



NORTH ATLANTIC TREATY ORGANISATION

HEADQUARTERS SUPREME ALLIED
COMMANDER TRANSFORMATION
7857 BLANDY ROAD, SUITE 100
NORFOLK, VIRGINIA, 23551-2490

Request for Proposal

IFIB-ACT-SACT-24-39
ACT Business Change (ABC)

Amendment 1 (Changes in red font)

Bidding Instructions

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BIDDING INSTRUCTIONS

1. General

This is a Firm Fixed Price deliverables contract in accordance with the HQ SACT General Terms and Conditions; **Contract Award is contingent upon funding availability; Partial bidding is not allowed.**

HQ SACT General Terms and Conditions dated 03/13/2024 are applicable to this procurement and can be located on the ACT website at WWW.ACT.NATO.INT/CONTRACTING under **contractor information**.

2. Classification

This Request for Proposal (IFIB) is a NATO UNCLASSIFIED document.

3. Definitions

- (a) The "Prospective Bidder" shall refer to the entity that 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 Headquarters Supreme Allied Commander Transformation.
- (g) The term "ACT" shall refer to Allied Command 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.

4. Eligibility

This IFIB is open to governmental or commercial entities:

- (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 country and countries in which this contract is to be performed, at the time of bidding. Has performed the desired past performance including size, cost and scope, as described in this IFIB.

- (c) **All proposed key personnel on this requirement must be citizens of a NATO member nation.**

5. Duration of Contract

- (a) The contract awarded shall be effective upon date of award.
- (b) Period of Performance: Base Period: 01 Aug 2024 – 31 Dec 2024 with four possible 12 month option periods (1 Jan 2025 – 31 Dec 2025, 1 Jan 2026 – 31 Dec 2026, 1 Jan 2027 – 31 Dec 2027, 1 Jan 2028 – 31 Dec 2028).

6. Exemption of Taxes

In accordance with the agreements (Article VIII of the Paris Protocol dated, 28 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 (three) calendar days prior to the bid closing date.
- (b) In lieu of a bidder's conference, HQ SACT invites bidders to submit initial technical and contractual questions not later than **17 June 2024, 0900 hours, Eastern Daylight Time**.
- (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: [Contracting - NATO's ACT](#) 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

- (a) Bids shall be received at HQ SACT, Purchasing and Contracting Office, no later than **16 July 2024, 0900 hours, Eastern Standard Time, Norfolk, Virginia, USA**. No bids shall be accepted after this time and date. **No hard copy proposals will be accepted.**
- (b) **Confirmation of receipt by HQ SACT is entirely the responsibility of the contractor. Allow time for the e-mails to clear both corporate and HQ SACT servers. A delay in transfer from the server does not constitute an exception for late receipt.**

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

A table of contents for the entire proposal:

- (a) The bidder's full name, address, Point of Contacts, Telephone, Fax number; Internet site;
- (b) Compliance statement (See Enclosure#1);
- (c) Provision of technical and price volumes;
- Technical volume:
 - Company Experience and Citations of Past Performance (See Enclosure#2; no more than 30 pages in total);
 - Ability to Meet or Exceed Quality Control Measures (no more than 3 pages per individual);
 - Company Access to Expertise and Reach back Capability (no more than 2 pages);
 - Quality Assurance Plan (no more than 5 pages);
 - Proposed Plan for Providing Programme Management (no more than 5 pages).
 - Price volume (See Enclosure #2)
- (d) Grading Matrix (See Annex B).

12. Proposal Submission

- (a) Proposals shall be submitted electronically in a two separate PDF documents, one containing the **Technical Proposal** and one containing the **Price Proposal**, each e-mailed separately to:

- Technical proposal: techproposal@act.nato.int
- Price proposal: priceproposal@act.nato.int

E-mail subjects shall include the solicitation information along with company name (for example: IFIB-ACT-SACT-24-39_Tech_ABC Inc. / IFIB-ACT-SACT-24-39_Price_ABC Inc.). **Allow sufficient time in your submission should you encounter e-mail size challenges.**

- (b) **Price proposals shall be in U.S. Dollar currency.** Contractor may request payment post award in alternate currency based on agreed conversion rate.
- (c) Prices shall be on a **Firm Fixed Price Basis** and include any relevant discount schedule.
- (d) No oral bids or oral modifications or telephonic bids shall be considered.
- (e) It is the ultimate responsibility of a prospective bidder prior to submission that all proposal submissions are reviewed to ensure they meet the technical, contractual 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) **A delay in an e-mail exchange due to server or size restrictions does not constitute a delay by NATO.**

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 these requirements, 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.
- (c) Proposals shall be evaluated and awarded taking into consideration of the following factors:

- 1) Successful administrative submission of bid packages as requested in paragraph 11 and as listed in this IFIB.
- 2) Successful determination of compliance. (Compliant/Non- compliant).
- 3) Technical factors / pricing factors rated the following: Technical / Price = 70/30 (Best Value Compliant Offer).
- 4) Technical clarifications as determined may be conducted.
- 5) Acceptance of HQ SACT General Terms and Conditions.

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 concern.

In addition, HQ SACT reserves the right to request a short briefing from compliant bidders to support technical clarification, via VTC, after the proposal submission date. Additional instructions will be shared with compliant bidders if this request is made.

17. Award

HQ SACT intends to award a firm fixed price contract(s) to the Bidder(s) whose proposal(s) represents the Best Value Offer to NATO. Partial awards are not authorized.

HQ SACT will collect information from references provided by the Bidder 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 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. Points of Contact:

Catherine Giglio, ACT Contracting Officer,
+1-757-747-3856, catherine.giglio@act.nato.int

Tonya Bonilla, ACT Contracting Officer,
+1-757-747-3575, tonya.bonilla@act.nato.int

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+1-757-747-3869, robert.mcmaster@act.nato.int

IFIB-ACT-SACT-24-39

Enclosure 1 Compliance Statement

COMPLIANCE STATEMENT TO SEALED BID IFIB-ACT-SACT-24-39

It is hereby stated that our company has read and understands all documentation issued as part of IFIB-ACT-SACT-24-39. Our company proposal submitted in response to the referenced solicitation is fully compliant with the provisions of IFIB-ACT-SACT-24-39 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 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 2 Past Performance

PAST PERFORMANCE INFORMATION FORM (References may be submitted in lieu of past performance)

- (a) Contracting Entity:
- (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

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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Enclosure 3 Price Proposal

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. Reference ACT contracting website at:
<https://www.act.nato.int/opportunities/contracting/>

SEALED BID PRICE PROPOSAL

SUBJECT: IFIB-ACT-SACT-24-39

Please find on behalf of **Insert: Company Name** to provide HQ SACT with services (collectively referred as “ITEMS”), subject to the provisions, terms and conditions stated in IFIB ACT-SACT-24-39 and the “**Insert : Company Name** Technical proposal”, submitted in accordance with solicitation provisions.

Deliverables Refer to Annex A for further scope of each deliverable)	Base Year 01AUG – 31DEC 2024
Executive level Quality Control Measures	Hourly Rate: \$
Senior level Quality Control Measures	Hourly Rate: \$
Expert level Quality Control Measures	Hourly Rate: \$
Junior level Quality Control Measures	Hourly Rate: \$
Deliverables Refer to Annex A for further scope of each deliverable)	Option Year 1 01JAN – 31DEC 2025
Executive level Quality Control Measures	Hourly Rate: \$
Senior level Quality Control Measures	Hourly Rate: \$
Expert level Quality Control Measures	Hourly Rate: \$
Junior level Quality Control Measures	Hourly Rate: \$

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Deliverables Refer to Annex A for further scope of each deliverable)	Option Year 2 01JAN – 31DEC 2026
Executive level Quality Control Measures	Hourly Rate: \$
Senior level Quality Control Measures	Hourly Rate: \$
Expert level Quality Control Measures	Hourly Rate: \$
Junior level Quality Control Measures	Hourly Rate: \$
Deliverables Refer to Annex A for further scope of each deliverable)	Option Year 3 01JAN – 31DEC 2027
Executive level Quality Control Measures	Hourly Rate: \$
Senior level Quality Control Measures	Hourly Rate: \$
Expert level Quality Control Measures	Hourly Rate: \$
Junior level Quality Control Measures	Hourly Rate: \$
Deliverables Refer to Annex A for further scope of each deliverable)	Option Year 4 01JAN – 31DEC 2028
Executive level Quality Control Measures	Hourly Rate: \$
Senior level Quality Control Measures	Hourly Rate: \$
Expert level Quality Control Measures	Hourly Rate: \$
Junior level Quality Control Measures	Hourly Rate: \$

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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 _____

**ANNEX A: STATEMENT OF WORK (SOW)
ACT BUSINESS CHANGE (ABC)**

1. Summary Scope of Work

- a. Background. This statement of work (SOW) specifies the products that contractor personnel will be required to deliver in support of the Allied Command Transformation (ACT) programmes and initiatives.
- b. Situation. Following Russia's invasion of Ukraine in 2022, NATO is once again at the forefront of Euro-Atlantic security. NATO's forces, structures, and capabilities must remain optimized to deter aggression and defend the Euro-Atlantic region.
- c. The situation in which NATO must operate, adapt and transform is multi-faceted and volatile. "Peace" has been replaced by a continuum of competition, requiring constant vigilance across a complex and uncertain environment. Speed of decision-making and action are increasingly essential, a network of cooperative partnerships remains an indispensable source of opportunity, NATO's technological advantage is increasingly challenged, and cognitive and virtual dimensions are increasingly contested in a pervasive information environment.
- d. The Alliance's Military Instrument of Power (MloP) must be employed in a variety of ways and contexts, all of which may be needed concurrently. These may include the following:
 - 1) Shape – situations where the MloP is used to set conditions (as part of a combination of different instruments of power: diplomatic, information, military, economic) favourable to the Alliance security, for example, by influencing and changing the behaviour of potential adversaries and/or engaging with and supporting partners facing security challenges.
 - 2) Contest – situations where the MloP could be used to counter efforts by potential adversaries to challenge Alliance or Allies' security in one or several domains, primarily by non-military means and below the threshold of armed conflict.
 - 3) Fight – situations where Alliance or Allies are directly attacked in multiple domains inside or outside SACEUR's AOR and the MloP is used to respond.
- e. Allied Command Transformation (ACT) leads NATO's efforts to maintain a relevant MloP. In leading NATO's Warfare Development, ACT performs a variety of functions:

We scan, investigate and inform
We connect
We drive standards
We plan

We Innovate and challenge
We deliver capabilities
We educate and train
We support operations

f. Noting this external environment, Supreme Allied Commander Transformation (SACT) has decided that ACT must critically evaluate itself, to improve the pace and scale of NATO's transformative efforts.

2. Strategic Factors Driving ABC Contract Deliverables

a. In line with SACT's direction to reshape itself, ACT has identified four primary elements of the business model as strategic drivers of rapid and profound transformation:

b. Driver: Workflow – NATO's military transformation is the responsibility of ACT. To ensure that ACT remains integrated and synchronized with external stakeholders, internal administrative and business operations processes are kept under constant review to balance efficient and effective delivery of transformative military effects that are quality assured and auditability.

c. Driver: Digital Workspaces – NATO's business IT systems typically prioritize security over usability, and rely on solutions that lag behind the commercial marketplace. To address inefficiencies and maintain security of the NATO Enterprise, NATO has number of change initiatives as part of a Digital Transformation strategy. The strategy and associated change programme and projects will affect staff, processes, accessibility and sharing of information, corporate communications, etc.

d. Driver: Physical Workplaces – Given NATO's need to accelerate transformation, HQ SACT will lose the ability to allocate desk space to each individual staff member. HQ SACT's internal design is currently focused on open-plan cubicles, and displays none of the working flexibility of modern, knowledge economy offices¹. Member states impose national regulatory restraints, which limit HQ SACT's ability to use hybrid office concepts.

e. Driver: Workforce – ACT's workforce is a mixture of civilians, mostly employed on long-term contracts, and military on 2- to 4-year rotations. There is little workforce flexibility, mobility, and little delegated authority to make significant organizational changes. ACT's workforce may be made increasingly civilian, and there are upcoming opportunities to increase workforce flexibility.

f. These drivers shape ACT's internal business change activities, including a full review of ACT's business model.

g. Business Change Management. Deputy Supreme Allied Commander Transformation (DSACT) is the SACT's lead for ensuring ACT's ongoing fitness-for-purpose, within the bounds of SACT's delegated authority.

- 1) The Business Change Management (BCM) team supports DSACT in delivering these changes, operating across organisational elements and functions of ACT to drive necessary change. The BCM is responsible for defining, coordinating, facilitating, and delivering change initiatives.

¹ For example, that laid out in the UK Government Workplace Design Guide v3, available online at: assets.publishing.service.gov.uk/media/6297a70ee90e070397a00fdc/Government_Workplace_Design_Guide_V3.0_Government_Workplace_Design_Guide_-_Current_version_uploaded_05_05_22_A_Accepted_as_Stage_Complete_4.pdf

- 2) The BCM team works to change ways of working within and across ACT (including HQ SACT and subordinate organisations). ACT works to transform Alliance military capability across Allied Command Operations and its connections to National militaries, and political-military decision-making interfaces.
- 3) The BCM team require support from experienced organisational development teams to:
 - a) Further shape and develop ACT's business model to efficiently and effectively improve the pace and scale of NATO transformation.
 - b) Further develop, deliver, and embed ACT organisational agility.
- 4) This includes providing advice and delivery of tasks relating to organizational designs and business change processes.
- h. Organisation: ACT is comprised of:
 - 1) Headquarters SACT (HQ SACT), primarily located in Norfolk, Virginia, USA,
 - a) Staff Element Europe is based in Mons, Belgium,
 - b) SACT's Representative in Europe, located in Brussels, Belgium,
 - 2) Joint Warfare Centre, located in Stavanger, Norway,
 - 3) Joint Force Training Centre, located in Bydgoszcz, Poland,
 - 4) Joint Analysis and Lessons Learned Centre, located in Lisbon, Portugal.
- i. HQ SACT is comprised of a Command Group, and the four Directorates of Strategic Plans & Policy (SPP), Capability Development (CAPDEV), Joint Force Development (JFD), and Resources and Management (R&M). Ad hoc project teams are also assembled to carry out specific niche, emergent, or urgent tasks.
- j. The ABC contract is held by the BCM team, which reports to the Command Group in HQ SACT. Deliverables produced by the Contractor will support all elements of ACT's business areas, providing injections of business change as and where necessary.
- k. For more information on ACT, see <https://www.act.nato.int/about/the-command/> .

3. Contractor Essential Technical Competencies

- a. As a NATO entity, HQ SACT comprises military and civilian staff drawn from the 32 Nations of the Alliance; this staff is further complemented by contributions from Partnership for Peace (PfP) Nations and other partners. Hence, intrinsically, HQ SACT is a multinational/multicultural workplace in which HQ SACT staff maintain very high standards of inclusiveness, integrity, impartiality, loyalty, accountability, and professionalism. The Contractor shall have a proven track record in working successfully and productively in multinational/ multicultural settings.
- b. The Contractor shall have a demonstrated ability to deliver high quality products that can offer tangible benefits to an array of organisational change activities. The Contractor shall have a record of evident competence pertinent to the subjects identified in the paragraph for Contract Serials for which they are bidding. The

Contractor will be expected to deliver specific products limited to the paragraph for Deliverables Summary. An opportunity to demonstrate requisite expertise is provided in “Company Experience and Expertise,” at Section One to this SOW.

4. Work Package 1: Programme Management

- a. This Work Package is the basis upon which the Contractor delivers supporting products in a timely manner and to a standard suited to seamless integration with the work of the HQ SACT. The Programme Manager (PgM) function will serve as the platform for the delivery of products, capability and best practices to HQ SACT.
- b. The Contractor will assign an appropriate management and reach back structure to connect with HQ SACT and deliver the PgM function. The PgM function will include the quality assurance measures required to produce and deliver contracted deliverables in Work Package 2 at acceptable standards.
- c. The Contractor’s solution for providing PgM shall ensure the Contractor maintains awareness of the BCM team’s activities, so that the contractor can responsively support emerging requirements for the development of deliverables. This is expected to shorten timescales between initial tasking and delivery. The PgM function will interface on a regular basis with the HQ SACT Contracting Officers Technical Representatives (COTR) for overall contract performance/schedule and contract reporting.
- d. Success in delivery of the PgM function will necessitate an effective and efficient interface. Successful PgM will rely on multiple quality factors including, but not limited to, the following:
 - 1) Contractor’s PgM element is accessible and able to work with the COTR(s).
 - 2) Contractor’s PgM element is sufficiently skilled in change management practices and theory that, following receipt of a Task Order, the PgM is able to advise the COTR by contributing ideas and insights to help shape an emergent task deliverable definition.
 - 3) Contractor and COTR are able to maintain a daily common operating picture including priorities, quality, scope, progress towards completion of Deliverables, and overall schedule.
 - 4) Contractor and COTR are able to maintain a monthly common operating picture of contract achievements, completed deliverables, and programmed deliverables in the months ahead.
 - 5) Contractor is able to coordinate use of a limited number of work stations at HQ SACT for on-site work as required.

5. Work Package 2: Deliverables

- a. This Work Package comprises the majority of contractor effort and outputs necessary to provide the deliverables **via issued task orders after the framework contract has been awarded**. Contractor personnel shall deliver products that support ACT's business change activities.
- b. ACT's business operations include a wide array of transformational processes, including strategy and policy development, outreach to academia and industry, strategic and operational analysis, concept development, experimentation, force design and development, capability planning and early-stage acquisition, individual and collective training, doctrine development, and others. Contractor personnel will work with ACT experts in these processes, where necessary, to understand and align elements of ACT's business model.

6. Indicative Tasks

The following paragraphs provide indicative tasks that might be expected in the initial period of this contract:

- a. Organizational redesign options, with reference to similar organizations in adjacent market sectors.
- b. Supporting the development of training and other individual learning and cultural interventions to address business skills, creative and structured thinking, international and other cultural awareness, organizational culture development, and military strategic knowledge.
- c. Re-writing ACT's job descriptions to be based on skills and attributes (noting NATO's unique resourcing policies and constraints).
- d. Design and support of internal trials for types of working, workplace flexibility, and other changes to ways of working.
- e. Process mapping and optimization, including identifying gaps between written processes and real practices, and proposing process adjustments.

7. Place of Performance / Travel

- a. HQ SACT places a high value on being able to benefit from a broad array of expertise from within the Contractor's network to help ensure the quality of products developed and delivered. HQ SACT staff are accustomed to conducting a wide variety of business through remote collaborative working with colleagues in North America and Europe.
- b. The Contractor will be expected to provide at least one main PgM point of contact working on-site in HQ SACT, Norfolk VA. This PgM is not anticipated to travel.
- c. In developing and delivering products under the ABC contract, the places of work are summarised as follows:
 - 1) Contractor Facilities,
 - 2) HQ SACT (as required),
 - 3) Other NATO or National HQs and Technical Centres,

4) NATO and Partner Nations.

- d. Travel Required: It is anticipated that task delivery teams may occasionally travel in support of this contract, both within and outside NATO Alliance member nations' boundaries. NATO per diem rates should be used as the benchmark for preparing travel estimates. Post-award, the Basis of Estimate for the development of deliverables should include anticipated indirect travel costs as a separate line item. Direct Travel (airfare) will be coordinated and funded separately by HQ SACT as required. Expected travel costs will not be a consideration for contract award and should not be factored into the price proposal.

8. Security and Installation Access

- a. Personnel details are to be supplied as requested to allow access to HQ SACT, if required. All contractor personnel shall abide by the security restrictions regarding carrying and using electronic devices (e.g. laptops, cell phones) in all NATO facilities. The Contractor(s) shall be responsible for satisfying the necessary clearance requirements before bringing any such device into a NATO facility.
- b. The Programme Manager must have NATO SECRET clearance, or equivalent clearance from a NATO Nation.
- c. It is recommended that at least one member of every task team possesses a national security clearance that can be converted to NATO SECRET prior to commencement of the task. The company must identify this individual prior to the placement of a task order.

9. Communications and Networking

The Contractor shall ensure that contract team members working offsite are accessible to HQ SACT via telephone and e-mail. In addition, the Contractor will ensure that all contract team members are trained in the use of Internet web conferencing. The Contractor shall be capable of participating in Client or third party-hosted web conferences and of hosting such conferences. Contract team members participating in web conferences will join the conference from locations that avoid distracting noise or activity in order to ensure that business may be conducted in a professional manner.

10. Contractor Supervision and Reporting

- a. The Contracting Officer will assign a COTR to administer all technical contract details. The Contracting Officer has final authority (in consultation with the COTR) to determine if the contract/SOW should be amended, extended, modified or cancelled for evolving requirements, new tasking, and/or technical non-performance.

- b. The COTR shall:
 - 1) Resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW;
 - 2) Review (and approve) all Contractor duties for completeness and accuracy;
- c. The COTR shall have daily interaction with contractor personnel and can assess the quality, quantity, and timeliness of their work. The COTR's written approval of work reported and deliverables submitted is mandatory for contractor invoices to be successfully processed.
- d. The COTR reserves the right to 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.

11. Contractor Essential Skills and Experience

In assessing bids for this framework contract, HQ SACT will be looking for the following essential skills and experience:

- a. Evidence of Organizational Development and Business Change knowledge and application within intergovernmental organizations, the public sector, and the private sector.
- b. Evidence of a broad knowledge of Defence, or intergovernmental organizations, or similar sectors.

12. Additional Required Experience

In assessing bids for this framework contract, HQ SACT will be looking for the following additional required skills and experience:

- a. Experience of having engaged across the hierarchy, from C-suite to shop-floor, to shape and drive business change.
- b. Experience of driving change within complex organizational policies, cultures, complex internal stakeholder structures, and other hard or soft constraints. How were you able to influence these constraints, and / or how did they require you to tailor your approach from normal best practice.
- c. Experience of collaboration and teaming with customers to adjust resources to tackle difficult problems, including reach-back to a wide array of skills and advice, and ramp-up and ramp-down of resources to match requirements phasing.
- d. Experience of collaborative working across a geographically distributed environment, including skills transfer to / capability development of the customer team.

13. Contract Serials

Serial	Description
1	Organizational and Business Model Design, Business Analysis <ul style="list-style-type: none"> Assessment and design of business models, including customers, products and services, activities, skills, roles, and structures and any other closely-related business model elements. Process improvement for organizational administration, including Human Resources, business finance, and related processes. Process improvement studies and techniques for non-repeatable knowledge tasks such as strategic analysis, defence capability development and acquisition, etc. (knowledge of these specific tasks is not necessary).
2	Culture change Conversational leadership, mentoring and engagement, coaching, bottom-up and top-down cultural change, cultural change in the context of unusual constraints on the workforce and available incentives. Individual, group, and organizational communications and engagement, and other closely related tasks.
3	Learning, Skills, and Talent Management Learning models and styles, including experience in designing learning curricula and training curricula, knowledge and experience in developing learning and training for international audiences, and civilian / military blends, or other closely related tasks.

14. Quality Control Measures

As a further guide to the specialised nature of ABC contract work, and the significant levels of skills and experience necessary to meet the Client's requirements, a set of Quality Control Measures is described at Annex B. These measures should be considered an initial baseline set; as NATO's agenda evolves, further requirements may emerge that drive the need for additional Quality Control Measures to be raised and agreed with HQ SACT.

15. The Ordering & Production of Contracted Deliverables

- a. In this volatile and uncertain strategic security environment, ACT must continuously ensure it maintains the relevance and edge of NATO's structures and forces. ACT's shape and structure are likely to change over this time, to incrementally test and adjust how to best transform the Alliance, and as shaped by the Alliance political landscape. As such, while BCM team are able to forecast some aspects of the annual programme with a good degree of certainty, other parts of the programme will evolve more incrementally as previously unknown factors materialise.

- b. This volatility is an enduring characteristic that must be accounted for in the design and operation of the ABC Contract. Before the start of the base year, and each subsequent year if an option is exercised, HQ SACT will alert the Contractor with known requirements for Deliverables. Then, within each year of contract operation, HQ SACT will alert the Contractor to emergent requirements and call for Deliverables as and when appropriate. Deliverables will therefore fall into 2 categories as follows:
 - 1) Forecast Deliverables: Deliverables that address requirements known to HQ SACT at the start of a contract/calendar year shall be known as "Forecast Deliverables." The Forecast Deliverables will include products needed within Work Package 2 and known to HQ SACT, as requirements, at the start of a calendar/contract year.
 - 2) On-call Deliverables: Deliverables that address emergent requirements, or for which the details are finalised within a contract/calendar year, will include products within Work Package 2 and shall be known as "On-call Deliverables."
- c. All Deliverables will be initiated through a Task Order issued by HQ SACT. A Task Order may cover a single Deliverable or sets of multiple Deliverables, and will identify the expected Quality Control Measures (QCM) level(s). A Task Order template will be agreed upon at the kick-off meeting.
- d. The Contractor shall provide a Basis of Estimate (BOE) to HQ SACT for each Deliverable, or set of Deliverables, ordered in a Task Order. The purpose of the BOE, which shall accompany each Price Proposal, is to help manage risk by ensuring a common understanding. The BOE presents an opportunity, at the Price Proposal stage, for the Contractor to demonstrate, by showing resourcing assumptions, a clear understanding of what constitutes a realistic approach to the tasks inherent in developing and delivering the required product(s). As a minimum, the BOE shall include the following:
 - 1) A breakdown assessment of the tasks needed to accomplish the Deliverable.
 - 2) The intended Quality Control Measures to be used. Given the connection between Quality Control Measure levels and price, the contractor is expected to employ the lowest Measures reasonable to achieve the required outcome; the BOE shall include clear justification and correlation of the proposed Quality Control Measures and the required Deliverables.
 - 3) The estimated time needed to accomplish the Deliverable.
 - 4) Other identified costs drivers including indirect travel.
 - 5) A summary, not to exceed 2-pages, of the proposed team(s) who are identified to complete the deliverable(s), including justification of Quality Control Measure allocations.
- e. HQ SACT requirements for both Forecast and On-call types of deliverables will be characterised by the following:
 - 1) Developed in accordance with the identified Demonstrated Competencies (*Paragraph 13: Contract Serials*).

- 2) Limited to the products described in the Deliverables Summary (*Paragraph 16*).

16. Deliverables Summary

- a. Deliverables are due as per the specific Task Order for each deliverable/set of deliverables, unless the COTR specifies otherwise. Deliverables shall provide information required by this SOW and amplified in the specific individual deliverable Task Order. Deliverables shall be complete, stand-alone, and provide the necessary products described in respective Task Order paragraphs. Deliverables shall be submitted and exchanged electronically, in Microsoft Office product suite. The COTR may specify alternative or additional formats or copies. The contractor shall provide deliverables on the date due as an electronic file and hard copy draft that will be finalized after client review.
- b. Deliverables expected under this contract are:
 - 1) Research studies, accessing wider best practice.
 - 2) Analytical studies of ACT.
 - 3) Training materials.
 - 4) Training events.
 - 5) Coaching and / or mentoring.
- c. Deliverables typically take the form of reports (including after action reports) and / or briefings, but may take other forms such as roadmaps, plans, data models and schema, process models, etc.
- d. HQ SACT will endeavour to review, accept, or comment on the draft deliverable within 10 working days.
- e. After HQ SACT reviews and comments on the deliverable, the contractor shall incorporate HQ SACT input and submit change into the final electronic deliverable within 7 working days from the receipt of the comments, unless this timescale is extended by the COTR (such as in cases where further consultation is in the HQ's best interest).
- f. The Contractor shall analyse and identify issues, and formulate and provide courses of action for issue resolution. In performing this SOW, the Contractor will be required to deliver products into HQ SACT's management structure. Although the COTR is based within the Business Change Management team, the Contractor will be developing and delivering products that support the requirements of a broad cross-section of branches, divisions, and directorates. Furthermore, the Contractor will be required to interact effectively with Allied Command Operations (ACO), subordinate commands, Nations, and NATO agencies, including the NCI Agency and others as designated.
- g. The Contractor shall be responsive to evolving requirements that may necessitate adjusting the quality control measures. The Programme Manager (or authorized company representative), COTR, Deputy COTRs (as applicable) and Contracting Officer shall address these changes in a formal review and reach

agreement at intervals of not more than six months. All agreed changes will be incorporated by formal contract modification.

- h.** ABC products shall contribute in part, not fully, to the overall progress/completion of a programme or project. In addition to the contributions made by the ABC contractor, and NATO staff, HQ SACT reserves the right to obtain contractual support from sources other than the ABC contract where to do so is in the best interests of the Alliance. If required and deemed appropriate to provide a satisfactory deliverable, the Contractor may be required to collaborate with other contractors.

17. Sections

The requirements for Contractors' responses to this SOW are described in Section One. Section Two addresses on-site and off-site support. Contract management is addressed in Section Three, and Terms & Conditions are detailed in Section Four.

18. Annexes:

- A. Statement of work
- B. Quality Control Measures for Contractor Project Management of Deliverables.
- C. Grading Matrix - Evaluation Criteria

19. SECTION ONE: Company Response to the SOW

a. Introduction

This section provides the requirements to be met in Contractor companies' responses to this SOW. The Evaluation Criteria and Checklist (Annex C) refers. Responses shall be in six divisions as follows:

- 1) Company Experience and Citations of Past Performance;
- 2) Ability to Meet or Exceed Quality Control Measures;
- 3) Company Access to Expertise and Reach back Capability;
- 4) Quality Assurance Plan;
- 5) Proposed Plan for Providing Programme Management;
- 6) Price.

b. Response Part 1 – Company Experience and Citations of Past Experience

- 1) Contractor companies shall submit papers of **no more than 30 pages, inclusive of the five past performance citations**, (single-spaced) text, describing in detail their expertise and past experience in developing and delivering products outlined in this SOW.
- 2) As NATO is an organization of 32 sovereign Nations, there is a requirement for the successful contractor company to have experience and a proven track record in multinational and cross-cultural work.
- 3) Contractor companies shall cite **at least five** past performances (summarized in **no more than three pages each**) based on contracts held within the last ten years that are of relevant scope, magnitude, and complexity to the tasks, activities, and deliverables detailed in this SOW.
- 4) ACT reserves the right to contact identified client points of contact for past performances to validate key facts. Note that this does not require positive client feedback; only that key facts are verified as being correct. "Key facts" are any facts relied upon to justify the strength of a proposal, aligned to these requirements.

c. Response Part 2 – Ability to Meet or Exceed Quality Control Measures (QCM)

- 1) This SOW is for a wholly Deliverables-based contract in which labour categories do not apply. Instead, QCMs are used as building blocks, denoting the expertise of the work force that the Contractor would assemble and apply to task orders placed in this contract. This section assesses Contractors' understanding of the levels of experience and qualifications needed in the company personnel who may be assigned to meet each level of QCM. On contract award, the successful Contractor will be expected to employ the same benchmarking standards when meeting future requirements; this will be subject to validation throughout the life of the contract.

- 2) Contractors shall provide **no more than two examples** (CV/resume) of an employee(s) who could fulfil the requirements of each of the QCMs, against each of the contract serials, in **no more than 3 pages per individual**. Note that it is assumed that all QCM's listed will be needed for each of the categories. **Partial bidding is not allowed.**
- 3) The baseline QCMs for Contractor Project Management of Deliverables are described at Annex A. The Contractor shall certify that all deliverables will be developed using the criteria established in the baseline QCMs.

d. Response Part 3 – Company Access to Expertise and Reach-back Capability

Given the exploratory nature of much of the work undertaken by HQ SACT, resilience in the ABC contractor's company or group is essential. Reach-back is intellectual support in-depth, providing accessible day-to-day expert assistance when necessary, by offering alternative approaches, advice and ideas based on relevant experience. Given the firm fixed price nature of this contract, each company shall describe in **no more than two pages** how it will make reach-back support available to its personnel who may need assistance with a complex challenge in developing a required deliverable. In the event that this would include Sub-Contractors, provide a sample of companies with which you have a current or previous prime/sub relationship.

e. Response Part 4 – Quality Assurance (QA) Plan

In order to ensure that HQ SACT receives the best value possible from the contractor, there is a need for a reliable QA process. Contractor companies shall prepare a paper of **no more than five pages** on their proposed QA plan to ensure that deliverables meet quality expectations. Considerations should include structure, process, continuity, reporting, risk management and overall project management.

f. Response Part 5 – Proposed Plan to Provide Work Package 1: Programme Management

The Programme Management (PgM) function will serve as the platform for the delivery of products, capabilities and best practices to HQ SACT. The PgM function will assure the QA measures required to produce and deliver contracted deliverables in Work Package 2 at the acceptable standards identified in the individual Task Orders. In order for the contractor to be agile and responsive to emerging requirements for the development of deliverables, the Contractor's solution for providing PgM shall ensure the Contractor maintains awareness of HQ SACT's business domain. This domain awareness will enable the Contractor to be rapidly oriented to new requirements for deliverables, thereby shortening timescales between initial tasking and delivery. Contractor companies shall prepare a paper of **no more than five pages** on their proposed PgM plan, excluding associated CVs (**no more than three pages** for each individual).

g. Response Part 6 – Price with Basis of Estimate

- 1) Bids shall be assessed on the “best value” blend of how well the foregoing response requirements are met, and on the price for QCMs to fulfil the requirements of this SOW for the base and option periods as defined. Bidders shall propose an hourly rate, for each of the QCMs for development of deliverables, to the standards specified in Annex B.
- 2) **Post Award Pricing.** A further price proposal review will be conducted with each individual deliverable ordered based upon this SOW, the relevant individual Task Order, and contractor Basis of Estimate (BOE) provided for analysis. ***QCM rates are to be used as a BOE allowing HQ SACT to make a Fair and Reasonable price determination.*** All deliverables are considered Firm Fixed Price and are expected to be invoiced at delivery or completion of established Milestones mutually agreed by HQ SACT and the Contractor.

20. SECTION TWO: Off-site and On-site Support

a. Management of Working Locations

- 1) Work of NATO UNCLASSIFIED or not classified nature, to develop deliverables, will be normally conducted at the Contractor's facilities. However, on occasions when close collaborative working with HQ SACT personnel is necessary, the Contractor may conduct work on-site at HQ SACT and other venues provided by HQ SACT. Work at a classification level of NATO RESTRICTED or higher will be conducted on-site at HQ SACT.
- 2) On-site working space at HQ SACT is limited. As a result, the Contractor will be required to coordinate with the COTR for access to the available work spaces designated for contractor personnel. The purpose of this 'hot-desking' system is to provide office space to contractor personnel on a temporary, as-needed, basis in order to make best use of the space and information technology available at HQ SACT. Due to the potential of split/multiple contract award, requests for use of this on-site working space should be coordinated through the COTR as soon as the requirement is identified and should be limited to the minimum time necessary to successfully produce the deliverable.

b. Furnished Materials

For on-site work, HQ SACT shall provide access to working space, office furniture, telephones, computers, software, peripherals and support equipment, office supplies, classified/unclassified storage space, and access to unclassified and classified NATO SECRET networks and the Internet for work to be performed at all NATO sites. Access will be granted on an as-needed basis to individuals with appropriate security clearances. Contractor personnel are not authorized to make any physical modifications to the HQ SACT facilities.

21. SECTION THREE: Contract Management

a. Points of Contact for Contractor Company

The Contractor's company interface for direction and guidance will be the designated COTR. The COTR shall resolve outstanding disputes, problems, deficiencies, and/or questions on the technical aspects of the SOW. The COTR can recommend to the Contracting Officer (who has final authority) that the contract/SOW be amended, extended, or cancelled due to evolving requirements, new tasking, and/or technical non-performance.

b. Contractor Invoices

The COTR shall review the Contractor's work on a monthly basis, as a minimum, or more often if needed. The COTR's written approval of deliverables accepted or agreed milestones achieved are mandatory for Contractor invoices to be successfully processed.

c. Physical Security

The following physical security points are relevant:

- 1) **Personnel Clearances:** Contractor personnel shall be responsible for obtaining all needed security clearances prior to assigning personnel to develop deliverables on-site at HQ SACT or other NATO entities. Any Contractor personnel working on-site for more than one week requires a minimum of a SECRET security clearance (as issued by NATO or the respective national Department / Ministry of Defence (DoD / MoD)). Any Contractor working on-site for less than one week shall be escorted by the PgM, if required.
- 2) The Contractor Company shall certify that proposed PgM, and any other intended candidates working on information above NATO Unclassified, hold the appropriate clearance and can produce deliverables in accordance with the QCMs identified.
- 3) **Security Conditions:** The Contractor must adhere to current security conditions at HQ SACT and other NATO provided work sites. Contractor personnel shall comply with all local host nation, NATO security provisions and other policies and procedures, as required.
- 4) **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 and US Naval Support Agency facilities. The Contractor Company shall submit

requests for site access to SACT HQ, Attention Security Office, at 7857 Blandy Road, Suite 100, Norfolk, VA 23551-2490.

- 5) **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.

d. Security of Deliverables

The possible security classification of the majority of deliverables under this contract may range from NATO Unclassified through NATO SECRET. In such cases, the requirement to work at this higher level of classification will be described in the individual SOW for the specified deliverable.

e. Intellectual Property Rights (IPR)

Specific information germane to IPR is articulated in the General Terms and Conditions that support this contract. In every case, intellectual property, including inventions, discoveries, technical communications, processes, programs and records generated during the performance of duty under this contract shall remain the exclusive property of HQ SACT, unless otherwise specified or transferred to the contractor or a third party. This paragraph shall survive the termination of this contract.

f. Releasability and Export Control

NATO nations have regulations and laws applying to the export of defence related goods by domestic commercial sources to outside entities (such as NATO). Contractor agrees not to disclose or export, either directly or indirectly, any technology or information, or the direct product thereof, acquired by it pursuant to this contract to any destination, person, or entity, if such disclosure or export is prohibited by the laws and regulations of any NATO member state, including the United States of America. This paragraph shall survive the termination of this contract.

g. Contractor Company Routine Reporting

- 1) The Contractor Company shall submit a monthly report to the COTR, detailing progress on SOW requirements for the reporting period. The report shall include, but not be limited to, the following information:
 - a) Contract Delivery Report: A summary of work completed during the reporting period:

- i. Tasking, deliverables or milestones met for the reporting month.
 - ii. Interim tasking, deliverables or milestones met for the reporting month.
 - iii. Contract Activity Forecast Report: A summary of Tasking, deliverables or milestones (work in-progress and finalised work) forecast to be met for the coming month.
 - b) Current or anticipated problems/deficiencies and recommended solutions.
- 2) The COTR reserves the right to 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.

h. Additional Contractor Requirements

The designated COTR shall identify missing, erroneous, or unneeded requirements and tasking. The Contractor Company is expected to be organised to maintain contact with the COTR while working closely with other HQ SACT/NATO staff members so that common understanding and shared situational awareness are achieved and maintained. Consequently, the Contractor Company is expected to promptly address any identified problem or deficiency, providing the COTR with information on how the problem shall be corrected and any impact to on-going work mitigated.

ANNEX B - QUALITY CONTROL MEASURES FOR CONTRACTOR PROJECT MANAGEMENT OF DELIVERABLES

a. Introduction

This contract is Deliverables-based. As such, HQ SACT seeks to ensure the basis of quality control by providing guidance on benchmark standards expected of the Contractor in the development and delivery of products. The guidance given below, in the form of quality control project management measures, is intended to help ensure a common understanding of the principal, executive, senior, expert, and junior level of the work to be carried out in developing and delivering products, and to contribute to meeting the quality assurance expectations of HQ SACT.

b. Use of the Full Spectrum of Quality Control Measures

- 1) This guidance will be employed by HQ SACT as a reference and compliance tool in assessing the accuracy of the Contractor's Basis of Estimate (BOE) as it applies to task orders. A BOE will be a contract pre-requisite for task orders and will accompany the price proposal for consideration of the products ordered in Work Package 2. The BOE will be used for placement of task orders, based on the agreed rates and schedule and resourcing specifics for each task. While it is anticipated that the various Quality Control Measures (QCMs) will be priced according to their relative levels of complexity, HQ SACT will, throughout the life of the contract, expect to see the full array of QCMs employed. In reviewing BOEs, HQ SACT will expect to see evidence that the most economical and efficient use of QCMs is intended by the Contractor.
- 2) New requirements may warrant development of further QCMs to enable the fulfilment of deliverables. In such cases, the new measure(s) shall be developed and agreed by the Contractor, the COTR and the Contracts Officer, and incorporated by formal contract modification.

c. General Measures

All work on the development of ABC Contract deliverables is expected to require, as a minimum, the following:

- 1) Develop and deliver products in the English language.
- 2) Develop and deliver products through Word Processing, Spreadsheets, Graphics presentations and Databases.
- 3) Capable of supporting temporary overseas travel to NATO and PfP nations.

d. Benchmark Measures

- 1) The benchmarks below set out indicative qualities and skills for each measure,

- 2) **Executive Level Quality Control Measures:** Strategy contributions, informed by global trends and proven forecasting across public and private sectors. Facilitation of capstone events, employing acknowledged expertise, experiences, and successful strategies to develop innovative or novel approaches to organizational development problem sets, in order to stimulate debate at the political/military nexus. Requires engaging successfully with senior leaders at the highest levels to include, but not limited to, SACT and DSACT, to advocate for, and embed change. Ensure the successful development and delivery of high quality, complex products on time, and assure the delivery of associated outcomes and benefits.
- 3) **Senior Level Quality Control Measures:** Leads major contributions in complex, multifaceted change projects, concepts, and trials. Collaborative concept drafting, trial planning, defining objectives and priorities, evaluating performance, resolving problems, establishing quality control procedures, and coordinating with diverse stakeholders. Planning, scheduling and coordinating technical trials or experimentation activities. Originating innovative trials/experimentation schemes. Development of analytical test plans and procedures.

Requires engaging at leadership (OF-5)² level and higher and among multinational participants within complex stakeholder environments to advocate for, and embed change. Collecting, synthesizing, and analysing multiple source information to produce coherent reports with strategic relevance and value. Prepare products for seminars, study groups and conferences, and interface effectively with executive decision-makers.

- 4) **Expert Level Quality Control Measures:** Leads the development of products including: studies, designs, execution planning, team-enabled data collection, data analysis, and reports. Large scale literature reviews and research efforts. Development of high quality analytical approaches to complex subjects. Requires engaging at BSc/BA level and higher, in task-dependent disciplines including science, engineering, communication, writing, journalism and critical thinking. Facilitating and presenting evidence-based, persuasive results to senior-level decision-makers. Ability to organize and utilize a number of different techniques (e.g. storyboarding, table-top exercises, workshops, and prototyping) to socially elaborate and form consensus around organizational and user requirements. Ability to conduct as-is process analysis, combined with known gaps and feasible mechanisms in order to provide as-is business

² For more information, see here: https://en.wikipedia.org/wiki/Ranks_and_insignia_of_NATO

process documentation. The development of plans that will take policy, directive, gap analysis and user inputs to create an integrated implementation plan with the appropriate actors, due dates, product descriptions and oversight responsibilities.

Requires engaging at working level (all ranks up to OF-5) among multinational participants within bounded stakeholder environments to advocate for, and embed change.

5) **Junior Level Quality Control Measures:** Supports the development of products through evidence gathering, administration, initial preparation of deliverables using agreed templates (if appropriate), etc. Requires understanding and awareness of analytical dependent disciplines including science, engineering, communication, writing, journalism and critical thinking. Ability to organize and utilize individual techniques (e.g. storyboarding, table-top exercises, workshops, and prototyping). Requires logical thinking, both people and analytical skills, an understanding of organizational dynamics and an awareness of the complexities of international organizations and cultures.

ANNEX C: Grading Matrix - Evaluation Criteria

Best Value Grading Matrix to STATEMENT OF WORK

Contractor technical proposal will be assessed based on criteria mentioned in the following table. HQ SACT reserves the right to conduct technical discussions with contractor. Ultimately, companies shall clearly demonstrate by providing unequivocal explanation to where and how it meets the criteria set forth in this solicitation. The Contractor must demonstrate their experience and expertise in the subject matter, in which will be graded in accordance with the Grading Matrix.

This SOW is for a wholly Deliverables-based contract in which labour categories do not apply. Instead, QCMs are used as building blocks, denoting the expertise of the work force that the Contractor would assemble and apply to Task Orders placed in this contract. Response Part 2 assesses Contractors' understanding of the levels of experience and qualifications needed in the company personnel assigned to meet each level of QCM. On contract award, the successful Contractor will be expected to employ the same benchmarking standards when meeting future requirements; this will be subject to validation, with each Proposal from the Contractor in response to each Task Order, throughout the life of the contract.

In evaluation scoring, "Relevant industries" are:

- a) Large, multinational companies (> 10,000 employees);
- b) Think tank / relevant charity / other policy-influencing small organizations;
- c) Military;
- d) Other public sector organizations.

Criteria	Evaluation Factor	Value Range	Score (100 possible)
ANY SCORE OF ZERO IS NON-COMPLIANT (UNLESS SPECIFIED OTHERWISE WITHIN THE CRITERIA)			
Response Part 1 - Company Experience and Citations of Past Performance			
1	Demonstrated academic credibility in Organisational Development, including publications, events, and industry	A) Publications: <ul style="list-style-type: none"> Well-respected, relevant books & articles (0-3 points) B) Events: <ul style="list-style-type: none"> International, national or state level/regional high-profile, respected event organising, or invitation as keynote speakers, etc. (0-3 points) 	12

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	benchmarking.	<p>C) Industry benchmarking:</p> <ul style="list-style-type: none"> Position on business change and / or relevant consulting industry benchmarks, by well-respected, independent benchmarking entities (0-6 Points) <p>A score of 0 in this criteria is still considered compliant</p>	
2	Demonstrated experience in Organizational and Business Model Design, Business Analysis	<p>“Relevant skills” are identified in contract serial 1: <i>Organizational and Business Model Design, Business Analysis</i></p> <p>Breadth & duration of experience</p> <ul style="list-style-type: none"> Extremely high: All examples of past performance are within the last 5 years, cover all relevant industries, and demonstrate a wide variety of applied relevant skills that delivered benefits to the referenced organizations. (20-27 points) High: Examples of past performance were delivered more than 5 years ago, OR examples cover only 3 out of 4 relevant industries. Provided examples demonstrate a wide variety of applied relevant skills that delivered benefits to the referenced organizations. (15-23 points) Good: Examples of past performance were delivered more than 5 years ago, AND the examples cover only 3 out of 4 relevant industries and demonstrate many relevant skills that delivered benefits to the referenced organizations. (10-18 points) Moderate: Examples of past performance cover only 2 out of 4 relevant industries, and demonstrate some relevant skills. (5-13 points) Low: Examples of past performance show experience in 1 out of the 4 relevant industries, and demonstrate a few relevant skills. (0-8 points). <p><u>A SCORE OF ZERO ON THIS CATEGORY IS NON-COMPLIANT</u></p>	27
3	Demonstrated experience in Culture Change	<p>“Relevant skills” are identified in contract serial 2: <i>Culture Change</i></p> <p>Breadth & duration of experience</p> <ul style="list-style-type: none"> Extremely high: All examples of past performance are within the last 5 years, cover all relevant industries, and demonstrate delivery of successful interventions to drive and maintain individual, group, and inter-group cultures in environments of highly diverse and 	25

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		<p>heterogeneous individual and team cultural backgrounds. Examples may include company mergers, international organizations, diverse cross-functional organizations, etc. Clear approach to applying lessons learned in these experiences to the requirements of this contract. (18-25 points)</p> <ul style="list-style-type: none"> • High: Examples of past performance were delivered more than 5 years ago, OR the examples cover only 3 out of 4 relevant industries, and demonstrate delivery of interventions that address individual, group, and / or inter-group culture in relatively heterogeneous cultural backgrounds. Clear approach to applying lessons learned in these experiences to the requirements of this contract. (14-22 points) • Good: Examples of past performance were delivered more than 5 years ago, AND the examples cover only 3 out of 4 relevant industries, and demonstrate experience in delivering interventions addressing individual, group, or inter-group culture in relatively homogenous cultural backgrounds. Some linkage of lessons learned in these experiences to the requirements of this contract. (9-17 points) • Moderate: All examples of past performance are within the last 10 years, cover 2 out of 4 relevant industries, and demonstrate experience in delivering interventions addressing individual, group, or inter-group culture in relatively homogenous cultural backgrounds. (5-12 points) • Low: Examples of past performance show experience in 1 out of the 4 relevant industries, and demonstrate some experience of considering cultural change and maintenance in homogeneous cultural backgrounds. (0-7 points). <p><u>A SCORE OF ZERO ON THIS CATEGORY IS NON-COMPLIANT</u></p>	
4	Demonstrated experience in Learning, Skills, and Talent Management	<p>“Relevant skills” are identified in contract serial 3: <i>Learning, Skills, and Talent Management</i></p> <p>Breadth & duration of experience</p> <ul style="list-style-type: none"> • High: All examples of past performance are within the last 5 years, cover at least 3 out of 4 relevant industries, and demonstrate successful interventions delivered in a wide array of contexts and under a range of unusual policy and / or cultural 	16

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		<p>constraints. (9-16 points)</p> <ul style="list-style-type: none"> Moderate: All examples of past performance are within the last 10 years, cover at least 2 out of 4 relevant industries, and demonstrate experience of talent acquisition and management across more than one policy and cultural context. (5-12 points) Low: Examples of past performance show experience in 1 out of the 4 relevant industries, and demonstrate some experience of talent acquisition and management. (0-7 points) <p><u>A SCORE OF ZERO ON THIS CATEGORY IS NON-COMPLIANT</u></p>	
5	Answers Reachback explanation questions posed in SOW	<ul style="list-style-type: none"> 4 Provides excellent answers to the questions posed 1-3 Adequately answers questions 0 Does not answer questions <p><u>A SCORE OF ZERO ON THIS CATEGORY IS NON-COMPLIANT</u></p>	4
6	Indicates Reachback is NOT a cost plus item	<ul style="list-style-type: none"> 4 Not cost plus 0 Cost plus <p>A score of 0 in this criteria is still considered compliant</p>	4
7	Submitted a quality assurance plan not exceeding 5 pages.	<ul style="list-style-type: none"> 3-6 Quality assurance plan provides information corresponding to a score of 2-4, and also: high confidence in deliverable quality. It highlights the nature of effective quality assurance as a continuous process. It appropriately balances the cost and duration of quality assurance activities against the business risk and benefit provided by deliverables. 2-4 Quality assurance plan identifies roles, responsibilities, milestones, and timelines for quality assurance activities. It provides high confidence in deliverable quality. 1-3 Quality assurance plan demonstrates that quality is considered during deliverable production. Quality control processes are in place to prevent release of poor-quality products. 0 Did not submit quality assurance plan <p><u>A SCORE OF ZERO ON THIS CATEGORY IS NON-COMPLIANT</u></p>	6
8	Submitted a plan for Programme Management	<ul style="list-style-type: none"> 3-6 PgM plan provides information corresponding to a score of 3-5, and also: continuous presence of Contractor 	6

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	(PgM) not exceeding 5 pages.	<p>Programme Manager provides strong confidence in the coordination and coherence of ongoing and upcoming tasks to support the ACT team. PgM is delivered with a managed or minimal impact on ACT business operations. Identified PgM resource is efficiently utilized and is able to manage variable task throughput.</p> <ul style="list-style-type: none"> • 2-4 PgM plan identifies specific roles, activities, and processes to coordinate and cohere ongoing and upcoming tasks. PgM resource has strong, relevant skills and experience. • 1-3 PgM plan identifies proposed resources. • 0 Did not submit PgM plan, or the proposed candidate(s) for PgM do not possess a NATO SECRET clearance (or equivalent clearance from a NATO Nation). <p><u>A SCORE OF ZERO ON THIS CATEGORY IS NON-COMPLIANT</u></p>	
9	Quality Control Measures	<ul style="list-style-type: none"> • PASS: At least one CV of a named individual is submitted for each QCM, for each Contract Serial, stating how the example individual aligns to the indicative benchmarks. The same CV may be submitted against multiple Contract Serials (if appropriate). • FAIL: No CVs of named individuals have been identified for at least one combination of QCM and Contract Serial. <p><u>FAILURE ON THIS CRITERIA IS NON-COMPLIANT</u></p>	

