

December 23, 2020

**Source Selection/Best Value Award Decision Document
Department of Defense (DoD) Fourth (4th) Estate Agencies
Employee Assistance Programs (EAP) & Work-Life Support Services
Solicitation Number: HQ0034-20-R-0210**

I. Description of Services:

The Government intends to award a Single Indefinite Delivery Indefinite Quantity (IDIQ) contract, consisting of Firm-Fixed Price (FFP), Labor Hours (LH), and Time and Material (T&M) Contract Line Item Numbers (CLINs), to a responsible offeror whose offer, conforming to the solicitation, is determined to be the best overall value, price, and other factors considered to provide Employee Assistance Programs (EAP) & Work-Life Support Services. The principal objective is for the contractor to provide programs and services to assist DoD with meeting mission goals and objectives by: (1) Empowering employees in their efforts to resolve personal issues that may adversely impact work performance; (2) Assist employees in balancing their professional and personal lives; (3) Equip employees with information and referral sources that assist in the caring for dependent family members; (4) Provide high quality programs and services that will lead to a more productive workforce; and (5) Support supervisors, managers, and other workplace leaders in managing complex demands in the workplace. The contractor shall provide all personnel, equipment, supplies, facilities, transportation, tools, materials, supervision, and other items and non-personal services necessary to perform Employee Assistance Programs (EAP) & Work-Life Support Services as defined in the Performance Work Statement, except for those items specified as government furnished property and services.

II. Background:

On September 1, 2020, solicitation no. HQ0034-20-R-0210 was issued via Beta.Sam's website under NAICS code "624190" with a small business size standard of \$12,000,000.00. On the date of issuance, solicitation questions to the Government were required by September 8, 2020 at 10:00 am, Eastern Standard Time (EST). The solicitation required response date/time was September 30, 2020 at 10:00 am EST.

A brief synopsis of the issued solicitation is referenced below.

On September 4, 2020, Amendment 0001 was issued via beta.Sam's website to extend the questions due date from September 8, 2020 to September 10, 2020.

On September 28, 2020, Amendment 0002 was issued via beta.Sam's website to extend the proposal due from September 20, 2020 to November 2, 2020 at 10:00am EST.

On October 9, 2020, Amendment 0003 was issued via beta.Sam's website to: (1) provide the Government's response to the Questions and Answers (Q&A); (2) provide the updated PWS dated October 8, 2020; (3) include the updated solicitation; (4) provide the corrections to Attachment 2 – NDA; (5) provide the updated Attachment 8 – Pricing

template; (6) provide the updated Attachment 30 – Technical Exhibit 3 – WHS Estimated Workload; and (7) include Attachment 31 – Utilization Report.

On October 21, 2020, Amendment 0004 was issued via beta.Sam's website to: (1) provide the updated Government response for the Questions and Answers; (2) provide the updated Attachment 1 – IDIQ PWS; (3) provide the updated Attachment 8 – Pricing Template; (4) provide the updated Attachment 31 – Utilization Report; (5) include DFARS Clause 252.244-7000 "Subcontracts for Commercial Items"; (6) add contract line item number (CLIN) X0005 for Defense Intelligence Agency (DIA) Emergency Care Support Services; (7) provide the updated Attachment 21 – Technical Exhibit 3 – DIA Estimated Workload; and (8) update the contract period of performance.

On November 2, 2020 the solicitation closed. The Government received one (1) proposal from Armed Forces Services Corporation (AFSC) dba Magellan Federal.

On November 12, 2020 the TEB convened and reviewed proposals.

III. Basis for Contract Award:

Unless all offers are rejected, the Government intends to award a Single Indefinite Delivery Indefinite Quantity (IDIQ) contract to the responsible offeror whose offer, conforming to the solicitation, is determined to be the best overall value, price, and other factors considered. The Government may select for award the Offeror whose price is not necessarily the lowest, but whose technical proposal and/or past performance is more advantageous to the Government and warrants the additional cost. Offerors must satisfy the requirements described in the Performance Work Statement (PWS), as well as other Request for Proposal (RFP) requirements. Proposals that take exception to any requirement, state assumptions or impose requirements not in or contrary to the solicitation or otherwise qualify the proposal shall not be considered and shall be deemed unacceptable for award.

PASS/FAIL CRITERIA:

The Government will evaluate a proposal ONLY IF the offer/proposal satisfies all of the following elements, which will be evaluated on a pass/fail basis*:

- (1) Commitment Letters for Key Personnel.
- (2) The Offeror submits a Small Business Participation Commitment Document (SBPCD) that meets the criteria identified in the solicitation.
- (3) Contract Award References of \$6M or greater annually in support of Employee Assistance Programs (EAP) & Work-Life Support Services.

*The Government will fully evaluate only those offers that receive a "pass" for the element; however, a "pass" for the element does not guarantee award. Offerors will only be eligible for award after an evaluation is conducted in accordance with the criteria set forth in FAR 52.212-2 of this solicitation. If the offeror receives a "fail" for the element listed above, the offeror's proposal will not be evaluated further.

EVALUATION FACTORS:

The evaluation of the base IDIQ will be based on an integrated assessment of the Offeror's proposal. Proposals shall be evaluated on the factors listed below. Technical Approach & Capability (Factor 1), and Past Performance (Factor 2) are equal, and when combined are significantly more important than Price; however, Price is a substantial factor. As offerors becomes more equal under Factors 1 and 2, Factor 3 - Price will become more significant in the award decision.

Factor 1 – Technical Approach & Capability

Factor 2 – Past Performance

Factor 3 – Price

a. Factor 1 - Technical Capability & Management Approach

The Government will evaluate the adequacy of the Offeror's approach as demonstrated by the proposed technical approach and capabilities. The proposal shall be sufficiently complete to demonstrate how the Offeror will meet the IDIQ PWS requirements throughout the performance period. The Government will evaluate the offerors technical approach and capabilities to include the Management Approach, Staffing Plan, Phase-in Plan, Personnel Matrix, and Key Personnel resumes. Data previously submitted, or presumed to be known, i.e., descriptions of previous projects performed for the Government, cannot be considered as a part of the proposal unless physically incorporated in the proposal. Clarity, completeness and conciseness are essential.

Management Approach: The Government will evaluate proposals to assess the Offeror's Management Approach to include the Staffing Plan and Key Personnel. The Offeror's Management Approach to meeting the PWS requirements needs to demonstrate to the Government that the proposed approach will meet the schedule and performance requirements.

Staffing Plan: The Government will evaluate and assess the offeror staffing approach to meet the Government's requirements and how the Offeror plans to attract, select, hire, and retain qualified personnel capable of successfully meeting the PWS requirements, and how that plan minimizes the impact on contract performance. The Government will evaluate the offeror's proposed Key Personnel and resumes to determine if the proposed

personnel have the required clearances and the degree to which the personnel proposed will lead to successful performance of the PWS requirements. All proposed Key Personnel shall meet the requirements detailed in the attached Key Personnel Requirements provided in the PWS.

Phase-in Plan: The Government will evaluate the Offerors phase-in plan that adequately describes an approach to provide a smooth, uninterrupted Phase-in, which shall take place during the initial 30 calendar days upon contract award.

Note. Commitment letters, Resumes for Key Personnel and Personnel matrix under Technical Approach & Capability (Volume III) shall not count against the page limitation.

b. Factor 2 - Past Performance

The Government will evaluate how well the Offeror has performed on contracts that have been determined to be both recent and relevant to the PWS.

Past performance is a measure of the degree to which the Offeror satisfied its customers in the past and complied with Federal, State, and local laws and regulations, as identified as the Prime Contractor. The Government may contact some, all or none of each Offeror's customers to ask, among other things, whether: (1) the Offeror is capable, efficient, and effective; (2) the Offeror's performance conformed to the terms and conditions of its contract; (3) the Offeror was reasonable and cooperative during performance; (4) the Offeror was committed to customer satisfaction; (5) the Offeror was able to hire and retain qualified personnel to the satisfaction of the customer; and (6) if they would select the same Contractor or a different Contractor, given the opportunity.

The Government may also use other information available from other sources to evaluate the Offeror's past performance, which may include, but not limited to: Past Performance Questionnaire, Federal, State and local Government agencies, Better Business Bureaus, published media, electronic databases such as the Contractor Performance Assessment Reporting System (CPARS) and the Past Performance Information Retrieval System (PPIRS). The Government reserves the right to limit or expand the number of references it decides to contact and to contact references other than those provided by the Offeror.

In the case of an Offeror without a record of relevant past performance or for whom no information on Past Performance is available, the Offeror will not be evaluated favorably or unfavorably on past performance.

c. Factor 3 - Price

In accordance with FAR 15.404-1, Proposal Analysis Techniques, proposals will be evaluated to determine if they are fair and reasonable. The offeror's price must be found to be fair and reasonable in order to be eligible for award. Price will not be scored or receive an adjectival rating. The total evaluated price will include all Contract Line Item Numbers (CLINs) listed in Section SF 1449 – CONTINUATION SHEET, except for CLINs associated with travel.

Firm Fixed Price (FFP) CLINs: For FFP CLINs, the evaluated price shall be the sum of the rates for each labor category shown on the pricing template multiplied by the number of hours for each labor category and (b) the six-month extension authorized by FAR clause 52.217-8. For purposes of determining the evaluated price for the six month 52.217-8 extension, the total price is calculated as one-half of the total price of the last ordering period. The government may determine that a proposal is unacceptable if the prices are significantly unbalanced. Evaluation of options will not obligate the Government to exercise the option(s).**

**The FFP Per Employee Per Month rate will become a part of the contract which the offeror cannot exceed.

Labor Hour (LH) CLINs: For the evaluated price of labor hour CLINs for each Labor Category (LCAT) in each contract year, the government will multiply the Offeror's proposed labor rate by the government's corresponding labor hours by the respected LH CLINs identified within the solicitation. The sum of these figures will represent the LH cost of the contract, and will be added into the total evaluated price.**

**The hourly rate for the Onsite Counselor, the hourly rate for each Training Session, and the hourly rate for each Critical Incident Response will become a part of the contract which the offeror cannot exceed.

Time & Materials (T&M) CLINs: The Offeror is not required to propose prices for Time and Material CLINs. The government will provide a not-to-exceed price based on the Government's estimates of lodging, shipping, travel location(s) and estimated days. The T&M cost of the contract will be added into the total evaluated price.

IV. Rating Methods:

a. Factor 1 - Technical Approach & Capability and Factor 2 - Management Approach

The combined technical/risk rating includes consideration of risk in conjunction with the strengths, weaknesses, significant weaknesses, uncertainties, and deficiencies in determining technical ratings. Volume I of each proposal shall be given a rating identified in Table 1 that reflects the degree to which the proposed approach meets or

does not meet the threshold performance or capability requirements through an assessment of the relative strengths, deficiencies, weaknesses and significant weaknesses, and risks to successful performance.

Table 1: Combined Technical/Risk Rating Method		
Color	Rating	Description
BLUE	Outstanding	Proposal indicates an exceptional approach and understanding of the requirements and contains multiple strengths, and risk of unsuccessful performance is low.
PURPLE	Good	Proposal indicates a thorough approach and understanding of the requirements and contains at least one strength, and risk of unsuccessful performance is low to moderate.
GREEN	Acceptable	Proposal meets requirements and indicates an adequate approach and understanding of the requirements, and risk of unsuccessful performance is no worse than moderate.
YELLOW	Marginal	Proposal has not demonstrated an adequate approach and understanding of the requirements, and/or risk of unsuccessful performance is high.
RED	*Unacceptable	Proposal does not meet requirements of the solicitation, and thus, contains one or more deficiencies, and/or risk of unsuccessful performance is unacceptable. Proposal is unawardable.

***NOTE:** If an Offeror is determined “unacceptable” under Factor 1 – Technical Approach & Capability, the Offeror’s proposal will be considered unacceptable overall and shall not be considered for award.

b. Factor 2 - Past Performance

There are three aspects to the past performance evaluation: recency, relevancy, and quality (including general trends in contractor performance and source of information).

Step 1 – Recency. The first step is to evaluate the recency of the Offeror's past performance. Recency is generally expressed as a time period during which past performance references are considered relevant, and is critical to establishing the relevancy of past performance information. Performance of each reference must be

completed within the previous three (3) years of the proposal due date to be considered recent.

Step 2 – Relevance. The second step is to determine how relevant a recent effort accomplished by the Offeror is to the effort to be acquired through the source selection. The relevancy rating evaluates the aspects of an Offeror's recent history of contract (or subcontract) performance that would provide the most context and give the greatest ability to measure whether the Offeror will successfully satisfy the current requirement. There are four levels of relevancy as shown in Table 2.

Table 2. Past Performance Relevancy Rating Method	
Rating	Definition
Very Relevant	Present/past performance effort involved essentially the same scope and magnitude of effort and complexities this solicitation requires.
Relevant	Present/past performance effort involved similar scope and magnitude of effort and complexities this solicitation requires.
Somewhat Relevant	Present/past performance effort involved some of the scope and magnitude of effort and complexities this solicitation requires.
Not Relevant	Present/past performance effort involved little or none of the scope and magnitude of effort and complexities this solicitation requires.

If the Offeror submits recent and relevant projects performed by a subcontractor, joint venture partner or key personnel as a past performance reference the Offeror must also explain how the subcontractor, key personnel or joint venture partner significantly contributed to the performance of the referenced project and how the Offeror expects the subcontractor, key personnel or joint venture partner to significantly contribute to the successful performance of the solicited work.

Step 3 - Quality of Products or Services. The third aspect of the past performance evaluation is to establish the overall quality of the Offeror's past performance (see FAR 15.304(c)(2)). The past performance evaluation conducted in support of a current source selection does not establish, create, or change the existing record and history of the offeror's past performance on past contracts; rather, the past performance evaluation process gathers information from customers on how well the offeror performed those past contracts. The past performance confidence assessment rating is based on the Offeror's overall record of recency, relevancy, and quality of performance. In conducting a performance confidence assessment, each Offeror shall be assigned one of the ratings in Table 3.

In the case of Offerors for which there is no information on past contract performance or where past contract performance information is not available, the Offeror may not be

evaluated favorably or unfavorably on the factor of past contract performance (see FAR 15.305(a)(2)(iv)). In this case, the Offeror's past performance is unknown and assigned a performance confidence rating of "neutral."

Table 3. Performance Confidence Assessment Rating Method	
Rating	Definition
Satisfactory Confidence	Based on the Offeror's recent/relevant performance record, the Government has a reasonable expectation that the Offeror shall successfully perform the required effort.
Neutral Confidence	No recent/relevant performance record is available or the Offeror's performance record is so sparse that no meaningful confidence assessment rating can be reasonably assigned. The Offeror may not be evaluated favorably or unfavorably on the factor of past performance.
Limited Confidence	Based on the Offeror's recent/relevant performance record, the Government has a low expectation that the Offeror shall successfully perform the required effort.
No Confidence	Based on the Offeror's recent/relevant performance record, the Government has no expectation that the Offeror shall be able to successfully perform the required effort.

Offerors that receive a rating of No Confidence under Factor 2 shall be considered unacceptable overall and shall not be further evaluated or considered for award.

c. Factor 3 - Price.

Price does not receive a rating. In accordance with FAR Part 12.209, the Government will evaluate whether the proposed price is fair and reasonable under Factor 3 above. The pricing evaluation will be based on price analysis techniques found in FAR 15.404-1, Proposal Analysis Techniques, to determine if they are fair and reasonable. If an Offeror's price is not found to be fair and reasonable, the Offeror will not be eligible for award.

V. Proposal Results:

(b)(5)

(b)(5)

(b)(5)



(b)(4)



VI. Evaluation Results:

(b)(5)



IX. Conclusion:

Based upon the finding of the Technical Evaluation Board (TEB), I have evaluated the proposal giving appropriate consideration to the evaluation criteria set forth in the solicitation and their relative importance. Based upon this evaluation of the proposal and a detailed assessment of their strengths, I have independently determined that the proposal submitted by Magellan provides the best overall value to the Government based on Factors 1 and 2 ratings, and total overall price. Accordingly, an award will be made to Magellan for Employee Assistance Programs (EAP) & Work-Life Support Services as set forth in its proposal.

Prepared By:

(b)(6)

Approved By:

JONES.JUANITA Digitally signed by JONES.JUANITA
(b)(6) (b)(6) (b)(6)
Juanita Jones
Contracting Officer/Branch Chief, WHS/AD/ESSD

12/23/2020

Date

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Tommie L. McCloud
Division Director, WHS/AD/ESSD

12/23/2020

Date

References:

- (a) Price Evaluation Memorandum dated 17 December 2020
- (b) Consensus Technical and Past Performance Evaluations
- (c) Offeror Proposal
- (d) RFP HQ0034-20-R-0210
- (e) Performance Work Statement