OASIS SB Industry Day Agenda

- Background
- Option Period
- On-ramp Solicitation Overview
- Symphony Demonstration by Apex Logic
- Popular Questions
OASIS

Background &
How it Works
OASIS Value Proposition

GSA’s OASIS Best-In-Class (BIC) contracts make complex professional services procurements expedient by maximizing streamlined acquisition processes.

Opportunity Costs and Cost Avoidance: GSA has already done the heavy lift of negotiating and awarding a master Government-wide IDIQ allowing agency acquisition professionals to focus on mission critical requirements.

Benefits of the OASIS family of contracts include:

- GSA managed Program and Master Contract Administration
- Avoids the cost and time to award and administer agency IDIQ’s
- Reduces contract duplication and administrative resources allocation
- Flexible contract vehicle providing a single solution for complex professional services in multiple technical areas/mission spaces with maximum flexibility for ancillary labor, materials and Other Direct Costs (ODCs)
- Highest rated contractor community who have undergone rigorous pool qualifications to ensure competency.
- Proven Experience, with every contractor having experience supporting Federal Customers

BIC solution to easily achieve Spend Under Management (SUM) goals:
OASIS provides agencies with a Tier 3 BIC solution for professional services
Spend Under Management (SUM) Tiers

**Tier 0**
Spend not aligned to Category Management Principles

Unaligned Spend, or Open Market

**Tier 1**
Agency-Wide Mandatory Solutions

Spend managed at the agency level

Example: Air Force NETCENTS-2 IDIQ

**Tier 2**
Multi-Agency Solutions

Cross Agency Strategy: spend managed contract with government-wide access

Example: Multiple Award Schedules

**Tier 3**
Government-wide Best-in-Class Solutions

Government-wide Strategy; spend managed at the government-wide level

Example: OASIS
FY 2018 Professional Services Category Spend & Industrial Base

### Business Size

**Contracts**
- Small: 49.6%
- Large: 50.4%
- Small: 37.1%
- Large: 62.9%
- Small: 15.1%
- Large: 84.9%

**Spend**
- Small: 31.2%
- Large: 68.8%
- Small: 28.2%
- Large: 74.8%
- Small: 8.7%
- Large: 91.3%

**Market**
- 100%

**Top 80%**
- 897 Contractors
- 12,005 Contracts
- 10 Agencies
- $60.9B

**Top 20%**
- 28,726 Contractors
- 237,441 Contracts
- 55 Agencies
- $76.1B
OASIS Contract Features

OASIS is a contract vehicle for complex professional services

- Multiple-award IDIQ Contracts
- Best in Class (Tier 3) Vehicle
- Multidisciplinary government-wide contract for Professional Services
- Geared toward highest technically qualified contractors with fair and reasonable pricing
- Designed for long periods of use
  - Task order can be awarded through 2024
  - Period of Performance is through 2029
- Supports commercial and non-commercial items
- Supports all contract types including FFP, T&M and Cost
- Prohibits protests on orders valued at less than $10M
- Direct access to socio-economic concerns to maximize small business participation
Do it all in One Task Order

Flexible, Complex, Integrated Professional Service Solutions

OASIS Task Order

- Professional Service Principal Purpose of Work
- Ancillary Labor
- Ancillary IT
- Ancillary Support
- Other Direct Costs (ODC)
- Minor Construction (Firm Fixed Price)

Requirements that contain multiple disciplines

Requirements that contain significant IT, but are not IT requirements in and of themselves

Not all labor to support a professional service is professional, this includes SCLS (SCA) and DBA labor as well

ODCs can be the majority of the costs to support a professional service in some cases

Allows for everything you need to support the professional service

Professional Service

Ancillary Labor

Ancillary IT

Ancillary Support

Other Direct Costs (ODC)

Minor Construction (Firm Fixed Price)
Task Orders Information

What you need to know

● Minimum order set at Simplified Acquisition Threshold
● There is no maximum order limitation, no ceilings
● There are no price lists or catalog pricing
  ○ Based upon task order competition
  ○ Rely on variety requirement factors (geography, security level, complexity, deadlines, risk levels, contract type, etc)
● Non-published ceiling rates exist ONLY
  ○ sole-source; Time and Material/Labor Hour requirements
● Ordering CO determines: Maintains Control
  ○ Terms & conditions and/or provisions & clauses
  ○ Evaluation criteria
  ○ Method of award
● OASIS master contract FAR clauses automatically flow down to task award contracts as applicable
● All awardees have been determined Responsible (FAR part 9)
OASIS Advantages to COs

Streamlined acquisition of FAR 16 saves time

- FAR Part 16.505 “Streamlined Acquisition Procedures” apply
  - Synopsizing/Posting Solicitations in FBO.gov is NOT Applicable
  - Fair Opportunity applies - sending requirements to entire Pool to maximize competition among contractors
  - Reps and certs performed at master contract level
    - Ordering COs do not need to do this
    - Protests less than $10 Million NOT allowable
  - FAR 15.3 Source Selection Procedures do NOT apply
  - The ordering contracting officer has the control
    - terms and conditions
    - order placement procedures
    - evaluation criteria & method of award
How Agencies Use OASIS

Assisted Acquisition or Agency Direct Award

Agency Direct Acquisition

- GSA issues a Delegation of Procurement Authority to the customer agency Ordering Contracting Officer (OCO)
- OCO performs the acquisition and makes task order awards
- Requires 90-minute training to receive Delegation of Procurement Authority

Assisted Acquisition

- Fee-for-service agencies authorized to conduct acquisitions on behalf of the end-user (e.g., GSA Regional offices, FEDSIM, VA or Other franchise-fund agencies
- An Inter-Agency Agreement is required
- For more information click here.
Ordering Procedures

Task Orders under OASIS SB MUST:

- Be awarded by an OCO with a Delegation of Procurement Authority (DPA)
  - Contractor authorized to use the OASIS SB Contracts
  - Be within the OASIS SB scope and all other terms and conditions of the OASIS SB contract
- Be solicited and awarded under the proper NAICS Code corresponding OASIS SB Pool
- Identify the proper Product Service Code
- Comply with OASIS SB Ordering Guide and FAR 16.505
- Comply with other applicable agency specific regulatory supplements

The OCO must tailor all optional and agency supplemental clauses, provisions, and other applicable terms and conditions specific to the task order Solicitation and award
Performance
OASIS Government Usage

OASIS Performance - valued at $15 Billion in obligations

OASIS Small Business: (through 2018)

- 159 Contractors performing on 255 master contracts
- 1,159 Task order awards made
- Estimated total value of awards: $ 5.7 Billion Obligated / $13.8 Billion Estimated
- Contract Type: 45% Cost Reimbursable, 40% FFP, 15% T&M/FPLOE
- Average order size: $11.9 Million

OASIS Unrestricted: (through 2018)

- 78 Contractors performing on 236 master contracts
- 492 Task order awards made
- Estimated total value of awards: $6.7 Billion Obligated / $20 Billion Estimated
- Contract Type: 75% Cost Reimbursable, 16% FFP, 9% T&M/FPLOE
- Average order size: $40.7 Million

Negotiated reduced fees with some Agencies

Over 2,000 contracting officers approved Delegation of Procurement Authority to use OASIS
# OASIS Small Business Utilization

*Nearly half of obligations go to 100% set aside OASIS SB*

<table>
<thead>
<tr>
<th>OASIS SMALL BUSINESS OBLIGATIONS</th>
<th>OASIS UNRESTRICTED BUSINESS OBLIGATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>46%</strong></td>
<td><strong>54%</strong></td>
</tr>
<tr>
<td>100% Set Aside, all contractors on OASIS SB are Small.</td>
<td>No Set Asides, contractors have a 50% subcontracting plan</td>
</tr>
</tbody>
</table>

- **38%** Non-Socio Small Business
- **30%** 8(a) utilization
- **18%** Veteran Owned Small Business
- **14%** Woman Owned Small Business
- **1%** Hubzone

- **50%** Subcontracting Plan
  - **50%** Small Business
  - **3%** Hubzone
  - **5%** Small Disadvantaged Business
  - **5%** Woman Owned SB
  - **3%** Veteran-Owned SB
  - **3%** Service Disabled Veteran Owned SB
# OASIS Pools 2019

2019 is a busy year for OASIS and we are growing

<table>
<thead>
<tr>
<th>OASIS Pool</th>
<th>SB Pool Size</th>
<th>Unrestricted Pool Size</th>
<th>Onramp projections for FY 2019</th>
</tr>
</thead>
</table>
| 1 Management Scientific and Technical Services | 44           | 45                      | • **SB target: 200 total Contractors**  
• UNR Target: 80 total Contractors  
• 8(a) Subpool Target: Flow down + 30 Total Contractors |
| 2 Financial Accounting Services          | 40           | 25                      | • SB target: No Change  
• UNR Target: PENDING AWARD  
• 8(a) Subpool Target: Flow down + 8 Total Contractors |
| 3 Engineering Exceptions: Military      | 43           | 42                      | • **SB target: 200 total Contractors**  
• UNR Target: 80 total Contractors  
• 8(a) Subpool Target: Flow down + 20 Total Contractors |
| 4 Scientific R&D                         | 40           | 42                      | • **SB target: 100 total Contractors**  
• UNR Target: 80 total Contractors  
• 8(a) Subpool Target: Flow down + 20 Total Contractors |
| 5a Aircraft Parts and Engines R&D        | 23           | 21                      | • SB target: No Change  
• UNR Target: No Change  
• 8(a) Subpool Target: No Change |
| 5b Space and Missiles R&D                | 23           | 21                      | • SB target: No Change  
• UNR Target: No Change  
• 8(a) Subpool Target: Flow down + 8 Total Contractors |
| 6 Aircraft R&D                           | 42           | 38                      | • SB target: No Change  
• UNR Target: No Change  
• 8(a) Subpool Target: Flow down + 8 Total Contractors |
| **Total Number of Contracts**            | **255**      | **234**                 | • **Adding additional 590 contractors to OASIS SB** |
Option Period
OASIS Option Period

What this means and why we are doing it

- Option period is next phase of the OASIS contract
- Extends life of contract another 5 years (through 2024)
- Opportunity to adjust master contract with current law
- Acclimate to new federal procurement landscape
  - Best In Class - Spend Under Management
  - SBA changes
  - Statute, regulation, and policy changes
- Demand from customer agencies to expand industry base
  - Further competition
  - Include Tier 0 contractors - Shift to SUM
  - Expand Tier III opportunities for Small Businesses
  - Increased number of small business participating
Re-Representation Window extended for Current OASIS SB Contract Holders

What this means and why we are doing it

- OASIS Small Business Contractors will re-represent their awarded size no later than October 20, 2019 (60 days) prior to the extended base period ending 19 December 2019
- GSA issued a FAR deviation to allow a 6-month extension for re-representation for OASIS SB
- Existing OASIS SB contractors are expected to remain eligible to respond to requirements solicited through the end of FY 2019
Changes to the OASIS Pools

Substantial increases to Strategic Pools

- **OASIS SB Pools 1, 3, & 4**
  - Pool 1 to increase from 44 up to 200 in total
  - Pool 3 to increase from 43 up to 200 in total
  - Pool 4 to increase from 40 up to 100 in total

- **OASIS Unrestricted Pools 1, 3, & 4**
  - Pool 1 to increase from 45 up to 80 in total
  - Pool 3 to increase from 42 up to 80 in total
  - Pool 4 to increase from 42 up to 80 in total

- Exercise OASIS SB Options
- Lateral and Vertical On-Ramping
- **Planned launch of 8(a) SubPools - up to 80 in total**
- Exercise Unrestricted Options

**NOTE:** There are no plans for any other On-Ramps at this time.
Impacts to OASIS Contracts

What federal agencies will see

- More high quality, highly technically rated contractors
  - Hallmark of the OASIS program
  - Their contractors on OASIS
  - Increased opportunity to secure SUM, Tier III credit
- Richer pools of contractors
- Expanded community for socio-economic set-asides
- Restoration of direct award ability to OASIS Prime 8(a) businesses
  - Expanded ability to exceed SBA small business goals with OASIS small business contract holders
OASIS SB On-ramp Solicitation
Overview

Background

Re-opening of the Solicitation GS00Q-13-DR-0002

- Open season on-ramps to support option period
- OASIS SB Pools 1, 3, and 4 are opening (ref. contract H.15.3) as Total Small Business Set-Aside (FAR 19.502-2; 15 USC 644(r)(2))
  - Pool 1- Primary NAICS 541330; $15M
  - Pool 3- Primary NAICS 541330 Exception A; $38.8M
  - Pool 4- Primary NAICS 541715; 1000 employees
- OASIS SB 8(a) SubPools are being created (ref. contract H.15.4) as Competitive 8(a) Set-Aside with (FAR 19.8), with ability to do 8(a) sole source and 8(a) Competitive Set-Aside task orders.
Contract Type

OASIS SB is a family of multiple award contracts

Providing Government-wide professional services based requirements

- Multiple Award, Indefinite Quantity, Indefinite Delivery (MA-IDIQ)
- Allows for all contract types at the task order level
- Contract types can be combined on a single task order
- Task orders allow for incentives, performance based measures, multi-year options, and commercial/non-commercial items
- Minimum guarantee: $2500 if no task order is obtained
- Minimum dollar limitation for individual task is the Simplified Acquisition Threshold (FAR 2.101)
- NO Maximum dollar ceiling
Authority & Scope

Providing Government with Total Integrated Solutions

Serving a multitude of professional service based requirements on a global basis

● OASIS SB available for use by all Federal agencies and other entities (GSA Order ADM 4800.21 - Eligibility to Use GSA Sources of Supply)
● In accordance with Section H.15.3 of original solicitation
   ○ Eval factors & award decisions based on substantially the same content as original solicitation
   ○ Section M.6 - Scoring Table remains unchanged from original
● GSA authorized to purchase on behalf of other agencies
   ○ Federal Property & Administrative Services Act (40 USC 501)
   ○ Economy Act does NOT apply to OASIS SB task orders (FAR 17.502-2(b); 40 USC 501)

Scope

● Include but not limited to: Communication, Compliance, Defense, Disaster, Energy, Environment, Financial, Health, Intelligence, Security, Transportation
Core Disciplines

Core Disciplines - Program Management

Examples Include but are not limited to:

- Acquisition Support
- Business Intelligence Support
- Cost/Schedule/Performance Analysis
- Cost Estimation & Analysis
- Cost/Performance Trade-off Analysis & Studies
- Earned Value Management Analysis
- e-Business Support
- Information Analytics
- Investigative Services
- Program Management
- Integrated Program Management
- Program Documentation
- Regulatory Compliance
- Risk Assessment & Mitigation
- Integration of Support Systems
- Knowledge Based Acquisition
- Vulnerability Assessment
- Counterintelligence Support
- Horizontal Protection
- Planning, Programming, Budgeting, & Execution Processes
- Capability Integration & Development
- Manpower Estimating
- Stakeholder Requirements Analysis
- Decision Analysis
- Technical Planning
- Technical Assessment
- Requirements Management
- Risk Management
- Configuration Management
- Technical Data Management
- Interface Management
- Intelligence Analysis
- Threat Analysis
Core Disciplines

Management Consulting Services

Examples Include but are not limited to:

- Business Process Re-engineering
- Business Case Development
- Change Management
- Concept Development & Requirements Analysis
- Cost/ Schedule/ Performance Improvement
- Information Analytics
- Knowledge Management
- Relations & Coordination with Law and Policy Making Entities
- Social Media Consulting
- Tactical & Readiness Planning
- Technical Advisory Services
- Training & Facilitation
- Strategic Planning
- Strategic Forecasting
- Long-Range Planning, Futures & Forecasting
- Strategy Development
Core Disciplines

Scientific Services
Examples Include but are not limited to:

- Environmental Sciences
- Engineering Sciences
- Life Sciences
- Physical Sciences
- Psychological Sciences
- Mathematical Sciences
- Social Sciences
- Decision Support Sciences
Core Disciplines

Engineering Services

Examples Include but are not limited to:

- Systems Engineering
- Advanced Technology Pilots & Trials
- Alternative Energy Sources & Engineering
- Configuration Management
- Concept Development
- Design Documentation & Technical Data
- Energy Services
- Engineering (Aeronautical, Astronautical, Chemical, Electrical, Mechanical, Metallurgy/Materials, etc)
- Engineering Process Improvement
- Environmental Management
- Environmental Consulting & Remediation
- Human Factors/Usability Engineering
- Independent Verification & Validation
- Integration
- Interoperability
- Life Cycle Management
- Modeling & Simulation
- Natural Resources Management
- Operation & Maintenance OR Direct Support of an existing weapon system/major system
- Prototyping & Fabrication Support
- Quality Assurance
- Red Teaming and Wargaming
- Requirements Analysis

- Systems Design
- System Integration
- System Safety Engineering
- Test & Evaluation
- Technical Documentation
- Mission Assurance
- Data Analytics
- Architecture Design
- System Verification & Validation
- Human Systems Integration
- Baseline (Configuration) Management
- Data Management
- Risk Management
- Technical Planning
- Systems Engineering Training
- System Security & Information Assurance
- System Effectiveness & Analysis
- Launch Processing & Verification
- Software Development (for non IT requirements)
- Software Independent Verification & Validation (for non IT requirements)
- Radar Engineering
- Optical Engineering
- Communications Engineering
Core Disciplines

Logistics Services

Examples Include but are not limited to:

- Analysis & recommendation of Support Equipment
- Deployment Logistics
- Disaster Management/ Contingency Operations
- Distribution & Transportation Logistics Services
- Infrastructure Services Including Transportation & Delivery
- Integrated Logistics Support (ILS) Technical Requirement Creation
- ILS Risk Assessments
- ILS Schedules Creation & Performance Tracking
- Inventory Management
- Logistical Studies & Evaluations

- Logistics Design Logistics Management & Support Services
- Logistics Operations Support
- Logistics Operations & Maintenance
- Logistics Optimization
- Logistics Training Services
- repair & Alteration
- Security
- Supply Chain Management & Provisioning
- Value Chain Management
- Technology & Industrial Base Analysis
- Test Range Support
- Life Cycle Sustainment
- Supportability Analysis & Implementation
- Integrated Logistics Support
Core Disciplines

Financial Management Services

Examples Include but are not limited to:

- Budget Analysis & Tracking
- Business Information Services
- Cost Estimating & Analysis Support
- Cost Performance Risk Assessments
- Disbursement & Reconciliation Support
- Financial & Financial Risk Analysis
- Financial Management, Accounting & Audit Services
- Impact Statement Development
- Program Management for Financial Services
- Program Objective Memorandum (POM) Creation & Documentation
- Oversight & Fraud Detection
- Safeguarding personal Data
- Loan Management
- Grant Management
- Economic Analysis
- Return on Investment Analysis
- Life Cycle Cost Determination
- Total Ownership cost Determination
- Affordability Analysis
- Analysis of Cost Alternatives
- Should-Cost Determinations
IT Plays a Role

Information Technology & Non-Information Technology

Information Technology (IT)

- Considered ancillary Support to OASIS SB task orders
- Performed only when integral to complete a total integrated solution UNDER a Professional Service requirement within in scope

“Non-IT”

- Considered within the primary scope of OASIS SB
- Supports the principal function of the task order - incidental or embedded
- Includes any equipment or service related to a National Security System
Performance - Time & Place

Place of Performance

- Services locations identified in task order
- Includes CONUS and OCONUS

Period of Performance

- Option period (exercise in progress) runs through 19 Dec 2024
- Task order periods may be exercised after the OASIS SB term expires
- Final task order cannot extend beyond 5 years AFTER OASIS SB term expires, up to 19 Dec 2029
- After OASIS SB expires, task order will remain an active contract until final task order is closed-out
Roles & Responsibilities of Key Personnel

- Current points of contact information will be maintained on the official GSA OASIS SB webpage [www.gsa.gov/oasis](http://www.gsa.gov/oasis)
  - Program Manager
  - Contracting Officer
  - Ombudsman
    - Subject to GSAR 552.216-74
    - Reviews complaints from Contractors
    - Ensures fair opportunity for task order award consideration
    - Review OASIS SB CO decision to place a Contractor in dormant status
  - Industrial Operations Analyst (IOA)
    - Government official auditing Contractor records
    - Conducts Contractor Assistance Visits
    - Assists with task ordering reporting, Contract Access Fee management & other general contract administration
Roles & Responsibilities

Ordering Contracting Officer (OCO)

- Authorized users of OASIS SB are identified as OCOs
- Allowed to solicit, award & administer an OASIS SB task order
- Must be a duly warranted Contracting Officer (FAR 2.101)
- Receive a Delegation of Procurement Authority (DPA) prior to soliciting & awarding an OASIS SB task order
- OCO duties include, but are not limited to:
  - Comply with OASIS SB terms & conditions
  - Comply with ordering procedures under FAR 16.505 & other agency regulatory supplements
  - Issue order solicitations under proper NAICS & corresponding OASIS SB MA-IDIQ
  - Allow reasonable time for fair opportunity proposal submission
  - Resolve performance issues, disputes, claims/protests at task order level
  - Respond to task order level FOIAs
  - Enter performance evaluation into CPARS
  - Enter task order award data into FPDS-NG upon award
  - Provide Solicitation & task order award data to OASIS SB CO
  - Close out task orders in timely manner
Roles & Responsibilities

**COCM and the COPM**

- Corporate OASIS Program Manager (COPM) & Contract Manager (COCM) shall be assigned & stay current
  - Serve as primary POCs to resolve issues, perform administrative duties, & other functions
  - Additional Key Personnel requirements are assigned by the OCO

- No costs for Contractor Key personnel may be billed to the OASIS Program Office

- Failure of Contractor Key Personnel performance may result in Dormant status activation or off-ramping
Contract Access Fee (CAF)

- Once established, shall be used for the entire life of the task order; applicable to ALL costs incurred under task order
- CAF is proposed as a separate CLIN; contractor responsible for proposing CAF on every task order
- CAF line shall be proposed as Not-to-Exceed; except for Firm Fixed Price
- Contractor may be placed in dormant status for failure to remit CAF payment to GSA

<table>
<thead>
<tr>
<th>Calendar Quarters</th>
<th>CAF Due Date</th>
<th>Payment Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st Quarter Jan 1st – Mar 31st</td>
<td>No later than April 30th</td>
<td>Trace Number</td>
</tr>
<tr>
<td>2nd Quarter Apr 1st – June 30th</td>
<td>No later than July 30th</td>
<td>Total Remitted Amount</td>
</tr>
<tr>
<td>3rd Quarter July 1st – Sep 30th</td>
<td>No later than October 30th</td>
<td>Remit Date</td>
</tr>
<tr>
<td>4th Quarter Oct 1st – Dec 31st</td>
<td>No later than January 30th</td>
<td>Amount applied to each Order Number</td>
</tr>
</tbody>
</table>
Reporting

Contract Payment Reporting Module (CPRM)

- Unclassified task orders, modifications, invoices, and CAF payment data will be reported electronically via CPRM.
- Classified task orders will require contacting the OASIS SB CO.
- Contractors will have to report:
  - Award data - labor hours, labor categories
  - Modification data
  - Subcontracting reporting data
    - >50% of the cumulative average of all task order performance incurred for personnel SHALL be expended by OASIS SB Prime Contractor (or similarly situated subcontractors).
- Invoicing: reported quarterly; each paid/remitted invoice within 30 calendar days after the end of reporting quarter, or “zero invoice data” if no invoices during reporting period.
- Closeout data.

Task Order Award Data

- Task order award data must be reported in CPRM within 30 calendar days after the month the task order was signed by the OCO.
Subcontracting (Sub-K) Plan

- NOT required for Small Business (SB) concerns
- Contractors that do submit Sub-K plan with their proposal shall comply with their plan
- Sub-K plans cover the OASIS SB program as a whole
- SF 294 and SF 295 are submitted per each individual Pool the Contractor has an award under
- Subcontract award data is reported by the Prime Contractors
- Contractors unsuccessful in meeting Sub-K plans for a given reporting period must explain in writing the rationale
Performance Assessment

CPARS

- CPARS applicable at order level by OCO, not OASIS SB CO
- Facilitates performance evaluation process for task orders awarded under OASIS SB
- Agencies requiring an alternative past performance assessment reporting system takes precedence over CPARS

Contractor Self-Assessment

- Contractor provides the OASIS SB CO with a standardized self-assessment (online tool) on contractual requirements
- Purpose is to monitor Contractor’s performance standards and compliances
- Self-assessment are used to resolve performance or compliance weaknesses, if necessary
- Annual Self-assessments are due August 31st for preceding reporting period (June 20 - June 19)
Insurance

- Coverage specified in FAR 28.3, is the minimum insurance requirement for OASIS SB
- Applies to OASIS program as a whole
- OCO may require additional insurance coverage for task orders
- Minimum insurance coverage must be maintained for OASIS SB entire term
- Minimum insurance requirements shall be required for task order participation
Mergers, Acquisitions, Novations, & Change-of-Name Agreements Occur:

- If all contractor assets involved in performance are transferred
- Contractor name changes
- Novation/change-of-name agreements executed by a CO other than OASIS SB CO
- Contractor must notify OASIS SB CO and provide copy of novation or any other agreements indicating change in status
- Applies the OASIS contracts as a whole
- OASIS SB CO’s discretion whether novation in best interest of the Government
- “Selling” contract not permissible; transfer of COCM/COPM as assets unlikely to be approved; novations are exception (not the norm)
Special Contract Requirements

Observance of federal holidays

The Government observes the following days as holidays:

1. New Year’s Day
2. Birthday of Martin Luther King Jr. Day
3. Washington’s Birthday
4. Memorial Day
5. Independence Day
6. Labor Day
7. Columbus Day
8. Veterans Day
9. Thanksgiving Day, and
10. Christmas Day

Notwithstanding holidays and Government closures, the Contractor shall perform in accordance with the terms established in OASIS SB and associated task orders
Set-Asides Based on Socioeconomic Group

**OASIS SB is a total small business set-aside contract**

- Orders issued under OASIS SB are automatically considered set-aside for small business.
- OASIS SB Solicitation reserved award for:
  - three HUBZone Small Businesses at a minimum
  - three Service Disabled Veteran-Owned Small Businesses (SDVOSB)
  - three Women-Owned Small Businesses (WOSB)
  - three Economically Disadvantaged Women-Owned Small Businesses (EDWOSB)
  - three 8(a) Small Businesses in each OASIS SB Pool.

- OCO has discretionary authority (15 USC 644(r)(2) further set-aside orders based on socio-economic groups
  - In anticipation at least two small business concerns within a specific socio-economic group will offer a proposal
  - socioeconomic groups eligible for competitive set-asides are identified as follows:
    - 8(a) small business concerns
    - HUBZone small business concerns
    - Service-disabled veteran-owned small business (SDVOSB) concerns
    - Economically disadvantaged women-owned small business (EDWOSB) concerns eligible under the Women-owned Small Business Program and Repository
    - Women-owned small business (WOSB) concerns eligible under the WOSB Program and Repository
North American Industry Classification System (NAICS)

- The NAICS is a coding system for classifying where services are performed by type of economic activity.
- NAICS assist in analyzing economic data and promote uniformity in describing the economy.
- SBA assigns a business size standard to each NAICS code:
  - Stated in number of employees
  - Average annual receipts
  - Represents the largest size that a business may remain to be classified as small business.
  - NAICS size standards are used to qualify for small business socio-economic programs.
- OASIS SB Pools 1, 3, and 4 NAICS Codes:
  - OASIS SB consists of 7 separate contracts known as Pools.
  - Each Pool is a separate OASIS SB MA-IDIQ task order contract.
  - NAICS codes are based on economic subsector 541.
  - Pools leverage 6 separate small business size standards.
Predominant Task Order NAICS Determination

- OCO has the responsibility to determine which predominant NAICS code applies to a task order Solicitation
- OCO shall only apply the OASIS SB Pool NAICS code and corresponding size standard representing the principle purpose of the requirement
- OCO must identify a predominant OASIS SB NAICS Code and Business Size Standard in the task order Solicitation
- OCO must provide fair opportunity to all Contractors under the applicable OASIS SB Pool for Solicitation purposes
- Ordering Procedures at FAR 16.505 apply

Only OASIS SB NAICS Codes are eligible to be selected as the predominant NAICS Code for task orders solicited under OASIS SB. Only OASIS SB Contractors are eligible to receive Solicitations and task order awards under OASIS SB.
# OASIS SB NAICS Codes

## POOL 1
($15M Business Size Standard)

<table>
<thead>
<tr>
<th>NAICS CODE</th>
<th>NAICS TITLE</th>
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<tbody>
<tr>
<td>541330</td>
<td>Engineering Services</td>
</tr>
<tr>
<td>541360</td>
<td>Geophysical Surveying and Mapping Services</td>
</tr>
<tr>
<td>541370</td>
<td>Surveying And Mapping (Except Geophysical) Services</td>
</tr>
<tr>
<td>541380</td>
<td>Testing Laboratories</td>
</tr>
<tr>
<td>541611</td>
<td>Administrative Management and General Management Consulting Services</td>
</tr>
<tr>
<td>541613</td>
<td>Marketing Consulting Services</td>
</tr>
<tr>
<td>541614</td>
<td>Process, Physical Distribution, and Logistics Consulting Services</td>
</tr>
<tr>
<td>541618</td>
<td>Other Management Consulting Services</td>
</tr>
<tr>
<td>541620</td>
<td>Environmental Consulting Services</td>
</tr>
<tr>
<td>541690</td>
<td>Other Scientific and Technical Consulting Services</td>
</tr>
<tr>
<td>541810</td>
<td>Advertising Agencies</td>
</tr>
<tr>
<td>541820</td>
<td>Public Relations Agencies</td>
</tr>
<tr>
<td>541830</td>
<td>Media Buying Agencies</td>
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<tr>
<td>541840</td>
<td>Media Representatives</td>
</tr>
<tr>
<td>541850</td>
<td>Outdoor Advertising</td>
</tr>
<tr>
<td>541860</td>
<td>Direct Mail Advertising</td>
</tr>
<tr>
<td>541870</td>
<td>Advertising Material Distribution Services</td>
</tr>
<tr>
<td>541890</td>
<td>Other Services Related to Advertising</td>
</tr>
<tr>
<td>541910</td>
<td>Marketing Research and Public Opinion Polling</td>
</tr>
<tr>
<td>541990</td>
<td>All Other Professional, Scientific, and Technical Services</td>
</tr>
</tbody>
</table>

## POOL 2

## POOL 3
($38.5M Business Size Standard)

<table>
<thead>
<tr>
<th>NAICS CODE</th>
<th>NAICS TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>541330</td>
<td>Engineering for Military and Aerospace Equipment and Military Weapons</td>
</tr>
<tr>
<td>541330 Exception B</td>
<td>Engineering for Marine Engineering and Naval Architecture</td>
</tr>
</tbody>
</table>

## POOL 4
(1,000 Employee Business Size Standard)

<table>
<thead>
<tr>
<th>NAICS CODE</th>
<th>NAICS TITLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>541713</td>
<td>Research and Development in Nanotechnology</td>
</tr>
<tr>
<td>541714</td>
<td>Research and Development in Biotechnology (except Nanobiotechnology)</td>
</tr>
<tr>
<td>541715</td>
<td>Research and Development in the Physical, Engineering, and Life Sciences (except Nanotechnology and Biotechnology)</td>
</tr>
</tbody>
</table>

The following NAICS codes are allowable substitutes under Pool 4:
- 541711 substituted for 541713
- 541711 substituted for 541714
- 541712 substituted for 541715
Acceptable Accounting Systems

**Mandatory**

- Acceptable Accounting Systems are mandatory
  - An acceptable accounting system is a system that is approved by the OASIS CO
  - Provides for the proper segregation, identification, accumulation, and allocation of direct and indirect costs for government procurements
- The Contractor must maintain an acceptable accounting system for the entire term of OASIS SB
- The Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing
  - Any changes in the status of their accounting system
  - Provide reasons for the change and copies of audit reports, as applicable
- All other Systems, Certifications, and Clearances are optional
Acceptable Estimating System (AES)

Optional

- AES includes policies, procedures, and practices for budgeting and planning controls, and generating estimates of costs and other data included in proposals in the expectation of receiving contract awards.

- An acceptable estimating system means an estimating system that is:
  - Maintained, reliable, and consistently applied
  - Produces verifiable, supportable, documented, and timely cost estimates
  - Estimates are the basis for negotiation of fair and reasonable prices
  - Consistent with and integrated with the Contractor’s related management systems
  - Subject to applicable financial control systems

- Contractors are encouraged to have an acceptable estimating system approved by the Defense Contract Management Agency (DCMA) or other cognizant auditor for the entire term of OASIS SB.

- The Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing:
  - Any changes in the status of their estimating system
  - Provide reasons for the change and copies of audit reports, as applicable
Forward Pricing Rate Agreements, Forward Pricing Rate Recommendations, & Approved Billing Rates

Billing rates and final indirect cost rates

- Used in reimbursing indirect costs under cost-reimbursement task orders and in determining progress payments under fixed-price task orders
  - Forward Pricing Rate Agreement (FPRA) - a written agreement to make certain rates available during a specified period for use in pricing contracts or modifications
  - Forward Pricing Rate Recommendation (FPRR) - a set of rates and factors unilaterally established by the ACO for use by the Government in negotiations or other contract actions when forward pricing rate agreement negotiations have not been completed
  - Approved Billing Rates - an indirect cost rate established temporarily for interim reimbursement of incurred indirect costs and adjusted pending establishment of final indirect cost rates

Contractors are encouraged to execute a FPRA and/or approved billing rates to the maximum extent practicable. Contractors may use FPRRs when an FPRA has not been negotiated.

FPRA, FPRR, and/or Approved Billing Rates will NOT be disclosed on the OASIS SB website. Only the OCO will have access to this information upon request.
**Approved Purchasing System**

*Optional*

- Contractor’s purchasing system has been approved under a Contractor Purchasing System Review (CPSR) for efficiency and effectiveness
  - Contractor spends Government funds and complies with Government policy when subcontracting
- Advance notification requirements for subcontracting and consent to subcontract are NOT required unless otherwise requested by the OCO
- Contractors are encouraged to have a purchasing system approved by the Defense Contract Management Agency (DCMA) or other cognizant Government administration office for the entire term of OASIS SB
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing
  - Any changes in the status system
  - Provide reasons for the change and copies of audit reports, as applicable
Earned Value Management System (EVMS)

*Optional*

- Project management tool effectively integrates the project scope of work with cost, schedule and performance elements for optimum project planning and control (EVMS ANSI/EIA Standard-748)
- Contractors are encouraged to have an EVMS ANSI/EIA Standard-748 during the entire term of OASIS SB
- Contractors are encouraged to have a EVMS approved by the Defense Contract Management Agency (DCMA) or other cognizant Government administration office for the entire term of OASIS SB
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing
  - Any changes in the status system
  - Provide reasons for the change and copies of audit reports, as applicable
ISO 9001 Certification

Optional

- ISO 9001 specifies requirements for a quality management system to demonstrate the Contractor’s ability to consistently meet requirements and statutory and regulatory requirements.
- Contractors are encouraged to have ISO 9001 Certification during the entire term of OASIS SB.
- Contractors are encouraged to have a ISO 9001 Certification for the entire term of OASIS SB.
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing:
  - Any changes in the status in their certification
  - Provide reasons for the change and copies of audit reports, as applicable.
ISO 17025 Certification

*Optional*

- ISO 17025 is used by laboratories to implement a quality system aimed at improving ability to consistently produce valid results
- Contractors are encouraged to have ISO 17025 Certification during the entire term of OASIS SB.
- Contractors are encouraged to have a ISO 17025 Certification for the entire term of OASIS SB
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing
  - Any changes in the status in their certification
  - Provide reasons for the change and copies of audit reports, as applicable
ISO 14001 Certification

*Optional*

- ISO 14001 Certification is applicable to organizations wishing to:
  - Establish, maintain and improve their environmental management system
  - Ensure conformity with environmental policy
- Contractors are encouraged to have ISO 14001 Certification during the entire term of OASIS SB
- Contractors are encouraged to have a ISO 14001 Certification for the entire term of OASIS SB
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing
  - Any changes in the status in their certification
  - Provide reasons for the change and copies of audit reports, as applicable
AS9100 Certification

*Optional*

- AS9100 Certification specifies requirements for the aerospace industry to demonstrate the Contractor’s ability to consistently meet requirements and statutory and regulatory requirements.
- Contractors are encouraged to have AS9100 Certification during the entire term of OASIS SB.
- Contractors are encouraged to have an AS9100 Certification for the entire term of OASIS SB.
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing:
  - Any changes in the status in their certification
  - Provide reasons for the change and copies of audit reports, as applicable.
CMMI Maturity Level Certification

Optional

- CMMI Maturity Level Certification is a 5 level approach to improve processes across projects, divisions, or an entire organization in areas of acquisition, services, and/or development. Contractors are encouraged to have CMMI Maturity Level Certification during the entire term of OASIS SB.
- Contractors are encouraged to have a CMMI Maturity Level Certification for the entire term of OASIS SB.
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing:
  - Any changes in the status in their certification
  - Provide reasons for the change and copies of audit reports, as applicable
Security Clearance Requirements

- OCO must tailor security requirements (both facility and employee), clauses, provisions, and other applicable terms and conditions specific to each task order requirement.
- Only Contractors meeting the required security clearance levels on individual task order solicitations are eligible to compete.
- All necessary facility and employee security clearances shall be at the expense of the Contractor.
  - Individual task order should specify the terms and conditions for reimbursement, if applicable.
- Contractor shall comply with all security requirements in task orders awarded under OASIS SB.
Security Clearance Requirements

Facility Clearance Level (FCL)

- Contractor’s facility is eligible for access to classified information at the Confidential, Secret, or Top Secret level
  - FCL includes the execution of a Department of Defense (DoD) Security Agreement (DD Form 441 and DD Form 441-1)
  - Certificate Pertaining to Foreign Interests (SF 328)
- Under a FCL agreement, the Government agrees to issue the FCL and inform the Contractor as to the security classification of information to which the Contractor will have access
- The Contractor follows the security requirements in the National Industrial Security Program Operating Manual, commonly referred to as the NISPOM
- There are no mandatory levels of facility security clearance OASIS
  - Task orders may require a FCL at any level, under OASIS SB
- Contractors must maintain their FCL by the Defense Security Service (DSS) for the entire term of OASIS SB
- Contractors shall notify the OASIS SB CO and designated OCO for affected task orders, in writing:
  - Changes in the status of their FCL and provide the reasons for the change
- Only Contractors meeting a required FCL level on task order solicitations shall be eligible to compete
Employee Security Clearance

- Security clearances for Contractor and/or subcontractor employees may require Confidential, Secret, Top Secret, Agency-Specific Clearances, and/or Special Background Investigations for Sensitive Compartmented Information or Special Access Programs.
- Contractors, at their own expense, is responsible for providing and maintaining personnel with the appropriate security clearances complying with Government security regulations, as specified in individual task order.
- Contractors shall cooperate on all security checks and investigations by furnishing requested information for employee verification.
- Task orders containing classified work may also include a Contract Security Classification Specification, (DD Form 254 or civilian agency equivalent).
- The Government has full and complete control over granting or terminating security clearances for employees.
Meaningful Relationship Commitment Letters (MRCL)

- Establishes commitments of performance for Contractors sharing Systems, Certifications, and Clearances from other affiliates, divisions, or subsidiaries within a Contractor’s internal corporate structure
- If applicable, the Contractor must maintain and honor each MRCL for the entire term of OASIS SB
- Contractor shall notify the OASIS SB CO and designated OCO for affected task orders, in writing
  - Any changes in the status in their internal corporate relationships or commitments
  - Provide reasons for the change and copies of audit reports, as applicable
- If applicable, the Contractor’s MRCLs are incorporated by reference into the OASIS SB contract and the OASIS PMO will provide MRCLs for the OCO upon request
Sustainability

- OASIS SB seeks to benefit sustainable management practices by Contractors to include:
  - tracking and seeking continual reductions in energy usage
  - greenhouse gas emissions
  - water consumption
  - solid waste and hazardous waste and other relevant environmental impacts and associated costs

- Assist federal agencies to meet sustainable acquisition requirements under Executive Order 13514: Federal Leadership in Environmental, Energy and Economic Performance, and its precursors, successors and related regulations

- Public disclosures of environmental impacts and sustainable management practices have been associated with:
  - increased operational efficiency
  - lower overhead costs
  - reduced supply chain and other business risks for disclosing companies

- Sustainability-related standards, including estimates of the lifecycle costs and environmental impacts of proposed solutions, may apply at the task order level
Ethics & Conduct

- Personal services are not authorized under OASIS SB
- OASIS SB is strictly a non-personal services contract
  - personnel rendering the services are not subject to supervision and control by the Government
- The Contractor and its employees must conduct themselves with the highest degree of integrity and honesty
- The Contractor must adhere to the policies and procedures as specified in FAR Part 3 and GSAM Part 503 Improper Business Practices and Personal Conflicts of Interest.
- Failure to adhere to proper ethics and conduct may result in activation of Dormant Status and/or result in a Contractor being Off-Ramped
Conflicts of Interest

- Follows guidelines in FAR Part 3, FAR Subpart 9.5 and GSAM Subpart 509.5
  - guidelines will be used in identifying and resolving issues of a conflict of interest under OASIS SB
  - the FAR and other applicable agency specific regulatory supplements will govern OASIS SB task orders
- OASIS SB Prime Contractor may be a Subcontractor to another Prime Contractor on task orders solicited and awarded under OASIS or OASIS SB
  - OCOs may require that the Contractor sign an Organizational Conflict of Interest (OCI) Statement
  - Contractor (and any Subcontractors or teaming partners) agree not to submit any proposal or provide any support to any firm which is submitting (as Prime or Subcontractor) any proposal for any Solicitation resulting from the work on an OASIS SB specific task
Conflicts of Interest

● Contractor personnel (including Subcontractors and Consultants) personally involved in task order performance requiring Contractor to act on behalf of, or provide advice with respect to an agency procurement shall execute and submit an “Employee/Contractor Non-Disclosure Agreement” Form
  ○ OCO will provide the appropriate nondisclosure form specific to the procurement prior to any work starting on a task order or when new personnel are proposed

● The Contractor is responsible for identifying and preventing personal conflicts of interest of their employees

● If a potential conflict of interest occurs, the Contractor shall:
  ○ immediately notify the OCO of the conflict
  ○ submit a plan for mitigation
  ○ not begin work until specifically notified by the OCO to proceed
Dormant Status

- GSA is responsible for ensuring performance and compliance with the terms of OASIS SB and safeguarding the interests of the Government.
- Dormant Status is a condition that applies to the OASIS SB contract only. Grounds for being placed in Dormant Status specifically include, but are not limited to, trends or patterns of behavior associated with the failure to meet the deliverables and compliances.
- OASIS SB CO determines if any requirement of OASIS SB is not being met. A Contractor, they may be placed into Dormant Status.
  - Contractor shall not be eligible to participate or compete in any new task order solicitations while in Dormant Status.
  - Contractors placed in Dormant Status shall continue performance on previously awarded and active task orders, including the exercise of options and modifications.
- Dormant status will only be imposed after careful consideration of the situation and collaboration with the Contractor to resolve the issues.
- Dormant Status is not a Debarment, Suspension, or Ineligibility as defined in FAR Subpart 9.4 or a Termination as defined in FAR Part 49.
Off-Ramping

- GSA reserves the unilateral right to Off-Ramp non-performing Contractors
- Off-ramped Contractors have no active task orders under their OASIS SB Pool at the time of the Off-Ramping
- Contractors under more than one OASIS SB Pool will only be off-ramped from the OASIS SB Pool where the non-performing issues have occurred
- Off-ramping methods may result from one of the following conditions:
  - Permitting the Contractor’s OASIS SB Contract term to expire instead of exercising Option I
  - After a Contractor is placed in Dormant Status and the Contractor has completed all previously awarded task orders under OASIS
  - Debarment, Suspension, or Ineligibility as defined in FAR Subpart 9.4.
  - Termination as defined in FAR Part 49
  - Contractors failing to meet performance standards, deliverables, or compliances
Instructions, Conditions & Notices

*Read the ENTIRE Solicitation, including Section J*

- Offerors may compete for more than one task order contract or pool
- Offerors shall only submit one proposal per pool
  - If sharing resources from other entities only one Offer/Proposal shall be submitted; this applies to:
    - Meaningful Relationships Commitments
    - Contractor Team Arrangements
- Electronic solicitation documents are posted on https://www.fbo.gov
- The Government will not reimburse Offerors for any costs for preparation and submission of a proposal
- All Offerors must be an Official Legal Entity
- Organize proposal submission documents ensuring Government can identify which documents apply to which minimum requirement or scored evaluation criteria for evaluation purposes
- Offerors shall provide any official, verifiable documentation necessary to validate any minimum requirement or scored evaluation criteria being claimed unless otherwise specified herein.
Offerors shall make all Project verification & validation straightforward by highlighting each section/paragraph corresponding directly to each minimum requirement and scored evaluation criteria being claimed.

Offerors shall use Adobe Sticky Notes to clearly identify each section/paragraph corresponding to each minimum requirement and scored evaluation criteria being claimed.

Offerors may make minor formatting changes to Section K and Section J templates without changing contents used in proposal submission.

The OASIS SB CO reserves the right, with sole discretion, to waive minor clerical errors and/or minor formatting discrepancies, provided the information is available in the proposal in a format enabling the Government to proceed with evaluation of the proposal.

All Pool Qualification, Primary, and/or Secondary Projects submitted in response to this solicitation shall have been performed by the Offeror unless:

- Meaningful Relationship Commitment Letter is provided.
- Offer is from a Contractor Team Arrangements (CTAs).
- Federal Supply Schedule Contractor Teaming Arrangement (FSSCTA) found to be acceptable by the Government.
Instructions, Conditions & Notices

- Offerors may choose the same Project(s) between Pool Qualification, Primary, and/or Secondary Projects.
- Projects that are the result of a Merger, Acquisition, Novation or Change-of-Name Agreement or Assets of a Project may be submitted in accordance with Section L.2.9.
- Omission of any proposal submission requirements or failure to follow the instructions under this solicitation may result in rejection of the offer as non-compliant.
- No Project, to include Pool Qualification projects, Relevant Experience Primary Projects, and Relevant Experience Secondary Projects, may be used in more than one proposal for each Pool submitted under this solicitation, except in accordance with L.2.9.
- Projects used in more than one proposal in a given Pool submitted under this solicitation will be removed from all proposals and will not be evaluated as part of any Offeror’s proposal.
  - It is the Offeror’s sole responsibility to ensure that the Projects submitted as part of its proposal are not submitted in any other proposals.
  - If an Offeror submits a “Collection of Task Orders” under a Primary Project 5-Alternate (5A), none of the Task Orders awarded under the Single-Award Indefinite Delivery, Indefinite Quantity contract (SA-IDIQ) or Single-Award Blanket Purchase Agreement (SA-BPA) can be submitted for Primary Projects 1 through 4. See Section L.5.3.1.
Solicitation Questions

**Symphony Online Proposal System**

- Offerors shall submit all questions related to this solicitation via the OASIS Symphony Online Proposal System.
- Draft answers may be provided as soon as available. Review the previously answered questions prior to submitting a new question to avoid submitting duplicate questions.
- Only questions and answers posted to FBO are considered “official.”
- Any questions related to this solicitation submitted via any other format or portal (e.g. oasisSB@gsa.gov) will NOT be acknowledged.

- All questions related to this solicitation (with the exception of questions related to Symphony) **must be submitted by May 10th, 2019**
  - Any questions submitted after this deadline, or through any means other than Symphony, will not be considered.
Solicitation Questions

Symphony Online Proposal System

● Questions regarding Symphony (e.g., access, system issues, upload issues) **must be submitted by June 17th, 2019**
  ○ To the maximum extent practicable, these questions shall be submitted through Symphony via the Symphony helpdesk at client.support@apexlogic.com

● Questions MUST include the Page Number, Section Number, and Paragraph Number of the Solicitation that pertains to the Offeror’s questions

● **Solicitation Questions will be answered under an amendment posted on FBO prior to the Solicitation closing date**

● **Acknowledgement of receipt of questions will not be made**

● **Any questions or requests to add, remove, or revise any of the scored evaluation criteria in Section M will not be considered**
Protests

**FAR 33.101**

- Protests filed directly with an agency, and copies of any protests that are filed with the Government Accountability Office (GAO) shall be served on the Contracting Officer by obtaining written and dated acknowledgment of receipt from:

  General Services Administration (GSA)
  Federal Acquisition Service (FAS)
  Office of Professional Services & Human Capital
  Contract Operations Division

  **Attn:** Alexander Luker, OASIS SB Contracting Officer
  1800 F Street, NW
  Washington, DC 20405
  E-mail [oasisSB@gsa.gov](mailto:oasisSB@gsa.gov)
Official Legal Entity

- Offerors take all credit as a Prime Contractor when submitting a proposal.
- All minimum requirements and scored evaluation criteria as an Offeror must be in the Offeror’s official legal entity Commercial and CAGE Code and DUNS Number.
  - Exceptions are if the Offeror is claiming a minimum requirement or scored evaluation criteria from:
    - Acceptable Meaningful Relationship Commitment Letter
    - Joint Venture partner
    - First Tier Small Business Subcontractor
- The CAGE Code and DUNS Number in SAM must match Offeror’s official legal entity name(s) and address(es).
- All OASIS SB Task Order awards shall be in the Offeror’s official legal entity name and address.
- Exception is when the OASIS SB Contract is modified to recognize a successor-in-interest as a result of a Merger, Acquisition, Novation and/or Change-of-Name Agreement.
Proposal Requirements

Minimum Requirements Outlined in Volumes 1 - 6

Volume 1- General

- Standard Form 33
- Pool Qualification Projects—demonstrate Offeror’s experience performing complex professional services & responsibility for overall performance on a project
- Submit 2 distinct Pool Qualification Projects, either:
  - Stand-alone contract or FAR 16.505 contract
  - Task Order awarded under a Multiple Award Schedule
  - Task Order under a Single-Award BPA or Multiple-Award BPA
  - Awards issued via an OTA (Other Transactional Authority)
- Copy of contract/task order award form must be provided with signature from a Warranted Contracting Officer
- Period of Performance must be ongoing or complete no earlier than November 13, 2013
- Projects should have at least one year duration
- Submit most current Government Past Performance rating for each project
  - Project shall meet or exceed 3.00
  - Provide evidence of the assigned NAICS or PSC for each project
- Self-Scoring Calculation is automatically calculated through Symphony
Proposal Requirements

**Contractor Teaming Arrangements**

- Defined as an arrangement in which two or more companies form a Partnership or Joint Venture to act as a potential Prime Contractor
- Includes a potential Prime Contractor agreeing with one or more other companies to have them act as its Subcontractors under a specified Government contract or acquisition program
- Any Prime/Subcontractor CTA as defined in Solicitation is limited to only First Tier Small Business Subcontractor
  - A subcontractor who has a subcontract directly with the prime contractor
- All CTA members must be small businesses under the applicable size standard, as reflected in their representations and certifications
Proposal Requirements

Volume 2 – Responsibility

- Prospective Contractor must have adequate financial resources to perform the contract, or the ability to obtain them
- The Offeror shall submit a GSA Form 527 as NO other format will be considered
- All forms must be signed by an authorized official
  - In the case of Prime/Subcontractor CTAs, only the Official Legal Entity shall submit Attachment 13
  - In the case of Joint Ventures each member of the Joint Venture shall submit Attachment 13
Proposal Requirements

Volume 3 - Relevant Experience Projects For PRIMARY Projects

- Offeror shall submit a minimum of 3 and a maximum of 5 distinct Primary Relevant Experience Projects (REP) meeting minimum conditions
- Involve performance and/or integration of at least three out of six OASIS SB Core Disciplines
- Any combination of federal, state, international public sector, and non federal government/commercial projects can be submitted
- A subcontract is not a Commercial Project and will be non-conforming
- A Primary REP awarded by the federal government must be:
  - stand alone contract
  - task order under a single-award or multiple-award IDIQ contract
  - Task order awarded under a GSA Multiple Award Schedule
  - Task order awarded against single-award or multiple-award blanket purchase agreement
  - Awards issued via an OTA
- One Primary REP may be a “Collection of Task Orders” awarded under a single-award IDIQ or BPA
- A copy of the contract task order award for each Primary REP must be submitted
Proposal Requirements

Volume 3 - Relevant Experience Projects For SECONDARY Projects

- Offeror shall submit a minimum of 2 and a maximum of 5 distinct Secondary Relevant Experience Projects (REP) with Mission Spaces
- If Agency isn’t listed with a specific Mission Space, the umbrella agency takes precedence
- REPs will only be given credit for a single Mission Space
- Once a Mission Space is covered, additional credit for the same Mission Space is not given
- A Mission Space Secondary REP awarded by the federal government must be:
  - stand alone contract
  - task order under a single-award or multiple-award IDIQ contract
  - Task order awarded under a GSA Multiple Award Schedule
  - Task order awarded against single-award or multiple-award blanket purchase agreement
  - Awards issued via an OTA
- A copy of the contract task order award, period of performance, and annual project value for each Primary REP must be submitted
Proposal Requirements

Volume 4 - Past Performance

- Demonstrates how well an Offeror performs and delivers complex professional services & responsibility for successful completion as a Prime Contractor
- Only applies to Pool Qualification and Primary REPs
- Offers shall have satisfactory record of 3.00 or higher
  - Record for each Pool Qualification Project
  - Record for each Primary REP
- Only Primary REPs are eligible for scored evaluation points

Volume 5 - Systems, Certification & Clearances

- Systems, Certifications, and/or Clearances are not a minimum or mandatory requirement
- Offerors who submit approved Government systems, Industry certifications, and Government Facility Clearances will be considered more favorably
- All Systems, Certifications, and Clearances must be in the name of the Official Legal Entity
- All approved Systems, Certifications, and Clearances must be maintained at the current level at the time of award or higher throughout the period of performance of OASIS SB
Proposal Requirements

Volume 6 - Cost/Price

- Only Attachment 9 - COST/PRICE TEMPLATE will be accepted
- Offeror shall propose ceiling rates for sole-source T&M/L-H task order
- Attachment 2 - DIRECT LABOR RATE RANGES provide direct labor rate ranges based on OASIS SB categories mapped to OMB Standard Occupational Classification
- Offerors are encouraged to propose Direct Labor for each OASIS SB labor category within ranges provided
- Indirect rate percentages according to the most current DCAA, DCMA or Cognizant Federal Agency approved Forward Pricing Rate Agreements, Forward Pricing Rate Recommendations, and/or Provisional Billing Rates
- OASIS SB only established ceiling rates for T&M/L-H task orders/CLINs awarded on a sole source basis or when adequate price competition is not anticipated
  - Offeror’s ceiling rates do not apply to fixed-price, cost-reimbursement or T&M/L-H task orders when adequate price competition is anticipated
- Ceiling rates for sole-source T&M/L-H task orders will be incorporated by reference into any resulting contract award and are considered proprietary
Basis for Awards

*Highest Technically Rated with a Fair & Reasonable Price*

- Source selection will not be based on LPTA or Trade-off processes
- Best Value for awards will be determined by Highest Technically Rated with Fair & Reasonable Price (HTRFRP)
- All evaluation factors, when combined, are significantly more important than cost/price
- HTRFRP achieves the objective of awarding contracts to Offerors of varying core experience in a variety of professional services disciplines
- Government intends to award contracts without discussions - Initial proposals must contain the best offer
- Government intends to strictly enforce all proposal submission requirements
Screening & Evaluation Process

2-step screening process

- GSA will verify support documents exist for all eval criteria in an Offeror’s proposal and compare it to the Self-Scoring
- OASIS SB evaluation team will assign a preliminary score
  - Preliminary scoring is completed for all offers
  - Offers are sorted by highest score to lowest score
  - Offerors failing any of the acceptability review criteria will be removed from consideration for award
- Evaluation team will verify and validate support documentation for each and every scored evaluation criteria the Offeror has submitted and claimed credit for
- Once a highest scored offer has been verified/validated, the eval team verifies/validates the offer has proposed fair & reasonable pricing
Screening & Evaluation Process

Awarding Socio-economic concerns in each Pool

- Evaluation team will examine Top highest technically rated Offerors within each Pool to determine those who are socio-economic concerns
  - If at least three representatives are present for each sub-group no additional awards shall be made
  - If any socio-economic sub-group is needed to have at least three in any Pool, GSA will award to the next highest rated Offeror within a given sub-group until each Socio-economic subgroup has at least three representatives
  - In addition to the top highest technically rated Offerors

- Once highest scored offers, including all ties, and all additional Socio-economic considerations have been accomplished, evaluations will cease

- All remaining successful contract awards will be issued under applicable OASIS SB Pools
Proposal Submission Instructions

● Proposals shall be accepted electronically through the OASIS Symphony Online Proposal System
  ○ The sole method of proposal submission accepted by the Government
  ○ Any proposal sent to the Contracting Officer or other point of contact will be determined non-responsive and ineligible for award
  ○ No paper versions shall be submitted
● Proposal submission documents uploaded to Symphony shall not be locked, encrypted, or otherwise contain barriers to opening.
● It is the sole responsibility of the Offeror to ensure that the electronic files submitted are virus free, can be opened and read by GSA
● All proposal documents shall be submitted in Adobe (.pdf) format with the exception of Attachment J.9
● It is the sole responsibility of the Offeror to ensure registration and submission of its proposal in Symphony
  ○ Offerors are strongly encouraged to register for an account and upload their proposal documentation in advance of the proposal submission deadline
● Solicitation closing/Proposal due date is June 20th, 2019 at 11:00 a.m. Eastern Daylight Time (EDT)
Proposal Format Instructions

- The Proposal Format Table is provided to assist Offerors in organizing their proposal submission documents
- Offerors must adhere to the Volume Numbers, Format and/or Templates, and Page Limitations provided in the Proposal Format Table
- Offerors must include their Company Name or Company Name abbreviation and Volume Number in the filename
- Offerors may make minor adjustments to the file naming methodology so long as the resulting file names and organization are clearly understood
- Offerors may provide a Table of Contents that serves as an overall guide to what files are included, where they are located and brief descriptions of what the documents are; Inclusion of a Table of Contents is optional
- Failure to follow the submission instructions may result in the offeror being ineligible for award
8(a) Sub-pool Establishment

OASIS SB

8(a) Sub-pools
8(a) SubPool On-Ramping

Objectives: Expand 8(a) industry base and BIC opportunities

• Build a diverse pool of the highest technically rated 8(a) contractors
• Allow for both Direct (Sole Source) and competitive 8(a) orders
• Market research and customer demand support SubPool creation
  • Collaborative effort with SBA
  • Demonstrated customer need for 8(a) socio-economic opportunity on Tier III contract
8(a) SubPool On-Ramping

Background

- OASIS SB
  - Solicitation closed 30 Oct 13
  - Total Small Business Set-aside
  - Provides for further setting aside orders to socioeconomic groups IAW 15 USC 644(r)(1)
  - No formal offer/acceptance into 8(a) program occurred at IDIQ level
  - Agencies relied upon OASIS for 8(a) set asides and sole source awards

- SBA issued Final Rule on Task and Delivery Order Contracts, 78 FR 61113 effective 31 Dec 13
  - In FY 17, SBA declined new OASIS task orders offered into the 8(a) program, due to conflict with 78 FR 6113
8(a) SubPool On-Ramping

Path Forward

• 8(a) only “SubPools” being created under authority of contract section H.15.4 Focused On-Ramping (SubPool Creation)
  • May be accomplished in response to client needs, competition levels, or other factors…
• SBA formally accepted requirement for 8(a) SubPools in December 2018
• Offer/acceptance of OASIS 8(a) MA-IDIQ contracts will occur at the IDIQ level, based on 8(a) RFP closing date for eligibility
8(a) SubPool On-Ramping

Architecture

- 8(a) solicitation limited to current 8(a) firms
- All prospective awards will be offered to SBA for acceptance into the 8(a) Business Development Program
  - IDIQ level acceptance applicable for competitive 8(a) set aside task orders for life of IDIQ contract
  - Order level offer/acceptance still required for sole source 8(a) task order awards

- Upon SBA acceptance, the final award process will commence
  - Award contingent upon SBA acceptance
  - Date for 8(a) status: 8(a) SubPool RFP closing date - currently June 20, 2019
8(a) SubPool On-Ramping

Solicitation Mechanics:

- Two pathways to award:
  - Pathway 1. SB Pool “Flowdown”
  - Pathway 2. 8(a) set aside IDIQ-level competition

- SubPool awards will be issued IAW the following process:
  - Step 1: Awardees identified for SB Pool On-Ramping
  - Step 2: GSA will identify which companies will qualify to flowdown to SubPool from the SB Pool, including SB Pool On-Ramping awardees and existing OASIS SB contractors who remain in the 8(a) program
  - Step 3: Competitive 8(a) awardees will then be identified; most highly rated Offerors who are not already in SubPool through flowdown
8(a) SubPool On-Ramping

Pathway 1: SB Pool Flowdown

- Per the OASIS SB contract section H.15.4 (authority for establishing SubPools):
  - Any Offeror already possessing a contract in the affected Pool will automatically be included in the newly formed SubPool if the Offeror can provide Pool Qualification projects for the new SubPool, with the exception of SubPools limited to specific socioeconomic programs described in FAR 19.000(a)(3). GSA may elect to restrict SubPools to contractors qualifying as any of the socioeconomic programs described in FAR 19.000(a)(3) (e.g. an "8(a) Only SubPool").

- No limit to the number of 8(a) contractors who flowdown; based on eligibility
8(a) SubPool On-Ramping

Pathway 1: SB Pool Flowdown

- In order to **flowdown** to SubPool, the Pool offer must meet the following 8(a) solicitation requirements:
  - Offeror must be eligible 8(a) participant at time of 8(a) SubPool RFP closing (currently June 20, 2019)
  - Per SBA guidance, any first tier subcontractors in a Prime/Subcontractor CTA must also be eligible 8(a) participants.

  ■ Note: an Offeror may propose with different teams in response to the SB Pool RFP and the 8(a) SubPool RFP (e.g., using non 8(a) CTA members for SB Pool, and using 8(a) only members for SubPool), however, they would not be eligible to **Flowdown**, and could only qualify for the SubPool through Pathway 2: 8(a) set aside IDIQ-level competition
8(a) SubPool On-Ramping

Pathway 2: 8(a) set aside IDIQ-level competition

- Following identification of flowdown SubPool awardees, 8(a) set aside competition awardees will then be identified; most highly rated Offerors not already in SubPool through flowdown, per below anticipated award numbers (note: flowdown awardees are NOT included in these totals):

<table>
<thead>
<tr>
<th>Pools</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5b</th>
<th>6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of new Contractors to be On-Ramped</td>
<td>30</td>
<td>8</td>
<td>20</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

- Pools 2, 5b and 6 are not currently being On-Ramped, therefore the flowdown is limited to existing OASIS SB contractors
8(a) SubPool On-Ramping

Solicitation Requirement:

● Must upload a PDF printout of the SBA Dynamic Small Business Search (DSBS) with Offer
  ○ For a Joint Venture CTA, the DSBS printout demonstrating 8(a) program eligibility would be for the member of the JV who is a current 8(a) member.
    ■ Note the project limitations for Other than small JV members (ref solicitation L.5.1.10(d)(2))
  ○ For a Prime/Subcontractor CTA, the DSBS printout demonstrating 8(a) program eligibility would be for all CTA members
8(a) SubPool On-Ramping

Contract Requirements:

- FAR 52.219-28 rerepresentation triggered:
  - Within 30 days after execution of a novation agreement
  - Within 30 days after a merger or acquisition that does not require a novation
  - Within 60 to 120 days prior to the end of the fifth year of the contract

- To reiterate, offer/acceptance still required at the order level for 8(a) sole source task orders; SBA will confirm continued eligibility
Symphony Demonstration
Symphony Demonstration

*Symphony creator Apex Logic to provide overview of Symphony (outside of this slide deck)*
Popular Questions
SB Pools On-Ramping Q&A

Overview of commonly received questions in response to the SB Pools 1, 3 and 4 On-Ramping

• Alexander Luker, Contracting Officer
SB Pools On-Ramping Q&A

Question 1

• **Question**: Was the previous OASIS SB Pool 1 solicitation, due in November 2018, cancelled? Why are the previous offerors being required to resubmit?

• **Answer**: The previous Pool 1 solicitation was not cancelled.
  • GSA amended the solicitation to allow Joint Ventures to utilize first tier small business subcontractors' experience.
  • GSA has taken the opportunity to improve both the solicitation itself and the proposal intake process based on feedback from industry.
  • These changes were significant enough to change the landscape of the competition to require both resubmission of previous offers and submission of new offers.
SB Pools On-Ramping Q&A

Question 2

• **Question**: Why has GSA decided to limit the submission of projects to one proposal per Pool as stated in L.2(l)?

• **Answer**: Issues discovered through the evaluation process showed a need for GSA to limit projects submitted to one proposal per Pool proposed for.
  • Needed in order to adhere to the requirement to follow substantially the same evaluation factors as the original solicitation, which did not allow for duplicate project submission across competing proposals.
SB Pools On-Ramping Q&A

Question 3

• **Question**: Why has GSA decided to stop using the GACA process and use Symphony for the required proposal submission method?

• **Answer**: Significant issues were encountered with the prior proposal submission method, GACA, necessitating the need for a better proposal intake system, Symphony.
SB Pools On-Ramping Q&A

Question 4

• **Question**: How come projects must be ongoing or completed by November 2013?

• **Answer**: To help accommodate those offers who submitted previously in 2018, GSA has decided to allow projects to be ongoing or completed by the date provided in the final November 2018 solicitation.
  
  • All previous and new offerors will be able to use projects dating as far back as November 13, 2013.
Question 5

• **Question**: How is our score calculated now? What is the purpose of the J.5 attachment provided on FBO?

• **Answer**: Scoring is now calculated automatically based on the answers and information provided in Symphony.
  - Attachment J.5 is provided so that offerors can see what score their company may be able to achieve before registering for Symphony and submitting their offer.
SB Pools On-Ramping Q&A

Question 6

- **Question**: The Small Business Runway Extension Act became law in December 2018 to allow for the previous 5 years of revenue rather than the previous 3 years when determining business size status. How will size status be determined under the OASIS solicitation?

- **Answer**: Until the SBA issues further direction, agencies will continue to use the previous standard of 3 years when determining size status.

  - GSA lacks the authority to deviate from the SBA's current regulations, which specify a 3 year size standard, absent coordination and concurrence from the SBA.
SB Pools On-Ramping Q&A

Question 7

• **Question**: Do I need a GSA schedule to propose for OASIS?

• **Answer**: No, all offerors may submit proposals to this solicitation, subject to the requirements of the solicitation.
SB Pools On-Ramping Q&A

Question 8

• **Question**: Can we submit projects we performed as a subcontractor?

• **Answer**: No, any projects performed as subcontractors will be determined unacceptable in accordance with L.2.7(b) of the solicitation.
SB Pools On-Ramping Q&A

*Question 9*

- **Question**: Can we submit proposals for multiple Pools?
- **Answer**: Yes, through Symphony you will be able to build and submit a proposal for whatever Pool you wish to propose under in this solicitation.
SB Pools On-Ramping Q&A

**Question 10**

- **Question:** Can we use the same projects for multiple Pools?
- **Answer:** Yes, an offeror may utilize the same project for multiple Pools
  - That project may not be submitted as part of any other offeror's proposal within the same Pool.
  - Example: Company A submits Project X for Pool 1 as a Prime Contractor. If Company A decides to team as a first tier subcontractor with Company B as the prime in Pool 1 as well, they cannot use Project X for Company B’s Pool 1 proposal.
SB Pools On-Ramping Q&A

Question 11

• **Question**: Is it permissible to submit a proposal as prime and be a subcontractor as part of a Contractor Teaming Arrangements (CTA) to another prime that is submitting a proposal?

• **Answer**: Yes, you may utilize first tier subcontractor Prime experience as well as individual Joint Venture member experience.
  
  • Additionally, you can be part of multiple CTA teams
  
  • Be aware of the restriction on using the same project in multiple proposals. Any project found submitted for more than one offer in the same Pool will be removed from all offers.
SB Pools On-Ramping Q&A

Question 12

• **Question**: Can we use the same project submitting as Prime contractor and as a subcontractor on another proposal as part of a CTA?

• **Answer**: You may not use a project in more than one proposal within the same Pool unless it's a project subject to a novation/merger/acquisition in accordance with L.2.9 of the solicitation.
SB Pools On-Ramping Q&A

Question 13

• Question: Can we utilize different CTA members for each Pool?

• Answer: Yes, through Symphony you will be able to choose which CTA members you are utilizing for each Pool submission.
  • All first tier subcontractors must be small businesses in accordance with the size standard applicable to that Pool.
SB Pools On-Ramping Q&A

Question 14

• **Question**: What sort of documentation needs to be submitted as part of our proposal?

• **Answer**: Offerors need to submit all explicitly required documents as required by the solicitation. Any claimed evaluation points or minimum requirements need substantiating documentation submitted with it.
  
  • GSA reserves the right to utilize information outside a proposal (e.g., government databases) to validate information provided/claimed in a proposal
  
  • Offerors should assume that GSA will not look outside of their proposal for information. Documentation needs to be as complete and official as possible.
SB Pools On-Ramping Q&A

Question 15

• **Question**: I’m registered in Symphony now, but when I try to login I receive the following message; "Your account is inactive. Before signing in your account must first be activated by your SAM Authorized Point of Contact." I am one of the two SAM Administrators, but I don’t know what action I am supposed to take to activate my Symphony login.

• **Answer**: As stated in J.19, only the Government Point of Contact or Alternate Government Point of Contact can activate users until a Proposal Manager is assigned.
On-Ramping Final Thoughts

To allow the GSA team to proceed with these OASIS SB On-Ramping source selections as quickly as possible, we would kindly ask contractors to please:

- Read the solicitation in its entirety before asking questions
  - Use “CTRL + F” to search the RFP docs for specific terms
- Follow the instructions for submission of questions
  - Don’t attempt to ask questions via email or by calling Government POCs. They will not be answered.
- Refrain from contacting the OASIS team requesting status updates. We will provide updates as soon as possible. We appreciate your patience!
Thank You For Your Interest in OASIS and the Professional Services Offerings of GSA