NITAAC CIO-CS
"The Store"
Pre-RFP Webinar

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7361 Calhoun Place, Suite 560
Rockville, MD
service@ostglobalsolutions.com
301.384.3350 • www.ostglobalsolutions.com

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CIO-CS
History

NITAAC CIO-CS "The Store"

- Electronic Commodities Store (ECS III):
  - 12-year contract after 2 one-year extensions from 2002 through 2014
  - Over 40 prime contract holders
- Chief Information Officer – Commodities And Solutions (CIO-CS) replaced ECS III and will expire in April of 2025
  - 70 prime contract holders
  - Over $4.3b obligated through 2024
- The Store will replace CIO-CS with the final RFP due "by end of summer 2024" and will have a 5-year base with a 5-year option
  - The Sources Sought says "It is anticipated that the resulting GWAC **will be open to all qualified contractors. Original Equipment Manufacturers (OEMs) that qualify in one or more of the Product Groups** described in the draft Product Categories and Groups List provided below and **Value Added Resellers (VARs) that qualify in all of the Product Groups**."
 - $25b ceiling over 10 years.

CIO-CS Spending by Agency
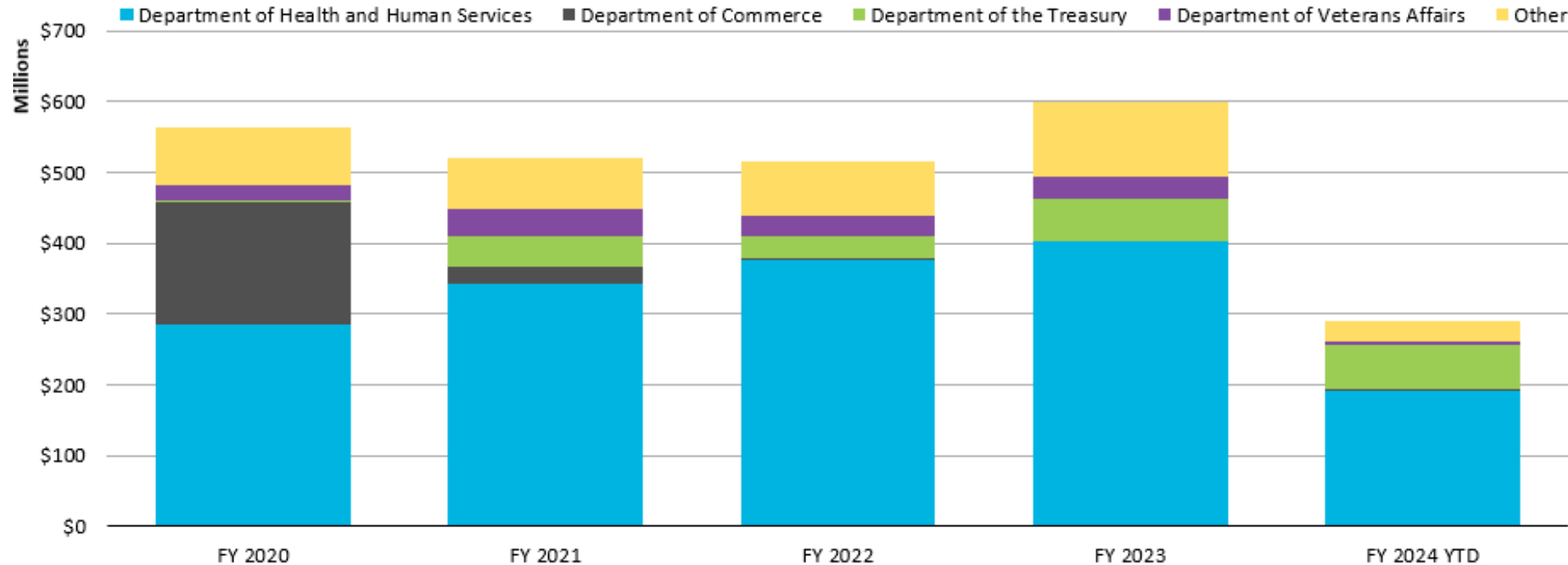
*Data from Bloomberg

Rank	Bureau or agency	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024 YTD
1	Department of Health and Human Services	$284,906,628	$342,176,949	$376,625,072	$402,759,684	$192,825,089
2	Department of Commerce	$173,338,708	$25,926,605	$3,126,321	-$8,381,159	$1,534,093
3	Department of the Treasury	$2,250,207	$41,366,149	$31,397,089	$59,153,127	$61,162,216
4	Department of Veterans Affairs	$20,485,346	$38,901,030	$28,128,920	$31,565,684	$4,746,829
5	Other	$82,627,393	$71,306,157	$76,988,972	$105,536,736	$30,392,229

CIO-CS Spending by NAICS

*Data from Bloomberg
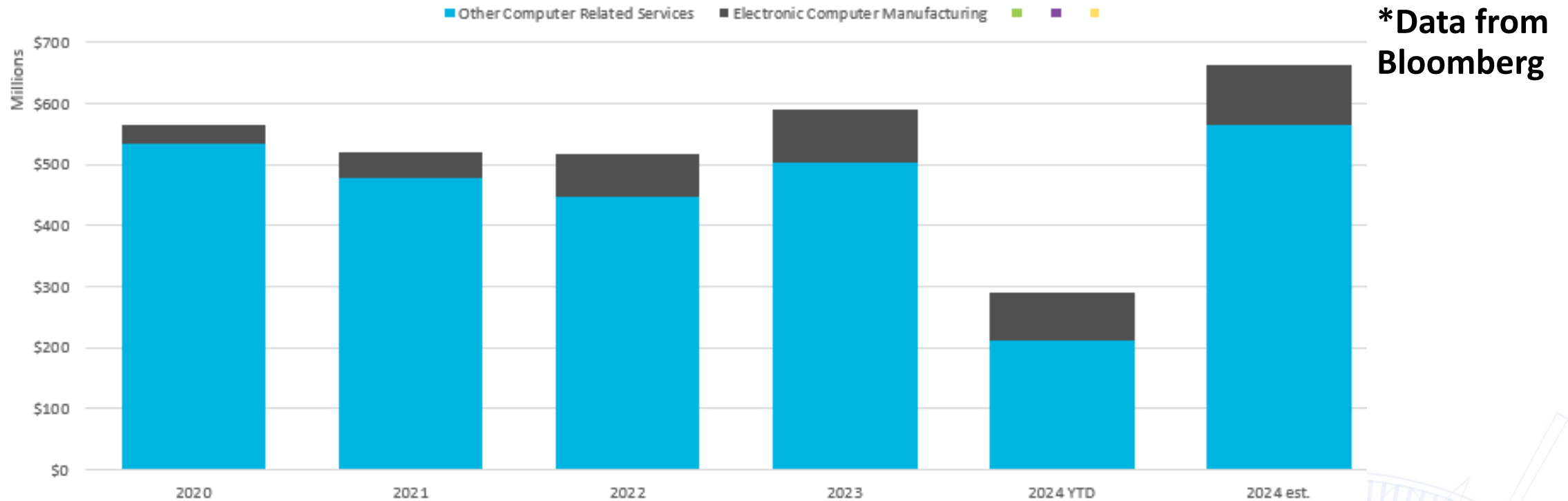
Rank	NAICS	Description	2020	2021	2022	2023	2024 YTD	2024 est.
1	541519	Other Computer Related Services	$534,285,600	$476,737,239	$447,777,715	$503,139,093	$212,064,282	$566,025,901
2	334111	Electronic Computer Manufacturing	$29,322,682	$42,939,651	$68,488,658	$87,494,979	$78,596,174	$96,256,282

CIO-CS Spending by Set-Aside

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Small business obligations as percentage of total obligations, fiscal 2023

■ Set-aside to SB ■ Full and Open - Awarded to SB ■ Awarded to Other than SB
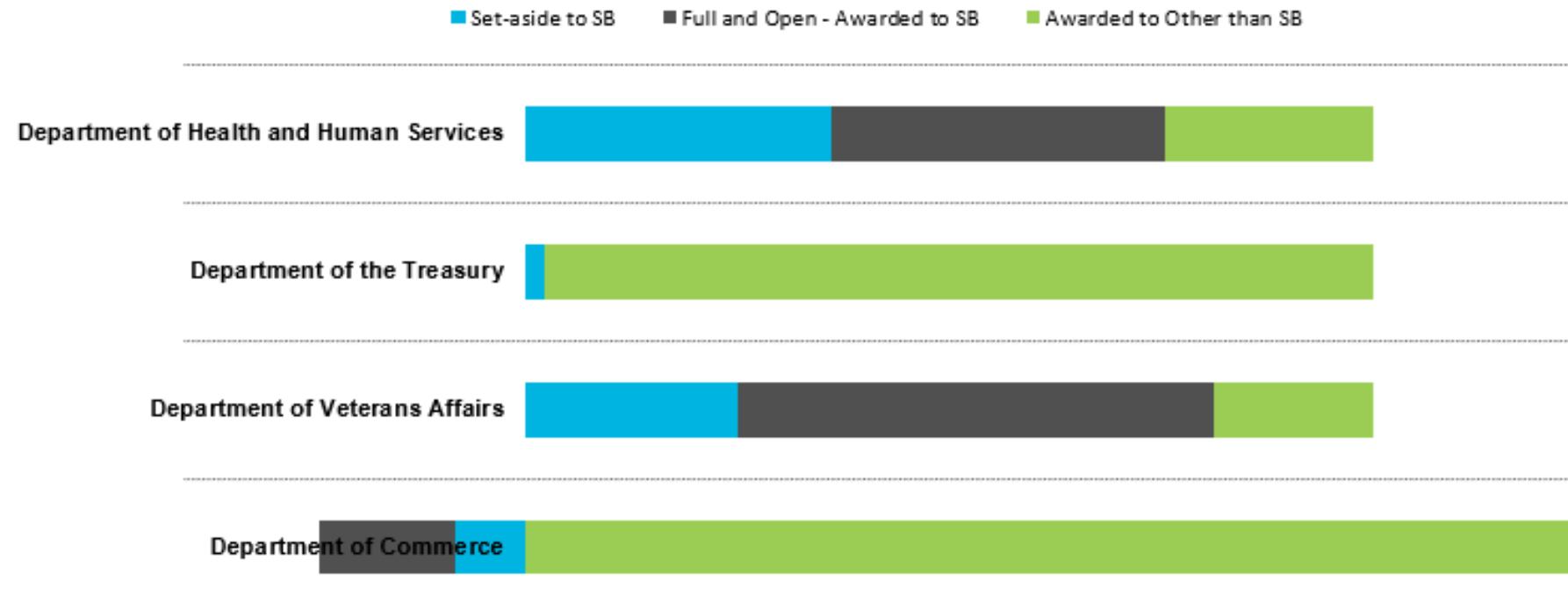
NITAAC had a goal of 60% SB spendings on the GWAC and exceeded that goal significantly.

Bureau or agency	Set-aside to SB	Full and Open - Awarded to SB	All SB	Awarded to Other than SB
Department of Health and Human Services	36%	39%	75%	25%
Department of the Treasury	2%	0%	2%	98%
Department of Veterans Affairs	25%	56%	81%	19%
Department of Commerce	-8%	-16%	-24%	124%

*Data from Bloomberg

2024 |

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The Store Requirements

The Store: Basic Information

- NAICS: 334111 and 541519
  - The small business size standards are 1000 employees (for 334111) and 150 employees (for 541519 - VARs).
- Anticipated Awards: all qualified offerors
- Offerors may propose under the solicitation either as an Original Equipment Manufacturer (OEM) or as a Value Added Reseller (VAR) subject to the definitions provided below.
  - Original Equipment Manufacturer (OEM) – A concern which, with its own facilities, performs the primary activities in transforming inorganic or organic substances, including the assembly of parts and components, into the end item being acquired.
  - Value Added Reseller (VAR) – Company that takes existing commodities adds its own "value" and resells it as a new product or package. An Information Technology Value Added Reseller provides a total solution to information technology commodity acquisitions along with commodity enabling services.

The Store: Scope

- Category 1, Group A - End User Hardware Commodities, Laptops
- Category 1, Group B - End User Hardware Commodities, Desktops
- Category 1, Group C - End User Hardware Commodities, Printers
- Category 1, Group D - End User Hardware Commodities, Monitors, TVs, Displays
- Category 1, Group E - End User Hardware Commodities, Accessory (Mouse, Keyboard, etc.)
- Category 2, Group A - End User Software Commodities, Operating System
- Category 2, Group B - End User Software Commodities, Desktop Collaboration Suite
- Category 2, Group C - End User Software Commodities, Accessory
- Category 3, Group A - IT Security Software Commodities, Anti-Virus Software
- Category 3, Group B - IT Security Software Commodities, Accessory
- Category 4, Group A - Enterprise-Wide Software Commodities, Enterprise Database Management Systems
- Category 4, Group B - Enterprise-Wide Software Commodities, Enterprise Performance Management Tools
- Category 4, Group C - Enterprise-Wide Software Commodities, Subscription, Licenses, Enterprise Suite
- Category 4, Group D - Enterprise-Wide Software Commodities, Accessory

- Category 5, Group A - Health and Biomedical Research IT Capabilities, Laboratory Information Systems
- Category 5, Group B - Health and Biomedical Research IT Capabilities, Subscription, Licenses, Enterprise
- Category 5, Group C - Health and Biomedical Research IT Capabilities, Accessory
- Category 6, Group A - On-Premise Infrastructure, Enterprise Servers
- Category 6, Group B - On-Premises Infrastructure, Subscription, Licenses, Enterprise, Service, Maintenance
- Category 6, Group C - On-Premise Infrastructure, Accessory
- Category 7, Group A - Infrastructure and Platform as a Service, Computing
- Category 7, Group B - Infrastructure and Platform as a Service, Enterprise Storage
- Category 7, Group C - Infrastructure and Platform as a Service, Service, Maintenance
- Category 7, Group D - Infrastructure and Platform as a Service, Accessory
- Category 8, Group A - Telecommunications Plans, Carrier Plans
- Category 8, Group B - Telecommunications Plans, Subscription, Licenses, Enterprise
- Category 8, Group C - Telecommunications Plans, Accessory
- Category 9, Group A - Value Added Services

The Store: Aniticipated Minimum Requirements

- It appears that NITAAC is encouraging more OEMs to submit proposals by adding groups with categories

- VARs must demonstrate capability within every category and group

- CIO-CS Minimum Sales and Business Background:
  - Be in business for a minimum of 3 years prior to submitting its proposal
  - VAR: average annual sales for IT commodities are a minimum of $5,000,000 over the past 3 years
  - OEMs average annual sales are a minimum of $50,000,000 over the past 3 years

- CIO-CS Minimum Past Performance Requirements:
  - The submitted past performances shall include at least 3 similar programs or contracts with a total value of over $5,000,000 for which the offeror is a prime contractor.
  - If the past performance cited is for an IDIQ or similar contract, the aggregate total value of the delivery/purchase orders shall be over $5,000,000.
  - Contracts listed shall include those entered into with the Federal Government, agencies of state and local Governments or commercial customers

CIO-CS Proposal Requirements

CIO-CS Evaluation Criteria

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- **Phase 1: Go/No-Go**
  - General – a complete proposal consisting of all documents as listed in the Compliance Checklist (Attachment J.2).
  - Technical Compliance Workbook.
  - Minimum Sales and Business Background. The government will assess the proposal to determine whether the offeror has been in business for a minimum of three years prior to the date of submitting its proposal and that over the previous three years, the offeror's average annual sales for IT commodities were a minimum of $5,000,000 for offerors proposing as a VAR or $50,000,000 for offerors proposing as an OEM.

- **Phase 2: Best Value Trade Off**
  - The Government strongly discourages use of commercially available proposal templates for preparation of a response to this solicitation. Proposals prepared from commercially available templates demonstrate a fundamental lack of understanding of the requirements of the solicitation. Proposals that are essentially duplicative of a proposal template may be determined to be unacceptable by the Government and ineligible for award.
  - The non-price factors are listed in descending order of importance:
    - a. Factor 2 (Technical Understanding and Capability)
    - b. Factor 1 (Management Approach)
    - c. Factor 3 (Past Performance)
  - To the extent that the factors contain subfactors, the government will consider the subfactors under each factor in equal order of importance in determining the overall rating for the applicable factor.

- When combined, the non-price factors are significantly more important than price.

Preparing for CIO-CS Evaluation Criteria: Management Approach

- **M.2.1 Factor 1 – Management Approach:** The government will assess the offeror's demonstrated capability to perform delivery orders under the contract by evaluating the offeror's management experience and capabilities.

- a) Subfactor 1 – Program Management: The government will assess the extent to which the offeror demonstrates an <mark>ability to successfully manage, deploy and sustain IT commodities and solutions</mark> by evaluating the offeror's proposed structure, quality focus and business operations.

Preparing for CIO-CS Evaluation Criteria: Management Approach

- **b) Subfactor 2– Corporate Commitment and Technology Refreshment**
  - Element 1 – Business Development. The government will evaluate the extent to which the offeror plans to commit to the CIO-CS GWAC, specifically, the offeror's ==strategy for marketing this GWAC to the NIH ICs, HHS Operational Divisions, and other eligible federal agencies during the life of the contract, participating in program improvement initiatives, training of customers, and strategy for pursuing technological innovations to include the offeror's method of tracking and motivating success in these efforts==.
  - Element 2 – Technology Refreshment. The government will evaluate the extent to which the proposal demonstrates a strategy for pursuing technological innovations including:
    - i. The feasibility of the offeror's plan to proactively reduce costs, add value and keep the technology current on the contract.
    - ii. The feasibility of the offeror's plan to keep abreast of industry trends and software licensing changes.
    - iii. The feasibility of the offeror's processes and structure that are in place to support the Government.

- **c) Subfactor 3 – Corporate Experience**
  - The Government will evaluate the relevancy of the offeror's experience in providing the commodities and commodity enabling services at other Government agencies for a similar size, scope and complexity as CIO-CS.

Preparing for CIO-CS Evaluation Criteria: Technical Understanding and Capability

- **M.2.2 Factor 2 – Technical Understanding and Capability**
- a) Subfactor 1 – Technical Capability
  - (1) The government will evaluate the degree to which the offeror demonstrates relevant experience and/or qualifications in each of the specific categories proposed, as described in Article C.6, including the offeror's proposed methodology, technical approach, and quality control process. As part of this subfactor, the government will assess whether proposals submitted by OEMs qualify in a minimum of one category as described in Article C.6 and that proposals submitted by VARs qualify in all categories except Category 8 – Telecommunication Plans.
  - (2) As part of this assessment, the government will evaluate:
    - (a) the depth and breadth of the technical capabilities proposed beyond the minimum requirements contained in the Technical Compliance Workbook (Section L.6);
    - (b) the scalability and extensibility of the offeror's commodities and capabilities that demonstrates the offeror's ability to deliver the full range of commodities as described in the solicitation where and when needed; and
    - (c) the extent of which the technical approach demonstrates the capability of the offeror in performing the commodity enabling services as contained in Article C.7, and the feasibility of that approach through the life of the contract.
  - (3) In addition, for VARs, the government will verify that the products proposed to be resold under the contract are authorized by evidence of authorization certificates and/or letters of supply from the manufacturer.

Preparing for CIO-CS Evaluation Criteria: Technical Understanding and Capability

- **b) Subfactor 2 – Strategic Sourcing:** The government will evaluate the extent to which the offeror presents a sound strategy for managing the strategic sourcing initiative. The government will evaluate the extent to which the offeror describes experience in managing strategic sourcing initiatives (commercial or federal) and the extent to which the offeror describes a methodology of tracking and managing a large influx of orders that ensures availability of sufficient products to meet the demand.

- **c) Subfactor 3 – Domain-Specific Capability in a Health-Related Mission (applicable to VARs):** The government will evaluate the extent to which the offeror demonstrates an inherent domain-specific capability in a health-related mission. Health-related missions are broadly defined as those that contribute directly to human health and may include corporate expertise in fields such as healthcare, health-related/biomedical research and health science, clinical analytics and intelligence, health policy, health-related grant making, and regulation of health industries. This capability can be demonstrated through experience examples or internal resources with substantial relevant experience. Failure to demonstrate such capability will result in an unacceptable rating.

Preparing for CIO-CS Evaluation Criteria: Past Performance

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- **M.2.3 Factor 3 – Past Performance**

- The government will assess the quality of the offeror's performance, and capabilities by evaluating the offeror's past performance as prime in providing IT commodities and commodity enabling services.

- When evaluating past performance, the Government will focus on the areas of Quality of commodity enabling services, Timeliness of Performance, Price/Cost Control, and Customer Satisfaction.

- The Government will not evaluate past performance information which is deemed to be not relevant or non-conforming. Examples of non-conforming past performance information include (but are not limited to) the following:
  - 1. Projects for which the primary purpose of the project was the delivery of services (as opposed to projects for which the primary purpose was the delivery of commodities);
  - 2. Projects completed more than five (5) years from the date of issuance of the CIO-CS solicitation.

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Preparing for CIO-CS Evaluation Criteria: Price

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- **M.3 Price Evaluation (Factor 4)**

- Offerors will be evaluated based upon price completeness and accuracy, price realism and price reasonableness to determine the validity of the proposed price for the base period and the option period. Total Evaluated Price (TEP) will be utilized as the basis for the Best Value Trade-off and award decisions. Total Evaluated Price will be calculated on the Summary worksheet of the Pricing Workbook.

Next Steps
&
Resources

Next Steps & Resources

- We provide gap analysis, capture, and proposal support.
- NITAAC Updates can be found here: https://nitaac.nih.gov/gwacs/cio-cs-store
- We have a subcontractor portal where you can upload your capabilities for this opportunity and others:
  - https://www.ostglobalsolutions.com/teaming-partner-match-portal/
- We are happy to schedule time to discuss your "The Store" bid:
  - https://calendly.com/ostglobalsolutions/bdconsulting?month=2023-09
- We regularly publish updates to major contracts through our newsletter and blog:
  - Blog: https://www.ostglobalsolutions.com/blog/
  - Newsletter sign up: https://www.ostglobalsolutions.com/tag/email/

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Let's Partner in Winning Business

David Huff

CEO

c: 513.316.0993

o: 301.769.6602

e: dhuff@ostglobalsolutions.com

www.ostglobalsolutions.com