performance evaluation is to allow the Government to assess the offeror's demonstrated ability to perform the effort described in this RFP. The Government will assign a quality rating and a relevancy rating for each source of past performance information.

The Government will consider the following: offeror's, and (if applicable) its principal subcontractors', demonstrated recent past performance, the effectiveness of program management, the delivery of quality services and products, cost control, initiative to solve problems with respect to employee assistance and work life services using the information provided in response to the Past Performance Questionnaire and Customer Survey (Attachment 2), and information from other sources.

The Government will evaluate the relevance of past performance references based upon applicability of the offeror's proposed approach to contract requirements, including but not limited to size, nature, or operational complexity.

The Government has multiple sources of past performance data, including the offeror's past performance volume, Past Performance Questionnaire responses, Government and/or commercial databases, and Government interviews with past and current clients. Using questionnaires and data independently obtained from other government and commercial sources, the Government seeks to determine the extent of the contractors experience in providing similar services.

1 Verifying Past Performance Data

The Government may contact the offeror's sponsors or clients to verify proposal information to include type of work performed, contractor accountability, prices, and completion dates. However, the Government may not necessarily interview all of the offeror's references.

2 Invalid Information

If client past performance questionnaire contact information is not valid, the Government may elect to not consider the assessment in the past performance evaluation.

3 Lack of Past Performance Project Data

If an offeror does not have any past projects whose performance is recent and relevant to the solicitation, the Government will assess the offeror's Past Performance Risk as Neutral, which is neither favorable nor unfavorable. However, an offeror's proposal with no recent and relevant Past Performance history, while evaluated as Neutral in Past Performance, may not represent the most advantageous proposal to the Government and thus, may be an unsuccessful proposal when compared to the proposal of other offerors.

However, the Government requires the offeror to provide and the Government will consider the offeror's explanation as to why the company does not have any recent and relevant past project performance related the scope of work defined in this solicitation.

The Government considers offerors with good performance on recent and relevant past projects a lower performance risk than offerors with no recent and relevant past projects. On the other hand, the Government considers offerors with poor performance on past projects a higher performance risk than offerors with no recent and relevant past projects.

4 Performance References

The Government will evaluate the responses for at least three but no more than five past performance references. The Government requires the offerors' references to return their completed questionnaire directly to the Government. The Government will not accept reference questionnaires directly from an offeror. The Government may contact the offeror's references to clarify proposal information to include type of work performed, contractor accountability, prices, and performance.

5 Other Past Performance Project Data Considerations

The Government may evaluate as deficient if an offeror has recent and relevant past performance projects, but fails to cite them in the proposal.

A significant achievement, problem, or lack of recent and relevant data in any element of the scope of work can become an important consideration in the evaluation process. Specifically, poor past performance for any area may result in a higher overall performance risk rating. In such cases, offerors should describe relevant mitigating efforts, especially those demonstrating corrective actions or acceptable client solutions.

The Government might consider key personnel, staff, or subcontractor involvement in an offeror's successful past performance project as a basis for improved performance risk ratings or as a basis to mitigate performance risk issues. The Government may permit offerors to explain and/or clarify negative past performance information, from any source, or to clarify the relevance of past performance cited in the proposal.

Factor 4: Subcontracting Plan

Subcontracting Plan: The Government considers proposals with a satisfactory subcontracting plan a lower risk than proposals with no subcontracting plan. On the other hand, the Government considers proposals with an unsatisfactory subcontracting plan a higher performance risk than proposals with no subcontracting plan.

Subfactor 1 is more important than Subfactor 2

Subfactor 1: Subcontract Management: The Government will evaluate the offeror's Small Business Participation/Subcontracting Plan, including teaming arrangements, conforming to the requirements of FAR subpart 19.7 unless exempted pursuant to FAR 19.702(b) (1). The Government will consider the complexity and variety of the work small business concerns are to perform, the offeror's previous involvement of small business concerns as prime contractors or subcontractors in similar acquisitions, proven methods of involving small business concerns as subcontractors in similar acquisitions, and the effectiveness of the offerors methods to meet the goals and requirements of the plan. The Government will assess the offeror's established processes and procedures for distributing work to small business team members, including the management of working data and lessons learned feedback. The Government will review the offeror's Subcontracting Management Plan to include teaming arrangements and processes for selecting, directing, coordinating, integrating, controlling potential subcontracted efforts, management/technical decision making, information sharing, problem resolution, and performance monitoring.

Subfactor 2: Small Business Participation/Subcontracting Plan: The Government will evaluate the offeror's Small Business goals, its understanding of DoD's goals for

small business concerns, particularly for Small Business, Ability One, Service Disabled Veteran Owned Small Businesses and Veteran Owned Small Businesses, and ability to meet or exceed these goals. These goals apply to the total dollars subcontracted. The minimum amount of subcontracted dollars required is 20%, reference section M.5.

Factor 5: Cost/Price

A. GENERAL

a. The Government will evaluate cost/price provided in Section B and CLIN Structure (Attachment J-1) and information found in any other section of the proposal that may aid in cost/price evaluation. The Government will assess the quality of the offeror's price proposal in light of the PWS and other solicitation instructions and guidance. More specifically, the Government will evaluate the offeror's price proposal with respect to completeness, fairness, reasonableness, realism, and balance. The Government will assess if the offeror's approach is consistent with costs presented in the offeror's cost proposal. The Government will review the offeror's costs for reasonableness, balance, affordability, and realism to determine whether they reflect an understanding of Government objectives or if they contain apparent mistakes. The Government defines the total price as the sum of the services and related costs over the term of the contract, including all option periods.

b. Each Offeror's price proposal will be reviewed to determine if it is complete, consistent, and reasonable with the Offeror's technical approach and reflects a clear understanding of the solicitation requirements. Inconsistencies between the technical and price proposals, unbalanced pricing, or other pricing anomalies may be assessed as proposal risk under the technical evaluation. As part of this evaluation, the Government may consider commercial published data, same or similar DoD contracts, Government estimates, industry standards, DCAA audit information, and other information the Government deems relevant

c. The Firm Fixed Price (FFP) Schedule B CLINs Total Price is equal to the proposed unit price multiplied by the Section B Quantity for that CLIN. For Time and Materials (T&M) CLINs, the Government Total Evaluated Price is defined as the sum of all of the Government evaluated costs for all Schedule B CLINs for the Base Period and all Option Periods.

d. The Government will evaluate the offeror's labor rates, startup and implementation costs, the day-to-day operations costs and related costs the contractor found necessary for operations, for all program years.

e. The Government will also evaluate proposed percentages for any fees associated with any cost item, to include, but not limited to the percentages for materials handling and pass through.

f. All tiers should be priced individually to account for the call volume in each band. However, **for evaluation purposes only** for CLIN 0001 1-800 Call Center Operations, the following information on likelihood of performance is provided:

Likelihood of Performance Level

	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5	Tier 6	Tier 7	Tier 8
Award	5%	5%	**60%**	**30%**	5%	5%	0%	0%
Option Period 1	5%	5%	**40%**	**40%**	5%	5%	0%	0%
Option Period 2	5%	5%	**40%**	**40%**	5%	5%	0%	0%
Option Period 3	0%	5%	**20%**	**45%**	**25%**	5%	0%	0%
Option Period 4	0%	0%	5%	**50%**	**25%**	**5%**	**5%**	**5%**

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B. BEST VALUE

a. The price evaluation will be based on the offeror(s) whose proposal(s) represents the best overall value to the Government based on the areas and factors set forth herein Section M, which may not be the lowest cost. The importance of price as an evaluation factor will increase with the degree of non-price factors equality among competing proposals. When the proposal with the lowest evaluated price is other than the proposal that has the highest rated non-price evaluation, a price/non-price tradeoff is necessary. The Government will use best value analysis to perform this tradeoff, if necessary.

b. The degree of importance allocated to cost will increase with the degree of equality of the proposals in relation to the other factors on which selection is to be based, or decrease when the cost is so significantly high as to diminish the value of the technical superiority to the Government

C. COST REALISM

Cost realism analysis evaluation technique will be used. Costs will be evaluated on the basis of cost realism. Cost realism pertains to the offeror's ability to project costs which are reasonable and which indicate that the offeror understands the nature of the work to be performed. The Government evaluates price realism by reviewing the written proposal to determine if the proposal and corresponding costs are appropriate for the work to be performed, reflect an understanding of the requirements, are consistent between the various elements of the proposal and can be executed for the proposed price. Any understatement or overstatement of costs may be considered a reflection of a lack of understanding of the work required and may be considered in the management or technical analysis, which could reduce the management or technical rating. With regard to any understatement of costs, the Government reserves the right to evaluate the cost proposals on the inclusion of all necessary and verifiable items of cost. The Government evaluates price completeness by assessing the offeror's responsiveness to the solicitation requirements, including price tables and other supporting data. Any proposal which is materially unbalanced as to prices may be rejected as non-responsive. An unbalanced proposal is one, which is based on prices significantly less than cost for some work and prices which are significantly overstated for other work. The Government evaluates price balance by assessing the price/cost stability and year-to-year consistency.

M.5 QUALITY, RELEVANCY AND RISK ASSESSMENT RATINGS

A. Compliance Ratings

For Factors 1, Factor 2, and Factor 4 Subfactor (1), the following evaluation ratings and corresponding definitions apply:

Rating	Definition
Outstanding (O)	The proposal has exceptional merit and reflects an excellent approach which should clearly result in the superior attainment of all requirements and objectives. The proposed approach includes numerous substantial advantages, and essentially no disadvantages, and can be expected to result in outstanding performance. The solutions proposed are exceptionally clear and precise, fully supported, and demonstrate a complete understanding of the requirements.
Highly Satisfactory (HS)	The proposal demonstrates a sound approach which is expected to meet all requirements and objectives. This approach includes substantial advantages, and few relatively minor disadvantages, which collectively can be expected to result in better than satisfactory performance. The solutions proposed are clear and precise, supported, and demonstrate a clear understanding of the requirements.
Satisfactory (S)	The proposal demonstrates an approach which is capable of meeting all requirements and objectives. The approach has both advantages and disadvantages, however; the disadvantages do not outweigh the advantages and the approach can be expected to result in satisfactory performance. The solutions for the most part clear, precise, and supported, and demonstrate a general understanding of all the

	requirements.
Marginal (M)	The proposal does not demonstrate a full understanding of all the requirements and may pose a risk that the offeror might fail to perform satisfactorily without significant Government oversight or participation. Any advantages that may exist in the approach are outweighed by existing disadvantages. The solutions proposed lack clarity and precision, or are unsupported.
Unsatisfactory (U)	The proposal demonstrates an approach which will very likely not be capable of meeting all requirements and objectives. This approach has one or more substantial disadvantages. Collectively, the advantages and disadvantages are not likely to result in satisfactory performance. The solutions proposed lack any clarity or precision, are unsupported, or indicate a lack of understanding of the requirement.
Neutral (N) Factor 4, Subfactor 1 for Small Business offerors only)	Factor 4, Subcontracting Plan Subfactor 1: Small Business Offerors Exempt

B. For Past and Current Performance (Factor 3), the following quality evaluation ratings and corresponding definitions apply:

Rating	Definition
Outstanding (O)	Performance was generally current. Program management has significantly exceeded expectations to be effective in meeting performance standards/schedules, maintaining high quality, being responsive to customers, taking the initiative to solve problems in a creative and flexible way without exceeding allowed monetary budgets. Excellent probability of success in meeting Government's requirements.
Highly Satisfactory (HS)	Performance was generally current. Program management has clearly exceeded expectations to be effective in meeting performance standards/schedules, maintaining high quality, being responsive to customers, taking the initiative to solve problems in a creative and flexible way without exceeding allowed monetary budgets. Good probability of success in meeting the government's requirements.
Satisfactory (S)	Performance was generally current. Program management has demonstrated effectiveness in meeting performance standards/schedules, maintaining high quality, being responsive to customers, taking the initiative to solve problems in a creative and flexible way without exceeding allowed monetary budgets. Fair probability of success in meeting the government's requirements.
Marginal (M)	Performance was not current. Based on the offeror's performance record, substantial doubt exists that the offeror will successfully perform the required effort. Program management has not consistently demonstrated effectiveness in meeting performance standards/schedules, maintaining high quality, being responsive to customers, taking the initiative to solve problems in a creative and flexible way without exceeding allowed monetary budgets. Probability of success is questionable with an unacceptably high degree of risk in meeting the government's requirements.
Unsatisfactory (U)	Based on the offeror's performance record, extreme doubt exists that the offeror will successfully perform the required effort. Program management has not been effective in meeting performance standards/schedules, maintaining high quality, being responsive to customers, taking the initiative to solve problems in a creative and flexible way without exceeding allowed monetary budgets.
Neutral (N)	Unknown No performance record is identifiable.

C. For Factor 4, Subcontracting Plan Subfactor 2 only, the following quality evaluation ratings and corresponding definitions apply:

Rating	Definition
Outstanding (O)	Proposal more than doubles DoD's goals for any five small business concerns. Proposal includes a subcontracting goal of at least 20% of the total contract value.
Highly Satisfactory (HS)	Proposal more than doubles DoD's goals for any three small business concerns. Proposal includes a subcontracting goal of at least 20% of the total contract value.
Satisfactory (S)	Proposal meets DoD's goals for Small Business and Ability One and Service Disabled Veteran Owned Small Businesses and Veteran Owned Small Businesses, and any other two small business concerns. Proposal includes a subcontracting goal of at least 20% of the total contract value.
Marginal (M)	The proposal meets fewer than five DoD goals. Proposal includes a subcontracting goal of less than 20% of the total contract value.
Unsatisfactory (U)	Proposal does not comply substantially with requirements.
Neutral (N)	Small Business Offerors are exempt from submitting a subcontracting plan.

D. For Factor 3, Past and Current Performance, the following relevancy rating scale and corresponding definitions apply:

Past Performance Relevancy Assessment Scale

Rating	Definition
Very Relevant (VR)	Performance was very relevant. Past/present effort involved essentially the same magnitude of effort, type of work or degree of complexity this solicitation requires.
Relevant (R)	Performance was generally relevant. Past/present effort involved much of the multitude of effort, type of work, or degree of complexity this solicitation requirement.
Semi-Relevant (SR)	Performance was generally relevant to semi-relevant. Past/present effort involved some of the magnitude of effort, type of work or degree of complexity this solicitation requires.
Marginally Relevant (MR)	Performance was marginally or not relevant. Past/present effort involved very little of the magnitude of effort, type or work, or degree of complexity this solicitation requires.
Not Relevant (NR)	Performance was not relevant. Past/present effort involved did not involve any of the magnitude of effort, type of work, or complexity of this solicitation.

E. Proposal Risk Assessment

The Government will make an overall proposal risk assessment. Proposal risks are those risks associated with the likelihood that an offeror's proposed approach will meet the requirements of the solicitation. General considerations include adequacy and feasibility of the offeror's approach and the offeror's understanding of, and compliance with the requirements and objectives of the Request for Proposal.

Proposal Risk Assessment Scale

Rating	Definition
Very Low (VL)	Has very little or no potential to cause disruption of service delivery, increase in cost, or degradation of performance. Normal contractor effort will very likely suffice to overcome difficulties

Low (L)	Has little potential to cause disruption of service delivery, increase in cost, or degradation of performance. Normal contractor effort will probably be able to overcome difficulties.
Moderate (M)	Can potentially cause some disruption of service delivery, increase in cost, or degradation of performance. However, special contractor emphasis will probably be able to overcome the difficulties.
High (H)	Likely to cause significant serious disruption of service delivery, increase in cost, or degradation of performance even with special contractor emphasis.
Very High (VH)	Highly likely to cause significant serious disruption of service delivery, increase in cost, or degradation of performance even with special contractor emphasis