

Request For Quote (RFQ)
[Insert Agency Name]

ENCLOSURE 1
REQUEST FOR QUOTE (RFQ)
[Insert Agency Name]
Records Management

This is a Request for Quote (RFQ) using the GSA Multiple Award Schedule under SIN 518210ERM Utilizing FAR part 8.405 (Federal Supply Schedules). The procedures under FAR part 8.405 apply. A best value trade-off process will be used. All submissions in response to this RFQ are considered quotes and not proposals or offers, even if labeled as such. The Quoters agree to and are bound by all instructions, procedures and rules of this RFQ.

The attached Statement of Objectives (SOO) defines requirements to establish a single-award Blanket Purchase Agreement (BPA) in support of a Comprehensive Digital Records Management program for the [Insert Agency Name]. Concurrently, GSA intends to award BPA Call 1 on a Firm Fixed Price basis to support a pilot digitization effort and the implementation of middleware and Application Programming Interfaces (APIs) to accommodate digitized records as described in the attached SOO for Call 1.

The Government will evaluate the submitted quotes against the criteria set forth below and then determine which quote represents the best value that meets the requirements, considering price and other factors (tradeoffs). The Government reserves the exclusive right to make this determination of best value and may make an award to other than the lowest priced quote if it is determined that the higher price is justified in return for the higher rated technical quote. The Government anticipates selecting an awardee for the BPA and simultaneously issuing the Call 1 award based on initial quotes received. The Government reserves the right to issue the BPA and to award BPA calls issued against it without discussions. Therefore, quoters are cautioned to submit their best price and technical quote upfront.

Reminder: Since submissions are quotes under the GSA Schedule, the Government is not obligated to determine a competitive range, conduct discussions with all quoters, solicit final revised quotes, and use other techniques associated with FAR part 15. The contracting techniques associated with FAR part 15 do not apply.

Questions: All questions about this requirement shall be submitted in writing not later than **4:00 p.m. Eastern Time on [Insert Date]** to the Contract Specialist and Project Manager at the following email addresses:

[Insert POC Information]

All communications shall be through the GSA POCs. Failure to comply with this instruction may result in the quote being removed from consideration for award.

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Pre-Quote Conference: The Government intends to conduct a pre-quote teleconference call on **January 23, 2020 at 2:00pm Eastern Time** to allow quoters the opportunity to hear the Government's approach to this RFQ. The dial-in number for the teleconference is Audio Bridge #: 1-844-419-4704 and the Conference Code is: 3441506080. This will not be an opportunity to ask questions of the requiring activity regarding this RFQ.

While the pre-quote teleconference call is not mandatory, information may be valuable to potential quoters and will not be provided by other means. Quoters who choose not to participate do so at their own risk.

Quote Due Date/Time: Quotes are due on or before **3:00pm Eastern Time on [Insert Date]**. All quotes must be submitted via the GSA ASSIST portal (<https://portal.fas.gsa.gov/home>) by the established date and time.

Note: After the closing time and date noted above, the Government will begin immediate review and evaluation of the submissions; therefore, Quoter submissions or information requests about this RFQ after the closing date and time will not be considered.

Contract Teaming Arrangements (CTA): For purposes of satisfying the customer's requirements, the Schedule 36 Contractor may team with other GSA contract holders via a Contractor Teaming Arrangement (CTA). The Schedule 36 contract holder must be the lead Contractor. A CTA is required by the same closing date and time of the RFQ. The Contractor should include the information outlined in Elements of a CTA. A fully executed CTA must be provided at time of award.

Evaluation Criteria and Quote Submittal Instructions

The written submission shall be broken into two volumes:

- **Volume I – Technical Quote**
- **Volume II – Price Quote**

Quotes will be evaluated on the following:

- **Technical Factors:** --- Presented in Volume I.
 - A. BPA Technical Factors (written only)
 - (1) BPA Performance Work Statement
 - (2) Expertise
 - B. Call 1 Technical Factors (written and oral)
 - (1) Technical Solution
 - (2) Records Digitization Approach
- **Price:** --- Presented in Volume II.

The Technical Factors are listed in descending order of importance. The Technical Factors when combined are considered more important than price. However, price is always evaluated and price rises in importance when technical merit becomes more equal.

Volume I – Technical Quote

The Technical Quote shall not exceed the page limitations specified below for each technical factor. Anything over the page limitations will be ignored. Quoters shall use letter-sized (8.5" x 11") pages and an 11 point (or larger) font size. One page equals one side of a sheet of paper. Number the pages consecutively. Graphics/illustrations embedded in the quotation may use a font size smaller than 11 point, provided it is legible on a letter-sized sheet.

A. BPA TECHNICAL FACTORS

1. Performance Work Statement (PWS) for the BPA (written)

For this BPA Technical Factor, the Quoter's written submission shall be limited to 30 pages.

The Quoter shall submit a Performance Work Statement (PWS) describing how it will satisfy each of the four objectives in Enclosure 2 - BPA Statement of Objectives (SOO). Details in the Quoter's PWS shall clearly demonstrate how the technical requirements and the business requirements in Enclosure 4 - Requirements Matrices will be fulfilled.

The Government will evaluate the Quoter's PWS to determine if:

- it demonstrates an acceptable approach to satisfy all four objectives in the Enclosure 2 - BPA SOO; and
- it provides the capability and capacity to fulfill the technical requirements and business requirements in Enclosure 4 - Requirements Matrices.

2. Expertise (written)

For this BPA Technical Factor, the Quoter's written submission shall be limited to 5 pages.

The Quoter shall include a narrative discussing its expertise in applying commercial technologies to the implementation of a comprehensive digital records management program that conforms to NARA standards. This should detail the Quoter's expertise in dealing with:

- a. Scanning of large quantities of records;
- b. Various record types shown in Attachment 03 (Records List);
- c. The dispersion of office locations across different regions (reference maps/zones);
- d. Development of middleware that is platform agnostic, can support multiple scanning solutions, is extensible, and maximizes automation of business processes for end user and their customers;
- e. Manageable storage solution and multiple records document stores;

The Government will evaluate the extent to which the Quoter's expertise demonstrates the capability and capacity to provide a comprehensive, NARA compliant records management program.

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B. Call 1 TECHNICAL FACTORS

Call 1 Technical Factors consist of both a written technical submission and an interview-style oral quote. The instructions for interview-style orals are embedded below. The Government will evaluate the written and oral information presented for a technical factor as a combined whole and assign a single rating for each technical factor.

1. Technical Solution (written and oral)

For this Call 1 Technical Factor, the Quoter's written submission shall be limited to 30 pages. The Quoter shall respond to the ENCLOSURE 3 – Call 1 Statement of Objectives (SOO) with a written Performance Work Statement (PWS) describing how it will satisfy the Task Objectives and requirements in this SOO. The Quoter shall describe methodologies and tools that will be used to successfully accomplish the objectives in the Call 1 SOO. In the response, the Quoter shall present details to:

- a. Demonstrate an understanding of the technical and business requirements.
- b. Discuss how it will meet the design objectives of the requirements document and the DRMS Reference Architecture.
- c. Explain how it will build consistent methods and processes to enable an efficient and effective digital records management capability for the agency sites.

The Government will evaluate the extent to which the Quoter's written and oral information combined:

- demonstrates a thorough understanding of the requirements;
- provides a solution that will meet the requirements for a minimally viable product (MVP) that is extensible and easily scalable; and
- provides a comprehensive, effective, and efficient approach to fulfill agency records management objectives under Call 1.

2. Records Digitization Approach (written and oral)

For this Call 1 Technical Factor, the Quoter's written submission shall be limited to 5 pages.

The Quoter shall provide a written narrative that addresses the following:

- a. Discuss its site assessment process, plans, and approach to minimize disruption to the field offices during while conducting hygiene and scanning operations.
- b. Discuss the steps it would take to help field offices prepare for the on-site scanning operations.
- c. Discuss its approach to manage the file types and metadata through the entire lifecycle and disposition of records consistent with practices that can support the record types reflected in Attachment 03 (Records List).

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The Government will evaluate the extent to which the written and oral information combined demonstrate an effective and efficient approach to satisfying the Records Digitization objectives under Call 1.

INSTRUCTIONS FOR INTERVIEW-STYLE ORAL PRESENTATIONS

Schedule and Agenda

Contractor Arrival and Acclamation	Approximately 20 minutes
Introductions	Approximately 10 minutes
Contractor Orals	2 hours maximum plus a 10 minute break
Clarifying Q&A Session (only if necessary)	1 hour maximum

Rules:

The interview-style oral presentations consists of an initial question and answer session on the oral technical factors listed in the RFQ and a follow-up clarification session (if necessary) to be called by the Government. The interview-style oral presentations do not and will not constitute discussions or negotiations as defined by FAR Part 15. The Government is not obligated to determine a competitive range, conduct discussions, and solicit or allow revised proposals.

Note: Since this is an interview-style oral presentation, Offerors shall not bring or present slides, graphs, charts or other written presentation materials; and the Government will not accept nor receive contractor handouts.

Oral Presentation (Two Parts):

Part One: During Part One, the Offeror's oral presentation will consist of answering the Government's core questions on the oral technical factors identified in Volume 1 – Technical Quote section of the RFQ. While the oral technical factors are identified in the RFQ, the core questions are not. All Quoters will be asked the same set of core questions. Part One of the oral presentation is limited to a maximum of 2 hours. A session may go shorter than the maximum allotted time, but not exceed the 2 hour time limit. A 10-minute break will not be counted in the time limit. The GSA Contracting Officer will strictly enforce this time limit on all Quoters and will terminate the oral session if the time limit is reached.

The Quoter is responsible for managing the use of time allotted for answering the oral questions. The Quoter's team will be allowed to caucus during the orals, however, the clock will continue to run and such caucus will be counted within the time limit.

Part Two (only if necessary): Following Part One, the Government will allocate up to 1 hour, if needed, for clarifying the Quoter's responses to the Government's core questions. During the clarification period, the Government may ask questions seeking clarification on any of the information that was

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presented by the Quoter during the oral proposals which is unclear to the Government. The Government's clarifying questions may differ among the Quoters based upon what information needs clarification. Any such interchange between the Quoter and the Government will be for clarification only, and will not constitute discussions. If the Government has no clarifying questions with a particular Quoter, then this part of the session will not take place.

Note: The answers given in Part Two are part of the Quoter's oral presentation. Part Two of the Oral Presentation is only for clarification purposes.

Participants:

The Quoter may include as many participants as they feel necessary, within the size limitations of the conference room (to be provided at a later date). The type and number of participants is at the Quoter's own discretion and is their full responsibility to determine who to bring. However, the Government does advise Quoters to include personnel knowledgeable of technical and business requirements identified in the SOOs for Call 1 and the BPA.

When scheduling the orals, the Government may require Quoters to furnish the names of attendees 24 to 48 hours prior to the scheduled date in order to coordinate building access with security.

Note: The Government is interested in the informational content of participant's answers rather than the particular style or technique used in delivering the information. The Government will take notes during the orals at its discretion, which becomes the Government's exclusive property, and may use such notes in the evaluation. No copies will be provided to the contractor.

Location:

It is anticipated that Interview-style Oral Presentations will be held at the GSA Regional Office Building. All travel expenses associated with attending the orals are the responsibility of the Quoter. Specific instructions will be furnished at the time the Quoter's oral presentation is scheduled.

Date and Time:

The Government will schedule the date and time of the oral presentations with each Quoter after the RFQ closing date and receipt of written submissions. The Contracting Officer will determine the order in which the Quoters will present by random means. The Government reserves the right to reschedule any Quoter's oral presentation date at the discretion of the Contracting Officer.

Videotaping and/or Voice Recording:

The Government may elect to videotape and/or voice record all oral presentations as its exclusive right and property. The Government will not provide a copy of the videotape or recording to any contractor, and contractors are prohibited from making independent recordings of the oral sessions by any means or method.

By participating in the RFQ and the Oral presentations, all Quoter's agree to the rules and procedures set forth herein.

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Volume II – Price Quote

The Quoter shall submit a price quote for this requirement in an editable Microsoft Excel spreadsheet following the structure in RFQ **Appendix 01** - Price Template.

The Quoter should provide their DUNS and TIN/EIN number with their quote.

Page Limitation: The Price Quotation does not have a page limitation.

1. BPA Price Quote:

On the BPA Labor Rates Worksheet of RFQ **Appendix 01** – Price Template, the Quoter shall list all labor categories intended to support the requirements of the BPA and complete GSA is seeking additional discounts off Schedule rates.

2. Call 1 Price Quote:

The labor reflected in the Call 1 Price Quote shall be derived from the BPA labor categories and rates that were submitted on the BPA Labor Rates worksheet in RFQ **Appendix 01** - Price Template.

Include all program management, contract administration, reporting, invoicing, and ancillary services necessary to perform Call 1 in the following CLINs:

- a) On the Call 1 Pricing Worksheet of RFQ **Appendix 01** – Price Template, the Quoter shall include line item pricing and aggregate totals, as follows:
 - (1) CLIN 001A: a Fixed Priced Level of Effort (FP LOE) subtotal for the pilot line items, based on the tiered pricing models in the template
 - (2) CLIN 0001B: a FFP subtotal for the additional 3 pilot line items
 - (3) CLIN 0002: an optional FP LOE line item subtotal for the scanning “PLUS-UP”
 - (4) CLIN 0003: an optional Not-To-Exceed (NTE) Fixed Price Level of Effort line item subtotal exclusively for large-sized records (Scanning Group B)
 - (5) CLIN 0004: A FFP subtotal for the Objective 2 Training Program line items
 - (6) CLIN 0005: A FFP subtotal for the Objective 3 Middleware line items
 - (7) A subtotal for Objectives 1-3, a subtotal for all Options, plus a Grand Total for Call 1
- b) On the TAB 2 Call 1 Breakdown of RFQ **Appendix 01** – Price Template, the Quoter shall provide a complete breakdown and rationale for the elements that compose the pricing for each CLIN as prescribed in the TAB 2 worksheet.