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**CON DBF: TREASURY Contract Award Debriefing Workshop**

**Scenario Two**

**Engineering and Technical Services**

***Government Participants***

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**WORKSHOP OVERVIEW**

The TREASURY Contract Award Debriefing Workshop is designed to provide participants with the tools needed to conduct effective oral debriefings and explanations of the basis for award. The workshop consists of a combination of facilitator-led training and role play exercises unique to the TREASURY mission with the hope that the skills learned in this workshop will encourage the TREASURY acquisition workforce to provide oral debriefings and explanations of the basis for award on a routine basis. The workshop is divided into four parts as follows:

1. **Introduction**: Identifies the goals and expectations of the workshop followed by a video message from the TREASURY Chief Procurement Officer.
2. **Instruction**: Overview of policy and regulations, including the types of debriefings (pre-award and post award), explanation of the basis for award, as well as the “do’s and don’ts” for each. Instruction on preparing for an oral debriefing including best practices and proper use of terminology is also provided.
3. **Role Play:** Two role play scenarios that will include participation from the workshop attendees and industry representatives. Each role play will focus on a specific procurement type. Time will be allotted for audience members and industry participants to provide feedback at the conclusion of each role play.

Selected workshop participants will be assigned one of two role play scenarios describing a fictitious procurement that challenges them to apply their knowledge and expertise in a realistic oral debriefing setting. The role play will be conducted in a discussion-oriented format in which participants will be expected to act out how they would conduct themselves during a real-life oral debriefing. The roles are purposely not scripted. Participants are to prepare for their roles by reading the materials provided prior to the workshop and coordinating their efforts with other role players assigned to their scenario.

Government participants will play one of the following roles: Contracting Officer and/or Contract Specialist, Chair of the Source Selection Evaluation Board, or Subject Matter Expert. They will be provided information on the offeror’s proposal, selected sections of the Request for Proposal (RFP), excerpts from the proposal, and information on how the proposal was evaluated. During the role play, participants will explain how evaluation factors were used to make the award, the results of the Government’s tradeoff analysis, and the role price played in the award decision. They should also prepare for potential questions from industry participants.

Industry participants will play multiple distinct roles: Chief Executive Officer (CEO), Capture/Business Development representative, proposal manager, contracts manager, and/or legal counsel. They will be provided selected sections of the RFP and limited information about why their proposal was not selected for award.

1. **Conclusion:** Facilitated workshop wrap-up, including a discussion on best practices for debriefings and explanations as well as keys to success.

# SCENARIO TWO OVERVIEW

The Department of the Treasury(TREASURY) Aviation Logistics Center (ALC) has a need for engineering and technical services. More specifically, the TREASURY ALC, Long Range Surveillance (LRS) Product Line (PL) has a need to consolidate requirements for services in support of the Progressive Structural Inspection (PSI) processes and depot level repair processes completed on both the HC-130H and HC-130J aircraft. This need includes contractor-furnished resources, capabilities, technical assistance, and suitable facilities to support its primary functional areas. Market research determined the Government should award a single firm-fixed price contract and that the Request for Proposal (RFP) should be issued using full and open competition. Best value will be determined using the tradeoff process in accordance with FAR subpart 15.101-1. The details of the procurement are as follows:

* + - * The RFP was issued on February 14, 2013. Proposals were due from offerors no later than 4:00 PM EST on March 31, 2013.
* The RFP contemplates award of a Firm Fixed Price (FFP) contract with one base year and two options years. Price evaluation was inclusive of options, and the total evaluated price cited in this scenario is inclusive of options.
* The RFP stated that the Government intended to award without discussions with offerors.
* A preproposal conference was held on March 1, 2013.
* The Government responded to over 120 questions submitted by various offerors by the date stipulated.
* Three proposals were timely received in response to the RFP.
* The government evaluated all three proposals. A competitive range was not established and discussions were not held.
* Award was made to Open Skies Corporation at a total price of $182,672,705.04 on June 7, 2013.
* The Government notified the unsuccessful offerors on June 10, 2013 that award was made to Open Skies Corporation at a total price of $182,672,705.04; Bel Air’s proposed price was $196,580,240.
* Within two (2) days of notification that they were not selected for award, BelAir requested in writing that the Government provide an oral debriefing.
* The Government agreed to BelAir’s request for an oral debriefing, and requested the Proposal Manager, Section Vice President, and the BelAir’s Contracts Lead for the proposal attend the debriefing on June 25, 2013, at the Coast Guard location, from 2:00 -2:30pm.

BelAir arrived at the debrief location on time with the following attendees:

* CEO, Ms. Claire Stone
* Program Manager, Ms. Stephanie Cloud
* Contracts Manager, Mr. Christopher Pilaught
* Technical Specialist, Mr. Steven Wing

In attendance for the Government are:

* Contracting Officer, Mr. George Carpouzi
* Source Selection Authority, Mr. Ronald Reagan
* Chair of the Source Selection Evaluation Board, Mr. Noah Itall
* Program Manager, Mr. Timothy Wire
* Subject Matter Expert, Mr. Some Body

**ROLE-PLAY EXERCISE:** You are debriefing BelAir Company. Since they received an unsuccessful notification letter, they are aware that their proposal was priced higher than the awardee. They want to understand why the Government did not “follow the RFP and do a true best value and award to them.” (Note: The direct quote is from a call between BelAir and the CO, made during a conversation while setting up the time and date for the debriefing.)

Request for Proposal Section L (Excerpt)

**To be considered timely, proposals must be received no later than 4:00 p.m. EST on March 31, 2013**. Responses not received by the time and date specified and in the manner specified will be eliminated from consideration. Technical and price proposals shall be separate volumes and consist of the following information:

**VOLUME I – TECHNICAL**

The Technical Volume shall be limited to 75 pages. (Note: The cover letter does not count towards the page limitation.) A front and back side of a page will count as two (2) pages. Response contents that exceed the stated page limitation will be removed from the volume by the Contracting Officer, prior to turning the response over to the Government evaluation team, and will not be considered in the evaluation. The Offeror's Technical Volume should demonstrate the firm's capability to perform the requirements outlined in the RFP and contain the following three (3) sections.

1. TECHNICAL CAPABILITY
2. PAST PERFORMANCE
3. MANAGEMENT APPROACH

**SECTION I - TECHNICAL CAPABILITY**

The RFP sets out only the MINIMUM requirements that must be met by any successful contractor. The Government is seeking responses that go beyond a mere repetition of the minimum requirements by offering innovative, effective, and efficient management strategies and solutions that will ultimately result in the highest quality services which are clearly visible to the stakeholders.

The offeror shall provide a description of its technical capability, detailed and complete enough to clearly and fully demonstrate an understanding of the tasks and requirements specified in the Statement of Work (SOW). Phrases such as “standard procedures will be employed” and “well known techniques will be used” are not considered to be an adequate description. Although it is recognized that all of the technical factors cannot be detailed in advance, the techniques, processes, and procedures the offeror plans to follow, in conjunction with the task areas to be performed, must be described in as much detail as the offeror considers necessary to fully explain the proposed technical approach or method.

The offeror shall, at a minimum, address the following elements when describing its technical capabilities[[1]](#footnote-1):

* An overview of its technical knowledge and corporate/commercial experience regarding capabilities, experience and expertise with performing HC-130H and HC-130J aircraft PSIs, or similar type aircraft, and all other tasks contained in the RFP.
* Experience completing center wing inspections on HC-130H and/or HC-130J or similar type aircraft and the length of time to complete the inspection.
* In-depth description of the facilities that will be utilized to perform inspections, addressing all aspects described in the RFP. Photos of facilities and detailed diagrams of hangar and office space shall be included.
* Quality Control Plan.
* Ground Flight Risk Compliance documents and/or certifications. If not previously qualified, offerors shall submit a plan to address deficient areas and their plan of action to become compliant.
* Approach for managing hazardous materials, pollutants and potential pollutants associated with activities specified in this contract. This program shall also apply to elimination, reduction and minimization of hazardous materials, pollutants and potential pollutants by sub-contractors. The offeror shall state its past relationship with EPA, OSHA, etc. and whether or not they have received violations for air quality, water quality or any other environmental issues.
* Detailed descriptions of de-painting and painting facilities proposed for use in this contract, highlighting the facility’s ability to handle the hazardous materials, control relative humidity and comply with all aspects stated in the RFP.

**SECTION II - PAST PERFORMANCE**

The offeror must demonstrate their capabilities and experience on similar projects that have been completed by its firm. The offeror shall identify three (3) contracts it has recently performed (within the last 3 years from the date of this RFP), or is currently performing, that are similar in scope, magnitude and complexity of this contract. The Government will consider the relevance and quality of the offeror’s performance by evaluating its past performance. The offeror shall complete and submit the Past Projects Form (see Attachment D) for each project identified. In addition, for each of the projects submitted, the offeror shall ensure that a Past Performance Questionnaire (Attachment E) is sent to the cited Client POC(s) to provide feedback. The completed questionnaire must be returned directly to the Government by the Client. This information will not count towards the 75 page limit in the Technical Volume.

The completed survey must be returned directly to TREASURY/ALC by the Client. The offeror is responsible for ensuring timely submission. **Past Performance Questionnaires are due no later than 4:00 p.m. EST on March 31, 2013. Surveys shall be submitted electronically to the following address:** [george.carpouzi@Treasury.mil](mailto:george.carpouzi@uscg.mil) **or via fax (202-000-0000). Late submissions of the questionnaire will not be accepted.**

The past projects form will be used to determine relevance and the completed past performance questionnaire will be used to collect and validate past performance information. The Government reserves the right to obtain information from sources other than those identified by the Contractor. References other than those identified in the proposal may be contacted by TREASURY/ALC and the information received will be used in the evaluation of past performance.

**SECTION III – MANAGEMENT APPROACH**

The offeror must describe its management approach by providing the following information:

* Staffing Plan that describes all resources that will be utilized for this effort, including identification of key personnel and roles and responsibilities of all key personnel. Key personnel resumes shall be submitted and shall demonstrate experience that is within the last ten (10) years. Recruitment and retention methodologies and training shall also be addressed.
* Master Delivery Schedule that identifies and comprehensively explains how the contractor will meet the 220 day delivery schedule.
* Risk Management Plan detailing how the offeror plans to meet the 220 day delivery schedule with a high number of non-recurrent repairs, Unscheduled Depot Level Maintenances (UDLMs), CFTs, Rapid Modification Production Line activities, etc. that will occur as described in the RFP.

**VOLUME II – PRICE**

Offerors shall provide two (2) copies (one (1) hard copy and one (1) electronic copy (CD), readable by MS Excel 12.0/MS Word 12.0, as applicable. The offeror shall provide the unit price and total price for each line item. The unit prices multiplied by the quantities shown in Section B must equal the total price. Inconsistencies in multiplication or addition to the total value of the proposal shall be construed as weaknesses within the proposal.

Request for Proposal Section M (Excerpt)

The Offeror's Technical Volume should demonstrate the firm's capability to perform the requirements outlined in the RFP. The following three (3) factors, listed in descending order of importance will be used to evaluate proposals:

1. TECHNICAL CAPABILITY

2. PAST PERFORMANCE

3. MANAGEMENT APPROACH

The above non-price factors, when combined, are considered to be significantly more important than price.

**FACTOR 1 - TECHNICAL CAPABILITY**

The Government will evaluate the offeror’s technical capability to determine the extent to which the offeror’s solution demonstrates an understanding of the requirements, and sound, practical, and feasible methods to accomplish all tasks, and proposes acceptable methods for ensuring the quality of deliverables. The offeror’s approach will be evaluated based on how well it meets the RFP requirements and the instructions in Section L.

**FACTOR 2 - PAST PERFORMANCE**

The Government will evaluate the offeror's experience performing projects of a similar scope, magnitude and complexity of current and previous contracts during the last three (3) calendar years from the date of this RFP. This assessment will be used as a means of evaluating the relative capability of the offeror to successfully meet the requirements of the SOW. In determining the rating for this factor, the Government will give greater consideration to the contracts which are most relevant to the SOW. Relevancy is defined as similar in size, scope, and complexity to the requirements of this SOW. In performing this evaluation, the Government will consider the Past Projects Form (see Attachment D) and the past performance information provided by the Client POC(s) on the Contractor Performance Evaluation Survey (Attachment E). Additionally, the Government reserves the right to obtain information for use in the evaluation of past performance from any and all sources including sources outside of the Government.

**FACTOR 3 - MANAGEMENT APPROACH**

TheGovernment will evaluate the offeror’s approach to managing the project, including staffing, scheduling, and risk management.

Price

The Government is requesting Firm Fixed Price (FFP) proposals covering one base year and two option years. The schedule is as follows:

* Base Year: June 1, 2013 – May 31, 2014
* Option Year One: June 1, 2014 – May 31, 2015
* Option Year Two: June 1, 2015 – May 31, 2016

Price will be evaluated for reasonableness; however, price realism may be utilized for the limited purpose of measuring an offeror’s understanding of the solicitation requirements and for assessing the risk inherent in an offeror’s price.

Basis for Award

This is a best value procurement using trade-offs between technical and price factors. The Government will make an award to the responsible offeror whose proposal represents the best value to the Government, price and other factors considered. The three (3) non-price factors are Technical Capability, Past Performance, and Management Approach. They are listed in descending order of importance and, when combined, are significantly more important than price.

Evaluation Rating Scheme

The following adjectival ratings will be used to evaluate Technical Capability and Management Approach:

|  |  |  |
| --- | --- | --- |
| **Rating** | **Symbol** | **Definition** |
| **Superior** | **S** | Proposal demonstrates an understanding of the requirements and the approach significantly exceeds performance or capability standards. Proposal has exceptional strengths that will significantly benefit the Government. |
| **Good** | **G** | Proposal demonstrates an understanding of the requirements and the approach exceeds performance or capability standards. Proposal has one or more strengths that will benefit the Government. |
| **Satisfactory** | **SA** | Proposal demonstrates an understanding of the requirements and the approach meets performance or capability standards. Acceptable solution. Proposal has few or no strengths. |
| **Unsatisfactory** | **U** | Proposal fails to demonstrate an understanding of the requirement; one or more deficiencies exist for which correction would require a major revision or redirection of the proposal. |

The following adjectival ratings will be used to evaluate Past Performance:

|  |  |  |
| --- | --- | --- |
| **Rating** | **Symbol** | **Definition** |
| **Neutral** | **N** | No relevant performance record is identifiable upon which to base a meaningful performance rating. A search was unable to identify any relevant past performance information for the offeror or key team members/subcontractors or their key personnel. This is neither a negative or positive assessment. |
| **Superior** | **S** | Based on the offeror’s past performance record, essentially no doubt exists that the offeror will successfully perform the required effort. |
| **Satisfactory** | **SA** | Based on the offeror’s past performance record, some doubt exists that the offeror will successfully perform the required effort. |
| **Unsatisfactory** | **U** | Based on the offeror’s past performance record, extreme doubt exists that the offeror will successfully perform the required effort. |

For the purposes of this evaluation, strength, weakness, and deficiency are defined as follows:

**Strength:** any aspect of a proposal that, when judged against a stated evaluation factor, enhances the merit of the proposal or provides the increased probability of successful performance of the contract.

**Weakness:** a flaw in a proposal that increases the risk of unsuccessful contract performance. A weakness need not be corrected for a proposal to be considered for award but may affect the proposal rating.

**Deficiency:** a material failure of a proposal to meet a Government requirement or a combination of significant weaknesses in a proposal that increases the risk of unsuccessful contract performance to an unacceptable level.

Evaluation Results

*This section is only provided to the government participants. Participants should evaluate what content can be disclosed to offerors in accordance with FAR guidelines.*

The evaluation results for BelAir Company are as follows:

**Technical Capability:**

**Strengths:**

* BelAir’s technical approach demonstrated strong depth and breadth of experience with HC-130H and HC-130J aircraft PSIs.
* BelAir’s summary of PSIs completed demonstrated the ability to repair and repaint HC-130H and HC-130J and other similar aircraft types within a reasonable time and budget.
* The Offeror submitted GFR Compliance certifications with no deficiencies.
* The facility is GFR compliant and meets the regulations specified in the SOW. The Offeror will be able to conduct all repairs indoors, in an environmentally controlled facility. Atmospheric conditions and aircraft skin temperatures shall meet TO 1‑1‑8 requirements.
* The Quality Control Plan is detailed and identified QC activities from technical implementation through deployment.
* BelAir currently implements an effective Hazardous Material Management and Pollution Prevention Programs in accordance with National Aerospace Standard (NAS) 41.

**Weaknesses:**

* N/A: No weaknesses or deficiencies were found.

**Past Performance:**

**Strengths:**

* Past performance information submitted is relevant, less than five (5) years old, and similar in scope and complexity of this solicitation.
* References contacted stated that they were relatively confident in BelAir’s ability to fulfill performance quality requirements most of the time.

**Weaknesses:**

* A past performance evaluation survey reported several minor incidents when the offeror was not able to meet the schedule.
* One reference identified deficient Quality Assurance (QA) procedures and insufficient time allowed to deliver monthly reports on time.
* The information was limited to two (2) past contracts, because one of the past performance references was unreachable.

**Management Approach:**

**Strengths:**

* BelAir identified a solid project management organization that addressed the technical and organizational management needs.
* The Offeror’s work plans, processes, and procedures for managing the tasks and efforts follow industry and government standards, including the International Standards Organization (ISO) and American National Standards Institute (ANSI). In particular, it incorporates the risk management approach as outlined in the TREASURY Risk Management Fundamentals guide.
* The Offeror’s integrated master schedule clearly identifies and explains how they will meet the 220 day delivery schedule with a potential for a high number of non-recurrent repairs.
* The employee retention rate for the last five (5) years is higher than average.
* Program Manager has more than 18 years of aircraft maintenance and logistics/parts management experience. She has documented experience with HC-130 aircraft and other similar aircraft types. She also has extensive knowledge of TREASURY and Department of Defense (DOD) aircraft maintenance practices and procedures.

**Weaknesses:**

* While the Quality Assurance Manager has eight (8) years of experience with wing aircraft heavy maintenance and possesses repair experience on aircrafts of similar category and class of aircraft as the HC-130, the experience is not within the last ten (10) years.

**Proposal Excerpt –** experience on aircraft of similar category and class of aircraft as the HC-130, experience must be within the last ten years (ten years from 2013 is 2003). Resume excerpt below:

|  |  |  |  |
| --- | --- | --- | --- |
| Quality Assurance Manager | Bachelor’s degree in English or related field plus eight (8) years of experience with wing aircraft heavy maintenance and possesses repair experience on aircrafts of similar category and class of aircraft as the HC-130 | BA, English, Morrow University, 2003,  20 years of experience maintaining the E-2C Hawkeye wing aircraft, U.S. Treasury Aircraft Electrician Senior Chief, retired 2002 | Edits, develops, and reviews written and graphic technical materials, including system configuration, documentation, studies, reports and other presentation graphics that meet client style standards in support of project-specific requirements |

**Price:**

Price reasonableness was determined by adequate competition. BelAir’s overall price of $196,580,240.00 appears to be competitive; however it is 6.4% higher than the average price and approximately 10% higher than the IGCE. Individual labor rates are significantly higher than its competitors in most labor categories and higher than comparable historical rates. BelAir’s proposed labor mix appears to be weighted more heavily on the lower skills labor categories and could be of concern due to the complex nature of this requirement.

Source Selection decision (excerpt)

*The name of the winning offeror, date of award and amount of award along with BelAir Company’s technical evaluation results were provided to BelAir. The following information is only provided to the government participants.Participants should evaluate what content can be disclosed to offerors in accordance with FAR guidelines.*

| **Factors** | **BelAir Company** | **Open Skies Corporation** | **Flying High Incorporated** |
| --- | --- | --- | --- |
| **Technical Capability** | Superior | Good | Satisfactory |
| **Past Performance** | Satisfactory | Satisfactory | Satisfactory |
| **Management Approach** | Superior | Good | Satisfactory |

| **Performance Period** | **BelAir Company** | **Open Skies Corporation** | **Flying High Incorporated** | **IGCE** |
| --- | --- | --- | --- | --- |
| **Base Year** | $62,528,898.01 | $58,105,142.93 | $55,658,906.54 | $56,791,429.24 |
| **Option Year 1** | $65,477,601.61 | $60,845,233.50 | $58,283,638.84 | $59,469,568.42 |
| **Option Year 2** | $68,573,740.39 | $63,722,328.61 | $61,039,607.75 | $62,281,614.57 |
| **Total Price** | $196,580,240.00 | $182,672,705.04 | $174,982,153.12 | $178,542,612.23 |

A contract will be awarded to Open Skies Corporation in the amount of $182,672,705.04. Both BelAir Company and Open Skies Corporation received higher than satisfactory ratings. However, when reviewing the strengths of each proposal, the Government could not justify paying the 7.61% price premium that award to BelAir Company would require. Open Skies Corporation’s proposal exceeded the Government’s minimum requirements in many areas. For example, Open Skies technical proposal demonstrated extensive knowledge and experience with HC-130H and 130J aircraft PSIs. Additionally, Open Skies quality control plan was detailed and demonstrated the company’s commitment to quality during all phases of the inspection process. All certifications are current with no documented issues from EPA or OSHA. Two past performance references indicated Open Skies did a great job providing PSIs and depot level repairs, stating that key personnel were responsive and well-qualified and that the work performed was of the highest quality. Only minor issues that were quickly resolved were identified. Qualified staff were proposed for all key personnel positions and Open Skies’ recruitment and retention policies exceed industry standards. The Master Delivery Schedule proposed is realistic and comprehensively explains their plan to meet the 220 day delivery schedule identified in the SOW.

The strengths of BelAir’s proposal were not significant enough to warrant the 7.61% premium in price when a more than satisfactory solution is available at a lower price. Although BelAir’s technical rating was higher than Open Skies, the government conducted a tradeoff and determined that the proposal submitted by Open Skies Corporation represents the best value to the Government. Open Skies Corporation received an overall technical rating of Good and submitted a proposal that met and in some areas exceeded the RFP requirements. Additionally, Open Skies Corporation’s price was evaluated to be fair and reasonable based on adequate price competition and was in line with the independent government cost estimate.

1. *Note that these are not sub-factors.* [↑](#footnote-ref-1)