

# IFIB-ACT-SACT-22-117

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**NORTH ATLANTIC TREATY ORGANIZATION**  
HEADQUARTERS, SUPREME ALLIED COMMANDER TRANSFORMATION  
7857 BLANDY ROAD, SUITE 100  
NORFOLK, VIRGINIA 23551-2490

## **Description of Acquisition**

### **Part 1 Bidding Instructions**

**IFIB-ACT-SACT-22-117**

#### **Amendment #1**

(All changes in red text)

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This Enclosure is designed to assist the respective company provide HQ SACT with all necessary documents/information required. For clarification, please refer to Bidding instructions in part 1 of subject solicitation.

# IFIB-ACT-SACT-22-117

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1. **General**
2. **Classification**
3. **Definitions**
4. **Eligibility**
5. **Duration of the Contract**
6. **Exemption of Taxes**
7. **Amendment or Cancellations**
8. **Bidder Clarifications**
9. **Bid Closing Date**
10. **Bid Validity**
11. **Contents of Proposal**
12. **Proposal Submission**
13. **Late Proposal**
14. **Bid Withdrawal**
15. **Bid Evaluation**
16. **Proposal Clarifications**
17. **Award**
18. **Communications and Contacts**
19. **Point of Contact**

## **ENCLOSURES:**

1. **Proposal/Content Checklist**
  2. **Address Label**
  3. **Bidder's Contact Information**
  4. **Compliance Statement to Sealed Bid**
  5. **Past Performance Information**
  6. **Mandatory Price Proposal**
  7. **Statement of Work**
- Annex A – Technical Proposal Assessment**

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## PART 1 BIDDING INSTRUCTIONS

### 1. General

This is a Firm Fixed Price Level of Effort contract in accordance the General and Special Terms and Conditions; **Contract Award is contingent upon funding availability; Partial bidding is allowed.**

### 2. Classification

This IFIB is a NATO UNCLASSIFIED document.

### 3. Definitions

- (a) The “Prospective Bidder”, shall refer to the entity that has completed and returned the Enclosure of the transmittal letter of this IFIB, and has indicated thereon its intention without commitment, to participate in this IFIB.
- (b) The term “Bidder”, shall refer to the bidding entity that has completed a bid in response to this IFIB.
- (c) The term Contractor shall refer to the bidding entity to whom the contract is awarded.
- (d) The term “Contracting Officer” designates the official who executes this IFIB on behalf of HQ SACT.
- (e) “Contracting Officer’s Technical Representative” or “COTR” is the official who is appointed for the purpose of determining compliance of the successful bid, per the technical specifications.
- (f) The term “HQ SACT” shall refer to Supreme Headquarters Allied Command Transformation.
- (g) The term “ACT” shall refer to Allied Commander Transformation.
- (h) The term “NATO”, shall refer to the North Atlantic Treaty Organisation.
- (i) The term “days” as used in this IFIB shall, unless otherwise stated, be interpreted as meaning calendar days.
- (j) The term “Habitual Residence”, means HQ SACT, Norfolk, Virginia, VA 23511.

### 4. Eligibility

This IFIB is open to companies:

- (a) Established in a North Atlantic Treaty Organisation Alliance member nation.
- (b) Working in the required field of study and legally authorised to operate in the United States of America, at the time of bidding.
- (c) Has performed the desired past performance including size, cost and scope,

# IFIB-ACT-SACT-22-117

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as described in this IFIB.

## 5. Duration of Contract

- (a) The contract awarded shall be effective upon date of award.
- (b) Period of Performance: Base Period is 1 January 2023 – 31 December 2023 with four possible 12 month option periods; 1 January – 31 December 2024, 1 January – 31 December 2025, 1 January – 31 December 2026, 1 January – 31 December 2027.

## 6. Exemption of Taxes

In accordance with the agreements, (Article VIII of the Paris Protocol dated, 25 August 1952) goods and services under this contract are exempt from taxes, duties and similar charges.

## 7. Amendment or Cancellation

- (a) HQ SACT reserves the right to amend or delete any one or more of the terms, conditions or provisions of the IFIB prior to the date set for bid closing. A solicitation amendment or amendments shall announce such action.
- (b) HQ SACT reserves the right to cancel, at any time, this IFIB either partially or in its entirety. No legal liability on the part of HQ SACT shall be considered for recovery of costs in connection to bid preparation. All efforts undertaken by any bidder shall be done considering and accepting, that no costs shall be recovered from HQ SACT. If this IFIB is cancelled, any/all received bids shall be returned unopened, per the bidder's request.

## 8. Bidder Clarifications

- (a) Prospective Bidders should seek clarification at their earliest convenience. Any explanation regarding the meaning or interpretation of this IFIB, terms, clause, provision or specifications, shall be requested in writing, from the Contracting Officer. The Contracting Officer must receive such requests for clarification no later than 3 calendar days prior to the bid closing date.
- (b) In lieu of a bidder's conference, HQ SACT invites bidders to submit initial technical questions not later than **1 October 2022**.
- (c) Information in response to all inquiries / requests for clarification to a prospective bidder shall be furnished to all prospective bidders at the following link: <http://www.act.nato.int/contracting> as a Question and Answer addendum. All such addendums and any necessary solicitation amendments shall be incorporated into this IFIB. Oral Interpretations shall not be binding.

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# IFIB-ACT-SACT-22-117

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## 9. Bid closing date

Bids shall be received at HQ SACT, Purchasing and Contracting Office, no later than **24 October 2022, 0900 hours, Eastern Standard Time, Norfolk, Virginia, USA**. No bids shall be accepted after this time and date.

## 10. Bid Validity

Bids shall remain valid for a period of one hundred and twenty days (120) from the applicable closing date set forth within this IFIB. HQ SACT reserves the right to request an extension of validity. Bidder shall be entitled to either grant or deny this extension of validity; HQ SACT shall automatically consider a denial to extend the validity as a withdrawal of the bid.

## 11. Content of Proposal

The proposal shall consist of 2 separate single PDF documents (Technical/Price) sent via e-mail as per the instructions. No hard copy proposals are required or will be accepted. E-mailed PDF documents shall be received no later than **24 October 2022, 0900 hours, Eastern Standard Time, Norfolk, Virginia, USA**.

A table of contents for the entire proposal (Checklist provided as Enclosure #1), with:

- (a) The bidder's full name address, Point of Contacts, Telephone, Fax number and Internet site;
- (b) Compliance statement;
- (c) Provision of financial and technical volumes
- (d) Annex A
- (e) Past performance

## 12. Proposal Submission

- (a) Proposals shall be submitted in two separately e-mailed packages, one containing a single PDF document of the Technical volume and one containing a single PDF document of the Price volume. Multiple files that must be pieced together to form the technical proposal will be rejected. The e-mail subject and PDF files shall be clearly marked with the IFIB Solicitation reference number and indicate if it is the Technical or Price Volume.
- (b) Proposal packages must be received by the HQ SACT identified Contracting Officers prior to the 0900 deadline. Delays in receipt due to server processes either at the contractor's facility, HQ SACT or both do not constitute an

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## IFIB-ACT-SACT-22-117

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- acceptable delay to the deadline. Contractors should ensure there is sufficient time to transmit proposals and confirm receipt prior to the established deadline.
- (c) Price proposals shall be in U.S. Dollar currency. Contractor may request payment post award in alternate currency based on NATO published conversion rate for applicable year. Prices shall be on a Firm Fixed Price Basis and include any relevant discount schedule.
  - (d) It is the sole responsibility of the interested company to review any Q & A that may be issued in support of this solicitation, prior to bid submission at [www.act.nato.int/contracting](http://www.act.nato.int/contracting).
  - (e) No oral bids or oral modifications or telephonic bids shall be considered.
  - (f) It is the ultimate responsibility prior to submission that all proposal submissions are reviewed to ensure they meet the technical and administrative specifications and that offers meet the limitations and expressed conditions.

### 13. Late Proposals

- (a) It is solely the bidder's responsibility that every effort is made to ensure that the proposal reaches HQ SACT prior to the established closing date and time. All late bids shall be returned to the offering company unopened. Only if it can be unequivocally demonstrated that the late arrival of the bid package was the result of NATO staff negligence (mishandling) shall the bid be considered.
- (b) A delay in a commercial courier service does not constitute a delay by NATO or government channels.

### 14. Bid Withdrawal

A bidder may withdraw their bid up to the date and time specified for bid closing. Such a withdrawal must be completed in writing or facsimile, with attention to the HQ SACT Contracting Officer. The proposal shall be returned unopened, at the expense of the company.

### 15. Bid Evaluation

- (a) The evaluation of bids and determination as to the responsiveness and technical adequacy or technical compliance, of the products or services requested, shall be the responsibility of HQ SACT. Such determinations shall be consistent with the evaluation criteria specified in the IFIB. HQ SACT is not responsible for any content that is not clearly identified in any proposal package.
- (b) Due to the highly technical nature of this requirement, HQ SACT reserves the

# IFIB-ACT-SACT-22-117

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right conduct pre-award discussions with proposed key personnel to accurately assess identified technical competencies. Discussions will be limited to scope of this IFIB and the evaluation criteria identified in Annex A.

(c) Proposals shall be evaluated and awarded based on best overall value to NATO. The following factors are considerations;

- Successful administrative submission of bid packages and requested documents.
- Compliance with mandatory criteria identified on Annex A (Compliant / Non-Compliant)
- Technical factors / pricing factors rated the following: Technical / Price = 70/30.
- Acceptance of HQ SACT General and Special Terms and Conditions.
- Proposals offering a core services provider arrangement including provision of all labour categories with well-qualified key personnel will be considered with priority. Only if a single core services provider solution is unavailable will bids be considered for split award.

## **16. Proposal Clarifications**

During the entire evaluation process HQ SACT reserves the right to discuss any bid with the order to clarify what is offered and interpretation of language within the bid, to resolve in potential areas of non-compliance.

## **17. Award**

HQ SACT intends to award a firm fixed price contract(s) to the Offeror(s) whose proposal(s) represents the best overall value to NATO. Partial Awards are authorised but shall only be considered if a single provider solution cannot be achieved. HQ SACT will collect information from references provided by the Offeror in regard to its past performance. Contractors must provide authorization to contact references. HQ SACT reserves the right to negotiate minor deviations to the listed General and Special Terms and Conditions to this IFIB.

## **18. Communications**

All communication related to this IFIB, between a prospective bidder and HQ SACT shall only be through the nominated HQ SACT Contracting Officer. Designated contracting staff shall assist the HQ SACT Contracting Officer in the administrative process. There shall be no contact with other HQ SACT personnel in regards to this IFIB. Such adherence shall ensure Fair and Open Competition with equal consideration and competitive footing leverage to all interested parties.

## **19. Organizational Conflict of Interest**

Organizational conflicts of interest may occur when factors create an actual or

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## IFIB-ACT-SACT-22-117

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potential conflict of interest on an instant contract, or when the nature of the work performed on the instant contract creates an actual or potential conflict of interest on a future acquisition. In the latter case, some restrictions on future activities of the contractor may result.

Contractors must implement a program to monitor, detect, and mitigate/remediate organizational conflicts of interest. While Contracting Officers retain authority to approve mitigation or remediation measures once organizational conflicts of interest are identified, the primary burden of detecting, identifying and disclosing organizational conflicts of interest to the contracting officer and proposing suitable mitigation or remediation measures falls on the contractor.

The two underlying principles regarding organizational conflicts of interest are: Preventing the existence of conflicting roles that might bias a contractor's judgment; and Preventing unfair competitive advantage.

An unfair competitive advantage exists where a contractor competing for award of any Federal contract possesses:

Proprietary information that was obtained from a NATO official, staff member, or NATO contractor without proper authorization; or

Information that is relevant to the contract but is not available to all competitors, where such information would assist that contractor in obtaining the contract. Contracting officers and potential bidders shall analyze planned acquisitions in order to:

Identify and evaluate potential organizational conflicts of interest as early in the acquisition process as possible; and

Avoid, neutralize, or mitigate significant potential conflicts before contract award, where possible, or post award when the organizational conflict of interest is not revealed prior to award.

The contracting officer shall award the contract to the apparent successful offeror unless a conflict of interest is determined to exist that cannot be avoided or mitigated. Before determining to withhold award based on conflict of interest considerations, the contracting officer shall notify the contractor, provide the reasons therefor, and allow the contractor a reasonable opportunity to respond. If the contracting officer finds that it is in the best interest of NATO to award the contract notwithstanding a conflict of interest, the Contracting Officer will issue a waiver and disclose the award and the existence of the organizational conflict of interest to the Financial Controller. The waiver request and decision shall be included in the contract file.

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## IFIB-ACT-SACT-22-117

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### Obligations of the Parties.

When a Contractor or Prospective Contractor becomes aware of the existence or potential for an organizational conflict of interest, the Contractor is obligated to disclose the existence, nature, and supporting evidence of the conflict. Contractors or Prospective Contractors will be deemed to be aware of the existence or potential for an organizational conflict of interest when the Contractor or Prospective Contractor actually knows or reasonably should know of the existence of the actual or potential organizational conflict of interest.

If the Contracting Officer becomes reasonably aware that the award of a contract will restrict the contractor's eligibility for future contract work, the Contracting Officer will disclose this fact in writing to the Contractor prior to the award, where practicable, and will permit the Contractor or prospective Contractor 7 days to make an election regarding award, discontinuing performance, or submitting an OCI mitigation plan for the Contracting Officer's approval. The sufficiency of the OCI mitigation plan is in the Contracting Officer's sole discretion.

### **20. Point of Contact Information For Submission:**

[techproposal@act.nato.int](mailto:techproposal@act.nato.int) – Technical Proposal Submission

[priceproposal@act.nato.int](mailto:priceproposal@act.nato.int) – Price Proposal Submission

### **21. Point of Contact is:**

LCDR Brandon Stewart, ACT Contracting Officer 757-747-3977;

[Brandon.Stewart@act.nato.int](mailto:Brandon.Stewart@act.nato.int)

Mrs. Kellie Hagen, ACT Contracting Officer 757-747-4180;

[Kellie.Hagen@act.nato.int](mailto:Kellie.Hagen@act.nato.int)

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**Enclosure 1 (Proposal Content / Checklist)**

**PROPOSAL CONTENT / CHECKLIST**

Table of Contents

- Bidder's name, address, POC, Contact numbers, email address.
- Compliance Statement.
- Past Performance (including References).
- List of Key Personnel.
- Technical Proposal.
- Price Proposal.

# IFIB-ACT-SACT-22-117

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ENCLOSURE 2

## COMPLIANCE STATEMENT TO SEALED BID IFIB-ACT-SACT-22-117

It is hereby stated that our company has read and understands all documentation issued as part of IFIB-ACT-SACT-22-117. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of IFIB-ACT-SACT-22-117 and the intended contract with the following exception(s); such exemptions are considered non-substantial to the HQ SACT solicitation provisions issued.

| <u>Clause</u> | <u>Description of Minor Deviation.</u> |
|---------------|--|
| -----         | -----                                  |
| -----         | -----                                  |
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| -----         | -----                                  |
| -----         | -----                                  |

If applicable, add another

page) Company: \_\_\_\_\_

Signature: \_\_\_\_\_

Name & Title: \_\_\_\_\_

Date: \_\_\_\_\_

Company Bid Reference: \_\_\_\_\_

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Bidder's proposal must be based on full compliance with the terms, conditions and requirements of the IFIB and all future clarifications and/or amendments. The bidder may offer variations in specific implementation and operational details provided that the functional and performance requirements are fully satisfied. In

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## IFIB-ACT-SACT-22-117

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case of conflict between the compliance statement and the detailed evidence or explanation furnished, the detailed evidence/comments shall take precedence/priority for the actual determination of compliance. Minor or non-substantial deviations may be accepted. Substantial changes shall be considered non-responsive.

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**Enclosure 3**

PAST PERFORMANCE INFORMATION FORM

- (a) Contracting Agency:
- (b) Contract No:
- (c) Type of Contract (Firm Fixed Price, IDIQ, Requirements):
- (d) Title of Contract:
- (e) Description of Work Performance and Relevance to Current Acquisition  
(Type of facility, capacity, estimated patronage, summary of staff used):
- (f) Contract Dollar Amount:
- (g) Period of Performance:
- (h) Name, Address, Fax and Telephone No. of Reference:
- (i) Indicate Whether Reference Acted as Prime or Sub-contractor:
- (j) Comments regarding compliance with contract terms and conditions:
- (k) Complete Contact Information for client:
- (l) Permission to contact client for reference:

Yes/ No Name/Signature of Authorized

Company Official

**IFIB-ACT-SACT-22-117**

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**Enclosure 4**

***IFIB-ACT-SACT-22-117 SEALED BID PRICE PROPOSAL***

**COMPANY NAME:**     ***ABC, Inc***

**ADDRESS:**           ***Street,***

CITY, POST CODE

**TO:** Chairman of Supreme Allied  
Commander Transformation, (HQ  
SACT)Contracts Award Committee.  
ATTN: LCDR Brandon Stewart  
7857 Blandy Road, Suite 100  
Norfolk, VA 23551

Please verify and acknowledge propriety of above, by duly  
completing signatures below. Authorizing Company Official:

Printed \_\_\_\_\_ Name: \_\_\_\_\_  
Position: \_\_\_\_\_ Title: \_\_\_\_\_

Authorizing Company (Signature): \_\_\_\_\_, Date: \_\_\_\_\_.

***Company name*** Witness Official:

Printed \_\_\_\_\_ Name: \_\_\_\_\_  
Position: \_\_\_\_\_ Title: \_\_\_\_\_

Witness Signature: \_\_\_\_\_

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# IFIB-ACT-SACT-22-117

## Enclosure 5 (Mandatory Price Proposal Format)

### SEALED BID PRICE PROPOSAL

Please find on behalf of **(Company Name)** to provide HQ SACT with services (collectively referred as “ITEMS”), subject to the provisions, terms and conditions stated in IFIB ACT-SACT-22-117 and the **(Company Name)** Technical proposal”, submitted in accordance with solicitation provisions.

| <b>Service Area</b>                | Base Period<br>01Jan2023–31Dec2023   | Option Period 1<br>01Jan2024 –31Dec2024 | Option Period 2<br>01Jan2025 –31Dec2025 |
|------------------------------------|--------------------------------------|---|---|
| <b>HQ SACT</b>                     | <b>Hourly Rate:<br/>(1800 hours)</b> | <b>Hourly Rate:<br/>(1800 hours)</b>    | <b>Hourly Rate:<br/>(1800 hours)</b>    |
| Protocol Specialist                | \$                                   | \$                                      | \$                                      |
| Protocol Resource Staff Specialist | \$                                   | \$                                      | \$                                      |

| <b>Service Area</b>                | Option Period 3<br>01Jan2026 –31Dec2026 | Option Period 4<br>01Jan2027–31Dec2027 |
|------------------------------------|---|--|
| <b>HQ SACT</b>                     | <b>Hourly Rate:<br/>(1800 hours)</b>    | <b>Hourly Rate:<br/>(1800 hours)</b>   |
| Protocol Specialist                | \$                                      | \$                                     |
| Protocol Resource Staff Specialist | \$                                      | \$                                     |

Total Contract Value (Base + Option Periods) \$ \_\_\_\_\_

Please verify and acknowledge propriety of above, by duly completing signatures below.

Authorizing Company Official:

Printed Name: \_\_\_\_\_

Position: \_\_\_\_\_

Title: \_\_\_\_\_

Authorizing Company (Signature): \_\_\_\_\_, Date: \_\_\_\_\_.

**Company name Witness Official:** This enclosure is designed to assist the respective company provide HQ SACT with all necessary documents/information required. For clarification, please refer to Bidding instructions in part 1 of subject solicitation.

## IFIB-ACT-SACT-22-117

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Printed Name: \_\_\_\_\_

Position: \_\_\_\_\_

Title: \_\_\_\_\_

Witness Signature: -----, Date -----

**NOTE: Proposed rates must be fully “loaded” [G&A, O/H etc.], however they must not include per diem (meals & lodging) and travel. Travel (and related expenses) will not be covered under this contract, but handled separately in accordance with the ACT Financial Manual.**

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## Enclosure 6 (Statement of Work)

### STATEMENT OF WORK

#### 1. Introduction

Allied Command Transformation, NATO's Warfare Development Command, leads and drives the continuous military adaptation and transformation of the Alliance to shape and contest the environment and to keep the edge over adversaries and competitors, now and in the future.

To prepare the ground for ACT's vital work, support its effective delivery and develop the pride in significant contributions to NATO, ACT utilizes Conferences, Seminars, High-level Visits and Events to communicate the three prioritized, transformational lines of effort; Multi-Domain Operations; Wargaming and Experimentation and Adapting the HQ to global challenges.

The Protocol Branch manages all Protocol functions for HQ SACT. Plans, coordinates and executes all Protocol aspects of VIP visits to HQ SACT and HQ SACT sponsored VIP visits. Plans, coordinates and executes all NATO official ceremonies within and outside the Headquarters. Coordinates logistical and protocol requirements in cooperation with other HQ SACT Branches to support conferences, seminars, and meetings within and outside NATO boundaries.

Develops and maintains HQ SACT relationship with the local community and the listing of all VIPs. Supports the planning and coordination of the Protocol Course in NSO. Provides direct support for planning and execution for DV-Days where SACT has direct involvement.

#### 2. Background

HQ SACT is seeking contract support for two Protocol Staff positions. A Protocol Specialist (to perform standard protocol functions, focal liaison point with Local Authorities and provide software planning tools expertise, in particular for VIP data base management) and a Protocol Resource Staff Specialist (to act as a liaison with industry and the Budget and Finance Branch, in addition to performing standard protocol functions) will be required.

##### 2.1 Scope

**2.1.a Protocol Specialist.** The Contractor shall perform under the direction of the COTR the following duties that include, but are not limited to:

- Acting as focal liaison point with Local Authorities.
- Developing and maintaining the VIP database.
- Planning, preparing, and executing all conferences, exercises, seminars, ceremonies, and VIP visits to HQ SACT.
- Personally meeting and escorting visitors and dignitaries (as required) on their arrival and accompanying them through various phases of their visits.

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- Preparing and executing an effective and comprehensive DV programme. Responsible for creating schedules of events, including briefing arrangements, luncheons, ship and base tours, accommodations, transportation, and all details.
- Providing advice and training on matters relating to the customs and regulations governing diplomatic formality, precedence, and etiquette.
- Supporting the execution of numerous National Day Flag Raising Ceremonies, including coordination of Marine Corps and Band support, guests of honour, gifts, and various other details.
- Maintaining alphabetical biography books of NATO officials and all DVs.
- Serve as SME on all matters regarding protocol planning software applications inside the Protocol Branch and for events in support of HQ SACT mission requirements.

### **2.1.b Protocol Resource Staff Specialist**

- Planning, preparing, and executing all conferences, exercises, seminars, ceremonies, and VIP visits to HQ SACT.
- Personally meeting and escorting visitors and dignitaries (as required) on their arrival and accompanying them through various phases of their visits.
- Preparing and executing an effective and comprehensive DV programme. Responsible for creating schedules of events, including briefing arrangements, luncheons, ship and base tours, accommodations, transportation, and all details.
- Providing advice and training on matters relating to the customs and regulations governing diplomatic formality, precedence, and etiquette.
- Supporting the execution of numerous National Day Flag Raising Ceremonies, including coordination of Marine Corps and Band support, guests of honour, gifts, and various other details.
- Act as liaison between Protocol, industry, and BUDFIN on all matters regarding contracts and payments for events in support of HQ SACT mission requirements.

### **3. Type of Contract and Period of Performance**

This is a Commercial Personnel Services Contract in accordance with the General and Special Terms and Conditions; as such it is a Level of Effort contract with a maximum limit or fraction thereof as set forth in this Statement of Work. All

employer responsibilities for the Contractor Personnel performing under this Contract shall lie with the Contractor.

### **3.1 Period of Performance.**

The period of performance for the Base Year is 1 January 2023 through 31 December 2023, with the possibility of 4 additional option years.

### **3.2 Level of Effort.**

One work-year (1800 hours) for the base year and each option year. Work-hours are further defined in part 1A of the special terms and conditions, but for purposes of this contract see paragraphs 6.1c and 6.2c regarding deviations from standard work days/hours.

### **3.3 Surge Capability.**

Surge capability requirement is included to have a contract vehicle in place should emerging circumstances require a quick and temporary increase in contractor personnel or contract hours. The Contractor Company shall be prepared to provide support for additional services in the same labour categories identified above as approved by the COTR, and Contracting Officer. Surge capability shall not exceed 300 hours annually per labour category. Surge hours must be billed at the same hourly base rate.

## **4. Place of Performance**

HQ SACT shall serve as the habitual residence for performance under this contract. The Contractor is expected to perform the majority of the required work at HQ SACT in Norfolk, Virginia or in alternate locations as per travel requirements at locations specified by the Contracting Officer's Technical Representative (COTR). It is anticipated that there will be approximately 2 trips per year, for approximately 10 days in duration per trip. NATO travel regulations and reimbursements are covered in Chapter 10 of the approved version of the **Allied Command Transformation (ACT) Financial Manual, and are available at: <http://www.act.nato.int/forms-contractor-travel>**. The COTR and Contracting Officer must approve trips and per diem in advance of all travel.

## **5. Partial Bidding and Teaming Arrangements**

Partial bidding is allowed. All submissions must clearly state which position candidate(s) is (are) being proposed to fill. A candidate will not be considered for multiple positions in the same proposal, i.e. John Smith can't be submitted as a candidate to fill the requirements of both the Protocol Specialist and the Protocol Resource Staff Specialist.

## **6. Protocol Specialist and the Protocol Resource Staff Specialist Professional Qualifications**

**6.1** The **Protocol Specialist** shall have the following qualifications as a minimum:

### **6.1.a Experience**

- Experience in an international military or governmental agency protocol environment.
- Experience on major joint or international military staff that includes planning of high-level events such as: Conferences, Exercises,

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Seminars, Ceremonies and high level visits (Preferably within NATO).

- Familiarity with NATO Protocol standards.
- Excellent organizational and communication skills.
- Experience in managing complex schedules.
- Experience in Management of electronic registration using Cvent.
- Experience in Management of protocol software i.e. SocialTables.
- Experience in Management of electronic seating plan drawing tools i.e. Autocad.
- Experience on Database managing tools (Microsoft Access).

### **6.1.b Education**

- College degree or similar national academic qualification is required. 5 years of equivalent military or professional experience in a protocol or similar environment can be used as a substitute(s) for a university degree.
- External of NATO Protocol Course Certificate desired.

### **6.1.c Special Requirements**

- Ability to work independently, proactively, and resourcefully on several tasks at one time with minimum supervision.
- Present a mature, professional appearance; interact well with others in International environment.
- Advanced knowledge of word processing, spread sheet, project management, and graphics software.
- Protocol Officer Course or equivalent formal training.
- Portfolio, Programme and Project management (P3) course is desirable.
- Previous experience working with Flag/General Officers or equivalent is desirable.
- Foreign Language proficiency, particularly French is desirable.
- Fluent in English (written and Oral).
- Ability to work outside of normal working hours to include weekends and evenings, often on short notice.
- Will attend the Protocol Course at the NATO School of Oberammergau in the first six months. Tuition paid by NATO. Travel paid for company via NATO Contractor Travel Request form, then reimbursed.

### **6.1.d Security**

- Valid NATO SECRET-level security clearance or active SECRET

security clearance issued by a national authority.

**6.2** The Protocol **Resource Staff Specialist** shall have the following qualifications as a minimum:

**6.2.a Experience**

- Experience in an international military or governmental agency protocol environment.
- Demonstrated experience on major joint or international military staff that includes planning of high-level events such as: Conferences, Exercises, Seminars, Ceremonies and high level visits (Preferably within NATO).
- Familiarity with NATO Protocol standards.
- Excellent organizational and communication skills.
- Experience in managing complex schedules.
- Previous experience on major joint or international military staff.
- Excellent organizational and communication skills.
- Working Knowledge of Centralized NATO Automated Financial System (CNAFS) or other comparable Oracle system, such as the Standard Procurement System (SPS) in the US.

**6.2.b Education**

- College degree or similar national academic qualification is required. 5 years of equivalent military or professional experience in a protocol or similar environment can be used as a substitute(s) for a university degree.
- External of NATO Protocol Course Certificate desired.

**6.2.c Special Requirements**

- Ability to work independently, proactively, and resourcefully on several tasks at one time with minimum supervision.
- Present a mature, professional appearance; interact well with others in International environment.
- Working knowledge of word-processing, spreadsheet, and graphics software.
- Advanced knowledge of database software.
- Previous experience working with Flag/General Officers or equivalent is desirable.
- Foreign Language proficiency, particularly French is desirable.
- Fluent in English (written and oral).
- Ability to work outside of normal working hours to include weekends and evenings, often on short notice.

- Will attend the Protocol Course at the NATO School of Oberammergau in the first six months. Tuition paid by NATO. Travel paid for company via NATO Contractor Travel Request form, then reimbursed.

#### **6.1.d Security**

- Valid NATO SECRET-level security clearance or active SECRET security clearance issued by a national authority.

### **7. Performance**

Requirements and Reporting: The Contracting Officer shall assign a Contracting Officer's Technical Representative (COTR). The COTR shall provide direction, guidance, and support information as needed for all technical and content areas of the SOW.

The COTR shall:

- Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW.
- Review (and approve) all Contractor duties for completeness and accuracy.
- Review the Contractor's work at a minimum of monthly, or more often if needed.

The COTR's written approval of work reported and deliverables submitted is mandatory for Contractor invoices to be successfully processed. The COTR shall receive a letter of appointment from the Contracting Officer that describes in detail his roles and responsibilities to which he shall sign formal acceptance.

### **8. Contract Reporting**

The Contractor shall submit a monthly report to the COTR and the Contracting Officer, detailing progress on the SOW for the reporting period. The report shall include, but not be limited to, the following information:

- Summary of work for the reporting period.
- Contract hours expended showing a comparison with budgeted hours.
- Current or anticipated problems/deficiencies and recommended solutions.

The COTR may amend the reporting requirements to receive alternate/additional data and information on a more frequent or less frequent basis, and to request other reports that detail designated aspects of the work or methods to remedy problems and deficiencies. The Contracting Officer shall receive a minimum of a monthly report, regardless of COTR changes. However, note that the report is NOT a deliverable subject to acceptance. The Contractor is expected to work closely with other team members, SMEs, and designated HQ SACT personnel. Consequently, the Contractor is expected to promptly address all identified problems and deficiencies, providing the COTR with written information on how the problem shall be corrected and any impact to on-going work.

### **9. Proof of Past Performance**

The Contractor is to provide a reference letter to show that it has successfully

completed work that is similar to the requirements outlined in this SOW. The citations shall include the following information at a minimum:

- Summary of work performed that is similar to or directly relates to this SOW in size scope and value.
- Status of work (i.e., on-going, complete)
- Date of work performance
- Summary of staff used (by number and position)
- Name of client
- Complete contact information for client
- Permission to contact client for reference

## **10. Contractor Technical Evaluation**

Each responding Contractor Company shall be judged on technical information provided in response to this SOW to determine Technical Compliance. It is the responsibility of the contractor company to clearly demonstrate both the company and nominated individual unequivocally meet full compliance. Proposals shall be assessed and evaluated in accordance to Annex A to this solicitation. All applicable resumes are mandatory to enable a professional evaluation.

## **11. Rights in Technical Data Computer Software**

N/A

## **12. Releasability**

NATO nations have regulations and laws applying to the export of defence related goods by domestic commercial sources to outside entities (such as NATO). The products or services under this SOW will need to be releasable to entities identified under the statements made with regard to both the Intellectual Property Rights and any applicable export control laws,

## **13. Furnished Materials**

For on-site work, HQ SACT shall provide all necessary working space; office furniture; telephones; computers, software, peripherals, and support equipment; office supplies; classified/unclassified storage space; and access to unclassified and classified NATO wide area networks (WAN) (granted on an as needed basis to individuals with appropriate security clearances) and the Internet for work to be performed at all NATO sites. Contractor personnel are not authorized to make any permanent/semi-permanent physical modifications to the HQ SACT facilities. Contractors shall have full access the Microsoft Office Suite, as well as Microsoft Project.

## **14. Security**

### **14.1 Personnel Clearances**

Contractor personnel shall be responsible for obtaining all needed security clearances prior to starting work at HQ SACT. All Contractors shall have a minimum of a SECRET security clearance (as issued by NATO or the respective national Ministry/Department of Defence

NATO UNCLASSIFIED

(Mod/DoD). No clearance or waiver to this requirement shall be granted, and no Contractor shall be assigned without having the needed clearance in place. If the Contractor Company cannot assign personnel with the required SECRET security clearance on the start date, the company shall be liable for bid non-compliance or immediate contract termination. The Contractor Company must provide advance written proof of the ability to assign fully cleared personnel prior to contract award/start. The Contractor Company is fully responsible for arranging all work visas.

## **14.2 Security Conditions**

The Contractors must adhere to current security conditions at HQ SACT and other work sites. Contractor personnel shall comply with all local host nation, NATO security provisions and other policies and procedures, as required. The possible security classification of the deliverables under this contract may range from unclassified through NATO SECRET.

## **14.3 Building, Installation Access**

The Contractors are fully responsible for ensuring that they have all needed vehicle passes and decals, and individual access badges and documents for appropriate access to the HQ SACT facility. The Contractor Company shall submit requests for site access to HQ SACT, Attention Security Office, 7857 Blandy Road, Suite 100, Norfolk, VA 23551-2490.

## **14.4 Electronic Devices**

All Contractor personnel shall abide by the security restrictions regarding carrying and using electronic devices (e.g., laptops, cell phones) in the HQ SACT. The Contractor shall be responsible for satisfying the necessary clearance from the HQ SACT Security Office before bringing any such device into the HQ SACT work environment.

## **15. Export Control**

NATO nations have regulations and laws applying to the export of defence related goods/ services originating from domestic commercial sources to foreign entities. Usually under those laws and regulations, NATO is considered a foreign entity. The following requirements of this statement of work are provided in order to allow the bidder/contractor the opportunity to assess the applicability of their pertinent national laws and regulations and take action, as required, (Reference, Part One A, Special Terms & Conditions). The services shall be rendered at a maximum in the following locations: NATO member Nations and future NATO member Nations and NATO Partnership for Peace, Med-dialogue, Istanbul Cooperative Initiative (ICI) and contact countries. Persons exposed to the services performed under this SOW shall be nationals of NATO member Nations working for NATO Nation Governments.



# IFIB-ACT-SACT-22-117

## Annex A (Technical proposal Assessment) to Enclosure 6 (Statement of Work)

### TECHNICAL PROPOSAL ASSESSMENT

Contractor’s technical proposals will be assessed on the qualifications of the individuals proposed to perform the work. Individuals’ résumés will be measured against each of the criteria specified below in order to ascertain whether the individuals have adequately demonstrated that they possess the required qualifications. HQ SACT reserves the right to conduct interview of nominated candidate(s). Examples of how detailed knowledge levels were attained are expected. Ultimately Contractor companies shall clearly demonstrate by providing unequivocal reference to where candidates meet the criteria set forth in this solicitation.

The bids will be evaluated against the following levels:

- Compliant (C) = Meets the criterion
- Non-compliant = Proposal will be deemed non-

| ITEM  | COMPLIANT | NON-COMPLIANT |
|---|-----------|---------------|
| Reference letter to show that it has successfully completed work that is similar to or directly traceable to the requirements outlined in this SOW. |           |               |
| NATO or national SECRET Personal Security Clearance   |           |               |

| #                          | CRITERIA   | RANGE   | SCORE<br>(100 PTS Max.) |
|----------------------------|--|---|-------------------------|
| <b>PROTOCOL SPECIALIST</b> |  |   |                         |
| <b>Experience</b>          |  |   |                         |
| 1                          | Experience in an international military or governmental agency protocol environment. | <3 years: 2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br><br>No Exp: 0 |                         |

## IFIB-ACT-SACT-22-117

|                  |   |   |  |
|------------------|---|---|--|
| 2                | Experience on major joint or international military staff that includes planning of high-level events such as: Conferences, Exercises, Seminars, Ceremonies and High Level Visits. (Preferably NATO). | <3 years: 2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br><br>No Exp: 0 |  |
| 3                | Familiarity with NATO Protocol standards.   | 1: No familiarity<br>5: Familiarity   |  |
| 4                | Excellent professionalism, organization, and communication skills.  | 0: Not Demonstrated<br>5: Demonstrated  |  |
| 5                | Experience in managing complex schedules.   | <3 years:2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br>No Exp: 0      |  |
| 6                | Experience in Management of electronic registration using Cvent or another equivalent Protocol main tool.   | <3 years: 2<br>3-5 years: 3<br>6-7 years: 4<br>8+ years: 5<br>No Exp: 0       |  |
| 7                | Experience in management of Protocol seating/check-in software i.e. Social Tables, OnArrival.   | <3 years: 2<br>3-5 years: 3<br>6-7 years: 4<br>8+ years: 5<br>No Exp: 0       |  |
| 8                | Experience in Management of electronic drawing tools i.e. Autocad.  | <3 years: 2<br>3-5 years: 3<br>6-7 years: 4<br>8+ years: 5<br>No Exp: 0       |  |
| 9                | Experience on Database managing tools (Microsoft Access).   | <3 years: 2<br>3-5 years: 3<br>6-7 years: 4<br>8+ years: 5<br>No Exp: 0       |  |
| <b>Education</b> |   |   |  |
| 1                | College degree or similar national academic qualification.  | 0: Not Demonstrated<br>5: Demonstrated  |  |

## IFIB-ACT-SACT-22-117

|   |  |  |              |
|---|--|--|--------------|
| 2   | University degree or 5 years of equivalent military professional experience in a protocol or similar environment.  | 1: Not Demonstrated<br>5: Demonstrated                       |              |
| 3   | External NATO Protocol Course Certificate.   | 1: Not Provided<br>5: Provided                               |              |
| <b>Special Requirements</b>               |  |  |              |
| 1   | Ability to work independently, proactively, and resourcefully on several tasks at one time with minimum supervision.   | 0: Not Demonstrated<br>5: Demonstrated                       |              |
| 2   | Present a mature, professional appearance; interact well with others in International environment. (Based on submitted video from provided ceremony script example(English)) | 0: Not Demonstrated<br>5: Demonstrated                       |              |
| 3   | Project management training is desirable   | 1: Not Demonstrated<br>5: Demonstrated                       |              |
| 4   | Previous experience working with Flag/General Officers or equivalent is desirable.   | 1: Not Demonstrated<br>5: Demonstrated                       |              |
| 5   | Foreign Language proficiency is desirable. (French)  | 1: Not Demonstrated<br>5: Demonstrated                       |              |
| 6   | Fluent in English (written and oral; based off CV and submitted video from Criteria # 2)   | 0: Not Demonstrated<br>5: Demonstrated                       |              |
| 7   | Ability to work outside of normal working hours to include weekends and evenings, often on short notice.   | 0: Not Acknowledged<br><del>5</del> <b>10</b> : Acknowledged |              |
| #   | <b>CRITERIA</b>  | <b>RANGE</b>   | <b>SCORE</b> |
| <b>PROTOCOL RESOURCE STAFF SPECIALIST</b> |  |  |              |

## IFIB-ACT-SACT-22-117

| <b>Experience</b> |  |   |  |
|-------------------|--|---|--|
| 1                 | Experience in an international military or governmental agency protocol environment.   | <3 years: 2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br>No Exp: 0 |  |
| 2                 | Experience on major joint or international military staff that includes planning of high level events such as: Conferences, Exercises, Seminars, Ceremonies and High Level Visits. (Preferably NATO) | <3 years: 2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br>No Exp: 0 |  |
| 3                 | Experience in administrative and office management experience.   | <3 years: 2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br>No Exp: 0 |  |
| 4                 | Excellent professionalism, organization and communication skills.  | 0: Not Demonstrated<br>5: Demonstrated                                    |  |
| 5                 | Experience in managing complex schedules.  | <3 years: 2<br>3-5 years: 3<br>6-10 years: 4<br>11+ years: 5<br>No Exp: 0 |  |
| 6                 | Working Knowledge of Centralized NATO Automated Financial System (CNAFS) or other comparable system, such as the Standard Procurement System (SPS) in the US.  | 1: Not Demonstrated<br>10: Demonstrated                                   |  |
| 7                 | Experience in Management of electronic registration using Cvent or another equivalent Protocol main tool.  | <3 years: 2<br>3-5 years: 3<br>6-7 years: 4<br>8+ years: 5<br>No Exp: 0   |  |
| 8                 | Experience in management of Protocol seating/check-in software i.e. Social Tables, OnArrival.  | <3 years: 2<br>3-5 years: 3<br>6-7 years: 4<br>8+ years: 5<br>No Exp: 0   |  |
| <b>Education</b>  |  |   |  |

## IFIB-ACT-SACT-22-117

|                             |  |  |  |
|-----------------------------|--|--|--|
| 1                           | College degree or similar national academic qualification.   | 0: Not Demonstrated<br>5: Demonstrated               |  |
| 2                           | University degree or 5 years of equivalent military professional experience in a protocol or similar environment.  | 1: Not Demonstrated<br>5: Demonstrated               |  |
| 3                           | External NATO Protocol Course Certificate.   | 1: Not Provided<br>5: Provided                       |  |
| <b>Special Requirements</b> |  |  |  |
| 1                           | Ability to work independently, proactively, and resourcefully on several tasks at one time with minimum supervision.   | 0: Not Demonstrated<br>5: Demonstrated               |  |
| 2                           | Present a mature, professional appearance; interact well with others in International environment. (Based on submitted video from provided ceremony script example(English)) | 0: Not Demonstrated<br>5: Demonstrated               |  |
| 3                           | Project management training is desirable   | 1: Not Demonstrated<br>5: Demonstrated               |  |
| 4                           | Previous experience working with Flag/General Officers or equivalent is desirable.   | 1: Not Demonstrated<br>5: Demonstrated               |  |
| 5                           | Foreign Language proficiency is desirable. (French)  | 1: Not Demonstrated<br>5: Demonstrated               |  |
| 6                           | Fluent in English (written and oral; based off CV and submitted video from Criteria # 2)   | 1: Not Demonstrated<br>5: Demonstrated               |  |
| 7                           | Ability to work outside of normal working hours to include weekends and evenings, often on short notice.   | 0: Not Acknowledged<br><del>4</del> 15: Acknowledged |  |

## **IFIB-ACT-SACT-22-117**

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\*Bidders shall provide self-evaluation of grading matrix within their technical proposal to include reference to page number/line number/pin cite from within their technical proposal that proves requirement is met. Lack of self-evaluated matrix could lead to a disqualification of bid submittal. Discretion left to CAC board members.

\*\*Grade of zero will result in a non-compliant and disqualification from the bidding process. Discretion left to CAC board members.

**Terms and Conditions**

**HQ SACT General Terms & Conditions dated 01/26/2022 and HQ SACT Special Terms and Conditions dated 10/08 apply to this contract and can be reviewed at [www.act.nato.int/contracting](http://www.act.nato.int/contracting) under *Contractor Information*.**