TET Evaluator Response Form

The Government intends to utilize a phased evaluation approach for this procurement as described below. To be considered for award, contractors must successfully pass through each phase.

The technical evaluation will take place using the following phased approach: First Phase: Challenge submission

Second Phase: Scenario submission

Third Phase: Technical Approach, Management Approach, and Similar Experience submission

While pricing will be evaluated separately from the technical volumes, it will be evaluated concurrently with those same volumes.

\* Required

1. Email address \*
2. Which phase are you evaluating? \*

*Mark only one oval.*

Phase 1 - Challenge Question Phase 2 - Scenario

Phase 3 - Technical and Management Approach *Skip to question 53*

Challenge question responses will be evaluated on an acceptable/unacceptable basis. Contractor quotes failing to achieve an “acceptable” rating in both the challenge question phase and scenario phase will not be further evaluated. Evaluators may find the Challenge Questions outlined (here)(Google Link was here)

To be considered acceptable Contractor responses must address the following in each core functional area: (1) Determining where things stand now; (2) Outlining the path forward for Implementation; and, (3) Ensuring modernization efforts continue beyond Implementation.

Challenge Question

1. Which functional area are you completing this evaluation for? \*

## Mark only one oval.

Change management *Skip to question 4* Cloud Adoption *Skip to question 10* Information Security *Skip to question 16* Contact Center *Skip to question 22* Customer Experience *Skip to question 28* Data Analytics *Skip to question 34*

IT Infrastructure Optimization *Skip to question 40*

Answer key:

* Determining where things stand now
  + Assessment of the “as is” state by continuous engagement and communication with all CoEs addressing re/upskilling and change management opportunities and updating plans as opportunities arise.
* Outlining the path forward for Implementation
  + Engage Agency employees from frontlines to C-suite to understand current and validate future state projections.
  + Identify technical skills, universal 21st century competencies, and modern work methods that specified organizations and teams should receive.
* Ensuring modernization efforts continue beyond Implementation
  + Change management communications and ongoing facilitation.

Change Management

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation?

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

Cloud Adoption

Answer key:

* Determining where things stand now
  + Assessment of the “as is” state of the legacy system and validate recently conducted assessments.
* Outlining the path forward for Implementation
  + Identify internal system dependencies and external dependencies (e.g. data interfaces and integration points).
  + Define a cloud solution architecture to modernize the legacy solution, given the agency’s constraints, and provide a menu of high-level technical alternatives for migration.
* Ensuring modernization efforts continue beyond Implementation
  + Coordination of efforts with other Centers when modernization of an application results in an impact to that functional area (for example, if certain efforts result in the closure of a data center, the IT Infrastructure Optimization Center would be impacted).

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

Information Security

Answer key:

* Determining where things stand now
  + Assessment of the “as is” state of security efficacy and performance measurements and reports.
* Outlining the path forward for Implementation
  + Acceleration of federal agency ATOs.
  + Ongoing process improvements with respect to government and vendor team intersection.
* Ensuring modernization efforts continue beyond Implementation
  + Support security and risk management during large-scale data and system migrations to the cloud as part of a cross-functional group of government and vendor teams while achieving and sustaining a resilient, risk-managed enterprise.

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

Contact Center

Answer key:

* Determining where things stand now
  + Assessment of the “as is” state of the legacy systems including how contact channels are managed across the agency, to include costs, maturity, staffing, technology, etc.
* Outlining the path forward for Implementation
  + Quantitative and qualitative review of contact center operations to prioritize necessary modernization efforts.
  + Assessment of the experience that people have when contacting the Agency to prioritize efforts that will have the greatest impact.
* Ensuring modernization efforts continue beyond Implementation
  + Coordination of efforts with other Centers to determine how to best use emerging technologies and latest best practices to solve problems that were once deemed too costly to address or to provide better solutions to problems already being addressed.

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

Customer Experience

Answer key:

* Determining where things stand now
  + Based on existing Agency data and set of priorities, definition of potential customer segments for focused pilot while maintaining an inclusive set of values (a solution designed for “everyone” ends up serving no one well, start small and scale up over time)
* Outlining the path forward for Implementation
  + Collect qualitative and quantitative data to: clearly define the current experience; identify insights that will guide recommendations for how the experience should evolve in the future; and clarify how the recommendations being made will improve the current experience in ways that are meaningful to customers and stakeholders.
  + Translate qualitative data into information that government leadership and employees can easily relate to and use to measure results.
* Ensuring modernization efforts continue beyond Implementation
  + Lead ongoing conversations with partners at the Agency and other CoEs and help inform the development of appropriate solutions with emphasis on excellence in customer experience design.

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

Data Analytics

Answer key:

* Determining where things stand now
  + A description of the rubric for selecting projects for modernization as well as a description of the set of activities that you would carry out during the assessment at the Agency.
* Outlining the path forward for Implementation
  + A methodology for evaluating private sector software and service solutions for an application such as (but not limited to): dashboarding, extract transform load, meta-data management, etc.
  + A process (both technical and requirements-gathering) for developing and enhancing enterprise-level business intelligence capabilities.
  + A strategy for securing key stakeholder buy-in and rolling out your the proposed innovation.
* Ensuring modernization efforts continue beyond Implementation
  + A plan to grow the culture of analytics practitioners at the agency, such as (but not limited to) establishing and growing maturity around artificial intelligence, machine learning, or geospatial analytics enterprise-wide.
  + A plan to establish formal structures and processes to establish, maintain, and grow analytics practices enterprise-wide.

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

IT

Answer key:

* Determining where things stand now
  + Assessment of the “as is” inventory and state of applications within the department and its component agencies.
  + Development of a repository to maintain an Agency’s business application portfolio.
  + Establishment of communications channel to review singular and holistic approaches to optimization.
* Outlining the path forward for Implementation
  + Evaluation matrix for cloud readiness, common technology stacks, best-fitting landing zones, refactoring, rebuilding, replacing, and other factors the Agency should consider.
  + Ensuring modernization efforts continue beyond Implementation
  + Coordination with the Cloud Adoption, Cyber Security, and Reskilling Change Management teams to ensure there are no gaps in strategy, policy, process, IT organizational structure, and employee skill sets required for the consolidation and ongoing maintenance of modern processes.

Infrastructure Optimization

1. Name of vendor (please use the stated name in proposal). \*
2. Did the vendor provide a way to determine where things stand now? \*

## Mark only one oval.

Yes No

1. Did the vendor provide an outline for the path forward for Implementation? \*

*Mark only one oval.*

Yes No

1. Did the vendor provide a way to ensure modernization continue beyond Implementation? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

For each YES or NO response, evaluators are encouraged to provide a fact from the proposal that justifies a YES or a NO. Evaluators are asked to cite the section of the challenge question response from which this justification is drawn. Evaluators are encouraged to provide in this portion of the response as many facts as needed to justify the response.

Evaluators shall answer each of the questions below. Evaluators are encouraged to add as many citations in their narrative response as possible. This will help ensure that evaluations have appropriate robust documentation.

Evaluators may find the Scenario Questions outlined (here)(google link was here)

To be considered acceptable Contractor responses must address the following: How would you obtain agency-wide buy-in for the modernization efforts promoted by the CoE while also linking efforts and fostering collaboration with other vendors and government staff across all of the Centers at the Agency Partner?

Scenario

Answer key:

* Obtain buy-in on the CoE’s future state vision and plan from C-suite to program staff (and frontline when applicable) through specific communication plans.
* Identify and coordinate the right combination of stakeholders at the right times and places to ensure their feedback is heard and requirements are acknowledged on a regular basis.
* Ensure that the work performed aligns with key areas within related functional areas. For example, DevSecOps practices established by the Cloud Adoption and Information Security Centers or human capital strategic workforce development plans developed by the Change Management Center for the IT Infrastructure Optimization Center.
* Facilitate collaborative experiences for CoEs, Agency Champions, and other contracted staff to co-create and ensure strategies are complimentary, such as workshops.
* Support ongoing efforts with specific tasks to ensure seamless transition from Discovery and Assessment Support to Implementation.
* Establishing a plan to evaluate private sector solutions and establishing their applicability to Agency engagements, where applicable.

# Name of vendor (please use the stated name in proposal). \*

1. Does the vendor mention a way to obtain buy-in on the CoE's future state vision and plan from C-suite to program staff through specific communication plans? \*

## Mark only one oval.

Yes No

1. Does the vendor identify and coordinate the right combination of stakeholders at the right times and places to ensure their feedback is heard and requirements are acknowledged on a regular basis? \*

*Mark only one oval.*

Yes No

1. Does the vendor provide a way to ensure that the work performed aligns with key areas within related functional areas. For example, DevSecOps practices established by the Cloud Adoption and Information Security Centers or human capital strategic workforce development plans developed by the Change Management Center for the IT Infrastructure Optimization Center. \*

*Mark only one oval.*

Yes No

1. Does the vendor suggest a way to facilitate collaborative experiences for CoEs, Agency Champions, and other contracted staff to co-create and ensure strategies are complimentary, such as workshops? \*

*Mark only one oval.*

Yes No

1. Is this vendor considered acceptable or unacceptable? \*

*Mark only one oval.*

Acceptable Unacceptable

1. Justification for rating \*

Evaluators are encouraged to add as many citations in their narrative response as possible. For each yes or no answer, please provide justification, citing the appropriate passage in the Contractor's response.

Technical and Management Approach

We perform narrative, qualitative evaluations, and don’t score quotations numerically. Therefore, it’s critical that we evaluate the quotations based on what we put down in the solicitation. The TET will order the technical proposals from highest technically rated to lowest.

How do you qualitatively evaluate?

* Provide as thorough of a narrative description as you can on these worksheets.
* Base your decision on the factors and descriptions identified in the solicitation (rather than on your own personal preference).
* Use common sense to consider real-world implications. As you’re making your decisions, imagine you or your agency’s day-to-day work needs.

1. Which functional area are you completing this evaluation for? \*

## Mark only one oval.

Change management *Skip to question 54* Cloud Adoption *Skip to question 65* Information Security *Skip to question 77* Contact Center *Skip to question 88* Customer Experience *Skip to question 100* Data Analytics *Skip to question 111*

IT Infrastructure Optimization *Skip to question 123*

Change management

Evaluators are expected to copy and paste the following templated narrative response into each performance objective long answer area. Evaluators are encouraged to add as many citations in their narrative response as possible. This will help ensure that evaluations have appropriate robust documentation.

Any responses received \*NOT\* using the below format will be rejected by the Contracting Officer and will need to be resubmitted using the format.

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Evaluators are encouraged to add as many citations in their narrative response as possible. Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

The contractor’s responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation for each functional area in which the contractor is submitting a response. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful at both the BPA level and the order level. If there are any specific deliverables the contractor believes would be necessary or useful to the Government at the BPA level, they must be outlined in the response as well.

# Performance objective: Reskill and upskill employees impacted by IT modernization efforts. \*

1. Performance Objective: Evolve workforce to more 21st Century skill sets and work practices using the latest technologies (including AI, RPA and machine learning).. \*
2. Performance Objective: Enabling the workforce to drive successful IT modernization efforts going forward utilizing in-house talent. \*
3. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

Evaluators are encouraged to add as many citations in their narrative response as possible. Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

The contractor must provide a narrative detailing their general management approach to accompany the technical methodology being proposed. Additionally, the contractor must provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail.

If subcontracting or teaming, the contractor must discuss their approach to working with their partner(s) in providing a solution to the functional area(s) they are being considered in, how they will support Agency Partner requirements as a cohesive unit, and the nature of how they will work together as an integrated entity in general. Documentation of CTAs is required and will be confirmed.

The contractor should identify all associated risks, and provide their strategy to mitigate each risk. Each functional area in which the contractor is submitting a response must be addressed separately and fully.

# Did the contractor provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail? \*

## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*

Similar experience

Evaluators are encouraged to add as many citations in their narrative response as possible. Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This demonstrates [substantial, some, or little to no] similar experience because [explanation]. This citation is [location in quotation].

The contractor must detail its Similar Experience in a maximum of one (1) contract per functional area that reflects and identifies experience on projects currently being performed or which has been completed within the last three

(3) years, within the functional area being quoted. The contractor must describe the client, project title, scope of work, the period during which the work occurred, the dollar value of the work performed, the specific responsibilities of the contractor, major deliverables produced, performance measures/service levels applied, any awards that were received for superior performance, quality assurance, risk management methodologies used, lines of communication used, and any problems or issues that occurred, and the corrective action taken. The contractor must provide point of contact data sufficient for the Government to verify the information.

# Similar experience - narrative \*

1. Management Approach and Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

Evaluators are expected to copy and paste the following templated narrative response into each performance objective long answer area. Evaluators are encouraged to add as many citations in their narrative response as possible. This will help ensure that evaluations have appropriate robust documentation.

Any responses received NOT using the below format will be rejected by the Contracting Officer and will need to be resubmitted using the format.

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

Cloud Adoption

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

The contractor’s responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation for each functional area in which the contractor is submitting a response. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful at both the BPA level and the order level. If there are any specific deliverables the contractor believes would be necessary or useful to the Government at the BPA level, they must be outlined in the response as well.

# Performance objective: Perform application/system portfolio inventory and analysis. \*

1. Performance objective: Develop cloud migration recommendations and prototypes, capture specific capabilities (e.g. strategies, roadmaps). \*
2. Performance objective: Plan and manage cloud migration execution and provide recommendations using the latest technologies (including AI, RPA and machine learning). \*
3. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

Evaluators are encouraged to add as many citations in their narrative response as possible. Please use the following templated narrative format in your response:

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

The contractor must provide a narrative detailing their general management approach to accompany the technical methodology being proposed. Additionally, the contractor must provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail.

If subcontracting or teaming, the contractor must discuss their approach to working with their partner(s) in providing a solution to the functional area(s) they are being considered in, how they will support Agency Partner requirements as a cohesive unit, and the nature of how they will work together as an integrated entity in general. Documentation of CTAs is required and will be confirmed.

The contractor should identify all associated risks, and provide their strategy to mitigate each risk. Each functional area in which the contractor is submitting a response must be addressed separately and fully.

# Did the contractor provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail? \*

## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*
2. Management Approach Rating \*

*Mark only one oval.*

Very Likely Likely Unlikely

Similar experience

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This demonstrates [substantial, some, or little to no] similar experience because [explanation]. This citation is [location in quotation].

The contractor must detail its Similar Experience in a maximum of one (1) contract per functional area that reflects and identifies experience on projects currently being performed or which has been completed within the last three

(3) years, within the functional area being quoted. The contractor must describe the client, project title, scope of work, the period during which the work occurred, the dollar value of the work performed, the specific responsibilities of the contractor, major deliverables produced, performance measures/service levels applied, any awards that were received for superior performance, quality assurance, risk management methodologies used, lines of communication used, and any problems or issues that occurred, and the corrective action taken. The contractor must provide point of contact data sufficient for the Government to verify the information.

# Similar experience - narrative \*

1. Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

Information Security

Evaluators are expected to copy and paste the following templated narrative response into each performance objective long answer area. Evaluators are encouraged to add as many citations in their narrative response as possible. This will help ensure that evaluations have appropriate robust documentation.

Any responses received \*NOT\* using the below format will be rejected by the Contracting Officer and will need to be resubmitted using the format.

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

The contractor’s responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation for each functional area in which the contractor is submitting a response. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful at both the BPA level and the order level. If there are any specific deliverables the contractor believes would be necessary or useful to the Government at the BPA level, they must be outlined in the response as well.

# Performance objective: Evaluate the maturity of the agency's information security governance and compliance and assess the effectiveness of existing processes and systems. \*

1. Performance objective: Developing prototypes as necessary to help further the process using the latest technologies (including AI, RPA and machine learning). \*
2. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

Please use the following templated narrative format in your response:

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

The contractor must provide a narrative detailing their general management approach to accompany the technical methodology being proposed. Additionally, the contractor must provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail.

If subcontracting or teaming, the contractor must discuss their approach to working with their partner(s) in providing a solution to the functional area(s) they are being considered in, how they will support Agency Partner requirements as a cohesive unit, and the nature of how they will work together as an integrated entity in general. Documentation of CTAs is required and will be confirmed.

The contractor should identify all associated risks, and provide their strategy to mitigate each risk. Each functional area in which the contractor is submitting a response must be addressed separately and fully.

# Did the contractor provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail? \*

## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*
2. Management Approach Rating \*

*Mark only one oval.*

Very Likely Likely Unlikely

Similar experience

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This demonstrates [substantial, some, or little to no] similar experience because [explanation]. This citation is [location in quotation].

The contractor must detail its Similar Experience in a maximum of one (1) contract per functional area that reflects and identifies experience on projects currently being performed or which has been completed within the last three

(3) years, within the functional area being quoted. The contractor must describe the client, project title, scope of work, the period during which the work occurred, the dollar value of the work performed, the specific responsibilities of the contractor, major deliverables produced, performance measures/service levels applied, any awards that were received for superior performance, quality assurance, risk management methodologies used, lines of communication used, and any problems or issues that occurred, and the corrective action taken. The contractor must provide point of contact data sufficient for the Government to verify the information.

# Similar experience - narrative \*

1. Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

Contact Center

Evaluators are expected to copy and paste the following templated narrative response into each performance objective long answer area. Evaluators are encouraged to add as many citations in their narrative response as possible. This will help ensure that evaluations have appropriate robust documentation.

Any responses received \*NOT\* using the below format will be rejected by the Contracting Officer and will need to be resubmitted using the format.

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

The contractor’s responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation for each functional area in which the contractor is submitting a response. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful at both the BPA level and the order level. If there are any specific deliverables the contractor believes would be necessary or useful to the Government at the BPA level, they must be outlined in the response as well.

# Performance objective: Provide expertise and offerings to help agencies assess, analyze and improve their customer interactions and knowledge management where they need assistance, be it managing their contact center operations, leveraging emerging technologies and tools using the latest technologies (including AI, RPA and machine learning). \*

1. Performance objective: Develop prototypes and pilot programs. \*
2. Performance objective: Reviewing internal business processes and systems to better manage day-to-day performance and metrics, incorporating contact center best practices. \*
3. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

Please use the following templated narrative format in your response:

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

The contractor must provide a narrative detailing their general management approach to accompany the technical methodology being proposed. Additionally, the contractor must provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail.

If subcontracting or teaming, the contractor must discuss their approach to working with their partner(s) in providing a solution to the functional area(s) they are being considered in, how they will support Agency Partner requirements as a cohesive unit, and the nature of how they will work together as an integrated entity in general. Documentation of CTAs is required and will be confirmed.

The contractor should identify all associated risks, and provide their strategy to mitigate each risk. Each functional area in which the contractor is submitting a response must be addressed separately and fully.

# Did the contractor provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail? \*

## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*
2. Management Approach Rating \*

*Mark only one oval.*

Very Likely Likely Unlikely

Similar experience

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This demonstrates [substantial, some, or little to no] similar experience because [explanation]. This citation is [location in quotation].

The contractor must detail its Similar Experience in a maximum of one (1) contract per functional area that reflects and identifies experience on projects currently being performed or which has been completed within the last three

(3) years, within the functional area being quoted. The contractor must describe the client, project title, scope of work, the period during which the work occurred, the dollar value of the work performed, the specific responsibilities of the contractor, major deliverables produced, performance measures/service levels applied, any awards that were received for superior performance, quality assurance, risk management methodologies used, lines of communication used, and any problems or issues that occurred, and the corrective action taken. The contractor must provide point of contact data sufficient for the Government to verify the information.

# Similar experience - narrative \*

1. Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

Customer Experience

Evaluators are expected to copy and paste the following templated narrative response into each performance objective long answer area. Evaluators are encouraged to add as many citations in their narrative response as possible. This will help ensure that evaluations have appropriate robust documentation.

Any responses received NOT using the below format will be rejected by the Contracting Officer and will need to be resubmitted using the format.

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Please use the following templated narrative format in your response:

Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

The contractor’s responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation for each functional area in which the contractor is submitting a response. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful at both the BPA level and the order level. If there are any specific deliverables the contractor believes would be necessary or useful to the Government at the BPA level, they must be outlined in the response as well.

# Performance objective: Assist agencies with the development of recommendations and prototypes for an optimal customer experience strategy. \*

1. Performance objective: Develop recommendations that include the latest technologies (including AI, RPA and machine learning) as well as a cohesive client experience across all channels including contact centers, online platforms, informational materials and in-person interactions. \*
2. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

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# Did the contractor provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail? \*

## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*
2. Management Approach Rating \*

*Mark only one oval.*

Very Likely Likely Unlikely

Similar experience

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# Similar experience - narrative \*

1. Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

Data Analytics

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Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Please use the following templated narrative format in your response:

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# Performance objective: Provide business analytics expertise, analysis of key performance and program outcome metrics and develop recommendations for modern analytics infrastructure. \*

1. Performance objective: Assess and make implementation recommendations for analytics systems, staff and processes that realize cost savings, drive improved customer service and improve organizational impact. \*
2. Performance objective: Recommend solutions and develop prototypes that improve and expand data drive decision making and the effectiveness of data analytics SMEs in federal agencies, using the latest technologies, including AI, RPA, and machine learning. \*
3. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

Please use the following templated narrative format in your response:

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Vendor indicates [fact] in their quotation. This [exceeds expectations, meets expectations or does not meet expectations] because [explanation]. This citation is [location in quotation].

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# Did the contractor provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill anticipated orders, and what the skill sets, roles, and responsibilities of the individuals involved on their team at the BPA level will entail? \*

## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*
2. Management Approach Rating \*

*Mark only one oval.*

Very Likely Likely Unlikely

Similar experience

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# Similar experience - narrative \*

1. Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

IT

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Please use RFQ section 3.3.2.for an in-depth explanation of the ratings. (RFQ link was here)

Infrastructure Optimization

1. Name of vendor (please use the stated name in proposal). \*

Technical understanding and methodology

Please use the following templated narrative format in your response:

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Vendor indicates [Issue] in their quotation. This issue is [correctable, uncorrectable] because [explanation]. This citation is [location in quotation].

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# Performance objective: Assist agencies with the assessment of computing infrastructure (i.e. network, storage, data center) optimization plans \*

1. Performance objective: Develop prototypes, as necessary, to further the process, using the latest technologies, including but not limited to AI, RPA, and machine learning. \*
2. Technical understanding and methodology rating \*

## Mark only one oval.

Exceptional Good

Poor

Management approach

Please use the following templated narrative format in your response:

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## Mark only one oval.

Yes No

1. If part of a contracting team arrangement, did the contractor discuss their approach to working with their partner? \*

*Mark only one oval.*

Yes No

Not applicable

1. Did the contractor identify risks and provide a mitigation strategy? \*

*Mark only one oval.*

Yes No

1. Management approach - narrative \*
2. Management Approach Rating \*

*Mark only one oval.*

Very Likely Likely Unlikely

Similar experience

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# Similar experience - narrative \*

1. Similar Experience Rating \*

## Mark only one oval.

Very Likely Likely Unlikely

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