



OAK RIDGE INSTITUTE FOR SCIENCE AND EDUCATION

Request for Proposal #26-56793

December 9, 2025

Angela Hawn
ORISE Procurement Manager
865-399-0688
Angela.Hawn@orau.org

Potential Offeror,

Oak Ridge Associated Universities (ORAU), in support of the Oak Ridge Institute for Science and Education (ORISE) DOE prime contract, is seeking a proposal for a virtual **Community Engagement Platform** in accordance with Attachment 1 – Statement of Objectives and Software Requirements Please review this document and all accompanying attachments before submitting a proposal to the individual named above, *no later than* **Friday, December 19, 2025.**

PRICING

Offeror shall propose a firm fixed price for a product solution that satisfies the objectives identified in Attachment 1 – Statement of Objectives and Software Requirements. For pricing purposes, Offerors shall include pricing for a) up to 5,000 members, b) up to 10,000 members, and c) price to “add-on” additional members (at any point within the period of performance term). Pricing shall be inclusive of all components (i.e. implementation, training, fees, etc.) and be at the lowest price available. Please ensure all discounts, including GSA, Government, Integrated Contractor Purchasing Team (ICPT), educational or best value is accurately reflected. Should GSA pricing be used, please provide the GSA Schedule Number.

TERMS AND CONDITIONS

Attachment 2 – Contract Terms and Conditions will apply to any resulting agreement.

QUESTIONS

Questions related to this RFP shall be submitted in writing to the individual named above no later than **Friday, December 12, 2025.**

PREPARATION OF OFFERS

Proposals shall be submitted in accordance with **Attachment 2, Section L.2 Preparation of Offers.**

AWARD CRITERIA

ORAU anticipates one (1) award as the result of this solicitation. Award will be made to the responsible and responsive Offeror who provides the best value based on the factors defined in **Attachment 2, Section M.1 Basis for Award.**

ATTACHMENTS

Attachment 1 – Statement of Objectives
Attachment 1a – Software Requirements
Attachment 2 – Contract Terms and Conditions
Attachment 3 – ORAU Representations & Certification (*required if not registered in SAM.gov*)

Attachment 1- Statement of Objectives

Background

ORAU provides innovative scientific and technical solutions to advance national priorities in science, education, security, and health. Through specialized teams of experts, unique laboratory capabilities, and access to a consortium of more than 100 major Ph.D.-granting institutions, ORAU works with federal, state, local, and commercial customers to advance national priorities and serve the public interest. A 501(c)(3) nonprofit corporation and federal contractor, ORAU manages the Oak Ridge Institute for Science and Education (ORISE) for the U.S. Department of Energy (DOE). Learn more about ORAU at www.ornl.gov and about ORISE at <https://orise.ornl.gov>.

ORISE, a DOE asset, is dedicated to enabling critical scientific, research, and health initiatives of the department and its laboratory system by providing world-class expertise in Science, Technology, Engineering, or Math (STEM) workforce development, scientific and technical reviews, and evaluation of radiation exposure and environmental contamination. Focusing on the core mission to recruit and prepare the next generation of the nation's scientific workforce for DOE, its national laboratory system, and for non-DOE entities through the Strategic Partnership Projects program, ORISE-managed STEM internship and fellowship training programs are key to enabling America's scientific competitiveness. These partnerships enhance collaboration between DOE mentors and facilities, other federal agencies, the academic community, and industry; strengthen the scientific and technical workforce pipeline; and support the national commitment to research and science education.

More specifically, ORISE Research Participation Programs (RPP) provide opportunities for college and graduate school students, recent postgraduates (master, bachelor, and associate degree recipients), and faculty members to participate in and learn from a STEM research or technical program, project, or activity at DOE, its national laboratories, and other partnering federal agencies.

Purpose

The ORISE RPP is responsible for assisting DOE in developing and maintaining a robust supply of highly qualified, diverse, interested, engaged, and eligible candidates for the STEM research workforce pipeline by connecting them to learning-based internship and fellowship opportunities across the nation at the lowest cost possible. To support this requirement, ORISE requires a **virtual community engagement platform** to aid RPP in locating, attracting, and informing this diverse pool of qualified candidates.

A purposeful virtual engagement platform will enhance the value of the ORISE experience and foster a robust alumni network by connecting current participants with each other, with former participants as resources and mentors, and with ORISE staff and Federal Agency mentors for ongoing, meaningful interactions and opportunities for community collaboration, professional networking and mentoring.

Networking and building connections with other scientists are imperative to progressing the ORISE mission in developing collaborative efforts that enhance STEM research and workforce. Given the high volume of ORISE participants, mentors and alumni, providing a tool that allows virtual communication and access to STEM resources, is a key component to support the ORISE RPP mission to the fullest.

Required Capabilities

A comprehensive list of all minimum (MUST HAVE) software requirements are listed herein.

Attachment 1- Statement of Objectives

For purposes of proposal and pricing considerations, ORISE currently requires up to 5,000 members/users however, it is ORISE's intent and strategy to grow the platform over the five-year period of performance.

Standard Software

For information purposes, the standard software systems currently in use at ORAU/ORISE include Microsoft Windows 11 Enterprise, Microsoft 365 Apps, Microsoft Outlook/Exchange Server, Microsoft Teams, and Oracle E-Business Suite (EBS). Web browsers include Google Chrome, Microsoft Edge, and Firefox.

Privacy Notice

The software provider is hereby expressly forbidden to sell or provide personal information (names, email addresses, phone numbers, etc.) of ORAU/ORISE employees, sponsors, and event attendees to any third-party vendors, advertisers, direct mail companies, email list services, etc.

Attachment 1a - Software Requirements is a separate EXCEL file.

Attachment 2
Contract Terms and Conditions

Table of Contents

Terms and Conditions.....	5
A. RESERVED	5
B. Supplies or Services & Prices	5
B.1. Type of Agreement	5
B.2. Funds Availability	5
B.3. Limitation of Funds	5
B.4. Payment	5
C. Specifications/Statement of Work	5
C.1. Deliverables	5
D. Packaging & Marking	5
D.1. Marking	5
D.2. Packaging	6
E. Inspection & Acceptance	6
E.1. Inspection & Acceptance	6
F. Deliveries or Performance	6
F.1. Service Term	6
F.2. Option to Extend the Term of the Subcontract	7
G. Contract Administration Data	7
G.1. Contract Point of Contact	7
G.2. Modification Authority	7
G.3. Technical Contact	7
G.4. Invoices	7
H. Special Contract Requirements	8
H.1. Special Information Technology and Information Security	8
H.2. Compliance With Federal Information Processing Standard Publication 201-2 (FIPS Pub 201-2) (APR 2015)	8
H.3. Implementation of FAR Subpart 39.1	8
I. Contract Clauses	9
I.1. ORAU General Terms & Conditions	9
I.2. Definitions	9
I.3. Acceptance of Terms & Conditions	9
I.4. Export Compliance	9
I.5. Privity	10
I.6. FAR 52.203-17 Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights (NOV 2023)	10
I.7. FAR 52.203-19 Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements (JAN 2017)	10
I.8. FAR 52.204-23 Prohibition on Contracting for Hardware, Software, and Services Developed or Provided By Kaspersky Lab and Other Covered Entities (DEC 2023)	10
I.9. FAR 52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment (NOV 2021)	10
I.10. FAR 52.204-27 Prohibition on a ByteDance Covered Application (JUN 2023)	10
I.11. FAR 52.222-35 Equal Opportunity for Veterans (JUN 2020)	10
I.12. FAR 52.222-36 Equal Opportunity for Workers With Disabilities (JUN 2020)	11
I.13. FAR 52.222-37 Employment Reports on Veterans (JUN 2020)	11
I.14. FAR 52.222-40 Notification of Employee Rights Under the National Labor Relations Act (DEC 2010)	11
I.15. FAR 52.222-50 Combating Trafficking in Persons (NOV 2021)	11
I.16. FAR 52.232-40 Providing Accelerated Payments to Small Business Subcontractors (MAR 2023)	11
I.17. FAR 52.240-1 Prohibition on Unmanned Aircraft Systems Manufactured or Assembled by American Security Drone Act-Covered Foreign Entities (NOV 2024)	11
I.18. FAR 52.244-6 Subcontracts for Commercial Products and Commercial Services (JAN 2025)	11

(DEVIATION FEB 2025)	11
J. List of Attachments	11
J.1. List of Attachments	11
K. Representations, Certifications, & Other Statements	11
K.1. Representations & Certifications	11
L. Instructions, Conditions, & Notices to Offerors	11
L.1. General Instructions	11
L.2. Preparation of Offers	12
L.3. Acceptance of Offer	13
L.4. Amendment of Request for Proposal	13
L.5. Exceptions and Deviations	13
L.6. Expenses Related to Offerors Submissions	14
L.7. False Statement in Offers	14
L.8. Negotiation and Award of Agreement	14
M. Award Criteria	14
M.1. Basis for Award	14

Terms and Conditions

A. RESERVED

B. Supplies or Services & Prices

B.1. Type of Agreement

This is a Firm Fixed Price Agreement for items and/or services described in Sections B and C, and elsewhere in this Agreement.

B.2. Funds Availability

ORAU's obligation under this Agreement is contingent upon the availability of appropriated funds from the U.S. Government from which payment for Agreement purposes can be made. No legal liability on the part of ORAU and the U.S. Government for any payment may arise until funds are made available to ORAU for this Agreement and until the Subcontractor receives notice of such availability.

B.3. Limitation of Funds

Total funds in the amount of \$_____ are obligated herewith for the efforts conducted through named period of performance and are made available for payment of authorized effort in accordance with the terms and conditions of this Agreement.

No legal liability on the part of ORAU for any payment may arise. Funds are not made available for this Agreement until the Subcontractor receives written notice of such availability.

B.4. Payment

ORAU shall make payment upon receipt of each invoice meeting the requirements of this Agreement. Unless otherwise provided, terms of payment shall be **NET** _____ days from the latter of (1) submission of Subcontractor's proper invoice, if required (unless such invoice is not approved), or (2) delivery of supplies/completion of work if invoice is not required. Any offered discount shall be taken if payment is made within the discount period that Subcontractor indicates. Payments may be made either by check or electronic funds transfer, at the option of ORAU. Payment shall be deemed to have been made as of the date of mailing or the date on which an electronic funds transfer made.

Subcontractor's acceptance of final payment of any agreement hereunder constitutes a release of all claims and liabilities, which the Subcontractor may have against ORAU relating to that agreement.

C. Specifications/Statement of Work

C.1. Deliverables

All deliverables shall be in accordance with this agreement.

D. Packaging & Marking

D.1. Marking

Each unclassified package, report, or other deliverable shall be accompanied by a letter or other document stating the following:

- (1) the Agreement number under which the item is being delivered;
- (2) the deliverable Item Number or Report Requirement which requires the delivered item(s); and

- (3) whether the Subcontractor considers the delivered item to be a partial or full satisfaction of the requirement.

D.2. Packaging

Preservation and packing for shipment or mailing of all unclassified work delivered hereunder shall be in accordance with good commercial practices, adequate enough to ensure acceptance by carriers, and at the most economical rate(s). The Technical Contact will indicate whether deliverables will be electronic or hard copy, and will provide any necessary formatting instructions for reports or other deliverables.

E. Inspection & Acceptance

E.1. Inspection & Acceptance

(a) The ORAU Technical Contact named in Section G of this Agreement will inspect and accept each deliverable under this Agreement, normally within 14 days of receipt. Inspection and acceptance will be at an ORAU location, unless modified by the Subcontract Administrator. The Technical Contact will be responsible for confirming acceptance of each deliverable under this Agreement to the Subcontract Administrator.

(b) ORAU has the right to inspect and test all services and supplies called for by the Agreement at all places and times, including the period of manufacture or performance, and in any event before acceptance. If ORAU specifies an inspection system elsewhere in the Agreement, Subcontractor shall provide and maintain such inspection system covering services and supplies under this Agreement and shall provide only services and supplies that have been found to conform to the requirements of the Agreement. Complete records of all inspections shall be maintained and made available to ORAU during performance and for as long as Agreement requires. ORAU shall perform inspections and tests in a manner that will not unduly delay the work. ORAU assumes no contractual obligation to perform any inspection or test for Subcontractor's benefit unless specifically set forth elsewhere in this Agreement. ORAU failure to inspect the services and supplies shall not relieve Subcontractor from responsibility, nor impose liability on ORAU, for nonconformity. If ORAU performs inspection or test on the premises of Subcontractor or a subcontractor, Subcontractor shall cause to be furnished, without additional charge, all reasonable facilities and assistance for the safe and convenient performance of these duties.

(c) Except for research and development, ORAU may reject or require correction of any nonconformity. If Subcontractor is not ready for inspection at time specified by Subcontractor, or if prior rejection makes re-inspection or retest necessary, ORAU may charge Subcontractor the additional cost of inspection or test. Subcontractor shall not tender for acceptance corrected or rejected services or supplies without disclosing the former rejections or requirement for correction, and shall disclose the corrective action taken.

(d) Except for research and development, ORAU, in addition to any other rights and remedies provided by law, or under other provisions of this Agreement, may require Subcontractor, at no increase in Agreement price, to (1) re-perform the non-conforming services and correct or replace the non-conforming supplies or (2) reduce the Agreement price to reflect the reduced value of Subcontractor's performance. When supplies are returned, Subcontractor shall bear the transportation cost. If within 10 days of ORAU written notice, Subcontractor fails to re-perform or correct or replace, as required, ORAU shall have the right by contract or otherwise to perform the services, replace or correct such supplies, and charge to Subcontractor the cost occasioned the ORAU thereby and /or terminate this Agreement.

F. Deliveries or Performance

F.1. Service Term

The service term for this agreement shall be **October 1, 2026 - September 30, 2027**, with four (4) one-year option periods.

- Option Year 1: October 1, 2027 - September 30, 2028
- Option Year 2: October 1, 2028 - September 30, 2029
- Option Year 3: October 1, 2029 - September 30, 2030
- Option Year 4: October 1, 2030 - September 30, 2031

F.2. Option to Extend the Term of the Subcontract

(a) ORAU may extend the term of this Agreement by written notice to the Subcontractor within any time before expiration of the Agreement or any exercised option periods; provided that ORAU gives the Subcontractor a preliminary written notice of its intent to extend at least 30 days before the Agreement expires. The preliminary notice does not commit ORAU to an extension.

(b) If ORAU exercises this Option, the extended Agreement shall be considered to include this Option clause.

G. Contract Administration Data

G.1. Contract Point of Contact

The Subcontract Administrator for any resulting award shall be:

Hawn, Angela McConnell

or any such other person as may later be named.

All written communication shall make reference to the Agreement Number and be electronically submitted to the Procurement Representative at: **angela.hawn@orau.org**

G.2. Modification Authority

Notwithstanding any other clauses of this Agreement, the Subcontract Administrator, or such other designated individual of ORAU Procurement, shall be the only individual authorized to accept non-conforming work, waive any requirement(s), or modify any term or condition of this Agreement.

Individual elements and/or items related to the Agreement may be added or deleted as other events occur throughout the entire period of performance. New elements will be priced when added.

G.3. Technical Contact

The Technical Contact for this Agreement is:

G.4. Invoices

Invoices shall contain the following information as applicable:

- Date of Invoice,
- Agreement Number,
- Line Item Number,
- Description of Services/Supplies (*including quantities, unit prices, and extended totals*) and,
- Payment Terms

Invoices shall be e-mailed to **ORAUAccountsPayable@orau.org**. The invoice shall be an attachment to the e-mail and must be in PDF Format. If the invoice is e-mailed to the above address, do not send a duplicate in the mail. If mailed please send to the address below.

Oak Ridge Associated Universities

Attn: Accounts Payable

P.O. Box 117, MS 35

Oak Ridge, TN 37831-0117

ORAU utilizes an Electronic Funds Transfer (EFT) Payment Program to expedite the payment process to

Subcontractor(s). The payee receives confirmation of the payment immediately with an established e-mail address. If your organization would like to benefit from this service, please email your request with contact information directly to **procurement@orau.org**.

If you have any questions, you may also contact the Subcontract Administrator named in Section G or the ORAU Procurement & Partnerships Help Desk at (865) 576-3049.

H. Special Contract Requirements

H.1. Special Information Technology and Information Security

(a) ORAU uses outsourced IT services (i.e. Cloud Services) to use, access, manage, or exchange information. ORAU information requires protection from unauthorized disclosure. Information protection requirements are based on FIPS-199 data and service characterization.

(b) *Definitions:*

i. *Information System:* An information system is a discrete set of information resources organized expressly for the collection, processing, maintenance, use, sharing, dissemination, or disposition of information. Information system components include, but are not limited to, mainframes, servers, workstations, network components, operating systems, middleware, and applications.

ii. *Sensitive Information:* Controlled Unclassified Information (CUI) i.e. Official Use Only (OUO), Personally Identifiable Information (PII), Protected Health Information (PHI), ORAU Business Sensitive.

(c) ORAU has reviewed the data sets and use cases for this outsourced IT service and requires, at minimum, the following control implementation:

Unclassified Non-Sensitive, FIPS 199 Low

(d) If Subcontractor significantly modifies the security configuration of its information system after award, Subcontractor must notify the ORAU Procurement Representative of the changes.

If data type characterization for ORAU changes from Non-Sensitive to Sensitive, ORAU shall inform the Subcontractor in writing through agreement modification to incorporate updated terms and conditions relative to the new data type characterization.

H.2. Compliance With Federal Information Processing Standard Publication 201-2 (FIPS Pub 201-2) (APR 2015)

This contract involves the acquisition of hardware, software, or services related to physical access to Federal premises or electronic authentication or access control to a Federal agency's computer systems and electronic infrastructure. Any such hardware, software, or services delivered under this contract shall comply with FIPS Pub 201-2 or any subsequent update, and FIPS 201-2 shall take precedence over any conflicting performance requirement of this contract. Should the Contractor find that the statement of work or specifications of this contract do not conform to FIPS Pub 201-2, it shall notify the Contracting Officer of such nonconformance and shall act in accordance with instructions of the Contracting Officer

This clause shall flow down to subcontractors at any tier.

H.3. Implementation of FAR Subpart 39.1

All information technology acquisitions shall include the appropriate information technology security policies and requirements, including use of common security configurations available from the National Institute of Standards and Technology's website at <http://checklists.nist.gov> commensurate with the mission of the contract and conducive to the

work of the Oak Ridge Institute for Science and Education. This requirement shall be included in all subcontracts which are for information technology acquisitions.

I. Contract Clauses

I.1. ORAU General Terms & Conditions

ORAU General Terms & Conditions, Revision 5; Dated 5-20, are hereby incorporated by reference and made part of this document. ORAU General Terms & Conditions may be viewed in full text at the following website:

<https://orau.org/doing-business-with-us/procurement/terms-conditions.html>

Should you require a paper copy, please contact the Subcontract Administrator named in Section G of this Agreement. This Agreement may also incorporate certain provisions by reference. These articles and clauses apply as if they were set forth in their entirety. For FAR and DEAR provisions incorporated by reference, *Contractor* means Subcontractor and *Contracting Officer* means Subcontract Administrator or ORAU. The FAR and DEAR may be obtained from the Superintendent of Documents, U.S. Government Printing Office, Washington, D.C. or from the following Government websites:

FAR: <https://www.acquisition.gov/far/>

DEAR: <https://www.acquisition.gov/dears/>

I.2. Definitions

The following terms shall have the meanings below:

- (a) Government means the United States of America and includes the U. S. Department of Energy (DOE) or any duly authorized representative thereof.
- (b) Company means Oak Ridge Associated Universities, Inc. (ORAU), acting under Contract No. DE-SC0014664.
- (c) Subcontractor means the person or organization that has entered into this Agreement.
- (d) Agreement means Purchase Order, Subcontract, Blanket Agreement, Modification, or Release thereof.
- (e) Contract Specialist means Company's cognizant Procurement Representative.
- (f) Educational Institution means an entity identified in Office of Management and Budget Circular No. A-21.

I.3. Acceptance of Terms & Conditions

Subcontractor, by signing this Agreement, delivering the supplies, or performing the requirements indicated herein, agrees to comply with all the terms and conditions and all specifications and other documents that this Agreement incorporates by reference or attachment. ORAU hereby objects to any terms and conditions contained in any acknowledgment of this Agreement that are different from or in addition to those mentioned in this document. Failure of ORAU to enforce any of the provisions of this Agreement shall not be construed as evidence to interpret the requirements of this Agreement, nor a waiver of any requirement, nor of the right of ORAU to enforce each and every provision. All rights and obligations shall survive final performance of this Agreement.

I.4. Export Compliance

(a) Subcontractor agrees to comply with all the applicable U.S. export control laws and regulations, specifically including, but not limited to, the requirements of the *Arms Export Control Act*, **22 U.S.C.2751-2794**, including the *International Traffic in Arms Regulations (ITAR)*, **22 C.F.R. 120 et seq.**; and the *Export Administration Act*, **50 U.S.C. app. 2401-2420** including the *Export Administration Regulations*, **15 C.F.R. 730-774**; including the requirement for obtaining any export license or agreement, if applicable. Without limiting the foregoing, Subcontractor agrees that it will not transfer any export controlled item, data, or services, to include transfer to foreign persons employed by or associated with, or under contract to Subcontractor or Subcontractor's lower-tier Subcontractors, without the authority of an export license,

agreement, or applicable exemption or exception.

(b) Subcontractor agrees to notify ORAU if any deliverable under this Agreement is restricted by export control laws and/or regulations.

(c) Subcontractor shall *immediately* notify the Subcontract Administrator if Subcontractor is, or becomes, listed in any Denied Parties List or if Subcontractor's export privileges are otherwise denied, suspended, or revoked in whole or in part by any U.S. Government entity or agency.

(d) If Subcontractor is engaged in the business of either exporting or manufacturing (whether exporting or not) defense articles or furnished defense services, Subcontractor represents that it is registered with the Office of Defense Trade Controls, and as required by the ITAR, and it maintains an effective export/import compliance program in accordance with the ITAR.

(e) Subcontractor shall be responsible for all losses, costs, claims, causes of action, damages, liabilities, and expense, including attorneys' fees, all expense of litigation and/or settlement, and court costs, arising from any act of omission of Subcontractor, its Officers, employees, agents, suppliers, or Subcontractors at any tier, in the performance of any of its obligations under this clause.

(f) Subcontractor shall include this clause in all Agreements hereunder.

I.5. Privity

The term "privity," as used herein, designates the relationship of right and duty that exists between the immediate parties to a contract. Subcontractor is in privity solely with ORAU. All legal relations involving the Subcontractor must be settled between ORAU and the Subcontractor, by reference to the common law of contracts between the two private parties.

I.6. FAR 52.203-17 Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights (NOV 2023)

(NOV 2023)

I.7. FAR 52.203-19 Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements (JAN 2017)

(JAN 2017)

I.8. FAR 52.204-23 Prohibition on Contracting for Hardware, Software, and Services Developed or Provided By Kaspersky Lab and Other Covered Entities (DEC 2023)

(DEC 2023)

I.9. FAR 52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment (NOV 2021)

(NOV 2021)

I.10. FAR 52.204-27 Prohibition on a ByteDance Covered Application (JUN 2023)

(JUL 2023)

I.11. FAR 52.222-35 Equal Opportunity for Veterans (JUN 2020)

(JUN 2020)

I.12. FAR 52.222-36 Equal Opportunity for Workers With Disabilities (JUN 2020)

(JUN 2020)

I.13. FAR 52.222-37 Employment Reports on Veterans (JUN 2020)

(JUN 2020)

I.14. FAR 52.222-40 Notification of Employee Rights Under the National Labor Relations Act (DEC 2010)

(DEC 2010)

I.15. FAR 52.222-50 Combating Trafficking in Persons (NOV 2021)

(NOV 2021)

I.16. FAR 52.232-40 Providing Accelerated Payments to Small Business Subcontractors (MAR 2023)

(MAR 2023)

I.17. FAR 52.240-1 Prohibition on Unmanned Aircraft Systems Manufactured or Assembled by American Security Drone Act-Covered Foreign Entities (NOV 2024)

(NOV 2024)

I.18. FAR 52.244-6 Subcontracts for Commercial Products and Commercial Services (JAN 2025) (DEVIATION FEB 2025)

(JAN 2025) (DEVIATION FEB 2025)

J. List of Attachments

J.1. List of Attachments

RESERVED

K. Representations, Certifications, & Other Statements

K.1. Representations & Certifications

The North American Industry Classification System (NAICS) code for this agreement is **513210**. The Small Business size standard for this classification is **\$47.0 Million**.

L. Instructions, Conditions, & Notices to Offerors

L.1. General Instructions

This section provides general guidance for preparing proposals as well as specific instructions on the format and content of the proposal. Each Offeror shall submit a proposal that clearly and concisely describes and defines the Subcontractor response to the requirements contained herein. The Offeror's proposal must include all data and information requested herein and must be submitted in accordance with these instructions. Use of vague statements such as "*standard*

procedures will be used" will not satisfy this requirement. Elaborate artwork, brochures, expensive paper or bindings, and expensive visual or other embellishments are neither necessary nor desired. Unnecessary elaboration or other presentations beyond that sufficient to present a complete and effective proposal are not desired and may be construed as an indication of the Offeror(s) lack of understanding or cost consciousness. The proposal shall contain all pertinent information in sufficient detail to permit evaluation of the proposal. This shall include cross-referencing for traceability. The proposal shall not contain hyperlinks to material requiring evaluation unless expressly stated elsewhere in this Agreement. Nonconformance with the instructions provided herein may result in an unfavorable determination(s) up to and including the proposal's exclusion from an evaluation for award.

L.2. Preparation of Offers

Offerors are expected to examine the entire RFP document. Failure to do so will be at the Offerors risk. Offerors proposal package shall be submitted electronically in PDF format to the ORAU Procurement Representative. Proposals shall be submitted in two (2) volumes:

Volume 1: Technical Proposal

Executive Summary

An Executive Summary of the Offeror's proposal is required. This summary will not be evaluated but will be used to gain an understanding of the Offeror and should include a brief summary of the *proposed solution* to meet the objectives identified in Attachment 1 - Statement of Objectives. It should identify and highlight significant features of the proposal, reference RFP # 26-56973 and include Offeror's company name, point of contract (*name, phone and email address*), and SAM UEID or verification of completion of ORAU Representations and Certifications. If the Offeror is not registered in SAM.gov, the ORAU Representations & Certifications form must be submitted with proposal (*reference Attachment 2 - Contract Terms and Conditions clause K.1 for NAICS & Size Standard*).

I. Software Requirements, Customization and Capabilities

Offeror shall complete Attachment 1a - Software Requirements in accordance with the instructions at the top of the document. Offeror(s) must indicate via YES, NO or ALT if proposed solution **can or cannot** meet each software requirement, to include the NICE TO HAVE requirements. If alternatives are proposed, Offerors shall provide a detailed explanation in the space provided to allow for adequate consideration and evaluation. Offerors are encouraged to provide additional detail and/or clarifying information in each response as necessary.

Offeror shall include narrative that describes, in detail, the proposed solution (*product names, numbers, or other identifying factors are encouraged*). Narrative should include any product capabilities, *above and beyond, at no additional cost*, the MUST HAVE requirements identified in Attachment 1a - Software Requirements. This should also address the *maximum capacity* of users the proposed solution offers.

Product customization features should be summarized, to include which features of the proposed product are customizable and clearly indicating what, if any features require an additional fee or cost.

In addition to the above, Offeror is encouraged to provide a brief narrative about any pending, planned or anticipated developments and/or upgrades to current features that may be implemented during the anticipated term of any resulting award (October 1, 2026 - September 30, 2027, including four one-year option periods). Narrative should include a timeline of planned activities and *if available*, what if any cost may be associated with new features. For example, some features may be part of the product itself and available at no additional cost while others may be only available as an "add-on" feature.

II. Implementation Plan

Offeror shall submit a plank to include a (proposed) timeline for implementing the proposed software, to include user training and data migration plan to ensure the proposed product is fully implemented, *if required*, by

October 1, 2026. The Plan shall demonstrate the Offeror's software solution and implementation processes. It shall also include plans for (1) tracking and controlling implementation, (2) ensuring continuity of service performance; (3) methods for monitoring, maintaining and enhancing the quality of the software, (4) ensuring timely deliverables and (5) maintaining customer satisfaction. Offeror shall describe its proposed transition plan that shall address Continuity of Services to include administrative and operational responsibilities, schedules, and plan to minimize operating disruptions.

III. Account Representative and Support

Offeror shall identify a Project Manager who will be assigned to any resulting award to ensure successful implementation. Additionally, Offeror shall identify any dedicated account representative(s) as the result of any award for the duration of the agreement term.

V. Terms and Conditions

Any resulting award will be funded by the federal government. As a federal prime contractor, the terms and conditions identified in Attachment 2 - Contract Terms and Conditions shall apply to any resulting award. If Offeror requires a Master Service Agreement, Software License agreement, or other similar agreement, the proposal must clearly state such requirement, and a copy must be provided with proposal submission. Further, any exceptions to the terms identified in Attachment 2 must be requested with proposal submission.

Volume 2: Price Proposal

Offeror(s) shall submit pricing for the proposed *software solution* that meets the objectives and capacity identified in Attachment 1 - Statement of Objectives and Attachment 1a - Software Requirements.

Pricing proposal must be based on the Offerors technical proposal, Attachment 1 - Statement of Objectives and be inclusive of all contractual requirements. Proposal shall clearly indicate various components (*implementation, training, customization, license fee, etc.*) included in the price, be itemized to assist with determining price reasonableness, *if published pricing is not used*, and clearly note any offered discounts. A list of additional pricing components or "add-ons" may be included to support pricing and options.

ORAU expects any resulting award will be based on *adequate price competition*. If necessary, to support the determination of price reasonableness, the Procurement Representative reserves the right to request pricing information in addition to that included in the price proposal. Requests may include published pricing or supporting documentation where the Offeror has charged the same or similar pricing for the same/similar services.

L.3. Acceptance of Offer

"Acceptance period," as used in this provision, means the number of calendar days available to ORAU for awarding an Agreement. The first day of the acceptance period is the date specified in this RFP for receipt of proposals. ORAU requires a minimum acceptance period of 90 days.

L.4. Amendment of Request for Proposal

The only method by which any term of this RFP may be modified is by an express, formal amendment issued by ORAU Procurement. If this RFP is amended, Offeror(s) must acknowledge receipt of amendments (by number and date) in their proposal transmittal letters.

L.5. Exceptions and Deviations

The Offeror shall identify and explain any exceptions or deviations taken or conditional assumptions made with respect to

any aspect of the RFP. The benefit to ORAU or the Government shall be explained for each exception taken. Such exceptions will not, of themselves, automatically cause a proposal to be termed unacceptable. A large number of exceptions or one or more significant exceptions not providing benefit to ORAU or the Government may, however, result in the rejection of a proposal as unacceptable.

L.6. Expenses Related to Offerors Submissions

ORAU will not pay any costs incurred by Offeror(s) in the preparation or submission of any proposal and proposal support documentation.

L.7. False Statement in Offers

Offers must provide true, accurate, and complete information as required by this solicitation and its attachments. The penalty for making false statements in offers is prescribed in 18 U.S.C. 1001.

L.8. Negotiation and Award of Agreement

ORAU may award an Agreement resulting from this RFP without any discussion of proposals; therefore, Offeror(s) should submit initial proposals representing the most favorable product/solution and pricing. However, the Offeror agrees by submission of the proposal to enter into good faith negotiations, if deemed necessary. Upon completion of negotiations, ORAU will issue formal award for signature.

M. Award Criteria

M.1. Basis for Award

ORAU may award one (1) award to the responsible and responsive Offeror whose proposal conforms to the RFP, which will be most advantageous to the ORAU (and the Government), price and other non-price factors considered, such that it provides the best value. Under a best value procurement, ORAU may reasonably determine via the tradeoff process that the superior solution/approach merits a higher price and, therefore, represents the best value or may reasonably determine that the Offeror with other than the highest rating in non-price factors is the best value.

Evaluation Factors for Award

An evaluation of each Offeror's proposal will be performed in accordance the following factors:

Factor 1: Software Requirements, Customization and Capabilities

ORAU will evaluate the extent to which Offerors proposal demonstrates the capability of the proposed software solution to meet ORAU's objectives as well as identify features beneficial to ORAU/ORISE. Preference may be given to Offerors whose proposed software solution addresses and satisfies the requirements of Attachment 1, Statement of Objectives and Attachment 1a, Software Requirements and will minimize the risk of unsuccessful performance.

Factor 2: Implementation

ORAU will evaluate the extent to which the Offerors proposal demonstrates a software implementation plan to meet the requirements of the Statement of Objectives and mitigate the risk of technical complications that could result in unsuccessful implementation. ORAU will evaluate the Offerors proposed implementation processes and the Offerors plan to address (1) tracking and controlling implementation, (2) ensuring continuity of service performance; (3) methods for monitoring, maintaining and enhancing the quality of the software, (4) ensuring timely deliverables and (5) maintaining customer satisfaction, and address Continuity of Services to include administrative and operational responsibilities, schedules, and plan to minimize operating disruptions.

Factor 3: Account Support

ORAU will evaluate the extent to which the Offerors proposal demonstrates a dedicated account representative with demonstrated ability and availability to support ORAU personnel.

Factor 4: Terms and Conditions

ORAU will review and evaluate any exceptions requested in Attachment 2 - Contract Terms and Conditions and requested service agreements, to include any associated risk as well as associated cost required for reviews and negotiations.

Factor 4: Price

Pricing will be evaluated to determine whether the proposed pricing is realistic for the products/services being purchased; it reflects a clear understanding of the requirements and is consistent with the approach described in the Offerors technical proposal. As part of the price evaluation, ORAU specifically reserves the right to evaluate the risk associated with any pricing schemes.

Prices will be evaluated to determine the reasonableness of an Offerors proposal. Evaluation may include analysis to determine an Offerors comprehension of the solicitation requirements, as well as the validity of an Offerors approach. A price that is found to be unreasonably high or unrealistically low in relation to the proposed solution may impact evaluation.