

d. Binding - Originals should be submitted unbound. Copies should be submitted in economical, three-ring binders.

L-3.2 Oral Presentation

a. Time Limit - The Offeror's oral presentation shall not exceed two (2) hours (60 minutes for presentation, 30 minutes break, and 30 minutes for questions and answers). The Contracting Officer reserves the right to terminate the presentation if it overruns the 60-minute limit. During the presentation, the Source Selection Evaluation Board (SSEB) members will not interrupt the offeror to ask questions (except to request the repetition of inaudible words or statements or the explanation of terms that are unknown to them) or otherwise engage the offeror in any dialogue. A question and answer period will follow and may cover the entire proposal. These questions will not constitute "discussions" as defined in FAR 15.306.

b. Offeror Attendees - A maximum of three (3) presenters will be allowed into the presentation room at any one time.

c. Topics - The offeror's oral presentation will address the following:

Management Approach

d. Presentation Media - Offerors are free to structure their oral presentations using 8-1/2" x 11" vu-graphs (slides, transparencies) or computer-generated media. If the Offeror chooses to utilize an electronic projection, they must provide their own equipment. Only the overhead projector will be available at the oral presentation site. The number of vu-graphs (or other media) should be reasonable for the stated time limits for presentation. Use of these visual aids is at the offeror's discretion.

e. Paper and Electronic Copies - Seven (7) printed copies of the final presentation shall be provided to the Government when the Offeror begins their presentation. The Offeror shall also provide an electronic copy of the final presentation.

f. Recording the Presentation - The Oral Presentation will be videotaped by the Government, and will be available to the SSEB for their review during the source selection, and be maintained as part of the source selection record.

g. Scheduling - The Oral Presentation will be scheduled as soon as practicable after proposal receipt, as arranged with the offeror by the Contracting Officer. The Government reserves the right to reschedule presentations at the sole discretion of the Contracting Officer.

h. Location - The location will be provided when Oral Presentation is scheduled.

L-3.3 Electronic Submission In addition to the paper copies identified above, the offeror shall submit all proposal information in electronic format (3.5" PC based high-density diskette(s) or CD). Text and graphics portions of the electronic copies shall be in a format readable by Microsoft (MS) Office 97, MS Word 97. Data submitted in spreadsheet format shall be readable by MS Office 97, MS Excel 97. Preliminary and final oral presentation material shall be readable by MS Office 97, MS PowerPoint 97. In case of conflict between the paper copy and the electronic copy of the proposals submitted, the paper copy shall take precedence.

L-4 Submission Requirements For Phase 1 The following information shall be submitted:

L-4.1 Factor 1 - Past Performance

a. Project Master List - Offerors shall provide a master list of **ALL** contracts for operation and maintenance activities, ongoing or completed, within the last five years in excess of \$1Million. For each contract, indicate if this contract was one for which a relevance summary was submitted (see paragraph b). In addition, provide the following information for each contract listed:

- companies performing the contract
- name and location of the contract
- contract type
- brief description (maximum three sentences)
- name and telephone number of the owner's representative most knowledgeable of the contract
- contract number for Government contracts
- role on the project (Prime or subcontractor)
- original and final total contract value
- scheduled and actual start and completion dates
- indicate if the offeror (included parent companies or affiliated firms) is a part owner in the building/buildings or facilities
- description of all pending and settled claims
- safety record, include frequency and severity of any lost time accidents
- if a subcontractor on the contract:
 - function/service performed
 - original and final value of the subcontract
 - contract type for the subcontract

There is no page limit for the Project Master List.

b. Relevant Project Summaries - Each offeror shall complete and submit summaries, as described below, for five (5) contracts from the Master Projects List. If the Offeror has less than five (5) relevant contracts, the Offeror shall submit as many relevant contracts as it has.

“Relevant” projects are defined as those operation and maintenance contracts, ongoing or completed, within the last 5 years, with comparable levels of complexity to the operation and maintenance of the Pentagon H&RP. These may include, but are not limited to, experience with: operation and maintenance of central plant facilities, operation and maintenance of large utility distribution systems, coordination with on-going adjacent renovation projects, integrated environmental management as part of operation and maintenance of facilities. Multi-division or regionalized firms should submit contracts performed by the division/business segment that would, if selected, perform the operation and maintenance of the H&RP. Contracts performed by other divisions/business segments may be considered but are less relevant than projects performed by the local division.

For the relevant contracts selected, offerors will summarize the following information in addition to the requirements identified in paragraph a. above, not to exceed three (3) pages for each project (total 30 page limit):

- Describe the relevance to the H&RP contract.
- Describe the team composition of those contracts.
- Describe energy efficiencies, indicate energy efficiency measures that were initiated by the contractor
- Describe major systems operated and maintained, to include:
 - Boilers – number of boilers, make, model number, capacity of boilers, fuel type, whether or not alternative fuels were used
 - Chillers – number of chillers, make, model number, capacity of chillers, refrigerant type used
 - Sizes and types of steam distribution systems
 - Sizes of chilled water distribution systems
 - Sizes of electrical distribution systems
 - Sizes and types of sewage distribution systems

- Square footage and numbers of buildings (campuses) supported
- Describe criticality of Plant Operations (i.e. Requirements for Plant to be operating 24 hours/7 days a week with no interruption in utility services)
- Describe cost performance (include explanations for any cost experienced)
- Provide the date the Past Performance Questionnaire was requested and to whom it was sent (see paragraph c.).

c. **Questionnaires** - The Offeror shall initiate the Past Performance Questionnaires [Attachment 1] for each of the 5 projects selected in paragraph b. above. The Offeror shall request the owner's representative most knowledgeable of the project from each project selected to complete and submit separate Past Performance Questionnaires [Attachment 1] directly to the Contracting Officer no later than the Qualifications Proposal due date.

L-4.2 Factor 2 - Management Approach

Each offeror shall describe the management approach they will apply to meet the requirement for Operation and Maintenance of the Pentagon Heating and Refrigeration Plant (total 20 page limit). The management approach shall include:

A description of key areas of operations and maintenance management including, but not limited to, maintenance activities (chiller plant, boiler plant, utility distribution systems and sewage lift stations), operation activities (chiller plant, boiler plant, utility distribution systems and sewage lift stations), quality assurance/quality control, document control, financial & accounting controls, safety program and recent safety rates, energy management, environmental management, safety management, utilization and maintenance of distributive control systems and change management procedures, contingency planning for loss of utility, methods employed to ensure continued plant operations.

Offerors are encouraged to include any additional information, within the constraints of the page limits identified herein, that will assist or aid the Government in understanding the internal operations of the offeror's team.

L-5 Special Notice to Offerors Offerors are advised that the Government will utilize Logistics Management Institute (LMI) to assist during the source selection evaluation. The exclusive responsibility for the source selection decision will reside with the Government. Proprietary information submitted in response to this solicitation will be protected from unauthorized disclosure as required by Subsection 27 of the Office of Procurement Policy Act as amended (41 U.S.C. 423) (hereinafter referred to as "the Act") as implemented in the FAR. This company is bound contractually by Organizational Conflict of Interest and disclosure clauses with respect to proprietary information. Contractor personnel assisting in the proposal evaluation are procurement officials within the meaning of the Act, and will take all necessary action to preclude unauthorized use or disclosure of a competing Contractor's proprietary data. Restricted data should be marked IAW FAR provision 52.215-1.

52.216-1 TYPE OF CONTRACT (APR 1984)

The Government contemplates award of a Firm Fixed Price contract resulting from this solicitation.

(End of clause)

52.252-5 AUTHORIZED DEVIATIONS IN PROVISIONS (APR 1984)

The use in this solicitation of any Federal Acquisition Regulation (48 CFR Chapter 1) provision with an authorized deviation is indicated by the addition of "(DEVIATION)" after the date of the provision.

SECTION M Evaluation Factors for Award

CLAUSES INCORPORATED BY REFERENCE:

52.217-5 Evaluation Of Options

JUL 1990

M-1 Evaluation For Phase 1**M-1.1 Evaluation of Past Performance Factor**

Past performance will be evaluated in both Phase 1 and Phase 2. In Phase 1, past performance is evaluated to determine the Government's confidence in the offeror's ability to perform the requirements to operate and maintain the H&RP, based on the offeror's past performance on contracts of a similar size and complexity. Special emphasis is placed on past performance on contracts that are *relevant* and *recent*. In Phase 2, an evaluation of the Offeror's proposed management team's past performance and experience will be made to ascertain the Government's confidence level in the Offeror's ability to perform the requirements of the contract.

M-1.2 Factor Descriptions and Evaluation Criteria Factors are listed in descending order of importance

M-1.2.1 Factor 1 - Recency and Relevancy of Past Performance

Description: Evaluation will be based on the Government's confidence in the offeror's ability to successfully execute the requirements of operating and maintaining the H&RP, based on the *recency* and *relevance* of the past experience and performance described in the offeror's submission. Relevant contracts are defined for this solicitation as those with comparable levels of complexity and scope to the operation and maintenance of the H&RP. This may include, but is not necessarily limited to, experience with: operation, maintenance and repair of steam plants, chilled water plants, sewage/wastewater services and major utility distribution systems, which are required to provide utility services 24 hours a day/7 days a week with no interruptions.

M-1.2.2 Factor 2 - Management Approach

Description: Management Approach shall be evaluated as a measure of the Government's confidence in the Offeror's ability to successfully perform the required effort, while ensuring the optimum levels of quality, operational efficiency and continuity of operations. The evaluation of this factor will be based on the Offeror's described approach to the operation and maintenance of the H&RP.

M-2 Phase 2 – Technical and Price Proposals

During Phase 2, the amended Request for Proposal (RFP) to include technical and price proposals will be issued to the offerors selected in Phase 1. Notwithstanding REFCO's expectation that only the Phase 1 contractors selected will be capable of successfully competing for Phase 2, all proposals from Phase 1 offerors will be considered.

In Phase 2, an amended RFP will be issued upon which a best value, source selection process will be conducted. The offeror selected as the best value to the Government will then undergo a cost comparison with a Government's Most Efficient Organization (MEO) proposal in accordance with OMB Circular A-76.

The evaluation factors (and any sub-factors), evaluation criteria, and submission requirements upon which the contract award will be based will be described in the amended RFP for Phase 2. The subcontracting goals for the project will also be described in Phase 2.