

Commercial Solution Opening

Workplace 3.0 – Managed Solution, Defense Healthcare Management Systems

HT0038-21-S-C003

September 27, 2021



1 **I. EXECUTIVE SUMMARY**

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3 **Requiring Activity:** Program Executive Office, Defense Healthcare Management Systems (PEO DHMS)

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5 **Opportunity Title:** Workplace 3.0 – Managed Solution, Defense Healthcare Management Systems

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7 **Announcement Type:** Final Draft Announcement

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9 **Solicitation Number:** HT0038-21-S-C003

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11 **Important Dates:**

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13 Draft Posting Date: August 20, 2021

14 Final Posting Date: September 27, 2021

15 Initial Abstract Submission Date: October 22, 2021, 5:00PM (ET)

16 Desired Initial Award Date: December 17, 2021

17 CSO Closing Date: September 26, 2022, 12:00 noon (ET)

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19 **Brief Problem Statement:** PEO DHMS strives to deliver world-class technologies in the health
20 information field. Our goal is, where appropriate, for our technologies and conduct to be indistinguishable
21 from those of leading private-sector technology firms. In order to achieve this, we have undertaken
22 several transformation efforts to mature the organization’s posture, technologies, and business practices.
23 One transformation initiative is the enhancement of the digital workforce fully enabled to excel in their
24 work through a modern digital workplace. The novel coronavirus pandemic has not only demonstrated an
25 additional need to embrace this digital workplace, but it presented more barriers to achieve a
26 comprehensive and successful transformation. These barriers are especially pronounced as the PEO
27 begins to depend on close, native collaboration with the rest of its partners in the Federal and non-Federal
28 health information domain. Further, as production capacity expands, PEO DHMS must be able to attract
29 and retain the highest level of talent in its workforce. Potential members of this workforce expect and
30 demand a frictionless, seamless digital workplace experience. We are seeking to establish this digital
31 workplace through fully managed solutions that leverage innovative new technologies, processes, and/or
32 methods to enable the entire PEO DHMS workforce to deliver world-class technology products.

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34 **CSO Solicitation Concept:** This solicitation document will provide streamlined, concise context and
35 instructions. Detailed documentation will be provided as Attachments and made available on the internet.
36 The Government will also provide direct communications and content to provide additional context and
37 clarifications for expectations. Questions and feedback are encouraged, especially early in the process.

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39 **Anticipated Awards:** Multiple awards may be issued resulting from this solicitation. See Section VI.

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41 **Potential Award Types:** FAR-based contracts, basic ordering agreements, blanket purchase agreements,
42 or Other Transactions (OT).

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44 **Award Ceiling:** \$100M

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46 **Applicants:** We encourage the broadest possible participation in responding to this solicitation, and will
47 seek to leverage every flexibility available in making any resulting awards. PEO DHMS is seeking the

48 most innovative solutions available. We know some traditional Government processes can be intimidating
49 or do not make business sense for some non-traditional participants. Interested applicants should propose
50 any contractual arrangement or flexibility that eliminates these barriers. If a proposed solution has merit,
51 the Government will work closely with the applicant and use its statutory flexibilities to make an
52 arrangement that benefits everyone. Further, we will provide mechanisms to ease networking in order to
53 form teaming arrangements and partnerships. More information is provided in Section III.

54

55 **CSO Contact Email:** dha.ncr.peo-ipo.mbx.dhms-enablers@mail.mil

56

57 **CSO Solicitation Website:** <https://community.hive.gov/main/groups/43702/lounge>

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59 **II. SOLICITATION DETAILS**

60
61 **A. Background**

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63 As a nation, our health is one of our most critical and important resources. Whether in the context of
64 maintaining economic output, the readiness of our military to defend our national security, or paying the
65 debt we owe to those who made sacrifices to do so, a healthy, fit society is the engine for these activities.
66 The Office of the National Coordinator (ONC) recently published its 2020-2025 Federal Health IT
67 Strategic Plan (Attachment 1), which lays out in detail the Federal Government’s role in healthcare and
68 how it uses Health Information Technology (Health IT) to fulfill that role. In short, the Government
69 regulates, purchases, develops, and utilizes Health IT to better enable healthcare delivery. The Plan
70 further lays out some of the biggest challenges facing the healthcare industry, and how the Government
71 plans to use technology to address these challenges and improve health outcomes. Among these are cost
72 growth, capacity in the system, and poor health outcomes, especially in areas such as obesity, substance
73 abuse, and mental health.

74
75 The Program Executive Office – Defense Healthcare Management Systems (PEO DHMS) is a key
76 Federal Health IT partner, and is responsible for delivering the single Electronic Health Record (EHR)
77 and other technologies for the Departments of Defense, Veterans Affairs, and the United States Coast
78 Guard (USCG). Sitting at the nexus of healthcare and defense, which together account for approximately
79 40% of that national budget, the PEO is in a unique position to make substantial national impact on the
80 challenges facing both domains. National Defense, like healthcare, faces challenges in resources,
81 capacity, and capability that can be addressed through innovative technology strategies.

82
83 In its official Purpose, Goals, and Strategies document (Attachment 2), the PEO lays out its vision for
84 maximizing its impact on healthcare and defense. While many tend to equate PEO DHMS with EHR, the
85 PEO, along with its subordinate and partner offices, has a considerably broader mission. Further, as its
86 various programs proceed to the next phases, they will continue to expand. According to data collected by
87 ONC, EHR adoption across the country is approaching 100%. The Federal Health IT Strategic Plan looks
88 well beyond the core EHR, and the PEO’s missions will likewise pivot to providing comprehensive health
89 management, advanced data applications, improved usability, reduced provider/patient burden, and many
90 others. These are things we know, and we know technology will make missions achievable that we have
91 not even thought of yet.

92
93 The PEO delivers on these missions with a strong workforce comprised of federal civilians from multiple
94 Agencies, military personnel from each Service, support contractors, and prime mission product
95 contractors. This workforce is organized into major program offices, project teams, coordinating offices,
96 and a back office/corporate team. The workforce strives to deliver world-class technologies in the health
97 information field. In order to succeed at one of the Department of Defense’s (DoD) most important
98 missions, PEO DHMS must, to the greatest extent possible, ensure its technologies and conduct are
99 indistinguishable from those of leading private-sector technology firms. This includes:

- 100
- 101 • Frictionless and seamless solutions and products that create the best possible user experience
 - 102 • Quality products to drive demand from Government and non-Government users
 - 103 • Increased competition and innovation from other Health IT developers in the private sector
 - 104 • Attracting the best people in these fields to join and stay in the PEO DHMS workforce
 - Changing the methods and tools we utilize to collaborate and execute

105
106 To achieve these lofty goals, PEO DHMS must undergo a fundamental shift in how it does business. In its
107 continual evolution, PEO DHMS has transitioned across three distinct operational paradigms:
108 • (2013 - 2014) The first and previous phase, **PEO 1.0**, was launched via the 2013 Secretary of
109 Defense (SECDEF) charter to establish an Electronic Health Record (EHR) for use by the DoD
110 and the Department of Veterans Affairs (VA). This phase represents the “crawl” of the PEO
111 DHMS organization as operational processes were identified and initially established.
112 • (2014 - Present) The second and current phase, **PEO 2.0**, is anchored by the successful
113 procurement and ongoing deployment of the MHS GENESIS EHR. This phase represents the
114 “walk” of the PEO DHMS organization as operational processes entered sustainment and flagship
115 products were launched into the market to achieve initial customer value.
116 • (Present - 2026) This third and next phase, **PEO 3.0**, is characterized by achieving a digitally
117 transformed organization with ambitious year-over-year growth in product portfolio value and
118 customer outcomes. This phase represents the “run” of the PEO DHMS organization as focus
119 shifts from internal organizational deployment to fostering external product development.

120
121 PEO DHMS launched the PEO 3.0 phase in FY21 with a four-pronged strategic effort that mirrors the
122 operational strategies of leading commercial counterparts: *Workforce 3.0* (“WF3”) to perform business
123 support services, *Workplace 3.0* (“WP3”) to provide business infrastructure, *DevMAC* to provide software
124 development support services, and *Federal XaaS* (“XaaS”) to provide software development
125 infrastructure. This CSO focuses on WP3 and providing the modern, digital-focus workplace to fully
126 enable our hybrid workforce. As new and innovative solutions are onboarded to the PEO DHMS
127 environment, integration and coordination with these other initiatives will be critical for success.

128
129 By forcing us to adopt and utilize the more virtual components of our workplace, the novel coronavirus
130 pandemic has shown us how productive we can be in a digital-focused workplace, but it has also shown
131 us that our current workplace has many capability gaps that will either impede us entirely from
132 transforming or make us considerably less productive while we do. It has also shown us how difficult it
133 can be to become one cohesive, seamless workforce when our access and ability to collaborate, share
134 information, and manage workflows is reduced according to which Agency we work for, or whether we
135 are a civilian or a contractor. Our current workforce and our desired future workforce expect and demand
136 better; a modernized solution is critical to meeting our expanding mission with our limited resources.

137 138 **B. Description of Need**

139
140 We are seeking a digital workplace managed solution that leverages new innovative technologies,
141 processes, and/or services to enable the entire PEO DHMS workforce to deliver world-class technology.
142 The provider of this managed solution should also serve as a catalyst for identifying new external
143 technology trends and building community with sources of innovation both outside traditional DoD and
144 Military Health System contractor communities.

145
146 We define a workplace as a common infrastructure that enables a modern workforce to successfully
147 complete their work. This includes logistical considerations such as physical collaboration facilities and
148 equipment, virtual and distance collaboration software, information sharing and workflow software,
149 methodologies and tools for scheduling, management of shared resource pools, administrative staffing,
150 and other enabling services to ensure success within the common infrastructure.

151

152 We consider a managed solution to cover the full breadth of digital workplace capabilities from document
153 sharing/management to software lifecycle management to workspace design to virtual communications to
154 robotic process automation and to all other enabling areas in the virtual and physical environments. A
155 managed solution scales seamlessly and accommodates fluctuations in demand rapidly. Most importantly,
156 a managed solution enables one seamless workforce where an individual’s Agency or employment status
157 does not affect the individual’s experience with the workplace. A managed solution is an actively
158 managed “stack” of capabilities, where the burden does not fall on the Government to execute individual
159 procurement actions, license/maintenance agreements, or other agreements. A managed solution must be
160 capable of rapid evolution as the needs of the workforce or the state of the art evolve.

161
162 Our overarching outcome for award(s) under this CSO is that our workforce has the same or better
163 workplace experience than leading technology firms with whom we want to compete for talent. Our
164 workplace must evolve towards becoming a dynamic, accommodating environment where top talent
165 wants to work to unlock their full potential and achieve team success. It should facilitate meaningful
166 interactions between employees to enable true value creation toward Digital Transformation. We will
167 measure the results of any award(s) against the extent to which these outcomes are satisfied compared to
168 the current state of the organization and ongoing progression of industry.

169
170 Additionally, the Workplace 3.0 managed solution is expected to have a strategy for growth and
171 development as the workforce grows and develops. Strategic elements include on- and off-boarding of
172 technologies and physical spaces, how customer satisfaction is measured and increased over time, and
173 communications and branding strategies to market the workplace transformation within and outside the
174 organization. While we anticipate the introduction of the early workplace changes and implementations to
175 have the greatest impact, DHMS will continue to hold ongoing workplace innovations to the highest of
176 standards to continually have meaningful contributions to the productivity of the organization into the
177 future.

178
179 We want to emphasize, while a digital workforce and digital workplace depend heavily on technology,
180 software is NOT the only capability necessary for the PEO to attract/retain the workforce it requires.
181 Solutions should include the full “stack” of capabilities and innovative teaming arrangements are
182 encouraged to ensure the “stack” contains the best components from top to bottom. Further, any lists or
183 examples provided throughout this document are not intended to be exhaustive or scope limiting, and
184 should not be interpreted as guidance for your solution. They are merely examples intended to provide
185 context. The scope of this action will be defined by the required outcome. We are seeking unconventional
186 approaches that are outside the mainstream for the Government, challenge accepted assumptions for the
187 Government, and have the potential to radically change established practice. We do not accept that we
188 should limit our ambition or capability just because we are a government organization, and we’re excited
189 to change how we do business to achieve this outcome.

190
191 That said, we are a government organization and we recognize the gaps in our research and understanding
192 of leading-edge practices is often outdated or incomplete. Proposals should investigate innovative
193 approaches that enable revolutionary advances in our capabilities, where appropriate. However,
194 evolutionary and incremental improvements to the existing state will be entertained especially when those
195 evolutions result in greater speed to delivery, as long as the nexus to the ultimate outcome is clear. We are
196 relying on your expertise. We understand there may be capabilities we require to satisfy our outcome that
197 we are not even aware of today, or that new capabilities may emerge tomorrow as the workforce matures.

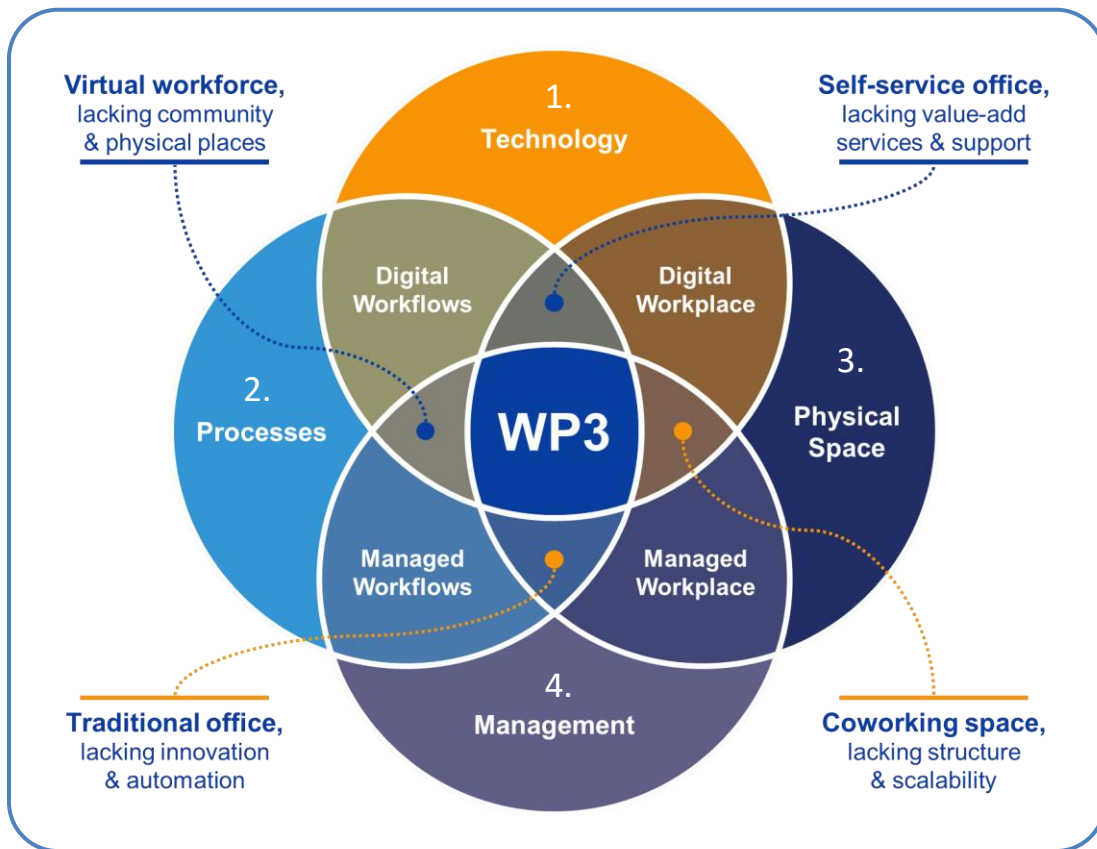
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199 Throughout the process and leading into post-award activities, the government will utilize a “design-to-
200 outcome” approach rather than specifying specific performance or capability requirements. Solution(s)
201 that receive procurement awards will be further designed through an iterative process that evolves and
202 provides an agreed upon outcome. Once a design is approved by the Government, the produced artifacts
203 will translate into requirements against which performance is measured. Change is inherent in the process
204 and adaptation/evolution is expected through each step from abstract, to proposed solution, to design, to
205 requirement, to performance.
206

207 C. Areas of Interest (AOIs)

208
209 Areas of Interest (AOIs) describe the problem space to be addressed through innovative technologies and
210 solutions. They are not detailed specifications and requirements, but rather kept broad to remain open to
211 all ideas and possibilities proposed by offerors.
212

213 For this CSO, PEO DHMS is seeking innovative workplace proposals that provide comprehensive
214 solutions aligned to all or several components of the WP3 vision - technological, physical, procedural,
215 and managerial. WP3 sits at the intersection of these four primary components, integrating and interacting
216 with one another to form the ideal working environment to improve employee productivity and morale in
217 the workplace. Without the inclusion of one AOI, the workplace is incomplete and lacking a key aspect to
218 support our workforce. These components are outlined below, where the best solutions are those that span
219 all components of the WP3 vision.
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Figure 1: Workplace 3.0 Areas of Interest

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1. Technology

New and unprecedented workplace creations are revolutionizing the way the workforce communicates and collaborates with co-workers, management, and clients. By integrating communication (voice, video, A/V equipment, etc.), process (seat and room reservations, security access, etc.), and additional tools (enterprise software, smart devices, etc.), the employees can achieve increased productivity as well as improved physical and mental work-life balance. PEO DHMS is interested in exploring the best technological fittings of the workplace and the benefits they will bring to PEO DHMS and its workforce, while maintaining cybersecurity compliance (refer to Attachment 7).

2. Processes

Future innovation in workplace design is less about space and more about strategies for using the space and maintaining service level agreements. Frequent variations in capacity, maintenance, and access requirements will demand clear protocols to ensure employees are able to efficiently and securely interact with the workplace. PEO DHMS is interested in understanding both processes the workforce will engage in to utilize the space as well as the management plan to maintain it. Additionally, how established processes can seamlessly recruit, hire, onboard, and orient new members of the workforce to the workplace.

3. Physical Space

Physical space and its design are critical influencers on the quality and proficiency of employee work, as well as engagement and retention. By providing access to a variety of central (cafés, lounges, kitchens, etc.), individual (work pods, privacy rooms, singular work stations, etc.), multi-purpose (training rooms, conference rooms, etc.), and unconventional (gyms, break rooms, etc.) zones, the physical space can help shape a flexible work environment for every kind of task, preference, and daily routine. PEO DHMS is interested in understanding space design and how it benefits its workforce in focus, collaboration, learning, and socializing. Ignoring space design can lead to stagnant work conditions, which lower employee engagement, decrease performance, and have an overall negative impact on the organization.

4. Management

To maintain and operate a workplace requires a variety of services to ensure the workforce remains comfortable and functional, whether virtually or in office. By incorporating the right staff throughout the workplace such as maintenance, security, reception, and general customer success staff who can accommodate travel and workplace requests, users of the building can be directly supported and accommodated to execute their daily functions. PEO DHMS is interested in optimizing personnel services in the workplace as well as understanding the impact of these positions on the workforce.

The examples provided above for each of the AOIs are not requirements for a modern workplace and are provided solely for understanding topic areas. PEO DHMS understands solutions bearing from partnerships between building owners and building tenant service providers could provide the optimal solution and welcomes these partnerships to form as part of submissions.

D. Eligibility Information

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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 organizations 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 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.

333 **III. CSO PROCESS**

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335 The Government will utilize an interactive, high-engagement solicitation process to seek and evaluate
336 proposals. Communication is encouraged through any step of the process for the entire duration of the
337 CSO. The Government strongly encourages interested parties not to hesitate to provide any feedback or
338 questions.

339

340 At the release of the CSO, the Government is specifying initial desired due dates for the first iteration of
341 activities. After the initial iteration, the Government will conduct additional iterations on an ad hoc or
342 scheduled basis (in batches) throughout the open period if funding is available to do so, and encourages
343 interested parties to continue providing feedback, questions, or abstracts after the initial due dates.

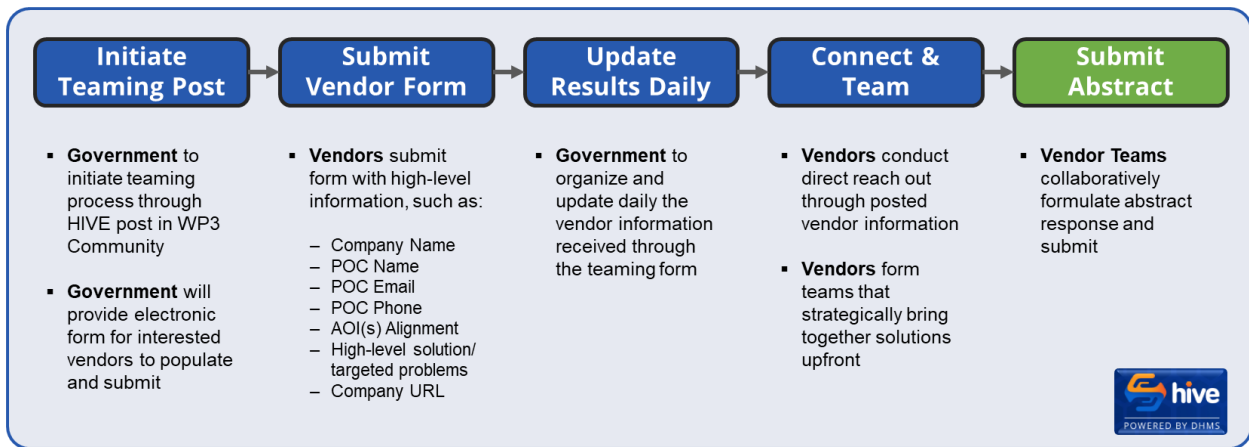
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345 **A. Teaming Phase**

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347 By the release of this document, the Teaming Phase is expected to be well under way. In this phase,
348 Applicants will be highly encouraged to form teams ahead of submitting abstracts to collaboratively pitch
349 uniquely combined solutions that address multiple AOIs. This early coordination will increase the
350 probability of success through the implementation and integration of multiple solutions. Formation of
351 teams can be achieved through existing networks and partnerships, but the Government will also facilitate
352 industry interactions to promote new connections, especially with non-traditional organizations. The high-
353 level process for this facilitation is outlined below and will be initiated through the HIVE WP3
354 Community (<https://community.hive.gov/main/groups/43702/lounge>).

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358 Applicants should be aware that form responses will be posted for public consumption and must NOT
359 include proprietary information, personally identifiable information, trade secrets, or other competitively
360 harmful information.

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362 As Applicants proceed through the Evaluation Phases, Government may identify potentially viable
363 solutions that may not cover the full breadth of AOIs. In such cases and with the permission of the
364 Applicant, Government may communicate through HIVE an opportunity to team with a vendor that has a
365 potentially viable solution. Whether or not the vendor’s name is shared and the extent of the solution
366 communicated will be up to the Applicant. As additional vendors express interest in teaming with this
367 Applicant, the Applicant can freely make connections and form teaming relationships for a future

368 Abstract submission. While the Government may identify potentially viable vendor solutions, the
369 Government is not bound to ultimately select this particular Applicant as more proposed solutions come
370 through the CSO process.

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372 **B. Feedback Phase**

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374 With the posting of the draft of this document on 20 August, the Government opened the Feedback Phase.
375 Feedback may consist of comments, suggestions for clarifications, questions, or suggested information.
376 Parties should be aware that submitted questions, and the answers to the questions, will be posted for
377 public consumption and must NOT include proprietary information, personally identifiable information,
378 trade secrets, or other competitively harmful information. The Government may, at its discretion, attempt
379 to rephrase or redact a question to remove such information, but if it cannot do so, a question may be
380 rejected without an answer. Instructions for feedback submission can be seen in Section IV.

381

382 In addition to direct digital feedback, the Government will also facilitate office calls. These will consist of
383 30-minute time blocks for industry to directly engage Government through 1-on-1, virtual conversations.
384 Government will not accept product pitches during this time. Rather, they are an opportunity for potential
385 Applicants to gain further clarity around WP3 expectations, communicate anticipated challenges, and
386 provide insights around innovation trends and successes in the workplace to shape the finalization of the
387 CSO.

388

389 In order to be considered in the first iteration, initial feedback must be submitted by 3 September, 2021.
390 Depending on the nature of the feedback received, the Government may provide additional verbal
391 supplementation along with written answers to any questions. Initial answers and/or modifications to the
392 CSO will be posted approximately 2 weeks after this date. The opportunity for feedback, questions, and
393 modifications will remain open past this date, but the Government will begin accepting abstract
394 submissions after the first iteration of updates and answers.

395

396 The fundamental outcome of this phase is a mutual understanding of the required outcomes and the
397 problem areas to be addressed.

398

399 **C. Abstract Phase**

400

401 The Abstract Phase will begin after the Government releases the final CSO in response to the first batch
402 of feedback received by September 3. Given the timeline and workload required to respond to the initial
403 feedback and to ensure a strong mutual understanding between the Government and potential Applicants,
404 the Government will not accept abstracts prior to the opening of the Abstract Phase. Detailed
405 requirements and formatting for abstracts is contained in Section IV below.

406

407 The Government will conduct a merit-based assessment on abstracts according to evaluation criteria
408 delineated in Section V. The Government will provide a positive or negative response to each abstract as
409 to whether the Applicant is selected to provide a pitch presentation of the proposed solution.

410 In order to be considered in the first iteration, initial abstracts must be submitted by 5:00PM (ET), 22
411 October 2021. The Government intends to respond to abstracts within 2 weeks, but the rate of response
412 will depend on the volume of abstracts that are received. After the first iteration of Abstracts are
413 reviewed, all Abstracts submitted after 5:00PM (ET), 22 October, 2021 will be evaluated on a rolling
414 basis.

415
416 Applicants who are the prime submitter of the abstract may only submit one abstract at a time. If a second
417 abstract is submitted by an Applicant prior to notification of selection or non-selection, it will be
418 dismissed and not reviewed. If an Applicant is a prime submitter of an abstract, it does not prevent them
419 from being a sub-teaming member of another prime Applicant submission. There is no limit on the
420 number of Abstracts sub-teaming members can be a part of.

421
422 Resubmission of rejected abstracts will not be re-evaluated until after the first iteration of submissions
423 received by 22 October 2021 are reviewed and provided decisions. All resubmitted abstracts must contain
424 substantial differences. The Government reserves the right to implement and enforce a set waiting period
425 after a rejected abstract to limit the level of burden on the internal evaluators.

426
427 The fundamental outcome of this phase is to maximize efficiency for the Government and industry. We
428 do not want Applicants to waste time and proposal resources developing solutions that do not address the
429 necessary outcomes, and the Government wants to use its resources to evaluate meritorious solutions and
430 make timely awards.

431 432 **D. Pitch Phase**

433
434 If your abstract is accepted, the Government will invite the Applicant to prepare and deliver an oral pitch
435 presentation of the proposed solution. These presentations will be conducted through either live, virtual or
436 in-person settings. During the initial iteration, the Government will assign presentation slots on a first-
437 come-first-served basis.

438
439 After the initial iteration, standing slots will be allocated each month, and these will be allocated on a
440 first-come-first-served basis once an abstract is accepted for full evaluation. After an initial award, and if
441 subsequent awards are made, fewer slots may be allocated, and the timing of standing slots may be
442 modified (e.g., quarterly, semi-annually) at the Government’s discretion, and may be stopped if funding is
443 no longer available to make additional awards.

444
445 Presentations will consist of a “receive” session and an “interactive” session. During the receive session,
446 the Government will listen to presentations without interrupting the presenters. During the interactive
447 session, the Government will ask questions and obtain clarifications regarding any areas where it did not
448 fully understand the proposed solution. The receive session will be one hour, followed by a twenty-
449 minute break for each party to hold separate discussions, and then a forty-minute interactive session. The
450 goal of the presentation is for the Government to have a full and complete understanding of the solution to
451 support a written assessment, not to evaluate, provide feedback, or alter the solution in the room. Once the
452 presentations are concluded, the Government may submit additional written follow-up questions or
453 request further clarification to assist in its evaluation. The Government will conduct a merit-based
454 assessment on pitches according to evaluation criteria delineated in Section V.

455 456 **E. Full Proposal Phase**

457
458 If the pitch is accepted, the Government will invite the Applicant to submit a final written proposal. The
459 proposal is expected to capture and formalize everything presented and accepted through the Abstract and
460 Pitch Phases. While additional details will be expected as part of this submission (including more defined
461 costs and schedules), it is intended for content delivered in the previous phases to seamlessly feed into

462 this submission. Detailed requirements and formatting for proposals is contained in Section IV below.
463 The goal of the proposal is for Government to receive all required documentation and information from
464 the Applicant to proceed into open discussion for the Negotiation Phase. The set of exit criteria for
465 Applicants to proceed past the Proposal Phase is delineated in Section V.

466
467 If additional information is required from the Government for the Applicant to finalize details of the
468 proposal, the Applicant may request this information directly. While Government cannot guarantee all
469 information can be shared upon request, there will be earnest effort made to provide additional context.
470 As such, the Government reserves the right to modify or correct any information provided in this phase
471 through the Negotiation and Post-Award Design Phase. Instructions for engagement will be provided
472 once the Proposal Phase is reached.

473
474 Please note the Government will NOT utilize the procedures of FAR Subpart 15.3 or the definitions of
475 terms contained therein. Nothing in this solicitation is meant to imply the use of these procedures, and no
476 section is meant to constitute the formal processes required by FAR 15.3 such as establishment of a
477 competitive range, discussions, or other communications.

478

479

480 **F. Negotiation Phase**

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

488

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

492

493 Prior to rejecting a proposal, the Government may advise the applicant of the aspects of its proposal
494 preventing agreement and request that the applicant revise or clarify the proposal as appropriate. This may
495 include suggestions to improve the approach/solution, including incorporating efforts/capabilities the
496 Government believes integral to its required outcomes that were not included in the original proposal. The
497 Government expects that these discussions will require "back and forth", discussion of tradeoffs, and
498 counter-offers. The Government expects the discussion will generate continued thinking and may spur
499 new ideas, and encourages revisions throughout the process. There is also opportunity for Government to
500 encourage additional teaming with other Applicants with potentially viable solutions that have been
501 identified through the CSO process.

502

503 Each iteration of the negotiation process should begin to layer in the appropriate contract/agreement terms
504 and conditions, as well as pricing arrangements. Final terms, conditions, and pricing will be requested and
505 finalized as quickly as possible after the solution is agreed, so applicants are strongly encouraged to
506 consider these business elements as the solution is developed, rather than starting from scratch after the
507 solution is finalized. The Government will provide business suggestions or concepts for consideration
508 throughout the process.

509 **G. Compliance Phase**

510

511 If agreement is reached, the Government will notify the applicant that it is proceeding to awarding the
512 negotiated instrument (e.g., FAR contract, OT, BPA, BOA, etc.). Depending on the instrument, the
513 Government will check the appropriate registrations, representations, and certifications.

514

515 Additionally, the Government will move to execute any necessary license agreement for data, software, or
516 anything else required, as well as any applicable Organizational Conflict of Interest (OCI) mitigations.

517

518 Finally, the Government will conduct a responsibility determination, which may require the submission of
519 financial information to substantiate the representations and certifications. Additionally, the Government
520 reserves the right to use any internal or external information to make a responsibility determination.

521

522 The Government desires to complete the compliance process within 48 hours of moving into the
523 compliance phase, so given some systems require up to a month for registration, applicants are strongly
524 encouraged to register and complete any representations and certifications as early as possible in the
525 process (in many cases these things can be completed before an abstract is even delivered) and keep any
526 draft agreements or OCI documentation up to date as the process matures.

527

528 **H. Post-Award Design Phase**

529

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

536

537 **IV. APPLICATION AND SUBMISSION INFORMATION**

538
539 This document and its attachments contain all information required to submit a response to this
540 solicitation. No additional forms, kits, or other materials are needed except as referenced herein. No
541 request for proposal (RFP) or additional solicitation regarding this opportunity will be issued, nor is
542 additional information available except as provided at HIVE.gov or under Contract Opportunities at
543 SAM.gov.

544
545 Note: The cost of preparing abstracts, presentations, and proposals in response to this CSO is not
546 considered a direct charge to any resulting AOI award or any other contract. Proposal preparation costs
547 are not recoverable.

548
549 **A. Feedback Submission**

550
551 Feedback and questions will be accepted immediately following the release of the initial draft of this
552 CSO. All feedback and questions should be consolidated according to the instructions provided in the
553 WP3 CSP Feedback Form (Attachment 4). Once complete, send the attachment to dha.ncr.peo-ipo.mbx.dhms-enablers@mail.mil
554 with Subject Title: “WP3 CSO Feedback”. Please note that failure to
555 use this Subject Title may result in your feedback being misrouted or otherwise not seen.

556
557 The Government will consolidate everything received and provide summarized responses back to industry
558 through the HIVE WP3 Community.

559
560 **B. Abstract Submission**

561
562 The abstract provides a synopsis of the proposed solution. It should demonstrate a high potential to
563 succeed during the proposal evaluation period. For more information about how the abstracts will be
564 graded, see Section V below.

565
566 **1. Abstract Format**

567
568 Abstracts shall not exceed five pages, including the cover sheet and all figures, tables, and charts. The
569 page limit does not include a submission letter (optional). Submissions are permitted one additional page
570 for each additional teaming partner as part of the submission (e.g., a three-company team can submit
571 seven pages), where the max submission shall not exceed eight pages. Alternatively, abstracts may be
572 submitted in the form of a deck that shall not exceed eight slides, including the cover slide and all figures,
573 tables and charts. Submissions are permitted one additional slide for each additional teaming partner as
574 part of the submission (e.g., a 3-company team can submit ten slides), where the max submission shall not
575 exceed twelve slides.

576
577 All pages shall be formatted for printing on 8-1/2 by 11-inch pages with 1-inch margins and font size not
578 smaller than 11-point. Alternatively, slides shall be formatted on 13.33 by 7.5-inch (16:9 widescreen)
579 slides and font size not smaller than 11-point font. Font sizes of 8- or 10-point may be used for figures,
580 tables, and charts. All files must be in .PDF formats. Submissions must be written in English. All pages
581 and slides should be numbered.

583 Abstracts must include the following components:
584

- 585 • **Cover Sheet:** Provide the administrative and technical points of contact (name, address, phone,
586 email, lead organization). Include the CSO number (HT0038-21-S-C003), CSO version (e.g.,
587 WP3 CSO_9.27.21 v2), title of the proposed project, primary partners, and AOI alignment.
588
- 589 • **Restatement of the Problem:** State your understanding, in your words (responses that simply
590 mirror the text of this announcement or other Government materials will not be accepted), of the
591 outcome being sought by the Government, including an overview of the current state of PEO
592 DHMS, the differences between what the PEO and its programs produce now, and what they
593 should be producing as a leading-edge technology organization. Describe suspected workplace
594 barriers preventing the PEO and its programs from producing world-class technology. Outline
595 your theory as to why its workplace stands in the way of the PEO attracting and keeping the best
596 technology workforce available. Please note that the Government understands applicants will not
597 have access to the specific PEO DHMS workplace or workforce, and the Government is not
598 seeking factual “correctness” in this assessment, but rather a well-researched hypothetical based
599 on an assessment of common workplace and workforce hindrances in the technology sector. As a
600 starting point, please refer to the User Personas and Stories (Attachment 5) that give a sense of
601 the type of employees and workplace scenarios that should be accommodated as part of relevant
602 proposed solutions.
603
- 604 • **Solution Overview:** Describe your vision of a fully digitally enabled workplace that attracts and
605 retains the best technology workforce. Outline and address your approach and possible solution
606 areas for addressing the AOIs described above. Ensure that technological and non-technological
607 aspects of the solution are addressed and identified. List each of the solution areas being
608 addressed. If you are partnering with other entities as part of your submission, describe the
609 teaming construct and the synergies that will be realized through introduction of the solutions
610 together.
611
- 612 • **Analysis Plan:** Describe your philosophy and approach to determining what components are
613 necessary to deliver a world-class workplace, how to identify and select the best components, and
614 how to determine innovative methods to manage the suite of components as a seamless solution.
615 Describe your long-term vision on how to adapt-and-adjust to an evolving workforce in order to
616 maximize user satisfaction. Solutions should not also only be striving to meet the needs of DHMS
617 today, but must be thinking about DHMS of the future and establishing a foundation for long-
618 term success.
619
- 620 • **Benefits/Value:** Describe what is being proposed and what difference it will make (qualitatively
621 and quantitatively), if successful. Describe the innovative aspects of the project in the context of
622 existing capabilities and approaches. Clearly show how the proposed workplace would lead to the
623 recruitment of a better workforce and how that workforce would be enabled to deliver better
624 technology products. Responses can range anywhere from specific amenities in the
625 collaboration space, enhanced user experiences through workplace logistics management,
626 increased productivity toward short and long-term goals, positive impact on employee well-being,
627 or overall operational resilience of the workforce.
628
629

630 2. Abstract Submission Instructions:

631
632 Abstracts shall be submitted directly as a PDF attachment to [dha.ncr.peo-ipo.mbx.dhms-](mailto:dha.ncr.peo-ipo.mbx.dhms-enablers@mail.mil)
633 [enablers@mail.mil](mailto:dha.ncr.peo-ipo.mbx.dhms-enablers@mail.mil) with Subject Title: “WP3 CSO Abstract”. Please note that failure to use this Subject
634 Title may result in your question being misrouted or otherwise not seen.

635
636 **C. Pitch Submission**

637
638 While the pitches will be presented live to a panel of evaluators, whether virtual or in-person, the
639 Applicant must deliver the content 48 hours in advance as a read ahead. What is ultimately presented
640 during the pitch does not need to be identical to what is submitted ahead of time, but it will allow the
641 evaluators to familiarize themselves with the content ahead of the pitch. Pitches shall address those items
642 to be evaluated in Section V.

643
644 Pitch material shall be submitted as a .zip file through the Procurement Integrated Enterprise Environment
645 (PIEE) (<https://piee.eb.mil>) Solicitation Module to include all necessary supplementary files that will be
646 shared during the presentation. Further instructions will be provided to Applicants upon successful
647 completion of the Abstract Phase.

648
649 **D. Proposal Submission**

650
651 Proposals consist of Volume 1: The Solution and Volume 2: Price.

652
653 Applicants are encouraged to fully address their solution as efficiently as possible. Specific examples of
654 problems, approaches, or goals are preferred to generalities. Analogies and demonstrative case studies are
655 encouraged, along with videos and electronic demonstrations. The reuse of commercial off the shelf
656 material is encouraged, but applicants are cautioned that proposals must contain more substance and
657 analysis than just high-level marketing information.

658
659 All pages shall be formatted for printing on 8-1/2 by 11-inch paper with 1-inch margins, single-line
660 spacing, and a font size no smaller than 11-point. Font sizes of 8 or 10 point may be used for figures,
661 tables, and charts. Document files and supplementary files must be in .pdf, .odx, .doc, .docx, .xls, or .xlsx
662 formats. Submissions must be written in English. All pages of Volume 1 should be numbered.

663
664 Proposals not meeting the format prescribed herein may not be reviewed.

665
666 1. Volume 1: The Solution

667
668 Volume 1 should be created with the mindset of convincing an executive team to invest in the proposed
669 solution. Consider using persuasive, evidence-based methodologies for each of the sections such as a
670 CHALLENGE-APPROACH-OUTCOME. The selection of the best method is up to the applicant. If long,
671 expository narrative is not required to be persuasive, it is not desired. Your goal for Volume 1 is to
672 convince the Government that your solution will best satisfy its stated outcomes. Volume 1 must include
673 the following components:

674
675 (1) **Cover Page** (to include the following information):

- 676
- Label: “Proposal: Volume 1”

- 677 • CSO Number (HT0038-21-S-C003)
- 678 • CSO Version (e.g., WP3 CSO_9.27.21 v2)
- 679 • Proposal Title
- 680 • Lead Organization (prime applicant) Name
- 681 • Type of Organization (selected from the following categories):
 - 682 ○ Large Business
 - 683 ○ Small Disadvantaged Business
 - 684 ○ Other Small Business
 - 685 ○ Joint Venture
 - 686 ○ Historically Black College and University (HBCU)
 - 687 ○ Minority Institution (MI)
 - 688 ○ Other Educational
 - 689 ○ Other Nonprofit
 - 690 ○ Other
- 691 • Technical Point of Contact (POC) including name, mailing address, telephone, and email address
- 692 • Administrative POC including name, mailing address, telephone number, and email address
- 693 • Area of Interest Alignment
- 694 • Award instrument requested:
 - 695 ○ Other Small Business procurement contract (specify type)
 - 696 ○ Basic Ordering Agreement (BOA)
 - 697 ○ Blanket Purchase Agreement (BPA)
 - 698 ○ Other Transactions (OT)
- 699 • Total Price of the Proposed Effort
- 700 • Place(s) and Period(s) of Performance
- 701 • Other Team Member (subcontractors, partners, associates, joint ventures, consultants)
- 702 Information (for each, include Technical POC name, organization, type of organization, mailing
- 703 address, telephone number, and email address)
- 704 • Proposal Validity Period (minimum 120 calendar days)
- 705 • CAGE Code (TBD is acceptable)

706

707 **(2) Executive Summary:** Summarize how your approach will achieve the outcome of creating a
 708 workplace that enables the delivery of world-class technology by a high achieving workforce. Describe
 709 the end-state of the workplace, and the general process to implement the necessary solution.

710

711 **(3) Proposal Research and Design Approach:** Describe how you approached the problem presented in
 712 this solicitation including your sources and methods for market research, analysis of how a workplace
 713 supports a high achieving technology workforce, and what a typical workforce lacks. Describe the
 714 methodology utilized to identify what capabilities are needed and the best-in-class capabilities for each
 715 area of the solution.

716

717 **(4) Post-Award Design Plan:** Describe the iterative process to be used to rapidly mature the proposal
 718 solution into an executable design after award. Outline the process to maximize user engagement in the
 719 design process and to reach decisions, including what user communities are required to finalize the
 720 solution. Highlight the methodologies you will use to overcome resistance and status quo. Describe what
 721 information and documentation would be required to complete a migration from the status quo. Many

722 people will say something cannot be done; even more are convinced what they do or use now is perfect
723 and cannot be improved upon. How will they be persuaded and energized to help?

724

725 **(5) Relationship Approach:** Provide your approach to managing the solution on a day-to-day basis.
726 Describe how your team will contribute to the overall culture of innovation and high achievement within
727 PEO DHMS. Outline how you will ensure that the standard for quality within the solution is kept at the
728 highest level. Describe how your success implementing and managing the solution aligns tightly with the
729 success of PEO DHMS. Explain how your team will remain flexible, adaptable, and fair in conducting
730 business in a rapidly changing environment. Please note, the Government is not expecting traditional
731 Government-type management plans; this approach should show the culture of this project, and how that
732 culture will contribute to the project's success.

733

734 **(6) Innovations:** Describe the innovative aspects of the project in the context of existing capabilities and
735 approaches, clearly delineating the uniqueness and benefits of this project in the context of the state of the
736 art, alternative approaches, and other projects from the past and present. Describe how the proposed
737 project is revolutionary and how it significantly rises above the current state of the art. Please note, it is
738 not expected that proposed capabilities are in and of themselves innovative (some may have been
739 available in the market for decades), but rather how they are applied, managed, or implemented might be
740 innovative for the DoD and its stakeholders.

741

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

749

750 **(8) Technical Plan:** Outline and address technical challenges inherent in the approach and possible
751 solutions for overcoming potential problems. Demonstrate a deep understanding of the technical
752 challenges and present a credible (even if risky) plan to achieve the project's goal, including an overall
753 architecture and/or high-level design. Discuss mitigation of technical risk.

754

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

765

766 **(10) Contract and Business Documents:** Offerors shall complete and submit an OCI Declaration and
767 Disclosure, Notice of Organizational Conflict of Interest (Attachment 6). In addition, the Offeror shall
768 provide a complete list of all team members (including all subcontractors at all tiers) so the Government

769 may perform an independent OCI assessment. In accordance with FAR 9.504, the Contracting Officer
770 may withhold award from any Offeror exhibiting a real or perceived conflict of interest. As applicable to
771 the proposed solution, the Company shall provide all relevant Business Documents that pertain to the
772 solution and/or further demonstrate the ability for the Company to successfully execute on the solution.
773 This may include, but not limited to: proposed Performance Work Statement (PWS), Contract Data
774 Requirements Lists (CDRLS), Quality Assurance Surveillance Plan (QASP), Bill of Materials (BOM),
775 coworking space agreements, software licenses, cloud computing service agreements, service level
776 agreements (SLAs), Concept of Operations (ConOps), runbooks, administrative staffing footprint,
777 teaming agreements, small business subcontracting plan, and any other task order specific documents.
778 These documents may be submitted in a draft state as they will be finalized during the Negotiation Phase.
779

780 2. Volume 2: Price Proposal

781
782 The Company shall propose a total price using relevant cost estimating methodologies (e.g., Basis of
783 Estimate [BOE]) and provide any other data or supporting information deemed necessary for the
784 determination of a fair and reasonable price. The Government reserves the right to request any other price
785 data or supporting cost information as appropriate. This can include but is not limited to commercial price
786 catalog(s), previous commercial sales receipts, and/or other proprietary information to help the
787 government determine reasonableness and future budgetary cost estimates. The proposed total price
788 provided here is not considered final and will be referenced along with all supporting documentation
789 through the Negotiation Phase as pricing is determined and finalized.
790

791 Note: The cost of preparing abstracts, presentations, and proposals in response to this CSO is not
792 considered a direct charge to any resulting AOI award or any other contract. Proposal preparation costs
793 are not recoverable.
794

795 3. Proposal Submission:

796
797 Proposals shall be submitted as a .zip file with all necessary supplementary documentation through the
798 Procurement Integrated Enterprise Environment (PIEE) (<https://piee.eb.mil>) Solicitation Module. Further
799 instructions will be provided to Applicants upon successful completion of the Pitch Phase.
800

801 **E. Additional Information and Instructions**

802

803 1. General

804

805 The proposal shall be clear, concise, and shall include sufficient detail for effective evaluation and for
806 substantiating the validity of stated claims. Offerors shall assume the Government has no prior knowledge
807 of its facilities or experience and will base its evaluation on the information presented in the Offeror's
808 proposal.
809

810 All Abstracts, Pitches, and Proposals shall be unclassified. Abstracts, Pitches, and Proposals containing
811 data that is not to be disclosed to the public for any purpose or used by the Government except for
812 evaluation purposes shall include the following general disclaimer on the cover page:
813

813

814 "This [select one: Solution Brief, Pitch, or Proposal] includes data that shall not be disclosed
815 outside the Government, except to non-Government personnel for evaluation purposes, and shall

816 not be duplicated, used, or disclosed -- in whole or in part -- for any purpose other than to
817 evaluate this submission. If, however, an agreement is awarded to this Company as a result of --
818 or in connection with - the submission of this data, the Government shall have the right to
819 duplicate, use, or disclose the data to the extent agreed upon by both parties in the resulting
820 agreement. This restriction does not limit the Government's right to use information contained in
821 this data if it is obtained from another source without restriction. The data subject to this
822 restriction are contained in sheets [insert numbers or other identification of sheets]"
823

824 Recommended marking (header or footer) for portions of business plans and/or technical information that
825 are to be protected for a period of five years from FOIA disclosure:
826

827 "10 U.S.C. §2371(i), provides that disclosure of certain type of information [i.e., a proposal,
828 proposal abstract, and supporting documents. ii. A business plan submitted on a Business
829 Proprietary basis. iii. Technical information submitted on a controlled basis as outlined in DoDI
830 5230.24] is not required, and may not be compelled, under FOIA during that period (5 years) if a
831 party submits the information in a competitive or noncompetitive process having the potential for
832 an award of an OT."
833

834 Foreign-Owned businesses may independently submit a solution or do so as part of a teaming
835 arrangement with one or more United States-Owned businesses. However, the ability to obtain an
836 agreement based upon a submission may depend upon the ability of the Foreign-Owned business to
837 obtain necessary clearances and approvals to obtain proscribed information.
838

839 Submissions must be submitted electronically through the instructions provided below. Submissions sent
840 through other channels or after the prescribed AOI open period has ended will not be considered,
841 reviewed nor evaluated.
842

843 2. System for Award Management (SAM) Registration 844

845 Offerors will not be eligible to receive a contract/agreement award unless they are registered in SAM at
846 the time of proposal submission and maintain an active record in SAM.
847

848 3. Contractor Teaming Arrangements & Joint Ventures 849

850 If an Offeror is proposing under FAR 9.601(1), where there is a joint venture or partnership, the combined
851 entity shall be registered in SAM, and the resulting award instrument must reflect the combined entity as
852 the Prime.
853

854 Please note that FAR 9.603 requires that arrangements and company relationships to be fully disclosed
855 with the offer as part of the final written proposal.
856

857 4. Communications 858

859 Exchanges between the Government and Applicants will be controlled by the Contracting Officer through
860 dha.ncr.peo-ipo.mbx.dhms-enablers@mail.mil. Applicants must submit all communications, including
861 questions or identified discrepancies, to this email address, except for live oral discussions. Please utilize

862 the Subject: “WP3 CSO Question/Comment”. Please note that failure to use this Subject Title may result
863 in your question being misrouted or otherwise not seen.

864
865 While Government engagement is also permitted through HIVE, all commentary and questions in HIVE
866 should be intended to engage the broader community and not be a direct request for information
867 specifically from the Government.

868
869 5. Updates to the CSO

870
871 If this CSO is amended or changed, all terms and conditions that are not amended remain unchanged.
872 Offerors shall comply with the most current version of the CSO when submitting a response to the CSO.

873
874 6. Period of Acceptance of Offers

875
876 The Offeror agrees to hold its proposal firm for 120 calendar days from the date specified for receipt of
877 offers.

878

879 **V. APPLICATION REVIEW INFORMATION**

880
881 **A. Evaluation Criteria**

882
883 Each Applicant’s submission will be evaluated on the basis of merit against the criteria stated below and
884 not against any other Applicant’s submission for each phase of the CSO process. Through evaluations, the
885 Government also reserves the right to select all, none, or portions of the solution(s) submitted by an
886 Applicant.

887
888 1. Abstracts

889 Submitted abstracts will be evaluated on the basis of merit against the criteria described below.

- 890
891
892 a. Relevancy: Evaluates how well the solution addresses Government needs
893 through a managed solution with a “stack” of capabilities addressing a substantial
894 breadth of the AOIs and demonstrates customer centricity through consideration
895 of the user personas/stories to satisfy the WP3 vision.
896
897 b. Solution Merit: Evaluates abstract solution for feasibility in addressing the AOIs
898 and demonstrates how it is “future-proof” through its adaptability, sustainability,
899 and alignment to the future vision of PEO DHMS, including the degree to which
900 the solution is world-class and addresses all security requirements of government
901 (refer to Attachment 7).
902
903 c. Business Viability: Evaluates the strength of the Applicant’s ability to effectively
904 execute to the proposed timelines through agility, level of managed support,
905 culture, and expertise, while complying with Government security requirements
906 through training, certification, and management of solution stakeholders (refer to
907 Attachment 7).
908
909 d. Innovativeness: Evaluates the degree to which the proposed solution provides
910 innovative, unique, and/or under-utilized capabilities in Government application,
911 while satisfying the conditions for use defined in Class Deviation 2018-O0016
912 (Attachment 3).

913
914 2. Pitches

915
916 Applicants selected for a Pitch Presentation will be afforded the opportunity to expand upon the areas of
917 evaluation identified in the Abstract Phase, as well as additional areas to better inform Government’s
918 assessment of proposed solutions. Each Pitch will be evaluated on the basis of merit against the criteria
919 described below.

- 920
921 a. Relevancy: Evaluates how well the solution addresses Government needs
922 through a managed solution with a “stack” of capabilities addressing a substantial
923 breadth of the AOIs and demonstrates customer centricity through consideration
924 of the user personas/stories to satisfy the WP3 vision.

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958
- b. Solution Merit: Evaluates solution for feasibility in addressing the AOIs and demonstrates how it is “future-proof” through its adaptability, sustainability, and alignment to the future vision of PEO DHMS, including the degree to which the solution is world-class and addresses all security requirements of government (refer to Attachment 7).
 - c. Business Viability: Evaluates the strength of the Applicant 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 7).
 - 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 (Attachment 3).
 - e. Cost: The rough order of magnitude (ROM) price is fair, reasonable, and acceptable, while providing sufficient value for the solution delivered, while satisfying the conditions defined in Class Deviation 2018-0016 (Attachment 3).
 - 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 7).
 - 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.

959 **B. Exit Criteria**

960
961 1. Proposals

962
963 Proposals will be the final submission summarizing what has previously been presented for the proposed
964 solution(s). Submissions will be assessed on a set of exit criteria, as opposed to evaluation criteria. The
965 proposals will be assessed on the following factors and successful completion will lead into the
966 Negotiation Phase:

- 967
968
969
970
- 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

971 information is adjusted to accommodate new knowledge, the Applicant must
972 provide a brief explanation for the adjustments).

973
974 b. Approach & Risks: Checks for a clear approach to execute on implementing the
975 proposed solution(s) with long-term success in mind, while addressing
976 anticipated risk elements through adequate mitigation plans and compliance with
977 the overall security requirements associated with implementing the proposed
978 solution (refer to Attachment 7).

979
980 c. Cost: Checks whether the proposed price is fair and acceptable with adequate
981 accompaniment of analysis and supporting material for negotiation, while
982 satisfying the conditions defined in Class Deviation 2018-0016 (Attachment 3).

983
984 d. Schedule: Checks the proposed performance schedule and requested Government
985 support is feasible and acceptable for negotiation.

986

987 **C. Non-Government Advisors**

988

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

991

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

998

- 999 a. 18 USC 1905 (Trade Secrets Act);
1000 b. 18 USC 1831 et seq. (Economic Espionage Act);
1001 c. 5 USC 552(b)(4) (Freedom of Information Act);
1002 d. Executive Order 12600 (Pre-disclosure Notification Procedures for Confidential
1003 Commercial Information); and
1004 e. Any other statute, regulation, or requirement applicable to Government
1005 employees.

1006

1007 The Government's policy is to treat all submissions as source selection information, and to disclose their
1008 contents only for the purpose of evaluation. Restrictive notices notwithstanding, during the evaluation
1009 process, submissions may be handled by support contractors for administrative purposes and/or to assist
1010 with evaluation. All Government support contractors performing this role are expressly prohibited from
1011 performing on the CSO and are bound by appropriate NDAs. Applicants who respond to this solicitation
1012 through each phase do so with the understanding that government support contractors serving as advisors
1013 in the review process may have access to the applicant's content.

1014

1015 Submissions will not be returned. The original of each submission received will be retained at PEO
1016 DHMS and all other non-required copies destroyed. A certification of destruction may be requested,

1017 provided the formal request is received at this office within 5 days after notification that a proposal was
1018 not selected.

1019 **VI. AWARD INFORMATION**

1020
1021 This CSO is being issued using procedures under DFARS Class Deviation 2018-O0016, Defense
1022 Commercial Solutions Opening Pilot Program. Any award(s) will use the procedures appropriate to the
1023 agreed upon procurement instrument. Any award(s) must satisfy the conditions for use defined in Class
1024 Deviation 2018-O0016 (Attachment 3).

1025
1026 The relationship and solution established with any resulting procurement award must meet the definition
1027 of commercial items as defined in FAR 2.101. The Government does not consider this solicitation to be
1028 seeking services/support labor. The contracted item will be the managed solution.

1029
1030 In accordance with 10 U.S.C. § 2371b(f), the Government reserves the right to award a follow-on
1031 production contract or Other Transaction (OT) for any OT awarded under this CSO if: (1) that participant
1032 in the OT, or a recognized successor in interest to the OT, successfully completed the entire prototype
1033 project provided for in the OT, as modified; and (2) the OT provides for the award of a follow-on
1034 production contract or OT to the participant, or a recognized successor in interest to the OT.

1035
1036 Multiple awards may or may not be made in response to the solicitation. The level of funding for
1037 individual award(s) made under this solicitation has not been predetermined and will depend on the
1038 quality of the proposals received and the availability of funds. Awards will be made to proposer(s) whose
1039 proposals are determined to be the most advantageous to the Government, all factors considered,
1040 including the potential contributions of the proposed work, overall funding strategy, and availability of
1041 funding.

1042
1043 The Government reserves the right to:

- 1044 • Select for negotiation all, some, one, or none of the proposals received in response to this
1045 solicitation;
- 1046 • segregate portions of resulting awards into pre-priced options;
- 1047 • accept proposals in their entirety or to select only portions of proposals for award;
- 1048 • fund proposals in increments and/or with options for continued work at the end of one or more
1049 phases;
- 1050 • request additional documentation once the award instrument has been determined (e.g.,
1051 representations and certifications);
- 1052 • remove proposers from award consideration should the parties fail to reach agreement on award
1053 terms within a reasonable time or the proposer fails to provide requested additional information in
1054 a timely manner; and
- 1055 • close the CSO prior to the 12-month ordering period if the desired set of solutions is reached, the
1056 award ceiling is met, or as new funding limitations arise.

1057
1058 Proposals selected for award negotiation may result in a procurement contract, basic ordering agreement,
1059 blanket purchase agreement, or Other Transaction depending upon the nature of the work proposed, the
1060 required degree of interaction between parties, and other factors. Regardless of vehicle type, any award
1061 will be firm-fixed price or fixed-price incentive in accordance with the CSO deviation.