

## TASK ORDER COMPETITION PROCEDURES

### **1.0 Statement of Purpose.**

(a) This Section outlines the internal procedures that govern the selection of contractors for task order assignments (projects) under the Training & Management Assistance (TMA) contract. These procedures serve as a supplement to the policies of the Office of Personnel Management (OPM) Contracting Office. All TMA staff will use these procedures.

(b) The procedures outlined in this Section will be revised occasionally to reflect the changing needs of the TMA program. Any changes will be consistent with the RFP requirements.

### **2.0 Definition of Terms.**

The terms listed below have the following meanings:

**(a) Task Order Assignment**, synonymous with the terms "new project" or "project," means an agreement between the OPM and a client agency that results or will result in (1) a planned undertaking using the TMA contract and (2) the development of a management plan.

**(b) Contractor or Firm** -- means a private sector company or entity that submitted a proposal in response to OPM-01-RFP-0003HLW and was selected for an award as a prime contractor.

**(c) TMA Matrix** -- a chart outlining the strengths and experiences of the firms in subject matter areas and product and technology categories listed in the RFP based on their proposals and past experiences.

### **3.0 Exceptions to Procedures.**

The following are exceptions to the task order selection procedures outlined in paragraph 4.1, Procedures, of this Section:

**(a)** if the task order assignment (project) is a continuation of a current project or the result of a function improvement proposal (FIP), thereby eliminating unnecessary start-up costs to the Government;

**(b)** if a task order assignment is awarded to insure that an offeror receives the guaranteed yearly minimum established by the Government for this award;

(c) if only one firm has the demonstrated capability in the required subject matter area and/or field necessary to meet client needs;

(d) if task order assignment is awarded to an 8(a) firm to support OPM's 8(a) business objectives; and

(e) any other applicable exceptions allowed under the FAR.

#### **4.0 Selection and Assignment of Contractors.**

(a) With the exception of Subsection 3.0, Exceptions to Procedures, the selection and assignment of contractors for task order assignments will be based on oral presentations.

(b) Using the criteria outlined in paragraph 4.1(b), Criteria for Selection of Contractors for Oral Presentations, all contractors will be considered for new projects prior to the selection of a firm.

#### **4.1 Procedures.**

(a) **Use of Procedures.** The OPM Project Manager will use these procedures to recommend to TMA management the selection of contractors for oral presentations and task order assignments. After consulting with the client agency representative(s), OPM TMA will determine which contractors will make oral presentations and will receive the task order assignment.

(b) **Criteria for Selection of Contractors for Oral Presentations.** Based on the client's Statement of Work, the OPM Project Manager, in conjunction with client agency representative(s), will use the following factors to formulate a recommendation regarding the selection of contractors for oral presentations:

- (1) The TMA matrix;
- (2) The client's recommendation of a firm;
- (3) The contractor's knowledge of the agency, its mission and corporate culture;
- (4) The contractor's history with OPM and other Federal agencies as it relates to the SOW;
- (5) The client agency's budget; and
- (6) Other relevant factors.

**(c) Number of Presenting Firms.** (1) The OPM Project Manager should recommend at least three firms for oral presentation competition. There may be instances when more or fewer firms are needed.

(2) If a firm declines its invitation to make an oral presentation, TMA management, after consulting with the OPM Project Manager and the client agency representative(s), will determine whether an additional firm should be selected for oral presentation competition.

#### **4.2 Oral Presentations.**

**(a) Format of the Oral Presentation.** (1) A selected firm will make its oral presentation in person to the selection panel. During the oral presentation, the firm should outline its capabilities, experiences and approaches that are relative to the SOW, any other documentation furnished by the client agency, and the evaluation criteria set forth in this Subsection.

(2) Generally, each firm will have forty (40) minutes to make its oral presentation, including addressing questions from the Government. However, OPM, in consultation with the client agency, may alter the length of the oral presentation based on the scope and complexity of the project. Firms that are asked to make oral presentations will be notified in advance of the length of the presentation.

(3) The Government should establish before task order assignments are made whether the question-and-answer (Q&A) period will be integrate within the established time period of the presentation or if the Q&A period will follow the firm's oral presentation. If the Government determines that the Q&A period will follow the firm's oral presentation, fifteen (15) minutes should be subtracted from the established time period to allow for the Q&A period. For example, if a presentation is scheduled for a total of forty (40) minutes and the government determines that it wishes questions to follow the firm's oral presentation, the firm's oral presentation will be 25 minutes in length and the Q&A period will be 15 minutes.

(4) As part of its presentation, firms may choose or be asked to present or demonstrate work samples that are relevant to the SOW. OPM will notify the firms in advance when samples are needed. It is the responsibility of the firm to assure that the sample products are operational during the presentation and to bring, set-up or arrange for any equipment to assure functionality.

**(b) Schedule of Presentation.** (1) Oral presentations will normally begin within five working days of the "forwarding" of the Statement of Work to the selected firms. Exceptions will be considered on a case by case basis. All firms will make their oral presentations on the same day unless OPM determines that such scheduling would not be in the best interest of the Government.

(2) Once notified of the scheduled date, time and location of its presentation, a firm shall complete its presentation at the scheduled location on that date and time. Requests from firms to reschedule their presentations will not normally be entertained. Rescheduling of presentations will be done when determined necessary by the Government to resolve unanticipated problems or delays encountered in the presentation process.

**(c) Background Information for Oral Presentations.** Unless otherwise determined by OPM, the OPM Project Manager will be solely responsible for forwarding background information to the firms that will make oral presentations. All firms will receive the same information. The background information will include the Statement of Work, criteria for selection, other pertinent information furnished by the client agency, and the date, time and location of the oral presentation. Firms will use the information as the basis for their oral presentations.

**(d) Firm's Presentation Team.** A firm shall have the option of selecting the participants who will make its oral presentation.

(1) *Subcontractor Involvement.* A firm that plans to use a subcontractor as part of its oral presentation team and subsequent work team shall assure that the subcontractor's fees are within the firm's approved daily rate structure unless otherwise approved by OPM.

(2) *Nationally Recognized Experts Involvement.* A firm has the right to use a Nationally Recognized Expert as part of its oral presentation and subsequent work team when it believes it enhances its opportunity to receive a task order. Under these conditions, the firm must submit to the appropriate OPM Project Manager a justification that supports the use of expertise outside the normal labor categories and a copy of the resume for each proposed nationally recognized expert before the oral presentation.

NOTE: When the Government determines that a Nationally Recognized Expert is required to perform the work or an aspect of the work, paragraph H.6 of the contract will apply.

**(e) Members of Selection Panel.** Generally, the selection panel will consist of two government representatives (e.g., OPM and client agency representative(s)). Occasionally, the COR or a TMA management official may participate on the selection panel.

**(f) Method of Evaluation.**

(1) *Criteria for Selection.* At a minimum, the oral presentations will be evaluated as to the best value using the following factors:

(A) Understanding of the Work Requirements;

- (B) Technical Approach to Meeting Client Needs;
- (C) Knowledge of the Subject Matter Area;
- (D) Key Staff Capabilities & Other Corporate Resources; and
- (E) Past Performance & Relevant Project Experience.

(2) *Evaluation of Presentation.* At the conclusion of all presentations, the selection panel will discuss the relative strengths and weaknesses of the presenting firms. The Project Manager will submit to TMA management documentation of the evaluation (i.e., Oral Presentation Evaluation Sheet) and a recommendation of the firm or firms considered the best qualified.

(3) *Additions to Selection Criteria.* On occasion, OPM, in consultation with the client agency, will add factors to the selection criteria. Firms that are selected for oral presentations will be notified of these factors in advance.

**(g) Selection of Firm.** Considering the exceptions outlined in Subsection 3.0, Exceptions to Procedures, or the evaluation of the oral presentations and the recommendation of the OPM Project Manager, OPM TMA will select the firm that will receive a task order assignment and notify the presenting firms of the result.

**(h) Documentation of Award.** The OPM Project Manager will document the selection of contractors for oral presentations and for task order assignments. The documentation shall include a clear justification for the selection of contractors for oral presentations and relative strengths and weaknesses of each firm's oral presentation. The OPM Project Manager will file the documentation in the official project file.

### 4.3 Roles and Responsibilities

Step	Description	Responsible Party
1	Contacts OPM TMA with a need.	Client Agency
2	Determines if potential project fits within the scope of the TMA contract and assigns a project manager to work with the client.	TMA Management
3	Further assesses client agency needs, providing technical assistance and consultation.	TMA Project Manager
4	Submits a SOW and interagency agreement to OPM TMA.	Client Agency
5	Matches agency requirements outlined in SOW against selection criteria and recommends firms for oral presentations to TMA management.	TMA Project Manager
6	Selects firms for oral presentations.	TMA Management
7	Establishes oral presentation schedule and notifies firms, forwarding SOW and logistical & other pertinent information.	TMA Project Manager
8	Delivers oral presentations outlining capabilities & project approach.	Firms
9	Evaluates oral presentations based on criteria in paragraph 4.2(f) and documents process.	Selection Panel
10	Makes recommendation of best qualified firm or firms to TMA management and submits supporting documentation.	TMA Project Manager
11	Selects firm or firms for task order assignment.	TMA Management
12	Notifies firms of the outcome, documents contractor selection and files documentation in the official project file.	TMA Project Manager

### ORAL PRESENTATION EVALUATION SHEET

Instructions: Use this form to evaluate the oral presentation of a firm. Circle the appropriate numerical score for each factor. After all oral presentations, complete the bottom portion of this form.

FACTORS	FIRMS																								
Work Requirements	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1
Technical Approach	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1
Subject Matter Knowledge	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1
Key Staff & Other Resources	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1
Past Performance	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1	5	4	3	2	1
Additional Factors:																									

Additional Comments:

Client Agency: \_\_\_\_\_ Project Code: \_\_\_\_\_ Estimated Task Order Amount: \_\_\_\_\_

Recommended Firm: \_\_\_\_\_

OPM Project Manager Signature: \_\_\_\_\_

OPM Management Official \_\_\_\_\_

## RATING SYSTEM KEY

The rating system will use a five point scale. This scale will be the basis for all numerical scores. The description of each rating point appears below:

SCORE	DESCRIPTION
5	<b>Highly Qualified</b> -- an outstanding and/or innovative response to project understanding, methodology (instructional or other), subject matter expertise, past performance, staff resources, and/or quality assurance.
4	<b>Very Qualified</b> -- a very good response to project understanding, methodology (instructional or other), subject matter expertise, past performance, staff resources, and/or quality assurance.
3	<b>Qualified</b> -- a response which demonstrates that vendor is capable of performing the work.
2	<b>Minimally Qualified</b> -- a response which meets most requirements, but contains generalized information which does not provide enough insight into the vendor's knowledge, capabilities and/or approach.
1	<b>Unqualified</b> -- a response which does not meet the requirements.