

ADDENDUM TO 52.212-1, INSTRUCTIONS TO OFFERORS - COMMERCIAL PRODUCTS AND COMMERCIAL SERVICES

Quotes shall be submitted in accordance with FAR 52.212-1, *Instructions to Offerors — Commercial Products and Commercial Services*, as outlined above, as well as the additional instructions outlined below. Please read the Performance Work Statement (PWS) and Instructions to Offerors carefully to ensure your quote meets all submittal requirements.

A. GENERAL PROPOSAL INSTRUCTIONS

Each quote SHALL include a standalone Cover Page (1 page maximum) that does not count against any other volume's page limits. The Cover Page must include the following:

1. Offeror Name
2. Address
3. Unique Entity Identifier (UEI)
4. CAGE Code
5. Point of Contact (Name, Phone Number, and Email Address)

Each quote shall be separated into three distinct volumes (Price, Technical, and Past Performance). Offerors shall provide the quote in accordance with the instructions below.

B. VOLUME I – PRICE PROPOSAL (Submit 1 Copy)

- Offerors shall insert proposed unit and extended prices for each Contract Line Item Number (CLIN) outlined in the SF 1449. Pricing of Deliverables and Key Personnel: The costs associated with the Key Personnel (the Lead Medical Case Manager / Contract Manager), as well as all mandatory deliverables from the performance work statement, shall not be priced separately. These costs must be fully burdened and incorporated into the overarching Firm-Fixed-Price (FFP) CLIN(s) for Services.
- Pricing Workbook: Offerors shall fully complete and submit the provided Excel Pricing Workbook. The 'Total CLIN Price' outputs from the Pricing Workbook must exactly match the totals entered into the official SF 1449 CLIN structure.
- Note: There is no page limit for the Price Proposal.

C. VOLUME II – TECHNICAL PROPOSAL (Submit 1 Copy)

Strictly limited to a total of 12 pages.

The Technical Capability volume shall be specific, detailed, and complete. It must clearly demonstrate how the Offeror intends to execute the requirements of the PWS. This volume is limited to 12 pages and shall consist of the following three (3) subfactors:

- Subfactor 1: Quality Control Plan (QCP). A preliminary QCP (not to exceed 5 pages) outlining the methodology for identifying, correcting, and preventing performance deficiencies, and managing timelines. Clearly label the submitted QCP as "Preliminary" and adhere strictly to the 5-page limit.
- Subfactor 2: Technical Approach and Methodology. A narrative (not to exceed 5 pages) explaining the Offeror's approach to coordinating care, managing MEB/PEB cases, staffing off-site mobilization events, and protecting HIPAA/PHI.
- Subfactor 3: Key Personnel Resume (Lead Medical Case Manager). The Offeror shall submit a resume (not to exceed 2 pages) *only* for the designated Key Personnel

position. The proposed candidate's resume must demonstrate they meet the qualifications in PWS Section 5.25.2. The Government will not accept or evaluate resumes for non-key personnel (Staff RNs or Medical Records Technicians) prior to award

Compliance with PWS Qualifications: By submitting a proposal, the Offeror certifies that all personnel assigned to this contract, including non-key personnel, shall meet the minimum mandatory qualifications set forth in the PWS. Verification of these qualifications for non-key personnel is a post-award contract administration matter and will not be evaluated during the source selection process.

D. VOLUME III – PAST PERFORMANCE INFORMATION (Submit 1 Copy)

- Offerors shall submit a Past Performance volume not to exceed a total of 10 pages. This volume must include a written narrative, which itself must not exceed 2 pages, detailing similar work performed within the last five (5) years from the date of issuance of this solicitation. This narrative must clearly demonstrate how the prior efforts are relevant in scope, magnitude, and complexity to the requirements outlined in the Performance Work Statement (PWS). The narrative must correspond directly to the contracts provided in the Past Performance Reference Worksheets and explicitly state whether the offeror performed as the Prime Contractor, a Subcontractor, or part of a Joint Venture.
- Quality and Satisfaction Rating (Past 5 Years): Provide any information currently available (letters, metrics, customer surveys, etc.) which demonstrates customer satisfaction with overall job performance and quality of completed products/services for same or similar type contracts within the last five (5) years. Explain any corrective actions taken for past substandard performance.
- Past Performance Reference Worksheets: Provide a contract reference worksheet for no more than two (2) of the most relevant contracts performed for Federal agencies or commercial customers within the last five (5) years. *Offerors must ensure POCs can be reached at the emails and phone numbers provided.*
- Teaming Arrangements/Joint Ventures: If a teaming arrangement is contemplated, provide complete information as to the arrangement, including relevant/recent past performance on previous joint efforts. If this is a first-time joint effort, each party to the arrangement must provide a list of relevant contracts.
- Subcontractor Consent: Past performance information pertaining to a subcontractor cannot be disclosed to the prime offeror without the subcontractor's consent. Provide a letter from all subcontractors that will perform major or critical aspects of the requirement, consenting to the release of their past performance information to the prime contractor.

E. FORMATTING & PAGE LIMIT COMPLIANCE

Documents submitted in response to this RFQ must be fully responsive to the requirements of the RFQ (CLINs & PWS) and the Evaluation Factors for Award.

1. Page Size: Proposals shall be formatted for 8.5" x 11" paper. Fold-outs used for charts, tables, or diagrams may not exceed 11" x 17". *Note: Each 11" x 17" page will count as two (2) pages toward the page limit.*
2. Page Definition: A page is defined as one face of a sheet of paper containing information.
3. Font: Typing shall be a minimum of 12-point font (e.g., Arial or Times New Roman). Smaller font (minimum 10-point) may be used for tables, charts, or graphics, provided it is legible.
4. Enforcement: Pages exceeding the page limitations set forth in Volume II will not be read or evaluated and will be removed from the proposal prior to evaluation. Elaborate formats or color presentations are not desired. The total proposal, excluding the Cover Page, SF 1449, and Price Volume, shall not exceed 22 pages. Within this total, the Technical Proposal subfactors and Past Performance narrative may be allocated as the Offeror sees fit, however, individual page limits for the QCP (5 pages), Technical Narrative (5 pages), and Resume (2 pages) remain in effect.

Volume	Volume Title	Max # of Pages
I	Price Proposal	SF 1449 and One Page Pricing Worksheet
II	Technical Proposal	12 Pages
III	Past Performance	10 Pages Last Five Years

ADDENDUM 52.212-2

Basis of Award & Evaluation Factors

1.0 BASIS FOR AWARD

Award will be made to the responsible Offeror whose proposal conforms to the solicitation requirements and is determined to provide the Best Value to the Government, price and other factors considered.

Relative Importance of Factors:

The factors are ranked in the following order of importance: Factor III (Price) is significantly more important than the non-price factors (Factor I, Technical Capability and Factor II, Past Performance) when combined. Among the non-price factors, Factor I is significantly more important than Factor II.

While the Government will use a best value tradeoff process, Price is the predominant evaluation factor. The Government reserves the right to award to other than the lowest-priced offeror if a higher-priced proposal provides significantly superior technical capability or past performance that justifies the price premium. However, as the price difference between proposals increases, the technical and past performance superiority must be increasingly significant to justify award to a higher-priced offeror.

2.0 EVALUATION DEFINITIONS

During the evaluation of Factor I (Technical Capability), the Government will identify findings using the following standard definitions:

Significant Strength: An aspect of an Offeror's proposal that has appreciable merit or exceeds specified performance or capability requirements in a way that will be of considerable advantage to the Government.

Strength: An aspect of an Offeror's proposal that has merit or exceeds specified performance or capability requirements in a way that will be advantageous to the Government.

Weakness: A flaw in the proposal that increases the risk of unsuccessful contract performance.

Deficiency: A material failure of a proposal to meet a Government requirement.

3.0 FACTOR I: TECHNICAL CAPABILITY

The Government will evaluate Technical Capability using a Combined Technical/Risk Rating process. Proposals will be evaluated to determine if they meet the minimum requirements (Acceptable) and will be assessed for Strengths that exceed the requirements to the advantage of the Government.

Subfactor 1: Quality Control Plan (QCP)

- **Evaluation Standard:** To receive an "Acceptable" rating, the QCP must demonstrate a clear methodology for identifying, correcting, and preventing performance deficiencies, and include processes for meeting the strict timelines established in the PWS (e.g., 1-day eCase creation, 3-day charting).
- **Trade-Off Potential (Strengths):** The Government may assign a Strength or Significant Strength if the QCP proposes an approach that exceeds the minimum requirements in a way that is advantageous to the Government. This may include, but is not limited to:
 - Implementing automated or real-time performance tracking dashboards that provide the COR with immediate visibility into PWS metrics.
 - Proposing a proactive quality audit frequency that exceeds PWS minimums to further reduce performance risk.
 - Demonstrating a superior method for maintaining quality during rapid surge or mobilization events that minimizes the burden on Government oversight.

Subfactor 2: Technical Approach and Methodology

- **Evaluation Standard:** To receive an "Acceptable" rating, the narrative must demonstrate a sound methodology for coordinating with military health systems, civilian providers, and Soldier commands, and present a feasible approach to staffing off-site mobilization events (e.g., Fort Bliss).
- **Trade-Off Potential (Strengths):** The Government may assign a Strength or Significant Strength if the Technical Approach proposes methodologies or efficiencies that exceed the minimum requirements in a way that is advantageous to the Government. This may include, but is not limited to:
 - Proposing a streamlined methodology for MEB/PEB file preparation that demonstrably reduces the "days-to-completion" for case processing.
 - Providing evidence of a highly robust recruitment and retention strategy that ensures

zero gaps in mission coverage during surge periods.

- Demonstrating advanced expertise in military-specific medical regulations (e.g., AR 40-501) that reduces the training and technical oversight required from Government personnel.

Subfactor 3: Key Personnel Resume

(a) Submission Requirements: The Offeror shall submit a resume (not to exceed 2 pages) for the designated Key Personnel position: Lead RN Case Manager / Contract Manager.

(b) Evaluation Standard: The Government will evaluate the submitted resume to determine if the proposed individual meets the mandatory minimum education and experience requirements established in PWS Section 5.25.2.

(c) Trade-off Potential (Strengths): While a candidate must meet the mandatory minimums to be rated "Acceptable," the Government may assign a Strength if the proposed candidate possesses preferred qualifications as described in PWS 5.25.2, such as:

- A Bachelor of Science in Nursing (BSN) or higher degree.
- A Certified Case Manager (CCM) or equivalent professional credential.
- Documented, recent experience (within the last 5 years) directly utilizing Army medical readiness systems (e.g., MEDCHART, MHS GENESIS).
- Supervisory and/or clinical case management experience that significantly exceeds the mandatory two-year minimum requirement.

Color	Rating	Description
Blue	Outstanding	Quote indicates an exceptional approach and understanding of the requirements and contains multiple strengths, and risk of unsuccessful performance is low.
Purple	Good	Quote indicates a thorough approach and understanding of the requirements and contains at least one strength, and risk of unsuccessful performance is low to moderate.
Green	Acceptable	Quote meets requirements and indicates an adequate approach and understanding of the requirements, and risk of unsuccessful performance is no worse than moderate.
Red	Unacceptable	Quote does not meet requirements of the solicitation, and thus contains one or more deficiencies, and/or risk of unsuccessful performance is unacceptable. Quote is not awardable.

FACTOR 2 - Past Performance:

The Government will conduct a comprehensive past performance evaluation to assess the Government's confidence in the offeror's ability to successfully meet the requirements of this solicitation. This assessment will be based on the recency, relevancy, and quality of the offeror's

past performance.

A. Definitions

- Recency: To be considered recent, past performance must have been performed within five (5) years from the date of issuance of this solicitation.
- Relevancy: The Government will assess relevancy by comparing the scope, magnitude, and complexity of the offeror's past projects to the requirements of this solicitation. The relevancy ratings are: *Very Relevant*, *Relevant*, *Somewhat Relevant*, and *Not Relevant*, as defined in Table 2.

B. Submission Requirements

Offerors shall provide the following as part of their Past Performance volume:

1. Contract References: A list of no more than two (2) of the most relevant contracts performed for Federal agencies or commercial customers within the last five (5) years.
2. Customer Satisfaction Information: Any available information (e.g., letters of commendation, customer surveys, performance metrics) that demonstrates customer satisfaction. Offerors must also explain any corrective actions taken for past substandard performance, if applicable.
3. Subcontractor Consent: If applicable, provide a consent letter from all major subcontractors allowing the release of their past performance information to the prime offeror.

C. Government Evaluation & Reserved Rights

The Government's evaluation is not limited to the information provided by the offeror.

- Use of Official Databases: The Government reserves the right to evaluate an offeror's past performance using data obtained from official Government databases, including but not limited to the Contractor Performance Assessment Reporting System (CPARS), the System for Award Management (SAM), and the Federal Awardee Performance and Integrity Information System (FAPIIS).
- Verification of References: The Government reserves the right, but is not obligated, to contact the Points of Contact (POCs) provided by the offeror to verify past performance information. The Government's inability to reach a specific reference will not automatically result in the rejection of the proposal.

D. Lack of Past Performance

In accordance with FAR 15.305(a)(2)(iv), an offeror without a record of relevant past performance, or for whom information on past performance is not available, will not be evaluated favorably or unfavorably on this factor. Such offerors will receive a rating of "Neutral Confidence." To be considered for this rating, an offeror with no relevant past performance must affirmatively state so in their proposal. The Government may still consider the performance of predecessor companies, key personnel, or critical subcontractors.

E. Final Assessment

Based on an integrated assessment of the information obtained, the Government will assign a single Performance Confidence Assessment rating, as defined in Table 3. To be considered for award, an offeror must receive a rating of "Satisfactory Confidence" or higher, or "Neutral Confidence."

Past Performance Relevancy Rating Method:

Past performance will be evaluated to assess the relevance of the offeror's recent efforts and to determine the probability of successfully meeting the solicitation requirements. The Government will consider the currency, relevancy, source, and context of the information provided, as well as general trends in the contractor's performance.

Each recent contract submitted will be evaluated individually and assigned an adjectival relevancy rating based on a comparison of the past project's scope, magnitude, and complexity to the current requirement. Offerors must provide a written narrative detailing similar work performed within the last five (5) years from the date of issuance of this solicitation.

Scope of Evaluated Entities (Primes, Subcontractors, and Joint Ventures):

The Government will evaluate the present and past performance of the Offeror, including formally established partnerships and Joint Ventures. Furthermore, the Government will accept and evaluate an offeror's past performance on relevant federal contracts where the Offeror performed either as the Prime Contractor or as a Subcontractor.

Table 2 - Past Performance Relevancy Ratings Definition

Rating	Definition
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance involved similar scope and magnitude of effort and complexities this solicitation requires.
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

Performance Confidence Assessments Rating Method

All recent contracts evaluated as Very Relevant, Relevant, and Somewhat Relevant, for which past performance information is provided will be considered; and based on all the recent, relevant past performance information, a performance confidence rating will be assigned for each offeror, as described below.

TABLE 3 - Performance Confidence Assessments

Rating	Definition
Substantial Confidence	Based on the offeror's recent/relevant performance record, the Government has a high expectation that the offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the offeror's recent/relevant performance record, the Government has a reasonable expectation that the offeror will successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available, or the offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. The Offeror may not be evaluated favorably or unfavorably on the factor of past performance.
No Confidence	Based on the offeror's recent/relevant performance record, the Government has no expectation that the offeror will be able to successfully perform the required effort.

Factor 3 - Price

The Price proposal shall be submitted using the one-page price sheet. Each Offeror shall provide a firm-fixed price. The Total Price proposed shall be for a firm-fixed price and will be utilized for the evaluation of the Offeror. The Government will evaluate proposed prices for fairness and reasonableness using price analysis techniques. The Government also reserves the right to evaluate for price realism to determine if the proposed prices are unrealistically low, which may reflect a lack of technical understanding or create a performance risk.

Steps to Submit a quote in the PEE Solicitation Module:

To submit a quote to the U.S. Government through the Procurement Integrated Enterprise Environment (PIEE) Solicitation Module, follow these steps:

- 1. Login to PEE:** Visit the PEE website and log in with your credentials. Make sure your role and access permissions are set to “Vendor” or the appropriate access level for submitting proposals.
- 2. Access the Solicitation Module:** From the PEE home page, navigate to the “Solicitation” module, which is designed for vendors to view solicitations and submit proposals.
- 3. Find the Solicitation:** Use the search functionality in the Solicitation module to locate the specific solicitation by Solicitation Number, Contract Number, or keyword.
- 4. Review Solicitation Details:** Carefully review all the details and documents associated with the solicitation, **52.212-1**, and submission requirements.
- 5. Prepare Your Proposal:** Prepare your proposal according to the format and requirements outlined in the solicitation documents. Make sure to include all required documents (e.g., technical, price, past performance) and ensure they comply with the submission guidelines.
- 6. Submit the Proposal:** Within the Solicitation module, find the “Submit Proposal” or “Respond to Solicitation” option associated with the solicitation. This will open up the submission portal. Upload the required documents (e.g., PDFs, Excel sheets) as specified in the solicitation. Verify that all files are properly attached and formatted according to the instructions.
- 7. Complete Submission:** After uploading the documents, confirm the submission by following the on-screen instructions. The system will ask you to verify all details before final submission.
- 8. Receive Confirmation:** Once submitted, you should receive a confirmation message within the system, and an email confirmation will likely be sent to your registered email address. You can monitor the status of your submission within the PEE portal.
- 9. Post-Submission:** You can return to the Solicitation module to check updates on the solicitation, review clarifications or amendments, and monitor the proposal status.

Additional Tips:

Check for Amendments: When viewing the solicitation ensure you are viewing the latest amendment. After submitting, keep an eye on amendments or changes to the solicitation. **You must update your offeror if the solicitation is amended.** Before submitting an offeror click the “Please notify me of amendments to this solicitation” in the upper left-hand corner.

Ensure Compliance: Make sure your proposal complies with all submission requirements, including format, deadlines, and documentation.

Technical Support: If you encounter any issues, PEE has support resources available, including help desks and user guides. This process ensures your proposal is securely and properly submitted to the government through the designated PEE platform.

W912LN-26-Q-A019

There are no Defense Priorities and Allocations System (DPAS) assigned rating for this acquisition.

Quotes are due by the date and time listed in the PEE solicitation module and must be submitted to the PEE solicitation module or uploaded to SAM.GOV