

TASK ORDER COMPETITION PROCEDURES

1. Statement of Purpose

- 1.1. This document outlines the internal procedures that govern the selection of contractors for task order assignments (projects) under the Training and Management Assistance (TMA) contract. These procedures serve as a supplement to the policies of the Office of Personnel Management (OPM) Contracting Office. All TMA staff will use these procedures.
- 1.2. The procedures outlined in this document may be revised from time to time, as required, to reflect the changing needs of the TMA program. Any changes will be consistent with the TMA Contract.

2. Definition of Terms

- 2.1. **Task Order Competition (TOC)** – a formal competition, oral or written, between a number of TMA contractors, conducted by TMA to award a task order assignment to one or more contractors, in response to a Statement of Objectives.
- 2.2. **Task Order Assignment** – synonymous with the terms “new project” or “project,” means an agreement between the OPM and a customer agency that results or will result in (1) a planned undertaking using the TMA contract and (2) the development of a Management Plan.
- 2.3. **Contractor or Firm** – means a private sector company or entity selected for an award as a TMA prime contractor.
- 2.4. **Statement of Objectives (SOO)** – a comprehensive document from the customer agency that provides background information, states the requirements for a customized solution, and provides requirements-related information, such as outcome objectives, project timeframe, and work location.
- 2.5. **TMA Matrix** – a chart outlining specific strengths and expertise of the firms in subject matter areas and product and technology categories listed in the RFP based on their proposals and past experiences.

3. Procedures

- 3.1. **Use of Procedures** - The TMA project manager will use these procedures to recommend to TMA management the selection of contractors for oral or written competitions and task order assignments. After consulting with the customer agency representative(s), TMA will determine which contractors will make presentations and will receive the task order assignment using the following steps:
 - An assigned TMA project manager invites a subset of qualified TMA contractors (typically three or four) to engage in a TOC. The contractors are selected on the basis of their experience in performing similar work in similar customer environments and on the basis of cumulative knowledge of contractor capabilities by TMA project managers and the TMA management team (see paragraph 3.2). The format for a TOC may be an oral presentation or a written proposal. In most cases, it takes the form of

successive 40-to-60 minute interactive contractor presentations to the customer, which the TMA project manager facilitates. The TMA project manager ensures that each contractor has equal presentation time with the customer.

- A Selection Panel, comprised of customer agency representatives and the TMA project manager, evaluates the participating TOC contractors, using a standardized TMA evaluation format with specified evaluation factors (see paragraph 6.4).

3.2. **Criteria for Selection of Contractors for Presentations** - Based on the customer's Statement of Objectives (SOO), the TMA project manager, in conjunction with customer agency representative(s), will use the following factors to formulate a recommendation regarding the selection of contractors for presentations:

- The TMA Matrix of Contractor Capabilities;
- The customer's recommendation of a firm or firms;
- The contractor's knowledge of the customer agency, its mission, and corporate culture;
- The contractor's history with OPM and other Federal agencies as related to the SOO;
- The customer agency's budget; and
- Other relevant factors.

3.3. **Number of presenting firms** - While the selection process is in progress, the single point of contact for the customer agency will be the appropriate TMA project manager.

- The TMA project manager will typically recommend three firms for competition. There may be instances when more or fewer firms are needed.
- Upon receipt of a SOO for a TOC, the invited contractors are constrained from any direct communication with the customer agency about the project until after award. Contractors with questions, concerns, or issues must communicate them through the assigned TMA project manager. Contractors who communicate directly with the customer agency may be eliminated from award consideration at the discretion of TMA.
- If a firm declines its invitation to participate in a TOC, TMA management, after consulting with the TMA project manager and the customer agency representative(s), will determine whether any additional firms should be invited to the TOC.

4. Oral Task Order Competitions

4.1. Format of the Oral Presentation

- Participating firms will make oral presentations in person to the Selection Panel. During the oral presentation, each firm should outline its capabilities, experiences, and approaches relative to the SOO, any other documentation furnished by the customer agency, and the evaluation criteria set forth in section 6.4.
- Each firm will have an equal length of presentation time, generally 40 to 60 minutes, to make its oral presentation, including addressing questions from the Government (i.e., TMA and the customer agency). TMA, in consultation with the customer agency, will determine the length of the oral presentation based on the scope and complexity of the project. Firms invited to make oral presentations will be notified in advance of the length of the presentation.
- Prior to each presentation, the Government will establish whether the question-and-answer (Q&A) period will be integrated within the established time period of the presentation or if the Q&A period will follow the firm's oral presentation. If the Government determines that the Q&A period will follow, a stipulated period of time will be subtracted from the established time period to allow for the Q&A. For example, if a presentation is scheduled for a total of 40 minutes and the Government determines that the Q&A period will follow each oral presentation, the firm's oral presentation may be delimited to 30 minutes in length and the Q&A period will be 10 minutes.
- As part of their presentations, firms may choose or be asked to present/demonstrate work samples that are relevant to the SOO. OPM will notify the firms in advance when samples are needed. It is the responsibility of the firm to assure that the sample products are operational during the presentation and to bring, set-up, or arrange for any equipment to assure functionality.

4.2. Schedule of Presentation

- Oral presentations will normally begin within five to seven work days of SOO distribution to invited firms. Exceptions may be considered on a case-by-case basis. All firms will make their oral presentations on the same day unless OPM determines that such scheduling would not be in the best interest of the Government.
- Once notified of the scheduled date, time, and location of its presentation, a firm shall complete its presentation at the scheduled location on that date and time. Requests from firms to reschedule their presentations will not normally be entertained. The Government will reschedule presentations when determined necessary to resolve unanticipated problems or delays encountered in the presentation process.

4.3. Background Information for Oral Presentations

Unless otherwise determined by TMA, the TMA project manager will be solely responsible for forwarding background information to the firms that will make oral presentations. All firms will receive the same information. The background information will include the Statement of Objectives, criteria for selection, other pertinent information furnished by the customer agency, and the date, time and location of the oral presentation. Firms will use the information as a basis for their oral presentations.

4.4. Firm's Presentation Team

Each firm has the option of selecting the participants who will make its oral presentation. A firm that plans to use a subcontractor as part of its oral presentation team and subsequent work team must assure that the subcontractor's fees are within the firm's approved daily rate structure under the TMA contract, unless otherwise approved by TMA.

5. Written Task Order Competitions

- Written proposals may be chosen by the customer in lieu of the standard oral presentation format. They are especially recommended for Task Order Competitions where the total value of the award is expected to be less than \$200,000, as a means of reducing start-up costs to the Government.
- When the Government determines that a written TOC is warranted, selected firms will receive an invitation to submit a written proposal in response.
- Each response is usually limited to two pages, plus resumes and attachments, and is evaluated against the criteria used in oral task order competitions. Any additional factors will be stated in the invitation. The TMA project manager, in consultation with the customer agency, may request a longer response, consistent with SOO requirements.
- The TMA project manager will indicate whether the written proposal package needs to be delivered in hard copy to TMA and to the customer or whether electronic submission is sufficient.
- Written proposals must include resumes of proposed key project team members and a price range for proposed solutions based on similar projects completed in the past.
- Written proposals typically include one to three sample (web-based, CD-ROM, or hard copy) products produced by the firm that demonstrate its ability to meet the needs specified in the SOO.

6. Evaluation and Selection of Contractors for Task Order Assignments

- 6.1. **Basis for Selection** – Except as described in section 7.0, Exceptions to Procedures, the evaluation and selection of contractors for task order assignments will be based on oral presentations or written proposals.
- 6.2. **Members of Selection Panel** - Generally, the Selection Panel will consist of two sets of Government representatives (e.g., TMA and customer agency representative(s). Occasionally, a Contracting Officer's Representative or an OPM management official may participate on the Selection Panel.
- 6.3. **Evaluation Process**
- 6.3.1. **Evaluation Criteria** - At a minimum, oral presentations and written proposals will be evaluated as to the best value using the following factors:
- Understanding of the Work Requirements;
 - Technical Approach to Meet Customer Needs;
 - Knowledge of the Subject Matter Area;
 - Key Staff Capabilities and Other Corporate Resources;
 - Past Performance and Relevant Project Experience; and
 - Estimated Cost/Return on Investment.
- 6.3.2. **Additions to Evaluation Criteria** - On occasion, TMA, in consultation with the customer agency, will add factors to the evaluation criteria. Firms that are invited to TOCs will be notified of these factors in advance.
- 6.3.3. **Evaluation of Presentations and Proposals** - At the conclusion of all presentations or upon review of all written proposals, the Selection Panel will discuss the relative strengths and weaknesses of participating firms and reach consensus on the firm(s) considered best qualified to perform the work. The TMA project manager will submit to TMA management documentation of the evaluation and a recommendation of the firm or firms considered the best qualified.
- 6.4. **Selection of Firm(s)** – Based on the results of the evaluation and recommendations of the Selection Panel and the TMA project manager, a TMA or OPM management official will select the firm that will receive a task order assignment. The TMA project manager will notify the presenting firms of the result, and discuss the strengths and weaknesses of their presentations or proposals.
- 6.5. **Documentation of Task Order Assignments** - The approval document for task order assignments will include clear justification for the selection of the contractor(s) and will be placed in the official project file.

7.1 Exceptions to TOC Procedures

The following are exceptions to the Task Order Competition procedures described elsewhere in this section:

- **Follow-on Work** - If the task order assignment (project) is a continuation of a current project;
- **Minimum TMA Contract Award** - If a task order assignment is made to ensure that a contractor receives the guaranteed minimum established by the Government for this contract;
- **8(a) Award** - if task order assignment is made to an 8(a) firm to support OPM's 8(a) business objectives; and
- **Other** - Any other applicable exceptions allowed under the FAR, to include the following:
 - FAR 6.302-1 – Only one responsible source and no other supplies or services will satisfy agency requirements.
 - FAR 6.302-2 – Unusual and compelling urgency.
 - FAR 6.302-3 – Industrial mobilization; or engineering, development, or research capability.
 - FAR 6.302-4 – International agreement.
 - FAR 6.302-5 – Authorized or required by statute.
 - FAR 6.302-6 – National security.
 - FAR 6.302-7 – Public interest.

All exceptions to TOC procedures will require justification and approval by a TMA and/or OPM management official.