National Aeronautics and
Space Administration

John H. Glenn Research Center
Lewis Field
Cleveland, OH 44135-3191

SOURCE SELECTION STATEMENT

FOR

LEADERSHIP DEVELOPMENT, ORGANIZATION DEVELOPMENT AND COACHING SERVICES (LOC)

PROCUREMENT BACKGROUND

The purpose of this procurement is to provide support services to NASA's Glenn Research Center, Langley Research Center, Ames Research Center, and Dryden Flight Research Center in each of the following areas:

- Organization Development Services – team development, conflict management, strategy development, managerial on-boarding, knowledge management, succession management, organization analysis and design, and change management;
- Required Certifications/Credentials – Emotional and Social Competency Inventory (ESCI) (Hay Group), Myers Briggs Type Indicator (MBTI), Fundamental Interpersonal Relations Orientation (Firo-B), Dominance, Influence, Steadiness, and Concise (DISC), Change Management Certification (Project Management Institute-PMI or Prosci);
- Professional Coaching Services – executive coaching, team coaching, business coaching, developmental coaching, transition coaching, and performance consulting;
- Required Certifications/Credentials – International Coach Federation (ICF); and
- Leadership Development Training – short courses and long-term development for leadership, supervisory and program/project management development.

To accomplish this work NASA Glenn Research Center will award a single Multi-Center Indefinite-Delivery Indefinite-Quantity (IDIQ) contract. The contact will have a minimum quantity of $100,000 and a not-to-exceed value of $4.8 million. All NASA Research Centers will be able to place firm-fixed-price task orders against the contract for a period of five (5) years from the date of award of contract. The Government will have an option to extend the Contract for up to six (6) months under the "Option to Extend Services" clause.

On August 2, 2012, a commercial Request for Proposal NNC12ZDO013R (the RFP) was issued electronically via the NASA Acquisition Internet Service and the Government-wide e-commerce site FedBizOpps. The procurement was issued as a 100% set-aside for small business concerns.

The solicitation stated that award would be made to the responsible Offeror whose proposal meets the requirements of the solicitation and provides the best value to the Government. It identified the following three evaluation factors: Technical Excellence (comprised of two equally important subfactors - Technical Capability and Management Approach), Experience & Past Performance, and Cost/Price. The RFP provided that adjectival ratings would be applied to the first two factors

based on strengths and weaknesses. The Cost/Price factor would not receive an adjectival score but stands on its own merits. The RFP provided that the pricing portion of the response to the RFP's four sample tasks would be analyzed to determine Cost/Price reasonableness and realism. Offerors were instructed to provide for each sample task a cost element breakdown; their burdened hourly rates by labor category, for coaches, facilitators and organizational development consultants for each contract year; a table of offeror-developed courses; and the percentage of markup added to subcontracts and other direct costs.

The solicitation specified that selection of an offeror would be based on a trade-off as described in FAR 15.101-1. The RFP stated that as individual factors, Technical Excellence is the most important while Experience & Past Performance is more important than Cost/Price. Technical Excellence and Experience and Past Performance when combined are significantly more important than Cost/Price.

Twenty-one (21) proposals were received on September 14, 2012. Five proposals were determined to be unacceptable and eliminated from the competition in accordance with NASA FAR Supplement (18 CFR) 1815.305-70. None of them represented a reasonable initial attempt to address the essential requirements of the RFP as they contained major omissions that discussions could not reasonably be expected to cure.

EVALUATION

An evaluation committee was appointed which performed a detailed evaluation of each remaining offer. The evaluation committee members reviewed each offer individually against the criteria established in the RFP. The committee then met to discuss the individual evaluations and to reach consensus findings on each offer. Past performance information was evaluated for each offeror (including the past performance of any significant subcontractor that will perform more that 15 percent of labor hours) by checking references, the information supplied in the offers, and information in past performance databases like the Contractor Performance Assessment Reporting System (CPARS). The evaluation committee undertook to conduct a cost/price evaluation. However, problems in proposal submission hampered a meaningful cost comparison. Some offerors had included travel in the proposed price for the Sample Tasks while others had not. In addition, the Government had not provided definitions of the labor categories for which burdened rates had been requested and various offerors proposed using their own labor category titles so no comparison could be made. The evaluation committee believed discussions would be necessary to correct these problems.

The evaluation committee presented its findings to the Source Selection Authority so that a Competitive Range could be established. On Dec. 3, 2012, the Source Selection Authority approved the establishment of a Competitive Range consisting of the highest technically rated offerors - Alphaport, Inc. (Alphaport), Careerstone Group, LLC (Careerstone), Oasis Consulting Services (Oasis), and Cleveland Consulting Group. All Competitive Range offerors had Technical Excellence ratings of "Good" or better. Of the offerors excluded from the competitive range one had a technical capability rating of "Fair" and the remaining offerors had ratings of "Poor." None of the excluded offerors had Experience and Past Performance or Price advantages sufficient to overcome their relatively low ratings under Technical Excellence - the most important evaluation factor.

On Dec. 7, 2012, letters were sent to all four offerors addressing their technical and experience and past performance weaknesses and providing further instructions for their cost proposals by:

- Specifying travel costs to be included in cost of Sample Tasks, giving location and date of each task; and,

- Specifying labor categories with definitions in a table which allowed the offeror to match their proposed labor categories with the Government's labor categories.

On Dec. 10, 2012, Cleveland Consulting Group withdrew their proposal.

On Dec. 14, 2012, initial discussions were conducted by telephone between the remaining offerors in the Competitive Range and the evaluators. Discussions were closed at 4:30pm Dec. 17, 2012, via a letter which also provided instructions for the submittal of the Final Proposal Revisions (FPR). FPR's were received before 4:30pm on Jan. 2, 2013. FPR's were evaluated and any changes to the original findings recorded. The Contracting Officer, with the assistance of a Price Analyst, evaluated the Cost/Price proposals. Each offeror's approach to the sample tasks was found to be technically sound and the supporting elements of the price were found to be reasonable. No adjustment to the proposed prices was required. The burdened labor rates were found to be reasonable. One offeror provided rates that were discounted from their GSA MOBIS contract rates. The elements of the burdened rates for the other two offerors were examined. In addition, the burdened rates for each labor category were found to be competitive. The markup rate proposed for ODCs by each offeror was found to be competitive when compared with rates used for similar contracts at GRC.

FINDINGS

The following are the findings for the offerors remaining in the competitive range.

Alphaport, Inc.

Technical Excellence: Alphaport received a Technical Excellence rating of "Very Good." Under the Technical Capability subfactor, Alphaport had one significant strength – its blended learning approach that could be fed right into NASA's training website SATERN, and which has proven to be very effective with the Safety and Mission Assurance (SMA) Safety and Technical Excellence Program and could be effectively applied to Leadership and Supervisory training. Also under Technical Capability Alphaport had six strengths: its solid understanding of organizational dynamics and the perceived class differences between engineers and technicians; its thorough response to the Change Management task that addressed the elements of a strong change management program including a communication plan and schedule; it demonstrated a solid understanding of the preexisting program and plan for partnering with internal consultants and incumbent external facilitators; its unique and effective approach to knowledge management; its proposed team coaching process which is widely accepted at NASA and which very few people are certified to use; and, the offeror has taken time to develop an understanding of the NASA Program lifecycle and has structured a relevant training program to address the needs of Program and Project Management professionals – the program described is a solid interweaving of the NASA process with the needed management skills. Under the Management Approach subfactor Alphaport had one strength – it proposed at least one Master Certified Coach (MCC) as one of its Key Personnel, which demonstrates the caliber of their cadre. Alphaport had no weaknesses under Technical Excellence.

Experience and Past Performance: Alphaport received a "High Level of Confidence" rating. It received a strength for its excellent references from NASA for relevant leadership development work, proposed key personnel have relevant experience through existing coaching contracts with NASA. Alphaport also provided technical training support during the launch of the Space Mission Excellence Program vis-à-vis Spaceflight Lessons Learned Courses. Alphaport has provided relevant training support to the NASA Safety Center. Alphaport had no weaknesses under Experience and Past Performance.

relevant training support to the NASA Safety Center. Alphaport had no weaknesses under Experience and Past Performance.

Cost/Price. Alphaport had the second-lowest proposed price for the four sample tasks. Its price was moderately higher than that of Oasis, but very significantly lower than that of Careerstone. Alphaport's price was somewhat higher than the IGCE.

Careerstone Group, LLC

Technical Excellence: Careerstone received a rating of "Good" under Technical Excellence. Under the Technical Capability subfactor, Careerstone had six strengths: its project schedule was well thought out and took into account the many aspects of change management that must be addressed; it provided a thorough communication plan demonstrating a solid understanding of change management principles; its approach to Sample Task 3 demonstrated a good understanding of coaching principles; it proposed an innovative cohort development practice; its sample curriculum outlines demonstrate a clear understanding of the topics to be presented and the methodologies to achieve outcomes; and, it provided a variety of team development methodologies and approaches that can be used in a variety of settings, as well as a team diagnostic tool. Careerstone had no strengths under the Management Approach subfactor. Careerstone had no weaknesses under Technical Excellence.

Experience and Past Performance: Careerstone had a "Very High Level of Confidence" rating. It received a significant strength for its excellent references from non-NASA customers for management development programs, change management coaching, and leadership development. It received a strength for the relevant past performance of its proposed subcontractor on a relevant NASA Headquarters contract. Careerstone had no weaknesses under Experience and Past Performance.

Cost/Price: Careerstone had the highest proposed price for the four sample tasks. Its price was very significantly higher than both of the other offerors, and also very significantly higher than the IGCE.

Oasis Consulting Services

Technical Excellence: Oasis received a rating of "Good" under Technical Excellence. Under the Technical Capability subfactor Oasis had two strengths: Oasis provided a good sample communication plan demonstrating their understanding of the culture and work to be done; and, in its approach to Sample Task 2 the Offeror proposed a coach who is a MCC. Oasis had no strengths under the Management Approach subfactor. Oasis had no weaknesses under Technical Excellence.

Experience and Past Performance: Oasis received a "Moderate Level of Confidence" rating. It had one strength with 4 references from State government for coaching, leadership development and OD work. These had excellent ratings, and also provided information about various state level and private sector leadership development, change management, OD and coaching initiatives.

Cost/Price: Oasis had the lowest proposed price for the four sample tasks. Its price was moderately lower than Alphaport's and very significantly lower than Careerstone's, and slightly lower than the ICGE.

DECISION

I have carefully reviewed the evaluation findings and questioned the evaluators about the process and findings. I am in agreement with the findings as presented by the Source Evaluation Committee.

In making my decision, I first considered the Technical Excellence Factor. I note Alphaport received a "very good" while Careerstone and Oasis received a "good". Alphaport received the only significant strength and both companies received a number of strengths as detailed above.

In direct comparison, I note that Alphaport had the only significant strength in this area by its blended learning approach with the NASA's SATERN. I further note that Alphaport and Careerstone had comparable strengths under the Technical Capability subfactor. However, I find that Alphaport's strengths reflected a better understanding of the NASA working environment – notably in Alphaport's understanding of organizational dynamics and perceived class differences between engineers and technicians, its solid understanding of the preexisting program and its plan for partnering with internal consultants and external facilitators, its proposed team coaching process which is widely accepted at NASA and its understanding of the NASA Program lifecycle as reflected in a relevant training program that is a solid interweaving of the NASA process with the needed management skills. I also consider Alphaport's response in the Management Approach subfactor to be superior to Careerstone's due to its strength for proposing a Master Certified Coach as one of its Key Personnel. I note Careerstone's had no strengths in the Management Approach subfactor. I therefore conclude in the Technical Excellence Factor, that the Alphaport proposal provided meaningful advantage over the Careerstone proposal.

In a comparison of Oasis's, while the proposal was responsive to the RFP in meeting NASA requirements, I consider it to be third in Technical Excellence as reflected in its fewer identified strengths and the nature of the strengths, as compared to the other two proposals. I also note Oasis had no strengths in the Management Approach subfactor. In this Factor, I do not find the Oasis proposal to offer any advantages over the Alpahport proposal.

I next considered the Experience and Past Performance Factor. I note that Careerstone received a "very high level of confidence". Careerstone provided excellent references from non-NASA government customers for management development, change management, coaching and leadership development that reflected a greater breadth of experience. I also note Careerstone's excellent NASA reference regarding the past performance of its subcontractor.

Alphaport received a "high level of confidence". Alphaport provided excellent NASA references for relevant leadership development, key personnel had relevant experience through existing NASA coaching contracts, and had relevant training experience with the NASA Safety Center and the launch of the Space Missile Excellence Program in relation to Spaceflight Lessons Learned courses. I do note that Alphaport has direct contract experience with GRC dating back a number of years.

Oasis received a "moderate level of confidence" in this Factor. I note the excellent ratings from state governmental organizations for coaching, leadership development, and organizational development.

In a direct comparison of the three offerors, I note Careerstone received the only significant strength in this Factor. I consider Careerstone to have a slight advantage over Alphaport with

slightly greater breadth of experience. I consider Oasis to be third among the three offerors and did not provide any meaningful advantages over the two higher rated offers.

I next considered the Cost/Price Factor. I understand that the offerors priced the sample tasks included in the solicitation which was designed to reflect actual costs to the Government. I find that Oasis had the lowest price closely followed by Alphaport and lastly by Careerstone. Here, I found Oasis's attractive price to provide a slight advantage. I found Careerstone's much higher price compared to Oasis and Alphaport to place it at a distinct disadvantage.

In making my decision, I have been careful to adhere to the evaluation criteria and their comparative weights as set forth in the RFP which identifies Technical Excellence as the most important Factor, followed by Experience and Past Performance followed by Cost/Price.

I find that Alphaport provided a superior technical proposal to that of Careerstone or Oasis. I consider the Alphaport proposal to reflect a better overall understanding of the work requirements and approach to accomplish the effort. I do not find any meaningful technical advantages of the Careerstone proposal over that of Alphaport. When I consider Alphaport's superior technical proposal with a significantly lower price then Careerstone, I consider it to clearly outweigh Careerstone's slight advantage in the Experience and Past Performance Factor.

I also believe Alphaport's superior technical proposal combined with its direct experience at GRC creates a strong likelihood of successful performance. I believe this strong likelihood of successful contract performance to be sufficient to outweigh Oasis's moderately lower price.

I therefore select Alphaport, Inc. for award of the Leadership Development, Organization Development, and Coaching Services Contract.

R Sepesi

Ronald W. Sepesi
Source Selection Authority

2-13-13

Date