

IFIB-ACT-SACT-22-127



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

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Amendment #1

(All changes in red text)

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.

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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,

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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.

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 technical questions not later than 5 November 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.

9. Bid closing date

Bids shall be received at HQ SACT, Purchasing and Contracting Office, no later than 30 November 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 **30 November 2022, 1500 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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- 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.
 - (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. 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)

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.

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

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 authorized. ~~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 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.

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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.

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.

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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 – Technical Proposal Submission

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

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

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ENCLOSURE 2

COMPLIANCE STATEMENT TO SEALED BID IFIB-ACT-SACT-22-127

It is hereby stated that our company has read and understands all documentation issued as part of IFIB-ACT-SACT-22-127. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of IFIB-ACT-SACT-22-127 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: _____

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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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.

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

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Enclosure 4

IFIB-ACT-SACT-22-127 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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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-22-127 and the **(Company Name)** Technical proposal”, submitted in accordance with solicitation provisions.

Service Area	Base Period 31Jan2023–31Dec2023	Option Period 1 01Jan2024 –31Dec2024	Option Period 2 01Jan2025 –31Dec2025
HQ SACT	Rate/Year:	Rate/Year:	Rate/Year:
Audience #1 (ACT General Staff: Transformation and Innovation Concept)	o 180 course seats \$/Student * 180 Students = *Price in fixed rate terms of 180 students with the same fixed rate surge up to 240 students.	o 120 course seats \$/Student * 120 Students = *No surge.	o 120 course seats \$/Student * 120 Students = *No surge.
Audience 2: ACT Staff Leadership; training in innovation and digital leadership	o 90 course seats \$/Student * 90 Students = *Price in fixed rate terms of 90 students with the same fixed rate surge up to 120 students.	o 60 course seats \$/Student * 60 Students = *No surge.	o 60 course seats \$/Student * 60 Students = *No surge.
Audience 3: ACT Staff in Digital Transformation: Innovation in Digital Business Transformation.	o 180 course seats \$/Student * 180 Students = *Price in fixed rate terms of 180 students with the same fixed rate surge up to 240 students.	o 120 course seats \$/Student * 120 Students = *No surge.	o 120 course seats \$/Student * 120 Students = *No surge.
Audience 4: ACT Technical Programme Management Staff. Prioritization of Innovations.	o 90 course seats \$/Student * 90 Students = *Price in fixed rate terms of 90 students with the same fixed rate surge up to 108 students.	o 72 course seats \$/Student * 72 Students = *No surge.	o 72 course seats \$/Student * 72 Students = *No surge.

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Senior Leadership 1: HQ ACT and wider SACT FOGOs mentoring in digital business change.	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>
Senior Leadership 2: HQ ACT and wider SACT FOGOs mentoring in digital business change.	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>

Service Area	Option Period 3 01Jan2026 –31Dec2026	Option Period 4 01Jan2027 –31Dec2027
HQ SACT	Rate/Year:	Rate/Year:
Audience #1 (ACT General Staff: Transformation and Innovation Concept)	<ul style="list-style-type: none"> o 120 course seats \$/Student * 120 Students = <p>*No surge.</p>	<ul style="list-style-type: none"> o 120 course seats \$/Student * 120 Students = <p>*No surge.</p>

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Audience 2: ACT Staff Leadership; training in innovation and digital leadership	<ul style="list-style-type: none"> o 60 course seats \$/Student * 60 Students = *No surge. 	<ul style="list-style-type: none"> o 60 course seats \$/Student * 60 Students = *No surge.
Audience 3: ACT Staff in Digital Transformation: Innovation in Digital Business Transformation.	<ul style="list-style-type: none"> o 120 course seats \$/Student * 120 Students = *No surge. 	<ul style="list-style-type: none"> o 120 course seats \$/Student * 120 Students = *No surge.
Audience 4: ACT Technical Programme Management Staff. Prioritization of Innovations.	<ul style="list-style-type: none"> o 72 course seats \$/Student * 72 Students = *No surge. 	<ul style="list-style-type: none"> o 72 course seats \$/Student * 72 Students = *No surge.
Senior Leadership 1: HQ ACT and wider SACT FOGOs mentoring in digital business change.	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students. 	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.

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Senior Leadership 2: HQ ACT and wider SACT FOGOs mentoring in digital business change.	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>	<ul style="list-style-type: none"> o 20 hours of face-to-face contact time. \$/Student * 5 Students = o 10 hours of VTC available mentoring time. \$/Student * 5 Students = o One to one mentoring up to 60 hours p/a. \$/Student * 5 Students = <p>Total: \$ *Price in fixed rate terms of 5 students with the same fixed rate surge up to 14 students.</p>
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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:

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

**Innovation and Digital Transformation FOGO Mentoring
and Staff Individual Training**

1. Introduction: ACT Specialist Staff Training

- a. **Background:** All new military and civilian personnel join NATO HQ ACT and undergo training to enable them to function within their allocated roles. The training comprises an introduction to NATO structures, environment and culture and is supplied at ACT and delivered by a Mobile Training team from NATO School Oberammergau.
- b. **Issue:** Newcomer Orientation Training (NCOT) does not include follow-on training to prepare staff in change management and transformation. The issue applies equally to staff and leadership where there is a shortfall in training and education in current concepts relating to innovation, transformation and change in digital environments as well as in support of new warfare development concepts.
- c. **Policy:** NATO training policy (MC-0458) states that where there is an “over and above” requirement that the Nations cannot provide, NATO shall provide a training opportunity to upskill. This shortfall matches the policy description of a NATO training requirement as NATO owns its own transformation and innovation programmes; whereas, Nations and Partners do not have a universal standard that is applied.
- d. **Training Gap:** There are 3 training gaps to be addressed:
 - i. **Executive Leadership.** The Command Group is responsible for setting the direction and guidance for NATO ACT tasks; the principles of this direction should be underpinned by a common set of skills shared by the staff carrying out the work.
 - ii. **Specialist Staff Training.** Those involved in technical programmes and projects, e.g. NATO Digital Transformation and NATO Warfighting capstone Concept develop should receive the training to carry out the work. This comprises innovation and transformation activities.
 - iii. **Innovation Specialists.** The introduction of new ideas and innovation require standardisation and prioritisation specialist training, against industry recognised technical standards.

2. Scope of work

- a. The Supplier shall provide training and consultation services to ACT staff to the SoW stated in Paragraph 3. This is in accordance within the parameters of NATO Commercial processes. The supplier must achieve through the outcomes of training:
 - i. Deliver training against the ISO56002 – Innovation Management Practice, Quality Standard.
 - ii. Accredited training to the ISO23053:2022 – Automation, Digital and AI Standard.

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b. The ACT Target Audience should deliver in the below quantities against each skill type per annum:

- i. Innovation Practitioners = 180 base; Option periods 120.
- ii. Innovation Leaders = 90 base; Option periods 60.
- iii. Innovation in Digital Transformation Practitioners = 180 base; Option periods 120.
- iv. Management of Innovation Prioritisation = 108 base; Option periods 72.
- v. Executive Development in Digital Transformation¹ = 5 base; Option periods 14.

c. The supplier shall deliver the Statement of Training Tasks (SOTT) as listed in Table 1 below:

Target Audience Need	Summary of Activity	Required Training Tasks
Executive Development in Digital Transformation	<p>This activity is consultancy based face-to-face engagement to connect the practices of the organisation to the strategic intent of the leadership.</p> <p>The purpose is to ensure that the language used is consistent across the organisation workforce conducting the activities with the senior leadership communicating with wider stakeholders.</p> <p>The activity should promote the use of recognised standards (international standards, including technical and business standards).</p>	<ul style="list-style-type: none"> • Discussion on Innovation and Transformation concepts. • Outline of recognised standards of practice used in international organisations, public services, Governments, militaries and academia. • Cross-organisational coherence methods and strategies. • Discussion of organisational processes to support the development of coherent strategy and change initiatives. • Cultural aspects of transformation and innovation practice.
Innovation Practitioners	<p>This deliverable enables ACT staff to implement innovation practice using models, theories and implementation of experiences linked to good practice.</p> <p>The training should align to recognised industry standards, and, preferably to a certified status.</p>	<ul style="list-style-type: none"> • Practical innovation tools and techniques that create agility and resilience within an organisation. • Practitioner level understanding of a range of methods and techniques that an organisation might use when aligning innovation with its values. • How to discover requirements, stakeholder analysis, identify the needs and expectations of customers/users (both internal and external). • Exploiting experimental thinking and managing uncertainty. • Enhancing creativity and create a culture of innovation. • Systematic processes that enables coherence amongst different operating model. • Introduce models to understand the business eco-system and where, when, what and how to exploit innovation.

¹ Consultation to mentor Senior Leaders = 20 (F2F) hours per event x 2 iterations per year on contract. 40 contact hours per year.

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Innovation Leaders	<p>This training prepares leaders to take on the responsibility for the application in strategic direction of innovation and transformation activities.</p> <p>It focuses on improving organisational performance through coherence and developing resilience.</p>	<ul style="list-style-type: none"> • Executive Level support for leaders' innovation leadership through provision of practical advice, options and ideas. • Scenario based solutions that consider impacts of a strategic nature, e.g. COVID-19 and create new normal strategies. • Disruption as a controlled means to force new ambition and strategic intent. • Management and governance methods to develop innovation investment portfolios. • Tools to build validate and align new business models to the organisation's strategy. • Techniques to improve organisational readiness to innovation. • Methods that accelerate digital transformation and optimise digital maturity. • Methods to analyse, benchmark and measure innovation impact and progress.
Innovation in Digital Transformation Practitioners	<p>This should aim to provide those in Digital Transformation Strategy with a baseline level of technical expertise to synchronise the concepts and theories of innovation in to a digital transformation programme.</p> <p>It should provide insight to the development of policies and strategies, considering organisational priorities, limitations and potential areas for exploitation.</p>	<ul style="list-style-type: none"> • Emerging digital trends, patterns and change vectors. • Enterprise Architecture building blocks of: <ul style="list-style-type: none"> • <i>Data.</i> • <i>Analytics.</i> • <i>Technologies.</i> • <i>People.</i> • 'Use cases' in creating Digital Extensions. • Digital Maturity and optimisation. • Solution path to Digital Transformation. • Developing a Digital Transformation Strategy, enabling you to: <ul style="list-style-type: none"> • <i>Assess your digital leadership competencies.</i> • <i>Evaluation of organisational data literacy and competence.</i> • Digital Optimisation Vs Transformation. <ul style="list-style-type: none"> • <i>Data sharing, distributed governance and develop Minimum Viable Functionality.</i> • <i>Integrating automation.</i> • <i>Automation KPIs.</i> • <i>Information Management optimisation values.</i> • <i>Risk Impact and assessment.</i>
Management of Innovation Prioritisation	<p>This training should prepare team leaders in their responsibility for managing a portfolio of capabilities where innovation and change is a competing factor.</p> <p>It prepared individuals to develop their systems for prioritisation and how to embed</p>	<ul style="list-style-type: none"> • Business theories that drive effective prioritisation • Tools used to evaluate parallel activities, for example: <ul style="list-style-type: none"> • <i>Simple Forced Pair Comparison (FPC)</i> • <i>Probability of Success Matrices</i> • <i>Prioritisation (C&E) Matrices</i> • <i>Real, Win, Worth (RWW) Analysis</i> • <i>Risk-Adjusted Cost-Benefit MCDA</i>

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	consistency in to practice.	
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Table 1.

3. Working activities and deliverables

- a. Effective execution of tasks, stated in Table 2, should follow the schedule BASE YEAR 2023 w/ four 12-month option years (2024-2027):

Serial #	Work / Activities	Deliverables	POP (period of performance)	Delivery Deadline
1	Provide an agreed list of course dates, scheduled to deliver between 1 Jan – 31 Dec each year.	Draft a schedule of courses, costed with an upper and lower limit of deliverable.	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
2	Supply advertising materials for internal ACT purposes	Commercial advertising materials amended for Government/ NATO use	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
3	Provide administrative support to enable individuals to access training materials	Provide individual correspondence on joining instructions and preparatory materials	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
4	Supply training courses per the agreed schedule	Deliver iterations of audiences stated in Para 2.b.	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
5	Provide post-course feedback data	Provide a report of analysed feedback on training provided	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
6	Provide certifications and post nominal proof	Supply individual completing participants with course certificates and post nominal record	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
7	Provide staff data on individuals who have completed training courses	Maintain a record of all NATO ACT course attendees and completions. Supply list rolling list monthly	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
8	Provide FOGO leadership and mentoring on strategic management of innovation and digital leadership	Visit ACT HQ in Mar and Oct each delivery year to deliver a short FOGO seminar on digital leadership and innovation.	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)
9	Provide an end of contract summary of courses and activities provided, a full list of all completions and recommendations from the Internal Validation	Submit a completion of task report that summaries the tasks and activities as well as the performance feedback.	Jan 23 – Dec 23 (Year 1) Jan – Dec (Years 2-5)	Dec (Each year)

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Table 2.

4. **Essential criteria for selection.** The bidder must demonstrate they can deliver the below tasks to a post-Graduate audience:
- a. State the ability to conduct delivery of training in English language to, or the equivalent of: PLS 3333, IELTS level 7, CEFR C1.
 - b. State the ability to deliver training and events in US Eastern Daylight Time.
 - c. Proposed candidate is national of NATO Member nation
 - d. Bidder has demonstrated the ability to deliver innovation and digital transformation training for the POP iaw the Statement of Training Tasks (stated in Para 2c.)
5. **Desirable criteria for selection.**
- a. Hold a NATO Secret clearance or Nations equivalent.

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ANNEX A

Deliverables for Innovation and Digital Transformation FOGO Mentoring and Staff Individual Training

Contractor's technical proposals will be assessed on the organization's ability to deliver the outputs. These are assessed under two types of criteria:

1. Compliance/non-compliance in demonstration that the output can be fulfilled;
2. An assessment of a criteria that assesses the technical ability to deliver an output against the associated cost.

Bidder Name _____

Required Criterion for Eligibility	Achieved?	Experienced Outlined
State the ability to conduct delivery of training in English language to, or the equivalent of: PLS 3333, IELTS level 7, CEFR C1.	Yes/No	
State the ability to deliver training and events in US Eastern Daylight Time.	Yes/No	
Proposed candidate is national of NATO Member nation	Yes/No	
Bidder has demonstrated the ability to deliver innovation and digital transformation training for the POP iaw the Standards of Practice (Para 2a.), volumes of training needed (Para 2b.) and the SOTT (Para 2c.)	Yes/No	
Evidence Based Assessment - Ability to Deliver the SOTT	Score	Summary of Evidence (reference to bidding material)
Demonstrate that training is delivered in accordance with the International Standard Organization (ISO) 56002 – Innovation Management Standard and accredited to ISO23053:2022 – Automation, Digital and AI Standard. No experience: 0 Formative Experience = post-ISO56002 award, demonstration of 1-3 years of experience in this field: 10 Demonstrated with experience of ISO56002 is shown with evidence plus >3 years deliverables: 20	/20	
Demonstrate that the SOTT (stated at Para 2c.) can be achieved through a proposed draft programme of activity, stated in Table 2. No demonstrable evidence: 0 Training delivery concept / outline plan: 10	/20	

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Training delivery plan with illustrative content: 20		
Demonstrate, through evidence, that Innovation and Digital Transformation Training has been previously delivered to Government organisations. No experience: 0 MOD/DOD (single department (Ex: DoD)) experience: 5 MOD/DOD + Other Departments (multiple department(Ex: DoD + FEMA)) experience: 10 Central Government (ex: NATO) plus Departments: 15 Governments with their National Industries: 20	/20	
Demonstrate that training delivered at Para 2c is configured to a post-graduate audience (Level 7 ² and above). No demonstrable evidence: 0 Demonstrated (Level 7): 20	/20	
Provide proof that entire instructional staff holds Level 8 qualifications in technology related disciplines. No demonstrable evidence: 0 Demonstrated: 20	/20	

*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.

² [International Qualifications Standard Level 8.](#)

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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 under *Contractor Information*.

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