**EVALUATION FACTORS**

[CORPORATE EXPERIENCE](#_f99vtphjgpld)

[TECHNICAL CAPABILITY](#_x52s55qx343h)

[MANAGEMENT APPROACH](#_4f8u20k7c09p)

[PERSONNEL EXPERIENCE](#_x50jcdz976u4)

[STAFFING PLAN](#_eprv8dflfdrm)

[PAST PERFORMANCE](#_afizbqqv5qin)

* **Sample 1 Introductory Paragraph:** A single task order award will be established with the responsible contractor whose quote conforms to the requirements outlined in this RFQ and is most advantageous to the Government based on the best value determination. The Contracting Officer will determine best value to the Government based on evaluation of price with non-price factors considered. The combined weight of the non-price factors is more important than price. The evaluation factors below are listed in descending order of importance.
* **Sample 2 Introductory Paragraph:** Award will be made upon the basis of best value, utilizing trade-offs of non-price factors and price. The TO will be awarded to the Vendor whose quotation represents the overall best value to the Government. The non-price factors are listed in descending order of importance and when combined are equally important to price.
* **Sample 3 Introductory paragraph (LPTA):** Award of this task order will be made on a competitive basis using the “lowest price, technically acceptable” approach. Evaluation will be made to identify all offerors whose quotes are technically acceptable in accordance with the Government’s requirements and the evaluation criteria. Award will be made to the offeror from the pool of technically acceptable proposals, whose cost/price is lowest.

# CORPORATE EXPERIENCE

* **Corporate Experience Sample 1 Evaluation Factor Language:** The Government will evaluate the extent to which the Contractor’s previous experience with projects of a similar size, scope and complexity demonstrate its capability to successfully perform the requirements of this task order.
  + **Corporate Experience Sample 1 Submission Instructions:** The contractor shall submit a detailed descriptive listing of no more than three (3) projects performed within the past five (5) years that are similar in nature to the one described in this solicitation. “Similar” is defined as projects comparable in terms of such factors as duration, dollar value, types of services performed or level of Contractor responsibility and authority. The detailed description submitted for each project shall include, at a minimum, the following information:

i. Contract number

ii. Estimated annual dollar value of contract

iii. Description of services (including location) provided and the offeror’s level of responsibility and authority on the project.

iv. (If applicable) List of subcontracted services and subcontractors used, along with estimated annual cost of each subcontracted service.

v. Type of contract (e.g. cost reimbursable, incentive fee, award fee, time and materials, fixed price, etc.).

vi. Date of contract start and completion, including options.

vii. Name, title, address, phone number, and email of customer contact. It is incumbent on the offeror to ensure the customer information is current and accurate.

* **Corporate Experience Sample 2 Evaluation Factor Language:** The Government will evaluate the summary of work experience for similar nature, scope, complexity, and difficulty to that which will be performed under the prospective contract contemplated by this solicitation, assessing the likelihood that the Offeror’s relevant experience will minimize risk to the Government of unsuccessful performance.
  + **Corporate Experience Sample 2 Submission Instructions:** The offeror shall submit a summary of work experience of a similar nature, scope, complexity, and difficulty to that which will be performed under the prospective contract contemplated by this solicitation. This submission will illustrate similar work that the offeror has been awarded or hired for but does not include the evaluation of the offerors performance.
* **Corporate Experience Sample 3 Evaluation Factor Language:** The Government will assess its level of confidence that the prime contractor will successfully perform the task order requirements based on its corporate experience, considering such matters as the size, scope and complexity of the submitted experience as it relates to the subject requirements.
  + **Corporate Experience Sample 3 Submission Instructions:**The contractor shall provide information to facilitate the Government’s consideration of Corporate Experience. The Government is most interested in examples of real work with actual results of the prime contractor in performing requirements similar to those of this solicitation in terms of size, scope and complexity. The Government is more interested in the quality and similarity of the corporate experience examples to the requirement than the quantity of examples. The contractor shall provide a name and contact information of a reference that can substantiate the work performed, if necessary.

# TECHNICAL CAPABILITY

* **Technical Capability Sample 1 Evaluation Factor Language:** The Government will evaluate the degree to which the technical and management approach demonstrates a thorough understanding of the requirements and provides a viable plan and means for successful completion, including transition-in, staffing, training, methodology for completion of the work, and quality assurance procedures.
  + **Technical Capability Sample 1 Submission Instructions:** The contractor shall provide a Technical and Management Approach clearly demonstrating how the Government’s requirement will be met. This section shall address: transition-in, staffing, training, methodology for completion of the work, and quality assurance procedures.
* **Technical Capability Sample 2 Evaluation Factor Language:** The proposal will be evaluated on how the offeror intends to organize, staff and manage the contract and the means that will be used to accomplish the contract requirements. The degree to which the quote demonstrates an understanding of the requirements will be evaluated, as well as the offeror's planned management of consultants and subcontractors, if applicable.
  + **Technical Capability Sample 2 Submission Instructions:** The offeror will explain in their quote how they will organize, staff and manage the contract and the means that will be used to accomplish the contract requirements. The quote shall demonstrate an understanding of the requirements, as well as how the offeror will manage consultants and subcontractors, if applicable.
* **Technical Capability Sample 3 Evaluation Factor Language:** The offeror’s quote will be evaluated on the extent to which its approaches and plans to completing the work demonstrate that the Government’s requirements will be met. The Government will also evaluate how the offeror plans to assess difficulties and risks it may encounter, and how the offeror plans to deal with them while still successfully performing the work.
  + **Technical Capability Sample 3 Submission Instructions:** The offering contractor shall provide information to facilitate the Government's consideration. The Government is most interested in substantive and meaningful discussion of how the offering contractor will approach the work requested. The Government is also interested in the offering contractor's assessment of the difficulties and risks it may encounter, and its approach to dealing with them while still successfully performing the work.
* **Technical Capability Sample 4 Evaluation Factor Language:** The Contractor will be evaluated on its ability to: 1) Demonstrate a clear understanding of the work to be performed; 2) Meet the Government’s objective; 3) Perform the tasks and deliverables of the SOW within the period of performance; 4) Deliver key personnel that meets the SOW’s qualification requirements; 5) Recruit/source, onboard, and retain the talent required to perform on this contract.
  + **Technical Capability Sample 4 Submission Instructions:** The Contractor shall provide a clear and detailed approach to meeting the Government’s objective and executing all SOW requirements. The Contractor shall provide a resume of their proposed key personnel that meets the qualifications of the position in the SOW. If the proposed key personnel is/are not a current employee of the Contractor, the Contractor shall include a signed commitment letter from the employee that reflects their intention and willingness to perform in the event the Contractor is awarded the contract.

The technical approach shall also include a management plan that discusses, at a minimum, the contractor’s ability to recruit/source, onboard, and retain the talent required to perform on this contract.

# MANAGEMENT APPROACH

* **Management Approach Sample 1 Evaluation Factor Language:** The evaluation of the management and staffing plan will consider the offeror’s ability to manage and balance technical performance, time constraints, cost factors and the management of subcontractor personnel, if applicable. The Government will evaluate the offeror’s plan for accomplishing work in a logical sequence that will lead to successful performance. This section will also evaluate allocation of resources and reasonableness of hours.
  + **Management Approach Sample 1 Submission Instructions:** Each offeror shall provide the following:
    - The Project Management plan shall detail the offeror’s ability to manage and balance technical performance, time constraints, cost factors and the management of subcontractor personnel, if applicable. The plan must detail how work will be accomplished in a logical sequence that will lead to successful performance, including how resources will be allocated and reasonableness of hours.
    - The management plan shall indicate all tasks that will be subcontracted and how subcontracted work will be monitored. Lines of communication between the contractor, \*insert agency here\*, and subcontractors are to be carefully considered in the project organization;
    - A staffing plan showing labor hours and categories by task/sub-task shall demonstrate a well-developed approach for ensuring successful completion of this project.
* **Management Approach Sample 2 Evaluation Factor Language:** The Management Approach Subfactor will be evaluated as follows:
  + - The quotation will be evaluated on the basis of the extent to which the quotation demonstrates capabilities to successfully manage, perform, and execute the PWS requirements.
    - The organization structure will be evaluated to the extent to which it aligns with the technical approach.
    - The Quality Control Plan will be evaluated to determine how well the Offeror demonstrates quality oversight and how quality standards, as outlined in the Performance Requirements Summary, will be achieved and maintained during performance.
    - The draft Transition-In Plan will be evaluated for completeness, timeliness of transition process, efficiency, understanding and consideration of the current environment, and risk identification and mitigation strategies that will allow a timely and seamless assumption of services while transitioning all requirements. The Transition-In Plan will be evaluated for compliance to the RFQ, assurance of continuity of services, orderly transition of responsibility, workforce stability, and impact and risk to customers and management.
  + **Management Approach Sample 2 Submission Instructions:** The Offeror shall provide a Management Approach that specifically defines and details the Offeror’s capabilities to successfully manage, perform, and execute the Government’s requirements. The Offeror shall:
    - Provide an organizational structure (including an organizational chart) that aligns with the Offeror’s technical approach.
    - Provide a draft Quality Control Plan that demonstrates how quality, as outlined in the PWS’ performance standards, will be met. The Offeror must provide performance measures in addition to those stated in the PWS that are meaningful, measurable, challenging and show the Offeror’s ability to meet the objectives identified in the PWS.
    - Provide a draft Transition-In Plan that describes how the transition will be accomplished in the designated transition period. The draft Transition-In Plan must include a schedule with task dependencies for transitioning in all of the PWS requirements, including working with incumbent contractors. The Transition-In Plan shall address the Offeror’s plan to effectively and efficiently initiate support immediately at task order award. The Transition-In Plan shall present a process for transitioning program management to minimize impact to customers, an appropriate skill mix for transitioning staffing to minimize impact to customers, and an approach for managing transition risks.

# PERSONNEL EXPERIENCE

Notes regarding personnel experience: if Government intends to consider evaluation of personnel experience as a meaningful evaluation factor, make sure to designate those positions as Key and include terms/conditions in the award requiring the contractor to replace any Key Personnel with those possessing equal or greater qualifications.

* **Personnel Experience Sample 1 Evaluation Factor Language:** Key Personnel Experience will be evaluated to determine the degree of and relevance of experience the Key Personnel possess related to the subject requirements. Evaluation of experience will factor in the length and degree of experience in the relevant technical areas. Please note that, as a condition of contract award and performance, should the contractor wish to substitute proposed Key Personnel in their proposal (or during performance, if after award), the replacement staff must possess education and/or experience equivalent to or exceeding that of the individual(s) being replaced, subject to the approval of the Contracting Officer, prior to performance.
  + **Personnel Experience Sample 1 Submission Instructions:** For any staff designated as Key, the Contractor shall provide resumes which clearly demonstrate the extent that the personnel meet or exceed the required minimum qualifications. The contractor shall also provide project descriptions detailing the similarity and relevance of the contractor employee(s)’ prior experience to the subject requirements.
* **Personnel Experience Sample 2 Evaluation Factor Language:** This Factor considers the Key Personnel proposed by the quoter; consideration will be given to the demonstrated experience and qualifications of the proposed Key Personnel on relevant projects of similar nature to the project in this solicitation. Proposed Key Personnel will be evaluated as to qualifications and experience in all areas necessary to effectively perform the required work. It is expected that the proposed Key Personnel will be the individuals who perform work under this contract.

Any changes to the proposed Key Personnels after award MUST be approved by the Contracting Officer and shall only be approved upon demonstration of as-good or better qualifications when the new individual is compared to the qualifications and experience of the original proposed individual. Key Personnel, and the requisite minimum qualifications and experience, for this project shall include the following: [insert key personnel positions and minimum qualifications]

* + **Personnel Experience Sample 2 Submission Instructions:** For this evaluation factor, the contractor shall provide the names and qualifications of the Key Personnel proposed for this project in the form of resumes. Resumes for each individual must include educational qualifications, if applicable. The contractor must clearly present the separate credentials of each proposed key team member, and must provide a concise summary of each individual’s separate duties and responsibilities as proposed for this project. The contractor shall describe up to three (3) project examples demonstrating the experience of each individual designated as key personnel. Projects should be relevant examples of similar size, scope, and complexity.
* **Personnel Experience Sample 3 Evaluation Factor Language**: The evaluation of key personnel will consider the competence and experience of the personnel in the skills necessary to perform the Government’s requirements. The evaluation of key personnel, to include any subcontractor personnel who are designated as key, will be based upon the individual’s past experience on similar efforts, academic qualifications, and relevant training. The Government will also evaluate the extent to which the proposed functions, duties, and time allocations of the key personnel will contribute to successful performance of the Government’s requirements.
  + **Personnel Experience Sample 3 Submission Instructions**: This portion of the quote shall describe the educational background, professional experience, and special qualifications of all key personnel proposed to perform the subject requirements, to include any subcontractor personnel who are designated as key. For key personnel, the contractor shall:
    - Describe functions and duties with respect to the subject requirements;
    - Specify the percent of time the individual will be allocated to this project
    - Provide a current resume indicating relevant specific experience and education.

# STAFFING PLAN

* **Staffing Plan Sample 1 Evaluation Factor Language:** The agency will evaluate the completeness and feasibility of the staffing plan to ensure a stable and qualified workforce over the life of the contract by review of the Offeror’s ability and approach to recruiting and retaining qualified personnel, specifically:
  + - How the Offeror plans to maintain an environment in which highly skilled and talented people will make long-term commitments to achieving this mission;
    - The Offeror’s identification of critical skills and ability to accomplish work requirements identified in their overall technical approach, as well as the Offeror’s approach for recruiting and maintaining critical skill personnel identified in their proposal;
    - The Offeror’s approach to managing resources while accommodating workload fluctuations; and
    - Information demonstrating the Offeror’s performance history as it pertains to historical retention rates on projects similar in size, scope and complexity to the subject requirements (e.g., % of contractor employees hired to perform under the project remained on the project at its completion)
  + **Staffing Plan Sample 1 Submission Instructions:** Vendors shall describe their staffing plan to ensure a stable and qualified workforce over the life of the contract by detailing their ability and approach to recruiting and retaining qualified personnel, specifically:
    - How the Vendor plans to maintain an environment in which highly skilled and talented people will make long-term commitments to achieving this mission;
    - The Vendor’s identification of critical skills and ability to accomplish work requirements identified in their overall technical approach, as well as the Vendor’s approach for recruiting and maintaining critical skill personnel identified in their proposal;
    - The Vendor’s approach to managing resources while accommodating workload fluctuations; and
    - Information demonstrating the Vendor’s performance history as it pertains to historical retention rates on projects similar in size, scope and complexity to the subject requirements (e.g., % of contractor employees hired to perform under the project remained on the project at its completion)
* **Staffing Plan Sample 2 Evaluation Factor Language:** The Government will evaluate the extent to which the proposed staffing plan:
  + - Demonstrates an effective integrated approach to hire, train, and retain qualified management and technical personnel by job category/position to execute all of the Government’s requirements. The Government will evaluate the Training approach to ensure it consists of all required initial, qualification, proficiency, certification, and recurring training actions needed to provide and maintain a qualified workforce with no interruption in service.
    - Demonstrates a comprehensive plan for creating and maintaining a work environment with incentives for employee performance and innovation.
  + **Staffing Plan Sample 2 Submission Instructions:**
    - Provide your integrated approach for hiring, training, and retaining qualified management and technical personnel by job category/position to execute all PWS requirements. Training approach shall consist of all required initial, qualification, proficiency, certification, and recurring training actions taken to provide and maintain a qualified workforce with no interruption in service.
    - Provide your plan for creating and maintaining a work environment that creates incentives for employee performance and innovation.

# PAST PERFORMANCE

Notes regarding past performance:

* Evaluation of past performance is optional, and is not required, under FAR 8.4 procedures as all of FAR 15 and thus [FAR 15.304(c)(3)](https://www.acquisition.gov/content/15304-evaluation-factors-and-significant-subfactors) is inapplicable to MAS orders (reference [FAR 8.404(a)](https://www.acquisition.gov/content/8404-use-federal-supply-schedules)
* If the CO elects to evaluate past performance, GSA strongly encourages offerors to leverage CPAR evaluations, if available, to prevent wasted resources of Government evaluators having to complete duplicate past performance references in multiple formats; this is the point of CPARS. To the extent that past performance questionnaires are utilized, they should only be used as a substitute should no CPAR be available and should align with the categories/ratings in CPARS to ensure consistent evaluations.
* **Past Performance Sample 1 Evaluation Factor Language:** The Government will evaluate the quality of the offeror's past performance deemed relevant to the requirements of this RFQ. The Government will use information submitted by the offeror and any other sources of information available to assess past performance. The Government will evaluate past performance on an Acceptable/Unacceptable basis as follows:
  + - Acceptable: Based on the offeror’s performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort, or the offeror’s performance record is unknown.
    - Unacceptable: Based on the offeror’s performance record, the Government does not have a reasonable expectation that the offeror will be able to successfully perform the required effort.

NOTE: In the case of an offeror without a record of relevant past performance or for whom information on past performance is not available or so sparse that no meaningful past performance rating can be reasonably assigned, the offeror shall be determined to have unknown (or “neutral”) past performance.

* + **Past Performance Sample 1 Submission Instructions:** The offeror shall provide past performance information for no more than three (3) of the most relevant contracts performed for Federal agencies, state/local governments and/or commercial customers within the last three (3) years from the issue date of this RFQ or currently being performed. Relevant contracts include contracts similar or greater in scope, magnitude, and complexity than the effort described in this RFQ. The Offeror shall provide a Contractor Performance Assessment Report (CPAR) for the referenced project, if one is available. If a CPAR is not available, the Offeror shall submit a Past Performance Questionnaire (PPQ) signed by the customer reference (see attachment \_\_ to this RFQ). PPQs shall not be sent directly to the Contracting Office soliciting this requirement; it is the responsibility of the Offeror to include the completed CPAR and/or PPQ as part of its quote.
* **Past Performance Sample 2 Evaluation Factor Language:** The Government will evaluate the degree to which past performance evaluations for relevant efforts, either included in the quotation or identified by the evaluators in any other manner, reflect success in the requirements and the degree to which these evaluations of past performance reflect a history of customer satisfaction and collaboration. Past performance information will be utilized to determine the quality of the Offeror’s past performance as it relates to the probability of success of the required effort. Due to the wide variety of past performance history of individual Offerors, the Government is not required to ensure that an equal number of references be obtained for each Offeror. A lack of recent and relevant past performance will be evaluated as neutral.
  + **Sample 2 Submission Instructions:** A summary of the Offeror’s past performance providing services relevant to the subject requirements with some portion of performance having been completed in the last three years. The summaries of three relevant projects performed in the last three years shall include:

1) project name, contract and/or task order number;

2) contract dollar value;

3) period of performance;

4) customer point of contact (including name, work number, cell number, and email address);

5) detailed description of work performed;

6) roles and responsibilities;

7) the results achieved; and

8) a narrative that addresses how the work performed is similar in scope and complexity. Customers may be Federal, State, or Local Government, corporate, university, or association customers.

* + If the example referenced has a CPAR available, the Offeror shall submit the CPAR as part of its quote. For those examples without CPARs, Offerors are responsible for ensuring Past Performance Questionnaires (PPQ) (Atch \_\_) are sent to the appropriate points of contact (POC) for each of the Government or commercial contract/work effort referenced. The PPQ reference must submit the completed PPQ directly to the Contracting Office as detailed in the PPQ attachment.
  + Note: The Government reserves the right to include its own past experience with the Offeror, in addition to provided references, as well as other sources of past performance information available to the Government.