

**Commercial Solution Opening (CSO)**  
**Healthcare Delivery (HCD) - Roles 1 and 2**  
*HT0038-22-S-C001*  
*December 8, 2021*



## **I. EXECUTIVE SUMMARY**

**Requiring Activity:** *Program Executive Office, Defense Healthcare Management Systems (PEO DHMS) Joint Operational Medicine Program Management Office (JOMIS PMO)*

**Opportunity Title:** *Healthcare Delivery (HCD) Modernization Roles 1 and 2*

**Announcement Type:** *Commercial Solutions Opening solicitation*

**Solicitation Number:** *HT0038-22-S-C001*

### **Classification:**

*Product Service Code: DA10 IT and Telecom – Business Application/Application Development Software as a Service (SaaS)*

*NAICS Code: 541512 - Computer Systems Design Services*

*Place of Performance: To Be Determined*

### **Important Dates:**

*Abstract Submission Initial Cut-off: January 4, 2022 at 1500 EST*

*CSO Closing: September 30, 2022 at 1500 EDT*

### **Brief Problem Statement:**

*The lack of “fit-for-purpose”, scalable, configurable and modular capabilities has led to current Operational Medicine (OpMed) Information Technology (IT) systems failing to meet the changing operational environment.*

**Authority:** *Section 879 of the National Defense Authorization Act for FY2017, Public Law 114-328, and Class Deviation 2018-O0016*

**Award(s) Ceiling:** *\$100M (excludes any awards made under the authority of 10 U.S.C. §2371b(f))*

**Applicants:** *The Government encourages broad participation in responding to this solicitation, and seeks to leverage every reasonable flexible avenue available in negotiating any resulting contract and/or agreement for HCD Roles 1 and 2 solutions. PEO DHMS JOMIS PMO is seeking the most innovative commercial solutions available. Further, as explained in the CSO, the Government will provide mechanisms to promote networking to form teaming arrangements and partnerships anticipated to stimulate highly sought after innovative solutions. If a proposed solution has merit, the Government will work closely with the offering vendor to strive to provide a mutually beneficial arrangement for all parties.*

## **II. SOLICITATION OVERVIEW**

### **A. Procurement Approach**

The prototype solution established within any resulting instrument to this CSO must meet the definition of commercial items as defined in FAR 2.101. The Government does not consider this solicitation to be seeking services/support labor. The contracted item will be the commercial solution.

The solicitation is comprised of several separate phases: 1)Abstract, 2)Pitch, 3)Full Proposal, 4)Negotiation, 5)Compliance and 6)Post-Award Design as prescribed herein. Further, the Abstract phase includes multiple iterations, which are fully explained in this CSO.

Potential award types include FAR-based contracts and/or Basic Ordering Agreements (BOAs) including orders, Blanket Purchase Agreements (BPAs) including calls, and/or Prototype Other Transactions (OTs) pursuant to 10 U.S.C.§2371b. Regardless of the type instrument negotiated, the pricing shall be Fixed-Price, which includes Firm-Fixed-Price (FFP) and Fixed-Price Incentive (FPI). This solicitation is not accepting offers for grants or cooperative agreements as the purpose of this CSO is to transfer something of value directly to the Government.

The Government reserves the right to award to one, some, all or none of the CSO respondents invited to submit proposals in response to the CSO. Be advised that only a Contracting/Agreements Officer has the authority to enter into, or modify, a binding contract/agreement on behalf of the United States Government.

The level of funding for any prototype award made under this solicitation is intentionally not being prescribed due to the risk of doing so compromising Applicant innovation and ingenuity. Should funding availability be insufficient, but the Government determine it to be in its best interest to pursue an award based upon the high quality of a proposal, the Government may elect to downward negotiate an otherwise unaffordable solution even if doing so necessitates awarding only portions of the proposal. It may also choose to include priced options in any award, incrementally fund awards, or both.

Awards made under this CSO constitute competitive procedures. The Government may award OTs for prototype projects that provide for the award of a follow-on production FAR-based contract or OT for production to participants in the OT for prototype projects, or a recognized successor in interest to the OT, without the use of further competitive procedures, if the participant in the OT for prototype projects successfully completes the prototype project, as permitted by 10 U.S.C.§2371b(f).

A contract or OT for a prototype awarded under this CSO shall allow for an iterative prototyping process. An iterative prototyping process will allow the Government to modify, by mutual agreement, the scope of a prototype contract or OT to allow for the adaptation and modification of the technology being prototyped to meet additional unique and discrete purposes/mission sets. The sequential prototype iterations may result in a separate prototype project rather than a modification of the original prototype contract or OT.

A prototype project is complete upon the written determination of the appropriate approving official for the matter in question that the efforts conducted under a prototype contract or OT: (1) met the key technical goals of a project; (2) met the metrics incorporated into the prototype contract or OT; or (3) accomplished a particularly favorable or unexpected result that justifies the transition to a production contract or OT. Furthermore, prior to successful completion of a prototype project under this CSO, the Government may transition any aspect of the prototype project determined to provide utility into production while other aspects of the prototype project have yet to be completed.

In accordance with 10 U.S.C 2371b(c), if an Agreement for a prototype is utilized and if that Agreement provides for payments in a total amount in excess of \$5,000,000, the Agreement will include a mandatory clause that provides for the Comptroller General the ability to examine the records of any party to the agreement or any entity that participates in the performance of the agreement. The \$5,000,000 amount includes the base agreement plus options.

Additionally, to enter into an OT for a Prototype agreement under 10 U.S.C. 2371b, one of the following conditions must be met:

- There is at least one nontraditional defense contractor or nonprofit research institution participating to a significant extent in the prototype project.
- All significant participants other than the Federal Government are small businesses or nontraditional defense contractors.
- Parties to the transaction other than the Federal Government must pay at least one third of the prototype project total cost.
- The senior procurement executive determines that exceptional circumstances justify the use of an OT to provide an innovative business arrangement not feasible under a contract or to expand the defense supply base in a manner not practical under a contract.

The Government reserves the unilateral right to either extend or close the CSO at any time prior to the prescribed CSO Closing Date.

## **B. Programmatic Background**

The Joint Operational Medical Information Systems (JOMIS) Segment 2 Acquisition Decision Memorandum (ADM), signed June 11, 2020, pursues a new strategy leveraging MHS GENESIS and extending capabilities through an enterprise platform that rapidly delivered incremental capabilities for Healthcare Delivery.

The JOMIS Program Management Office (PMO) and stakeholder community strives to deliver OpMed IT solutions at the speed of relevance. This CSO focuses on OpMed Roles 1 & 2 healthcare delivery knowledge management solutions to support the full range of military operations. As new and innovative solutions are introduced to the JOMIS OpMed ecosystem, integration and coordination with other military initiatives will be critical for success, including integration and operation on hardware and networks provided by each of the Services. JOMIS must also work closely with the Services to integrate IT operations and support activities with any new and innovative solutions that are awarded to Applicant(s).

## **C. Description of Need**

OpMed providers require solutions that enable bi-directional data flow, “fit-for-purpose”, scalable, configurable, enabling healthcare delivery documentation, with clinical decision support (CDS) in the disconnected, intermittent and low-comms environment.

The HCD Modernization effort must provide fit for purpose, modular capabilities that enable the capture of data and transmission of data throughout the deployed continuum of care. This effort will address critical gaps in order to document preventative healthcare and patient encounters; manage patient data, ancillary data, and maintain patient visibility; and provide decision support to Health Service Support providers in austere Role 1 and 2 environments. This solution should also serve as a catalyst for identifying new external technology trends and building communities with sources of innovation both outside traditional DoD and Military Health System contractor communities.

## **D. Functional Areas of Interest (AOIs) and Technical Attributes**

Functional AOIs describe the problem space to be addressed through innovative technologies and solutions. They are not detailed specifications and requirements, but rather kept broad to remain open to all ideas and possibilities proposed by Applicants.

Technical Attributes are also identified and addressed to ensure that innovative solutions meet the necessary requirements leading to prototype development.

As outlined immediately below, the Functional AOIs and Technical Attributes are being broadly expressed by PEO DHMS to stimulate Applicant interest and exploration of ingenious solutions that span all components of the HCD vision with reasonable potential of successful execution and implementation.

### Functional AOIs

#### 1. Document OpMed Healthcare Delivery & Preventative Readiness

- Supports the documentation of healthcare into an electronic medical record including diagnosis, plan of care, treatment, longitudinal care, and other clinical notes.
- Supports the documentation of preventative exams, immunizations, screenings, health counseling, and health education and medical readiness requirements.

#### 2. Management of OpMed data

- Collects, organizes, stores, protects, disseminates and analyzes patient health and safety- related data and treatment history (clinical preventive and injury/illness-related encounters) across the continuum of care in an electronic format.

- Captures, organizes, and disseminates information related to patient location and status during delivery of health care throughout the continuum of care.

### 3. Clinical Decision Support (CDS)

- Provides clinical decision support (CDS) tools, manages medical reference information, manages Occupational Environmental Health (OEH) Assessment information, and tracks Quality Assurance (QA)

## Technical Attributes

### 1. Configurability, Scalability, “Fit-for-Purpose”

- Configurability to support the full range of Role 1, 2, and enroute care capabilities from outpatient sick call to surgery and ancillary medical services and integrate occupational and environmental health documentation capabilities
- Workflows and medical personnel role configurability adapts to the OpMed environment
- Technical configurability adapts to the Service expeditionary networks and associated networking and cyber requirements to function on those networks

### 2. Bi-Directional Data & Data Seeding

- Facilitates the bi-directional flow of patient data through tactical intra-theater (Role 1->2->3) and strategic intra/inter-theater Patient Movement (Role 3 ->patient staging/enroute care -> 4+) transfers of care
- Facilitates the bi-directional transfer of data with the longitudinal Electronic Health Record (her), MHS GENESIS, through the OpMed Data Service (OMDS) & Operational Medicine Information Gateway (OMIG) to support provider clinical decisions and transmit OpMed and OEH data to the MIP.

### 3. Operates in Disconnected, Intermittent & Low-Comms (DIL)

- Provides immediate access to critical longitudinal EHR information for known/registered patients regardless of network state
- Supports the asynchronous retrieval of detailed patient longitudinal EHR information
- Records patient encounter data regardless of network state and ensures that data is reconciled with the patient’s longitudinal EHR when network conditions allow

## E. Eligibility Information

### 1. Eligible Applicants

The Government strongly encourages engagement from all responsible sources capable of satisfying the Government's needs, including academia (colleges and universities), businesses, and other organizations (including non-profit). Contractors who have not previously supported the Government, the Department of Defense, or the Defense Health Agency are strongly encouraged to engage, as prior experience with our organization is not required.

## 2. Special Categories

### a. Federally Funded Research and Development Centers (FFRDCs)

While the CSO pilot is intended to borrow heavily from the structure of Broad Agency Announcements, where FFRDCs are permitted to compete when in compliance with the appropriate regulations, the CSO is applied to different outcomes. The Government has determined that the exception to competition limitations at DFARS 235.017-1 does not apply, because the solicitation seeks new private sector commercial products or new applications of those products.

### b. Government Entities

The Government has determined that the work is otherwise available from the private sector and Government entities are therefore precluded from competing under this CSO.

### c. Participation

If a prime applicant proposes to utilize an FFRDC and/or Government entity as a partner or subcontractor, the Government will entertain submissions on a case-by-case basis. However, the burden to prove eligibility for all team members rests solely with the Applicant. The Government strongly recommends that these potential partnerships be identified in the abstract or otherwise as early in the proposal process as possible. Notwithstanding the above limitations, FFRDCs and Government entities are welcome to provide feedback and/or questions about the solicitation if they are so inclined.

## 3. Foreign Participation

Non-U.S. organizations and/or individuals may participate to the extent that such participants comply with any necessary nondisclosure agreements, security regulations, export control laws, and other governing statutes applicable under the circumstances. The burden to prove eligibility for all team members rests solely with the applicant. Potential applicants are advised that any solution will likely be required to contain controlled unclassified information and personally identifiable information.

## **III. CSO PROCESS**

The Government will utilize an interactive, high-engagement solicitation process to seek and evaluate proposals. Communication is encouraged through any step of the process for the entire duration of the CSO. The Government strongly encourages interested parties to provide any feedback and/or questions relating to this CSO.

The Government is specifying an Abstract Submission Initial Cut-off date and time for the first iteration of activities. After the initial iteration, the Government will conduct additional iterations on an ad hoc or scheduled basis (in batches) at its discretion throughout the CSO open period depending upon funding availability. Accordingly, submittal of feedback and/or questions and abstracts after the Abstract Submission Initial Cut-off date and time is encouraged prior to 120 days before the prescribed CSO Closing date.

As Applicants proceed through the prescribed CSO phases, the Government may identify potentially viable solutions that may not cover the full breadth of AOIs. In such cases and with the permission of the Applicant, the Government may communicate through <https://www.sam.gov> a potential opportunity to team with a vendor that has a potentially viable solution. Whether or not the vendor's name is shared and the extent of the solution communicated will be at the Applicant's discretion. As additional vendors express interest in teaming with this Applicant, the Applicant can freely make connections and form teaming relationships for a future Abstract submission. While the Government may identify potentially viable vendor solutions, the Government is not bound to ultimately select this particular Applicant as more proposed solutions come through the CSO process.

#### **A. Abstract Phase**

The Abstract Phase will begin immediately after the Government releases the CSO. Detailed requirements and formatting for abstracts is contained in this CSO.

The Government will conduct a merit-based assessment on abstracts according to evaluation criteria delineated in the CSO. Applicants submitting abstracts prior to the Abstract Submission Initial Cut-off Date and Time will be provided a positive or negative response ONLY as to whether the Applicant is selected to provide a pitch presentation of the proposed solution. The Government intends to provide this response within 2 weeks of the Abstract Submission Initial Cut-off Date, but the rate of response will depend on the volume of abstracts that are received. All abstracts received after the Abstract Submission Initial Cut-off Date, but prior to 120 days before the prescribed CSO Closing date, may or may not be evaluated by the Government on an ad hoc or scheduled basis (in batches) at its discretion depending upon funding availability. If evaluated, a positive or negative response ONLY as to whether the Applicant is selected to provide a pitch presentation of the proposed solution will be provided.

Applicants who are the prime submitter of the abstract may only submit one abstract at a time. If a second abstract is submitted by an Applicant prior to notification of selection or non-selection, it will be dismissed and not reviewed. If an Applicant is a prime submitter of an abstract, it does not prevent them from being a sub-teaming member of another prime Applicant submission. There is no limit on the number of Abstracts sub-teaming members can be a part of. Due to anticipated funding constraints and the breadth of the AOIs, partnering and/or teaming is anticipated and encouraged to optimize the likelihood of program success.

Resubmission of rejected abstracts will not be re-evaluated until after all abstracts submitted by the Abstract Submission Initial Cut-off Date and Time are reviewed and adjudicated. All



resubmitted abstracts must contain substantial differences. The Government reserves the right to implement and enforce a set waiting period after a rejected abstract to limit the level of burden on the Government evaluators.

The fundamental outcome of this phase is to maximize efficiency for the Government and industry. The Government does not want Applicants to waste time and proposal resources developing solutions that do not address the necessary outcomes. The Government does intend to use its resources to evaluate meritorious solutions and make timely awards.

## **B. Pitch Phase**

If an abstract is accepted, the Government will invite the Applicant to prepare and deliver an oral pitch presentation of the proposed solution. These presentations will be conducted through either live, virtual or in-person settings. For abstracts received prior to the Abstract Submission Initial Cut-off Date and Time, the Government will assign presentation slots at its discretion.

For abstracts received after the Abstract Submission Initial Cut-off Date, but prior to 120 days before the prescribed CSO Closing date, standing slots will be allocated each month, and these will be allocated on a first-come-first-served basis once an abstract is accepted for the pitch phase. After an initial award under the CSO, and if subsequent awards are made, fewer slots may be allocated, and the timing of standing slots may be modified (e.g., quarterly, semi-annually) at the Government's discretion, and may be stopped if funding is no longer available to make additional awards.

Presentations will consist of a "receive" session and an "interactive" session. During the receive session, the Government will listen to presentations without interrupting the presenters. During the interactive session, the Government will ask questions and obtain clarifications regarding any areas where it did not fully understand the proposed solution. The receive session will be limited to approximately one hour, followed by an approximate twenty minute break for each party to hold separate discussions, and then an approximate forty-minute interactive session. The goal of the presentation is for the Government to have a full and complete understanding of the solution to support a written assessment, not to evaluate, provide feedback, or alter the solution in the room. Once the presentations are concluded, the Government may submit additional written follow-up questions or request further clarification to assist in its evaluation. The Government will conduct a merit-based assessment on pitches according to evaluation criteria delineated in the CSO.

## **C. Full Proposal Phase**

If the pitch is accepted, the Government will invite the Applicant to submit a final written full proposal. The full proposal is expected to capture and formalize everything presented and accepted through the Abstract and Pitch Phases. While additional details will be expected as part of this submission, it is intended for content delivered in the previous phases to seamlessly feed into this submission. Detailed requirements and formatting for full proposals is contained in the CSO. The goal of the full proposal is for the Government to receive all

required documentation and information from the Applicant to proceed into open discussion for the Negotiation Phase. The set of exit criteria for Applicants to proceed past the Full Proposal Phase is delineated in the CSO.

If additional information is required from the Government for the Applicant to finalize details of the full proposal, the Applicant may request this information from the Contracting Officer. While the Government cannot guarantee all information can be shared upon request, there will be earnest effort made to provide additional context. As such, the Government reserves the right to modify or correct any information provided in this phase through the Negotiation and Post-Award Design Phase. Instructions for engagement will be provided once the Full Proposal Phase is reached.

Please note the Government will NOT utilize the procedures of FAR Subpart 15.3 or the definitions of terms contained therein. Nothing in this solicitation is meant to imply the use of these procedures, and no section is meant to constitute the formal processes required by FAR 15.3 such as establishment of a competitive range, discussions, or other communications.

#### **D. Negotiation Phase**

The fundamental outcome of the Negotiation Phase will be to develop an arrangement that defines the relationship to deliver the best possible solution to the Government's Functional AOs and Technical Attributes while aligning the contractor's success with that of the Government. Negotiations will be in an iterative, interactive process using mixed modes, including either live, virtual or in-person discussions. The final results of negotiations will be presented to the internal decision authority, who will assess the outcomes before making a decision to finalize the proposal for award.

The Government reserves the right, at its sole discretion, to reject a proposal at any point, and end negotiations, whether because 1) no agreement is reached; 2) the desired set of solution(s) is reached via award(s) to another Applicant(s); 3) no further funding is available; or 4) any other reason.

Prior to rejecting a proposal, the Government may advise the applicant of the aspects of its proposal preventing agreement and request that the applicant revise or clarify the proposal as appropriate. This may include suggestions to improve the approach/solution, including incorporating efforts/capabilities the Government believes integral to its required outcomes that were not included in the original proposal. The Government expects that these discussions will require "back and forth", discussion of tradeoffs, and counter-offers. The Government expects the discussion will generate continued thinking and may spur new ideas, and encourages revisions throughout the process.

Each iteration of the negotiation process should begin to layer in the appropriate contract/agreement terms and conditions, as well as pricing arrangements. Final terms, conditions, and pricing will be requested and finalized as quickly as possible after the solution is agreed, so applicants are strongly encouraged to consider these business elements as the

solution is developed, rather than starting from scratch after the solution is finalized. The Government will provide business suggestions or concepts for consideration throughout the process.

## **E. Compliance Phase**

If an agreement is reached, the Government will notify the applicant that it is proceeding to award via the negotiated instrument. Depending upon the instrument utilized, the Government will check the appropriate registrations, representations, and certifications. Additionally, the Government will execute any necessary license agreement for data, software, or any other commercial entity required, as well as any applicable Organizational Conflict of Interest (OCI) mitigations.

Finally, the Government will conduct a responsibility determination, which may require the submission of financial information to substantiate the representations and certifications. The Government reserves the right to use any internal or external sources of information to make a responsibility determination. The Government desires to complete the compliance process as soon as possible upon moving into the compliance phase, so given some systems require up to a month for registration, applicants are strongly encouraged to register and complete any representations and certifications as early as possible in the process (in many cases these things can be completed before an abstract is even delivered) and keep any draft agreements or OCI documentation up to date as the process matures.

## **F. Post-Award Design Phase**

Once an instrument is awarded, the Government will request the agreed upon initial design and will work iteratively with the contractor to refine a design to maximize the satisfaction of the required outcome. Once a design is approved, the design will be utilized to measure performance and the satisfaction of “requirements” derived from the agreed upon design. The Government expects that the design will be different from the proposed solution in a way that considers the evolution of available information, circumstances, and decisions made by the Government.

## **IV. APPLICATION AND SUBMISSION INFORMATION**

This document and its attachments contain all information required to submit a response to this solicitation. No additional forms, kits, or other materials are needed except as referenced herein.

Note: The cost of preparing abstracts, presentations, and proposals in response to this CSO shall not be recoverable as a direct cost under any resultant instrument.

### **A. CSO Feedback/Questions**

Feedback and/or questions will be accepted immediately following the release of this CSO.

Feedback/Questions should be sent to [dha.ncr.co.mbx.jomis-contracting@mail.mil](mailto:dha.ncr.co.mbx.jomis-contracting@mail.mil) with the Subject: "HCD Feedback/Questions". Failure to use this Subject verbiage may result in feedback/questions being misrouted or potentially misdelivered or not accepted.

Feedback/Questions received beyond seven days after issuance of the CSO solicitation may not be responded to prior to the Abstract Submission Initial Cut-off Date. Government responses to feedback/questions will be consolidated and posted as an Amendment to the CSO solicitation via <https://www.sam.gov>. Unless the Government determines otherwise, the Feedback/Question and Response process shall not serve as a basis to extend the aforementioned Abstract Submission Initial Cut-off Date. Submission of feedback/questions throughout the CSO period up to 120 days prior to the CSO Closing date is permitted.

## **B. Abstract Submission**

The abstract provides a synopsis of the proposed solution. It should demonstrate a high potential to succeed during the proposal evaluation period. For more information about how the abstracts will be graded, see Section V below.

### **1. Abstract Format**

Abstracts shall not exceed ten pages, including the cover sheet and all figures, tables, and charts. The page limit does not include a submission letter (optional).

All pages shall be formatted for printing on 8-1/2 by 11-inch pages with 1-inch margins and font size not smaller than 11-point. Alternatively, slides shall be formatted on 13.33 by 7.5-inch (16:9 widescreen) slides and font size not smaller than 11-point font. Font sizes of 8- or 10-point may be used for figures, tables, and charts. All files must be in .PDF formats. Submissions must be written in English. All pages and slides should be numbered.

Abstracts must include the following components:

- **Cover Sheet:** Provide the administrative and technical points of contact (name, address, phone, email, Applicant). Include the CSO number, CSO version, the title of the proposed project, primary partners, and functional AOIs and Technical Attributes addressed.
- **Restatement of the Problem:** State your understanding, in your words (responses that simply mirror the text of this announcement or other Government materials will not be accepted), the outcome being sought by the Government, including an overview of the current state of OpMed, highlight differences between what the PMO may be able to use versus what its programs produce now, and what they could be producing as an Agile OpMed IT delivery organization. Describe suspected current barriers preventing the PMO and its programs from delivering world-class OpMed IT solutions. Outline your theory as to what barriers need to be addressed to ensure full adoption of OpMed IT solutions.

Please note: the Government understands applicants will not have access to the specific PMO legacy applications, and the Government is not seeking factual "correctness" in this assessment, but rather a well-researched hypothetical based on an assessment of hindrances

in the technology sector.

As a starting point, please refer to the OpMed Information (Attachment 1) that give a sense of the type of OpMed end users and scenarios that should be accommodated as part of relevant proposed solutions.

- **Solution Overview:** Describe a vision of a fully digital OpMed environment that enables documentation of healthcare across the roles of care. Outline and address your approach and possible solution areas for addressing the functional AOs and Technical Attributes described above. Ensure that technological and non-technological aspects of the solution are addressed and identified. List each of the solutions areas being addressed. If you are partnering with other entities as part of your submission, describe the teaming construct and synergies that will be realized through introduction of the solutions together (vs. what would happen without the other entity).
- **Analysis Plan:** Describe your philosophy and approach to determining what components are necessary to deliver a world-class OpMed IT solution, how to identify the best components, and how to determine innovative methods to manage the solution or suite of components as a seamless solution. Describe your long-term vision and how to integrate with legacy components and modernized components in an evolving OpMed IT environment. Describe your vision to remove barriers to adoption and enable a customer-centric approach. Solutions should not also only strive to meet the needs of OpMed today but must think about OpMed in future operational environments.
- **Benefits/Value:** Describe the solution being proposed and the difference it will make (qualitatively and quantitatively) if successful. Describe the innovative aspects of the commercial solution and products in the context of proposed capabilities and approach(es). Clearly illustrate how the proposed OpMed IT solution would lead to the full adoption of electronic documentation and how OpMed personnel would benefit from better OpMed IT products. Responses can range anywhere from specific gaps being closed, enhanced user experiences, to increased productivity toward short and long-term goals. Additionally, consider how the commercial solution will positively impact DoD service members' care or optimize overall operational effectiveness of OpMed personnel.

## 2. Abstract Submission Instructions:

Abstracts shall be submitted directly as a PDF attachment to [dha.ncr.co.mbx.iomis-contracting@mail.mil](mailto:dha.ncr.co.mbx.iomis-contracting@mail.mil) with Subject Title: "HCD Abstract". Failure to use this Subject verbiage may result in an abstract being misrouted or potentially misdelivered or not accepted.

## C. Pitch Submission

While the pitches will be presented live to a panel of evaluators, whether virtual or in-person as mutually agreed, the Applicant must deliver the content 48 hours in advance as a read ahead. What is ultimately presented during the pitch does not need to be identical to what is submitted ahead of time, but it will allow the evaluators to familiarize themselves with the content ahead of the pitch. Pitches shall address those items to be evaluated in Section V.

Pitch material shall be submitted, ONLY IF INVITED TO DO SO RESULTANT TO THE ABSTRACT SUBMISSION AND REVIEW, to [dha.ncr.co.mbx.jomis-contracting@mail.mil](mailto:dha.ncr.co.mbx.jomis-contracting@mail.mil) with Subject Title: "HCD Pitch". Failure to use this Subject verbiage may result in an abstract being misrouted or potentially misdelivered or not accepted. Further instructions will be provided to selected Applicants upon successful completion of the Abstract Phase.

#### **D. Full Proposal Submission**

Proposals shall be submitted as a .zip file, ONLY IF INVITED TO DO SO RESULTANT TO THE PITCH SUBMISSION AND REVIEW, to [dha.ncr.co.mbx.jomis-contracting@mail.mil](mailto:dha.ncr.co.mbx.jomis-contracting@mail.mil) with Subject Title: "HCD Proposal". Failure to use this Subject verbiage may result in a proposal being misrouted or potentially misdelivered or not accepted. Further instructions will be provided to selected Applicants upon successful completion of the Pitch Phase.

Proposals consist of Volume 1: The Solution and Volume 2: Price.

Applicants are encouraged to fully address their solution as efficiently as possible. Specific examples of problems, approaches, or goals are preferred to generalities. Analogies and demonstrative case studies are encouraged, along with videos and electronic demonstrations. The reuse of commercial off the shelf material is encouraged, but applicants are cautioned that proposals must contain more substance and analysis than just high-level marketing information.

All pages shall be formatted for printing on 8-1/2 by 11-inch paper with 1-inch margins, single-line spacing, and a font size no smaller than 11-point. Font sizes of 8 or 10 point may be used for figures, tables, and charts. Document files and supplementary files must be in .pdf, .odx, .doc, .docx, .xls, or .xlsx formats. Submissions must be written in English. All pages of Volume 1 should be numbered. Proposals not meeting the format prescribed herein may not be reviewed.

##### 1. Volume 1: The Solution

Volume 1 should be created with the mindset of convincing an executive team to invest in the proposed solution. Consider using persuasive, evidence-based methodologies for each of the sections such as CHALLENGE-APPROACH-OUTCOME. The selection of the best method is up to the applicant. If a long, expositive narrative is not required to be persuasive, it is not desired. The objective for Volume 1 is to demonstrate an innovative, viable commercial solution that will satisfy the scenarios. It must include the following components:

##### **(1) Cover Page** (to include the following information):

- Label: "Proposal: Volume 1"
- CSO Number including any Amendment Number(s)
- Proposal Title
- Applicant Name
- Size and Socio-economic status of Applicant as represented in System for Award Management in relation to the NAICS code applicable to this CSO and corresponding size standard of \$30M.

- Applicant Technical Point of Contact (POC) including name, mailing address, telephone, and email address
- Applicant Administrative POC including name, mailing address, telephone number, and email address
- Area of Interest Alignment
- Preferred award instrument being requested. If no preference, then so state.
- Total Price of the Proposed Effort
- Place(s) and Period(s) of Performance
- Other Team Member(s) (subcontractors, partners, associates, joint ventures, consultants) Information (for each, include Technical POC name, organization, type of organization, mailing address, telephone number, and email address)
- Proposal Validity Period (minimum 120 calendar days)
- CAGE Code (TBD is acceptable if not yet established)

**(2) Executive Summary:** Summarize how your solution and approach will enable documentation of healthcare across the roles of care through delivering a world-class OpMed IT solution. Describe the end-state of the OpMed environment, and the general process to implement the necessary solution.

**(3) Proposal Research and Design Approach:** Describe how you approached the problem presented in this solicitation including your sources and methods for market research, analysis of how your OpMed IT solutions supports the OpMed community of interest. The methodology utilized to identify what capabilities are needed and the best-in-class capabilities for each area of the solution.

**(4) Post-Award Design Plan:** Describe the iterative and agile methodologies to be used to rapidly mature the proposal solution into a Minimally Viable Product (MVP) and subsequent Minimally Viable Capabilities Release (MVCR). Outline the process to maximize user engagement in the design process and to reach decisions, including what OpMed personnel are required to develop the solution to meet the needs at roles 1 & 2. Describe what information and documentation would be required to complete a migration from the legacy to a modernized HCD solution and a proposed timeline to rapidly deploy the solution to the field.

**(5) Relationship Approach:** Provide your approach to managing the solution on a day-to-day basis. Describe how your team will contribute to the overall culture of innovation and high achievement within the JOMIS PMO. Outline how you will ensure that the standard for quality within the solution is kept at the highest level. Describe how your success implementing your solution within the DoD or similar environments aligns tightly with the success of the JOMIS PMO.

**(6) Innovations:** Describe the innovative aspects of the project in the context of existing capabilities and approaches, clearly delineating the uniqueness and benefits of this project in the context of the state of the art, alternative approaches, and other projects from the past and present. Describe how the proposed project is revolutionary and how it significantly rises above the current state of the art. Please note, it is not expected that proposed capabilities are in and

of themselves innovative (some may have been available in the market for decades), but rather how they are applied, managed, or implemented might be innovative for the DoD and its stakeholders.

**(7) Capabilities:** Describe each capability area required to enable the solution. Identify technology capabilities, non-technology capabilities and the processes separately. Applicants are encouraged to use tables or charts to organize this section. It should be clear what each capability does, and what this functionality enables the OpMed personnel to perform, and what user personas are expected to interact with it. Describe how the capabilities interact with each other within the overarching solution. If proposing to bundle particular capabilities into a phased implementation, identify the phases and groupings of capabilities for each phase.

**(8) Technical Plan:** Outline and address technical challenges inherent in the approach and possible solutions for overcoming potential problems. Demonstrate a deep understanding of the technical challenges and present a credible (even if risky) plan to achieve the project's goal, including an overall architecture and/or high-level design. Discuss mitigation of technical risk. Explain how your team will utilize DevSecOps and ensure Cyber security is baked in early into your solution to meet stringent DoD requirements.

**(9) Schedule and Milestones:** For the post-award design phase, provide a detailed schedule showing tasks (task name, duration, work breakdown structure element as applicable, performing organization), milestones, and the interrelationships among tasks. The task structure must be consistent with that the work breakdown structure. Measurable Agile milestones should be clearly articulated and defined in time relative to the start of the project. The detailed plan should be aggressive but achievable, and accompanied by a thoughtful schedule risk assessment and the rationale for selecting the "spot" schedule chosen, along with any assumptions necessary to achieve it. In addition to the detailed plan for the post award design phase, provide a high-level "drop-in" summary schedule with time periods (e.g., D+1, not specific days) for the entire proposed project. If applicable, clearly identify iterations and/or phases of implementation. Identify the most critical design elements that will drive the project schedule.

**(10) Contract and Business Documents:** Applicants shall complete and submit an OCI Declaration and Disclosure, Notice of Organizational Conflict of Interest (Attachment 2). In addition, the Applicant shall provide a complete list of all team members (including all subcontractors at all tiers) so the Government may perform an independent OCI assessment. In accordance with FAR 9.504, the Contracting Officer may withhold award from any Applicant exhibiting a real or perceived conflict of interest. As applicable to the proposed solution, the Company shall provide all relevant Business Documents that pertain to the solution and/or further demonstrate the ability for the Company to successfully execute on the solution. This may include, but not limited to: proposed Performance Work Statement (PWS), Contract Data Requirements Lists (CDRLS), Quality Assurance Surveillance Plan (QASP), Bill of Materials (BOM), agreements, software licenses, cloud computing service agreements, service level agreements (SLAs), Concept of Operations (CONOPS), run books, administrative staffing footprint, teaming agreements, small business subcontracting plan, and any other documents. These documents may be submitted in a draft state as they will be finalized during the



Negotiation Phase.

## 2. Volume 2: Price Proposal

The Company shall propose a total price using relevant cost estimating methodologies (e.g., Basis of Estimate [BOE]) and provide any other data or supporting information deemed necessary for the determination of a fair and reasonable price. The Government reserves the right to request any other price data or supporting cost information as appropriate. This can include, but is not limited to, commercial price catalog(s), previous commercial sales receipts, and/or other proprietary information to help the government determine reasonableness. The proposed total price provided here is not considered final and will be referenced along with all supporting documentation through the Negotiation Phase as pricing is determined and finalized.

Note: The cost of preparing abstracts, presentations, and proposals in response to this CSO is not considered a direct charge to any resulting award and is not recoverable as such.

### **E. Additional Information and Instructions**

#### 1. General

The proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for substantiating the validity of stated claims. Applicants shall assume the Government has no prior knowledge of its facilities or experience and will base its evaluation on the information presented in the Applicant's proposal.

All Abstracts, Pitches, and Full Proposals shall be unclassified. Abstracts, Pitches, and Full Proposals containing data that is not to be disclosed to the public for any purpose or used by the Government except for evaluation purposes shall include the following general disclaimer on the cover page:

"This [select one: Solution Abstract, Pitch, or Full Proposal] includes data that shall not be disclosed outside the Government, except to non-Government personnel for evaluation purposes, and shall not be duplicated, used, or disclosed -- in whole or in part -- for any purpose other than to evaluate this submission. If, however, an agreement is awarded to this Company because of -- or in connection with - the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent agreed upon by both parties in the resulting agreement. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [insert numbers or other identification of sheets]"

Recommended marking (header or footer) for portions of business plans and/or technical information that are to be protected for a period of five years from FOIA disclosure: "10 U.S.C. §2371(i), provides that disclosure of certain type of information [i.e., a proposal, proposal abstract, and supporting documents. ii. A business plan submitted on a Business Proprietary

basis. iii. Technical information submitted on a controlled basis as outlined in DoDI 5230.24] is not required, and may not be compelled, under FOIA during that period (5 years) if a party submits the information in a competitive or noncompetitive process having the potential for an award of an OT."

Foreign-Owned businesses may independently submit a solution or do so as part of a teaming arrangement with one or more United States-Owned businesses. However, the ability to obtain an agreement based upon a submission may depend upon the ability of the Foreign-Owned business to obtain necessary clearances and approvals to obtain proscribed information.

Submissions must be submitted electronically through the instructions provided below. Submissions sent through other channels or after the prescribed AOI open period has ended will not be considered, reviewed nor evaluated.

## 2. System for Award Management (SAM) Registration

Applicants will not be eligible to receive an award unless they are registered in SAM at the time of proposal submission and maintain an active record in SAM.

## 3. Contractor Teaming Arrangements & Joint Ventures

If an Applicant is proposing under FAR 9.601(1), where there is a joint venture or partnership, the combined entity shall be registered in SAM, and the resulting award instrument must reflect the combined entity as the Prime.

Please note that FAR 9.603 requires that arrangements and company relationships to be fully disclosed with the offer as part of the final written Full Proposal.

## 4. Amendments to the CSO

If this CSO is amended, all terms and conditions that are not amended remain unchanged. Applicants shall comply with the most current version of the CSO when submitting a response to the CSO.

## 5. Period of Acceptance of Offers

The Government is requiring Applicants to agree to a propose validity period of a minimum of 120 calendar days upon receipt of Full Proposal.

# **V. APPLICATION REVIEW INFORMATION**

## **A. Evaluation Criteria**

Each Applicant's submission will be evaluated based on merit against the criteria stated below and not against any other Applicant's submission for each phase of the CSO process. Through evaluations, the Government also reserves the right to select all, none, or portions of the solution(s) submitted by an Applicant.

## 1. Abstracts

Submitted abstracts will be evaluated based on merit against the criteria described below. All stated criteria are approximately equal in importance.

- a. Relevancy: Evaluates how well the solution addresses Government needs through a solution with a “stack” of capabilities addressing a substantial breadth of the AOIs and Technical Attributes and demonstrates customer centricity through consideration of the user personas/stories to satisfy the HCD vision.
- b. Solution Merit: Evaluates abstract solution for feasibility in addressing the AOIs and Technical Attributes and demonstrates how it is “future-proof” through its adaptability, sustainability, and alignment to the future vision of the JOMIS PMO, including the degree to which the solution is world-class and addresses all security requirements of government (refer to Attachment 3).
- c. Business Viability: Evaluates the strength of the Applicant’s ability to effectively execute to the proposed timelines through agility, level of managed support, culture, and expertise, while complying with Government security requirements through training, certification, and management of solution stakeholders (refer to Attachment 3).
- d. Innovativeness: Evaluates the degree to which the proposed solution provides innovative, unique, and/or under-utilized capabilities in Government application, while satisfying the conditions for use defined in Class Deviation 2018-O0016.

## 2. Pitches

Applicants selected for a Pitch Presentation will be afforded the opportunity to expand upon the areas of evaluation identified above in the Abstract Phase, which will again be evaluated during the Pitch phase, as well as address the additional areas as stated below to be evaluated, which is intended to better inform the Government of the Applicant’s anticipated solution. The Applicant’s Pitch will be evaluated on the basis of merit and estimated price as specified below in subparagraph e. All stated criteria are approximately equal in importance.

- a. Relevancy: Evaluates how well the solution addresses Government needs through a solution with a “stack” of capabilities addressing a substantial breadth of the AOIs and Technical Attributes and demonstrates customer centricity through consideration of the user personas/stories to satisfy the HCD vision.
- b. Solution Merit: Evaluates abstract solution for feasibility in addressing the AOIs and Technical Attributes and demonstrates how it is “future-proof” through its adaptability, sustainability, and alignment to the future vision of the JOMIS PMO, including the degree to which the solution is world-class and addresses all security requirements of government (refer to Attachment 3).
- c. Business Viability: Evaluates the strength of the Applicant’s ability to effectively execute to

the proposed timelines through agility, level of managed support, culture, and expertise, while complying with Government security requirements through training, certification, and management of solution stakeholders (refer to Attachment 3).

d. Innovativeness: Evaluates the degree to which the proposed solution provides innovative, unique, and/or under-utilized capabilities in Government application, while satisfying the conditions for use defined in Class Deviation 2018-O0016.

e. Estimated Price: A rough order of magnitude (ROM) for all prototyping activity will be assessed for its apparent fairness, reasonableness and acceptability, while providing sufficient value for the solution to be delivered and satisfying the conditions defined in Class Deviation 2018-O0016.

f. Schedule: The notional schedule is feasible and acceptable within a relevant time period.

g. Risks: The risks associated with implementing the solution are comprehensively identified with reasonable and acceptable mitigation plans; additionally, a high degree of information assurance is demonstrated in compliance with the minimum cybersecurity requirements to this CSO (refer to Attachment 3).

h. Intellectual Property Rights: The potential impact of any intellectual property involved in the effort and associated restrictions on the Government's use of that intellectual property is reasonable and acceptable.

## **B. Exit Criteria**

### **1. Proposals**

Proposals will be the final submission summarizing and expanding upon what has previously been presented during the Abstract and Pitch phases. Submissions will be evaluated against a set of exit criteria, as opposed to evaluation criteria. The proposals will be assessed on the following factors and successful completion will lead into the Negotiation Phase:

- a. Consistency & Completeness: Checks the consistency of the final proposal with everything previously presented and approved in alignment with the proposal submission requirements for the CSO as described in Section IV (if any information is adjusted to accommodate new knowledge, the Applicant must provide a brief explanation for the adjustments).
- b. Approach & Risks: Checks for a clear approach to execute on implementing the proposed solution(s) with long-term success in mind, while addressing anticipated risk elements through adequate mitigation plans and compliance with the overall security requirements associated with implementing the proposed solution (refer to Attachment 3).
- c. Price: Checks whether the proposed price is able to be evaluated for fairness and reasonableness and is accompanied by an adequate analysis and supporting material for negotiation, while satisfying the conditions defined in Class Deviation 2018-0016

from a contract type perspective.

d. Schedule: Checks the proposed performance schedule and requested Government support is feasible and acceptable for negotiation.

### **C. Non-Government Advisors**

Non-Government advisors may be used throughout the evaluation process and will have signed non-disclosure agreements (NDAs) with the Government.

The Government understands that information provided in response to this CSO is presented in confidence and may contain trade secret or commercial or financial information. Any information or data that is not to be disclosed to the public for any purpose or used by the Government except for evaluation purposes shall include the disclaimers specified in Section IV. The Government and non-government advisors agree to protect such information from unauthorized disclosure to the maximum extent permitted or required by Law, to include:

- a. 18 USC 1905 (Trade Secrets Act);
- b. 18 USC 1831 et seq. (Economic Espionage Act);
- c. 5 USC 552(b) (4) (Freedom of Information Act);
- d. Executive Order 12600 (Pre-disclosure Notification Procedures for Confidential Commercial Information); and
- e. Any other statute, regulation, or requirement applicable to Government employees.

The Government's policy is to treat all submissions as source selection information, and to disclose their contents only for the purpose of evaluation. Restrictive notices notwithstanding, during the evaluation process, submissions may be handled by support contractors for administrative purposes and/or to assist with evaluation. All Government support contractors performing this role are expressly prohibited from performing on the CSO and are bound by appropriate NDAs. Applicants who respond to this solicitation through each phase do so with the understanding that government support contractors serving as advisors in the review process may have access to the applicant's content.

Submissions will not be returned and will be retained by PEO DHMS JOMIS PMO and by the DHA contracting organization in their electronic Contract Filing Management System.