

Cornerstone Initiative Request (CIR)

For

National Imperative for Industrial Skills

For

**Government Fiscal Year 2020
Cornerstone Initiative Request (CIR) Number: CS-20-1601**

Issued by:

Army Contracting Command - Rock Island

For

Cornerstone

In Support of:

**Industrial Base Analysis and Sustainment (IBAS) Program Office
Office of the Deputy Assistant Secretary of Defense for Industrial Policy**

Issue Date: 11 March 2020

Revised: 13 September 2021

Initial Whitepaper Due Date/Time: 1 April 2020/4:00PM Central

Final Due Date/Time: 10 March 2025

I. Background/Terms and Conditions

1. Purpose

The purpose of this Cornerstone Initiative Request (CIR) is to establish a Department of Defense (DoD) sponsored strategic and long-standing, multi-year (5-year maximum) mechanism to solicit proposals for prototype projects intended to improve the nation's capacity to produce and deliver workers with industrial skills to meet defense acquisition and operational needs. The full portfolio of projects is envisioned to form the framework for an integrated, multi-layered initiative addressing the Department's most pressing industrial skills workforce development challenges and gaps, with long-term, strategic benefits for both economic and national security.

2. Background

The Industrial Base Analysis and Sustainment (IBAS) Program (10 U.S.C. § 2508) office within the Office of the Deputy Assistant Secretary of Defense for Industrial Policy (ODASD(IndPol)) established the "Cornerstone" Other Transaction Agreement (OTA) with Army Contracting Command – Rock Island (ACC–RI). It was created to establish an enduring and broad-based public-private consortium focused on strategic strengthening of the U.S. Manufacturing and Defense Industrial Base. Cornerstone provides the acquisition framework and mechanisms supporting prototype projects using OTAs under the authorities of 10 U.S.C. § 2371b and represents an important platform to address the industrial base risks and mandates addressed in the National Security Strategy, the National Defense Strategy, and Presidential Executive Order 13806 and its associated interagency report.

Over time, this CIR and associated tailored project calls will lead to the award and management of a multi-year portfolio of Cornerstone OTA prototype projects focused on catalyzing activity that leads to a more integrated and robust national industrial skills workforce development ecosystem. The overall effort is entitled the "National Imperative for Industrial Skills" initiative. The vision for this initiative is one of an increasingly healthy industrial skills workforce development ecosystem that closes critical domestic skills gaps and promotes U.S. economic growth and development, strengthening defense and national industrial capabilities.

The DoD's ability to produce and maintain the systems required to train and field modern military forces is threatened by the lack of skilled industrial workers. Defense suppliers face critical shortages (i.e., up to tens of thousands of unfilled positions) in areas including, but not limited to: additive manufacturing; composites specialties; CNC machining (metals, composites and optical materials); digital manufacturing methods and processes (e.g., use of CAD/CAM, digital enterprise resource planning (ERP) and product lifecycle management (PLM) systems,

including production planning/operations/work instruction systems, production/machine controls and cybersecurity for industrial control systems, etc.) and other Industry 4.0 applications; metrology; microelectronics; precision optics; quality assurance / quality control (including non-destructive testing); shipbuilding skills (ship and pipe fitting, metal forming, specialty welding, etc.); and welding / joining, especially for specialty materials.

This CIR is being issued by ACC-RI under the direction of the IBAS program office in ODASD(IndPol), with program management support provided by the U.S. Army Combat Capabilities Development Command – Chemical Biological Center (DEVCOM CBC) IBAS/Cornerstone program management team. The Government intends to issue a single, overarching CIR that functions as a standing, multi-year (5 year maximum) mechanism to solicit proposals for prototype projects intended to improve the nation’s capacity to produce and deliver workers with industrial skills to meet defense needs— the CIR will remain open for a period of up to 5 years from the date it is released. The Government will evaluate whitepapers and invite selected Offerors to develop full proposals on at least a quarterly basis. In addition to the overarching CIR, the Government will issue specific project calls (subordinate to the overarching CIR) when needed, to meet specific/tailored requirements or needs not addressed by received responses. Each project call will include specific instruction concerning response deadlines, supplemental page limit and formatting requirements, and evaluation processes and criteria, as needed. Over time, the Government will modify the overarching CIR as required, and will close it when needed.

Detailed background information on the initiative and the Government’s associated acquisition approach are provided in Attachment 0003.

3. Period of Performance.

The period of performance (PoP) will vary by project/agreement. Project PoPs and any established option periods will be based on project requirements and established through negotiations between Offerors and the Government. Exercise of any option periods will be at the sole discretion, and in the best interest, of the Government.

4. Agreement Type

Each OT agreement is anticipated to be a fixed-cost award with milestone payments. Other types of agreements (e.g., cost-based OTAs) will be considered when in the best interest of the Government. Subject to availability of funds, the Government reserves the right to award multiple OTAs or opt to make no awards if it is in the best interest of the Government.

5. Other Transaction Authority

In accordance with 10 U.S.C. § 2371b, Authority of the DoD to Carry Out Certain

Prototype Projects, each prototype project awarded under an OTA must meet at least one of the following conditions:

- a. There is at least one nontraditional defense contractor or nonprofit research institution participating to a significant extent in the prototype project.
- b. All significant participants in the transaction other than the Federal Government are small businesses (including small businesses participating in a program described under Section 9 of the Small Business Act (15 U.S.C. § 638)) or nontraditional defense contractors.
- c. At least one third of the total cost of the prototype project is to be paid out of funds provided by sources other than the Federal Government.

Throughout the period of performance of any CIR, the Government will actively monitor the award to ensure compliance with this provision in accordance with the implementation guidance from Headquarters – Department of the Army (HQDA) and/or OSD. Offerors will be given the opportunity to become compliant with the guidance should they be found non-compliant. Failure to comply may result in termination. Please see Attachment 0001 for additional information.

6. Eligibility

- a. Only those members who have an executed Cornerstone Consortium Management Agreement and active registration in System for Award Management (SAM) are eligible to receive an Agreement resulting from this CIR.
- b. Contractors must have an active registration with the Joint Certification Program (JCP) in order to handle unclassified military technical data. Instructions for obtaining JCP certification may be found at the following site:
<http://www.dla.mil/HQ/InformationOperations/Offers/Products/LogisticsApplications/JCP/FAQ/>
- c. Foreign participation, access and transfers, and permit participation for this CIR is restricted and will be approved on a case by case basis, and only when in the best interest of the U.S. Government. Members are wholly responsible for their non-U.S. members/persons if permitted, and shall comply with 8 U.S.C. § 1324(a) and 8 CFR § 274a.2.

Projects within Cornerstone may be subject to export control laws and regulations. Under no circumstances may any foreign entity (i.e. organizations, companies, or persons) receive access to export controlled information unless proper export procedures have been satisfied.

7. Follow-On Production

The potential for follow-on production for projects awarded from this CIR will be in accordance with 10 U.S.C. 2371b(f). Upon determination that the competitively awarded prototype project has been successfully completed, the requiring office may determine to award a follow-on production contract or transaction without the use of competitive procedures.

**10 U.S.C. 2371b requires two criteria be met before using follow-on production authority noncompetitively: 1) Competitive procedures were used to select the parties to participate in the prototype project; and 2) The participants in the transaction successfully completed the prototype project provided for in the transaction.*

***Follow-on production is not guaranteed.*

8. Metrics for Successful Completion

- 8.1. Offerors shall identify which objective(s) of the National Imperative for Industrial Skills initiative (see Attachment 0001, Statement of Objectives) their proposed projects are intended to address and how each project addresses them. Project progress and objective attainment metrics must be realistic, sufficiently robust/complete, and measurable and documented.
- 8.2. Specific metrics and milestones (including a work breakdown structure) measuring progress and successful completion of each project will be as proposed by the Offeror and accepted by the Government, including any negotiated adjustments. Minimally, metrics must address deliverables across the full scope of work proposed, benefits resulting from the prototyped capability (including specific skillset applicability), scalability (and velocity of the scalability) of the proposed model(s), and quality of the deliverables.
- 8.3. Project-level metrics 'dashboards' are encouraged that consolidate and present performance measures and performance attainment, including showing the 'roll-up' performance of prototype programs and systems as a whole. Examples include but are not limited to how the needs of employers are met and the impact of the project's investments and outputs to DoD supply chains and labor markets across skillsets/credentialing, academic/student demographics, and industry.
- 8.4. Common education and training programmatic levels and tracks may be appropriate for binning certain performance metrics, depending on the element(s) or segment(s) of the Industrial Skills Workforce Development Ecosystem Model being prototyped (see Attachment 0003). Those programmatic levels and tracks may include, but are not limited to, the following:

- K-12 educational activity
- Trade/technical school and community college programs (typically 2-yr-long programs)
- Four-year/bachelor's degree-granting educational programs
- Graduate and post-graduate (e.g., master's and doctorate) degree-granting programs
- Continuing and refresher education and training programs
- Other industrial skills education or training programs or venues as proposed by the Offeror

8.5. Each awardee shall support semi-annual Program Management Reviews (PMR) led by the Government, normally convened in the winter and summer of each calendar year, or as otherwise established. Not later than thirty (30) days prior to a semi-annual review, the awardee shall deliver to the Government necessary project performance and progress data

9. Data Rights

The Government will establish, through negotiations with each awardee, appropriate Government Purpose Rights in all data, including but not limited to curriculum, processes, data, models, business plans, and/or physical items developed under the scope of this project. Intellectual property negotiations will focus on the Government's potential need to use, modify, release, reproduce, perform, display or disclose the data within the Government without restriction and to release or disclose the data outside the Government only for government purposes. Required technical data shall be provided to the Government at the end of the contract performance period in its most current form; i.e., current as of the last date of its use. Technical data delivered with Government Purpose Rights will automatically revert to unlimited rights 5 years after the end of the contract performance period. The Offeror may identify and assert restrictions on the Government's use, release, or disclosure of technical data or computer software under the procedure identified at DFARS 252.227-7017.

10. Government Property

There is no expected provision for government property to be furnished or obtained during the period of performance.

11. Non-Government Personnel

This OTA will utilize non-Government personnel to function as technical advisors to the Government reviewers. These non-Government personnel will have access to the information submitted in response to the CIR and will provide technical expertise and/or advice as required. All non-Government personnel have Non-Disclosure Agreements on file with the Government and are required to protect information to the same standards as Government personnel.

12. Freedom of Information Act (FOIA)

Any sensitive documents or other proprietary data submitted by non-Government parties to this agreement shall be marked with a restrictive legend. The Government will follow its FOIA procedures, including submitter notice, in the event that any person requests sensitive or proprietary data which belongs to a non-Government party.

13. Limitation of Government Liability

Claims for damages of any nature whatsoever pursued under this agreement shall be limited to direct damages only up to the aggregate amount of Government funding disbursed as of the time the dispute arises. In no event shall the Government be liable for claims for consequential, punitive, special and incidental damages, claims for lost profits, or other indirect damages.

14. Milestone Payment and Deliverables

Milestone payments will be made in accordance with the negotiated agreement resulting from this CIR. Acceptance criteria for each milestone will be approved/disapproved by the Agreement Officer Representative within 14 calendar days of receipt from the contractor. Once the Government has determined the milestone has been successfully completed and provided notification of approval, the contractor may invoice through Wide Area Work Flow (WAWF).

15. Accounting System Requirements

The contractor shall ensure that appropriate arrangements have been made for receiving, distributing and accounting for Federal funds under this agreement. Consistent with this stipulation, an acceptable accounting system will be one in which all cash receipts and disbursements are controlled and documented properly and which is capable of generating a cost element summary.

16. Payment by Electronic Funds Transfer

All payments by the Government under this contract, shall be made by electronic funds transfer (EFT). The Government will make payment to the Contractor using the EFT information contained in the SAM. In the event that the EFT information changes, the Contractor shall be responsible for providing the updated information to the SAM.

17. Electronic Invoicing

The WAWF system is the method to electronically process vendor payment requests and receiving reports. To access WAWF, the Contractor shall have a designated electronic business point of contact in the SAM and be registered to use WAWF. Step-by-step procedures for self-registration in WAWF is available at <https://wawf.eb.mil/piece-landing/>.

18. Use of Funds and Comptroller General Access

All funds are to be used only for costs that a reasonable and prudent person would incur in carrying out this prototype project. To the extent required by 10 U.S.C. § 2371b(c), the Comptroller General shall be permitted to examine the records of any party to resulting agreement.

19. Foreign Involvement

For the entirety of this agreement, keeping with the Cornerstone Mission of “Strengthen the force posture of the U.S. Defense Industrial Base (DIB),” and in accordance with the 2018 Unclassified National Defense Strategy (NDS) which articulates the threat from foreign predatory economics and inter-state strategic competitions that are the primary threats to U.S. security, Cornerstone will restrict foreign participation, access and transfers. Any proposed foreign participation, access or transfer will require Government notification and concurrence on a case-by-case basis prior to initiating any work effort.

20. Non-US Research Programs

For the entirety of this agreement, keeping with the Cornerstone Mission of “Strengthen the force posture of the U.S. Defense Industrial Base (DIB),” and the intent of protecting tax-payer investments and intellectual property, Cornerstone will restrict direct or indirect participation, collaboration, communication or acceptance of funding with non-U.S. research programs, such as the Thousand Talent Program (TTP), even in the case the activity is conducted with and/or through a U.S. citizen, entity or company. Any proposed non-U.S. research program involvement will require Government notification and concurrence on a case-by-case basis prior to initiating any work effort.

21. Foreign Acquisitions/Mergers

For the entirety of this agreement, the Cornerstone Member shall notify the Government within three business days of entering any discussions regarding potential foreign acquisition or merger, for itself or any business unit of the Cornerstone Member. Said notification will include all relevant details of the potential merger or acquisition. Per the “Foreign Involvement” clause, above, the Government retains the right to consent to any foreign acquisition or merger, considering whether or not the merger/acquisition is consistent with the best interests of the Government.

22. Clauses

FAR Clause 52.204-24, Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment.

FAR Clause 52.204-25, Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

II. Whitepaper and Full Proposal Submission Instructions

This CIR and any associated project calls will normally use a two-step evaluation process whereby the consortium of Cornerstone members will be invited to submit whitepapers of prescribed format/length. Each submitted whitepaper will outline a proposed project or effort addressing one or more objectives detailed in the National Imperative for Industrial Skills Statement of Objectives (SOO) (see Attachment 0001).

Offeror whitepapers shall present summaries of proposed project objectives, technical approach, timelines, milestones, rough order of magnitude (ROM) cost estimates, general cost share arrangements and targets, and proposed performance metrics. The Government will evaluate each whitepaper using the process and relevant criteria detailed in paragraph IV below.

Following whitepaper evaluations, the ACC-RI Agreements Officer will issue invitations to selected Offerors to either: 1) Enter directly into negotiations with the Government; 2) produce and submit full proposals that develop the ideas presented in the Offeror's respective whitepaper; or 3) re-submit whitepapers containing specific changes. The target deadline for full proposal submission may vary based on the Government's assessment of each proposed project's size and complexity. The Government will then evaluate the full proposals using the process and relevant criteria detailed in paragraph IV below.

1. Whitepaper Submissions

a. Whitepaper Submission Deadline and Addresses

This CIR is a *standing* (5-year) call for ideas. In effect, Offerors may submit a whitepaper against any relevant subject at any time while the CIR is open. Whitepapers can be submitted in one of three ways:

- i. As part of the initial response to the issued CIR, which has a fixed deadline for submission of 21 calendar days after CIR release. Whitepapers received by this date will be evaluated as part of the first tranche;

- ii. Any time thereafter in response to the same CIR. These submissions will be evaluated as part of an established series of evaluations on a recurring, structured (for example – quarterly) basis.
- iii. In response to specially issued project calls subordinate to this overarching CIR, with tailored or specific project requirements. These submissions will be evaluated in accordance with the project call instructions. The target date for responses to specific, tailored project calls may vary as needed, but will typically be 21 calendar days from project call release.

In all cases, the Government will consider submitted whitepapers to remain valid for six (6) months from the date they are received, unless the Offeror specifies an alternative timeframe.

Whitepapers shall be submitted electronically via email. The Offeror may choose to send the email encrypted or unencrypted. If an Offeror chooses to encrypt the email, send a separate email follow up with the encrypted password to the following addresses:

- i. usarmy.ria.devcom-cbc.mbx.cornerstone-ota@army.mil
- ii. claire.m.dowd.civ@army.mil
- iii. katelyn.m.coon.civ@army.mil

b. Whitepaper Formatting and Page Limitations

Whitepapers shall adhere to the following requirements:

- i. Whitepapers shall be submitted in PDF, shall not exceed 15 pages (5MB file size or less), and shall be Unclassified. The page limit does not include the cover page, table of contents, compliance matrix, required quad chart (see paragraph 1e) and supplementary appendices or exhibit documentation.
- ii. Pages shall be 8.5 inches x 11 inches; however, graphs, charts (except for the required quad chart), tables, and diagrams may use oversized paper (up to 11 inches by 17 inches). Oversize pages will count as two pages.
- iii. Text size shall be no less than 12 point and Offerors shall utilize Times New Roman font. Smaller font size may be used in figures and tables but must be clearly legible.
- iv. All pages shall be numbered and contain at least one inch margin (top, bottom and both sides).

- v. Offeror shall mark all technical information that is to be protected for five years from Freedom of Information Act (FOIA) disclosure with a legend identifying the documents as being submitted on a confidential basis.
- vi. Each whitepaper shall include a cover page that includes the proposing organization's name, Commercial and Government Entity (CAGE) Code (if applicable), address, point of contact (including phone number and email address), and indication of membership in the Defense Manufacturing Communities Support Program (DMCSP), if applicable.
- vii. Offeror shall demonstrate the reasonableness of their ROM cost estimate. The cost of preparing whitepapers and/or proposals in response to this CIR shall not be considered a direct charge to any resulting award or any other agreement or contract.

c. Whitepaper Technical

- i. The Offeror shall detail the specific objective(s) of the proposed task and present a sufficiently detailed technical approach to enable evaluators to determine fitness-for-purpose. The technical approach must demonstrate specific knowledge and capability to perform all aspects of the proposed tasks in support of the appropriate objective(s) in the SOO. It must specify which defense-related suppliers or supplier community the proposed effort is intended to serve and how the proposed solution will advance progress toward one or more of the objectives detailed in the CIR and SOO (i.e., the specific benefits that will accrue to the defense suppliers intended to benefit and, by extension, to the DoD). The technical approach write-up must also provide information that supports assessment of the reasonableness of the remainder of the whitepaper (teaming, management, timelines, milestones, ROM cost estimate, cost share arrangements/targets, and proposed performance metrics).
- ii. Offeror shall not simply rephrase or restate the Government's requirements in their Whitepapers. Offeror shall assume that the Government has no prior knowledge of Offeror's facilities, capabilities, or experience.
- iii. As part of the whitepaper technical proposal submission, the Offeror shall describe the recommended OTA structure best suited to accomplish the proposed technical approach; for example, whether or not the OTA with the Government should entail a base PoP only, and what that length of time should be; or a base PoP plus any additional recommended option periods (including how many and for how long) along with justification, or some other configuration(s). The Government will consider the Offeror's recommendation when deciding on the specific OTA configuration to be conveyed to the Offeror in the invitation for a full proposal, should an invitation be sent.

- iv. Offeror shall describe its teaming plan (list all external organizations on the team) and management approach (including subordinate roles and responsibilities with organization chart) for the proposed task(s). Limited Joint Ventures are permitted, and Offerors shall be prepared to submit signed copies of the Joint Venture Agreement with the full proposal.
- v. Offeror shall provide a milestone task schedule illustrating its approach to completing the proposed task(s). Feasibility will be assessed based on the proposed technical approach, but Offeror must provide enough detail to demonstrate the extent to which the schedule is realistic and achievable.
- vi. Offeror shall provide a proposed set of performance metrics to be used to determine the status of progress toward the proposed objective(s).

d. Whitepaper Cost Estimate

- i. Offeror shall provide a ROM cost estimate and proposed cost sharing arrangements (mix of cash and 'in-kind' contributions) and targets.
- ii. Offeror shall demonstrate the reasonableness of the ROM cost estimate of their technical approach and schedule. The cost of preparing Whitepapers and/or proposals in response to this CIR shall not be considered a direct charge to any resulting award or any other agreement or contract.

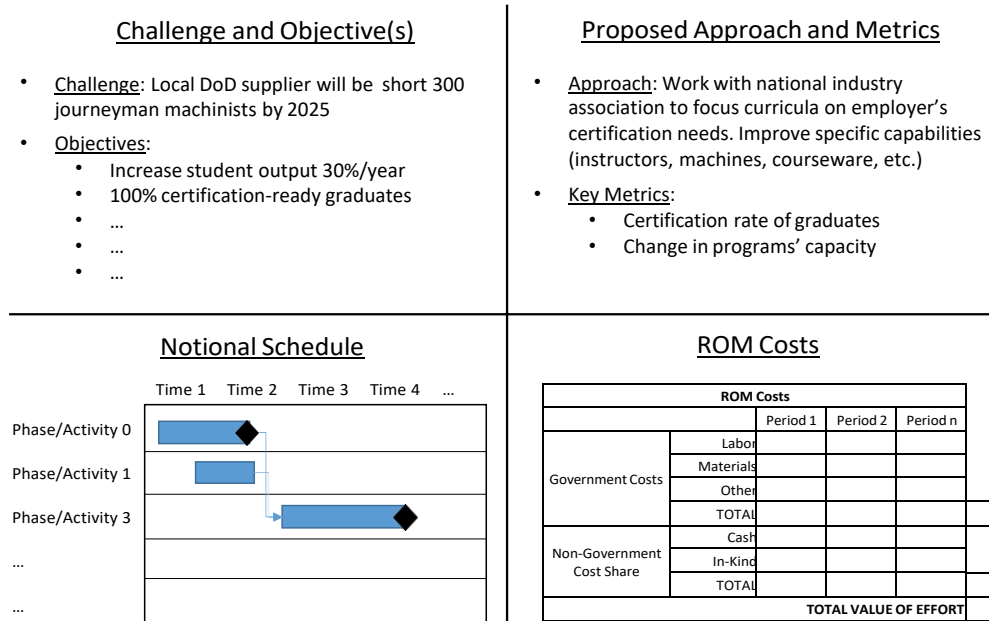
e. Whitepaper Quad Chart

Each whitepaper shall be accompanied by a separate, standardized quad chart concisely summarizing key facts about the proposed effort (see Figure 1). The chart shall be comprised of a heading and four fields, or quadrants. The quad chart will not count against page limits. All text must be clearly legible, with fonts no smaller than 10-point, and no less than single spacing between lines.

- i. Heading: Show the name of the proposed effort on the top line and place the name of the Offer on the next line.
- ii. Challenge and Objectives:
 - a. Challenge Bullet: Briefly summarize what problem(s) or issue(s) the proposed effort/project is intended to address, and show the relevance to DoD needs.
 - b. Objectives Bullet: Briefly describe the desired end state that the effort/project is intended to produce.
- iii. Proposed Approach and Metrics:

- a. Approach Bullet: Briefly summarize the proposed approach to the stated challenge.
 - b. Key Metrics Bullet: List the proposed key metrics by which both the Offeror and Government will assess progress toward achieving the proposed effort's objectives (i.e., 'measures of success').
- iv. Notional Schedule:
- a. Depict a notional top-level schedule for the proposed effort.
 - b. Phases / Activities: Present the proposed schedule in terms of Phases (more complex efforts) or activities (less complex efforts). Indicate the length of time for each item, indicate and label major milestones, and use small arrows to illustrate dependencies among the activities (e.g., the products of Activity 1 are used by Activity 3, etc.).
- v. Rough Order of Magnitude (ROM) Costs. All costs will be treated as Offeror Proprietary. For their own protection, Offerors must not remove the warning notice at the bottom of the quad chart.
- a. Time Data: Enter labels above the grid to indicate the number of periods (months or years, as appropriate) the effort is planned to require. Efforts planned to be completed in less than six months need enter only a total column. Offerors may add cells as required to accommodate longer schedules.
 - b. Government Costs Data: Enter expected Government ROM costs (\$x,xxx.x K) for Labor, Materials, Other Costs and TOTAL Cost for each time period in the appropriate cells. Efforts planned to be completed in less than six months may enter a single value for each item (single column).
 - c. Non-Government Cost-Share Data: Enter the anticipated values for non-Federal Government cost shares, broken out by monetary/cash ROM contributions and "in kind" ROM contributions to be provided by the Offeror and others. NOTE: Due to local/regional differences, cost share will be evaluated for overall appropriateness rather than total magnitude.

Title of Proposed Effort
Offeror Name



COST ESTIMATE IS PROPRIETARY INFORMATION

Figure 1: Sample Whitepaper Quad Chart

2. Full Proposal Submissions

Full proposals shall adhere to the following requirements.

While tailored and supplemental proposal instructions will be issued as part of the invitations described in Attachment 0003, the following instructions apply unless specifically stated in the individual proposal instructions.

a. Full Proposal Submission Deadline and Addresses

The length of time given to the Offeror to prepare the full proposal will be based on the Government’s needs and its assessment of proposal development complexity and effort required. Proposals shall remain valid for a period of six (6)

months from the date they are received, unless the Offeror specifies an alternative timeframe.

Full proposals shall be submitted electronically via email. The Offeror may choose to send the email encrypted or unencrypted. If an Offeror chooses to encrypt the email, send a separate email follow up with the encrypted password to the following addresses:

- i. usarmy.ria.rdecom-ecbc.mbx.cornerstone-ota@army.mil
- ii. claire.m.dowd.civ@army.mil
- iii. katelyn.m.coon.civ@army.mil

b. Full Proposal Formatting and Page Limitations

Unless specifically waived or changed in the Instructions to Offerors contained in the invitation to submit a proposal, proposals shall adhere to the following requirements:

- i. Full proposals shall include a cover page that includes the company name, CAGE Code, address, point of contact (including phone number and email address), and indication of membership in the DMCS. The cover page should also include the total dollar amount being proposed and must specifically lay out the Government/Contractor share. The cover page is excluded from the page count limit.
- ii. Full proposals shall include a completed and signed Representation and Certification statement as provided at Attachment 0002. The Representation and Certification document is excluded from the page count limit.
- iii. Full proposals shall be submitted in PDF, shall not exceed the page count specified in the Government's invitation for full proposal, and shall be Unclassified. Supplementary appendices or exhibit documentation may be included and will be excluded from the page count limit.
- iv. Pages shall be 8.5 inches x 11 inches; however, graphs, charts, tables, and diagrams may use oversized paper (up to 11 inches by 17 inches). Oversize pages will count as two pages.
- v. Text size should be no less than 12 point and Offerors shall utilize Times New Roman font. Smaller font size may be used in figures and tables but must be clearly legible.

- vi. All pages shall be numbered and contain at least one inch margin on all sides.
- vii. Each full proposal shall contain a table of contents. For more complicated proposals, the Government encourages, but does not require the use of a compliance matrix cross-referencing the proposal, CIR and SOO to allow the Government to ascertain that all required sections of the CIR and SOO are fully addressed. (The table of contents and compliance matrix are exempt from the page count limit.)

c. Full Proposal Technical

All full proposals must include the following information:

- i. Proposing organization's name, address, technical point of contact, phone number, email address, and company size (companies only);
- ii. A summary that includes a brief description of the Offeror's: parent organization(s), member organizations or teammates (if applicable), name/address/point of contact identification/email address, potential partnering/teaming agreements, relevant capabilities;
- iii. A description of relevant certifications achieved;
- iv. Recent (i.e., three years) past experience directly relevant to the proposed task(s).
- v. Identification of all long lead items required to execute the proposed technical approach.
- vi. A detailed technical approach and proposed Statement of Work (SOW) that demonstrate sufficient understanding of the challenge and specific knowledge and capability to perform all aspects of the proposed tasks in support of the appropriate objective(s) in the SOO (including references to successful past performance of relevant tasks within the prior three years). It must specify which defense-related supplier communities/supply chains, and/or industrial sector/niche the proposed effort is intended to serve and how the proposed solution will advance progress toward one or more of the objectives detailed in the CIR and SOO (i.e., the specific benefits that will accrue to the defense suppliers/supply chains intended to benefit and, by extension, to the DoD). More specifically, the proposed technical approach and SOW shall:

- a. Detail which element(s) or segment(s) of the Industrial Skills Workforce Development Model (described in Attachment 0003) the proposed work addresses through design, testing, evaluation or development. Describe which key objectives in the SOO are being addressed as a result. Describe extant capabilities versus those that will be developed or improved to establish full(er) capabilities (for example, a specific expanded or expedited industrial skills development pipeline; enhancing a degree-granting program by giving students new access to advanced manufacturing facilities; testing new credentialing programs or processes, establishing new industry-academic collaborative practices, etc.).
 - b. Detail any and all pilot/prototype operations planned, along with an Integrated Master Schedule (IMS) for execution. Describe any and all equipment or special software/tools to be used and their respective costs and/or licensing requirements. Similarly, address workforce technology transfer plans and anticipated qualification requirements. State how those plans and requirements will be executed to achieve success. Describe performance metrics and innovations that are expected to improve the targeted elements or segments of the Industrial Skills Workforce Development Ecosystem Model. Include a table or matrix listing all such targeted elements or segments, cross-referencing them to descriptions of any and all relevant tasks in the Offeror-prepared SOW that show how those tasks will address the elements or segments. These tasks should also be tied to key milestones and Government decisions points during project execution.
 - c. Provide detailed information that supports assessment of the reasonableness of the remainder of the proposal (teaming, management, timelines, milestones, cost proposal, cost share arrangements/targets, and proposed performance metrics). Offerors whose proposal relies upon the formation of a Limited Joint Venture must include a copy of the Limited Joint Venture Agreement.
 - d. Include the requirement for and delivery of detailed lessons learned at the completion of the project in support of knowledge management supporting the National Imperative for Industrial Skills initiative and continued maturation of the U.S. industrial skills workforce development ecosystem at applicable levels (i.e., local, regional/state or national).
- vii. A detailed management approach that clearly shows the proposed: organizational structure; assignment of major roles and responsibilities

(i.e., task organization); internal and external communications plan; team management process (if applicable); staffing plan; and risk, issue and opportunity identification and management process (including currently known risks to cost, schedule and performance and a discussion of how proposed project metrics will be applied within this process). Offerors forming a Limited Joint Venture to execute their proposed project shall include signed copies of the Joint Venture Agreement as part of the proposal package (exempt from page count limitations).

d. Full Proposal Price.

- i. The cost proposal shall be submitted in Excel format and is not included in the page limitations.
- ii. Offeror shall provide a firm fixed price (FFP) proposal that provides a detailed cost breakdown for all tasks and timeframes aligned with the OTA base period conveyed by the Government in its invitation to the Offeror to submit a full proposal. Other types of agreement (e.g., cost-based OTAs) will be considered when in the best interest of the Government. The cost proposal shall be broken out into sections that conform to the major activities in the proposed schedule. The breakdown shall identify all direct labor (including labor categories, man-hours, and rates), material costs, subcontractor costs, other direct costs (e.g., travel), and overhead/indirect costs (including rates), and fee necessary to execute the requirements of this initiative. Cost sharing, as required by 10 U.S.C. §2371b, shall be clearly identified.
- iii. In accordance with DoD OUSD(A&S) Other Transaction Guide Version 1.0, Section II, paragraph (E)(4)(b)(i), the Government shall determine price reasonableness utilizing commercial pricing data, market data, parametric data, or cost information. The Other Transaction Guide also states, “the Agreements Officer should exhaust other means to establish price reasonableness before resorting to requesting cost information.” In an effort to streamline negotiations and to expedite the award of OTAs, the Government requests the following:

The Government assumes that the Offeror can readily identify the cost elements within its proposal that will NOT meet the criteria for determining price reasonableness through utilizing commercial pricing data, market research, parametric data, or cost information. Therefore, when the Offeror identifies that a sufficiently comprehensive search of outside sources cannot determine a cost element fair and reasonable, the Offeror shall provide the data necessary to support its proposal, and the Government will make a price reasonableness determination. This is

ONLY applicable when no other means have been identified by the Offeror and is intended to streamline negotiations and award for the mutual benefit of the Offeror and the Government.

The following is a list of examples of supporting documentation; this list should not be considered all-inclusive.

Pricing Narrative: provide all cost assumptions, application of indirect rates and associated rationale.

Direct Labor Rates: the documentation used as the Basis of Estimate for the rates, e.g. Payroll data documenting the labor rates, intent letters, wage surveys, DCAA/DCMA audited/reviewed labor rates, etcetera.

Proposed Indirect Rates, Fringe rates and Factors: an offeror may submit its Forward Pricing Rate Agreement (FPRA), upon availability. If an offeror does not have a FPRA, the offeror may provide all of the data necessary to review the indirect rates, fringe rates and/or factors. The following data is an example of typical data to review the rates:

Indirect Cost Pool(s): a detail of the costs proposed in each pool may be submitted in the Offeror's proposal. Any subcontractor submitting an independent Cost/Price Proposal may also provide a detail of the costs proposed in each pool. An indirect cost pool is a logical grouping of indirect costs with its associated cost objective. For example, maintenance overhead pools include indirect costs that are associated with maintenance effort.

Indirect Cost Allocation Base(s): the offeror may provide a narrative that describes its indirect cost allocation base(s). Any subcontractor submitting an independent Cost/Price Proposal may also need to provide a narrative describing its indirect cost allocation base(s).

Budgetary Data: the Offeror may provide budgetary data to support the proposed indirect rate(s). Any Subcontractor submitting an independent Cost/Price Proposal may also provide budgetary data for its proposed indirect rate(s). The data provided may be the detail of costs for the pool(s) and base(s) used to calculate the proposed indirect rates. The Offeror may also provide appropriately detailed explanations for the basis of the proposed indirect rates. If budgetary data from a prior year was used to estimate the proposed indirect rates, an explanation may be provided. If any portion of the proposed indirect rate is a discreet estimate, the Offeror and/or Subcontractor may provide the explanation and supporting data. The budgetary data may include the pool and base summary information as explained in the previous paragraphs. If the budgetary data is not

available, the Offeror and/or Subcontractor may provide an explanation why the data cannot be provided.

Historical Cost Data (Historical Rates): The Offeror may provide historical cost data for three years, upon availability. Any Subcontractor submitting an independent Cost/Price Proposal may also provide historical actual cost data for three years. The historical data can be provided in the same format as proposed rates and include detailed actual pool and base costs, upon availability. If the data is not available, the Offeror/Subcontractor may provide an explanation why the data cannot be provided.

Sales Data: the Offeror may provide historical sales data for three years. The Offeror may provide the budgetary sales data utilized to calculate the proposed indirect rate(s). Any Subcontractor submitting an independent Cost/Price Proposal, may also provide budgetary sales data to support the proposed indirect rate(s) calculation(s).

Subcontractors: if the subcontractor is providing a commercial service, then sales data may be submitted in support of its proposal; if sales data is not available, the Subcontractor's cost proposal submission may include the contract or agreement type and methodology used by the Prime Offeror to determine the Subcontractor's proposal fair and reasonable. When a Firm-Fixed-Price (FFP) contract type is in place between the Prime and Subcontractor, and competition was used for the fair and reasonableness determination, the Prime Offeror may submit the quotes received, as well as the Prime's fair and reasonable determination of the Subcontractor's proposal. When a Cost Reimbursable or Time-and-Material (T&M) type contract or agreement is in place between the Prime and Subcontractor a detailed cost proposal may be submitted even when awarded competitively. **If a Time-and-Materials type of contract or agreement is in place between the Prime and the Subcontractor, and competition was used for the fair and reasonableness determination, the Price Offeror may submit the quotes received, as well as the Prime's fair and reasonable determination of the Subcontractor's proposal.** When a non-competitive contract or agreement was utilized, regardless of contract type (FFP, Cost Reimbursable, T&M), submission of the Subcontractor proposal may be submitted; this submission can include the supporting documentation in accordance with Federal Acquisition Regulation (FAR) 15.408, Table 15-2 (FAR compliance is not required). Subcontractors may submit cost proposals and supporting documentation under separate cover directly to the U.S. Government.

- iv. The cost proposal shall identify pricing assumptions, and include the basis of estimate and vendor quotes (if applicable) used to generate proposed costs (actual quotes must be provided to support material/subcontract costs).

- v. Offeror shall provide ROM cost estimates for any option periods agreed to by Government in its invitation for full proposal.
- vi. Offeror shall provide documentation that demonstrates that its accounting system and cost data are reliable and are capable of identifying costs to individual agreements/contracts.

III. Evaluation Criteria

1. Initial Screening of Whitepapers and Full Proposals

The Government will conduct an initial screening of each received whitepaper and full proposal to determine if they have met basic eligibility and submission requirements. Those whitepapers and full proposals determined to meet the aforementioned criteria will be forwarded for competitive evaluation.

2. Competitive Evaluation of Whitepapers and Full Proposals

The Government will conduct a competitive evaluation of every eligible whitepaper and invited full proposal received in response to this CIR and subsequent project calls. The overall competitive evaluation rating will be based on an integrated assessment of the Technical and Price factors identified herein. The Government will select the whitepapers and full proposals that represent the best overall value to the Government within available funding resources. Because the Government expects to receive offers addressing a wide variety of needs, the Government will develop specific rules for determining best value among directly competing proposals on a case-by-case basis, where required. The Government reserves the right to award to other than the lowest priced offer, or other than the strongest technical offer.

3. Technical

Both whitepapers and full proposals will be evaluated on their ability to meet the Government's objectives. Evaluators will use the following criteria:

- a. The Government's perception of the importance of the proposed task(s). This includes, but is not limited to factors like: the severity of the need versus the proposed time required to address it, sequencing relative to other current or proposed tasks, the industrial/geographic distribution of current and proposed efforts, and the names of defense-supporting suppliers and/or educational/training institutions or broader supplier communities/supply chains that will benefit from the proposed effort.
- b. The Government's impression of the overall quality and reasonableness of the proposed efforts(s) from both the technical and management perspectives. For full proposals, the Government's technical evaluators will evaluate the reasonableness and completeness of the proposed SOW and alignment with the objectives in the SOO.

- c. The Government’s perception of the advantageousness and appropriateness of the proposed cost share arrangement.
- d. The adequacy of relevant funding available to the Government.
- e. Rating Criteria. The Government will evaluate whitepapers and full proposals for acceptability based on demonstrated knowledge, capability, and approach to perform all aspects of the proposed SOW. The Government will assign an overall competitive evaluation merit rating for each eligible whitepaper and proposal. The overall competitive evaluation rating reflects the Government’s confidence in an Offeror’s ability, as demonstrated in its whitepaper or full proposal, to meet the stated objective and the potential technical benefit of the effort. The overall competitive evaluation technical ratings are detailed in the table below.

Merit Rating	Definition
Outstanding	Whitepaper or full proposal indicates an exceptional approach and understanding of the need/objective and contains multiple technical benefits. The risk of unsuccessful performance is low.
Good	Whitepaper or full proposal indicates a thorough approach and understanding of the need/objective and contains at least one technical benefit. The risk of unsuccessful performance is low to moderate.
Acceptable	Whitepaper or full proposal meets the need/objective and indicates an adequate approach and understanding of the requirement. The risk of unsuccessful performance is no worse than moderate.
Marginal	Whitepaper or full proposal does not demonstrate an adequate approach and understanding of the need/objective, and/or the risk of unsuccessful performance is high.
Unacceptable	Whitepaper or full proposal does not meet the proposed need/objective and thus, contains one or more deficiencies, and/or the risk of unsuccessful performance is unacceptable.

4. Price

Evaluation of Proposed Cost. The Government will evaluate the Offeror’s ROM cost estimate and detailed cost proposal as part of the competitive evaluation process to assess (1) whether the proposed cost is within the available funding limits, and (2) the ability and/or likelihood of the Offeror to successfully execute the proposed project with the financial resources proposed. The Government will determine if the

overall estimate is deemed Sufficient, Insufficient, or Excessive in accordance with the ratings below:

Rating	Definition
Sufficient	The price is considered appropriate to successfully complete the proposed project.
Insufficient	The price is lower than what is considered appropriate to successfully complete the proposed project.
Excessive	The price is higher than what is considered appropriate to successfully complete the proposed project, or exceeds available funding limits.

5. Evaluation Result

The Government reserves the right to do any or all of the following:

- a. Invite entry into direct negotiations with or development of full project proposals only from those Offerors whose whitepapers are determined to be of sufficient value for development.
- b. Accept or reject whitepapers and full proposals in whole or in part;
- c. Ask Offerors to revise evaluated whitepapers and full proposals to better meet Government needs; and
- d. Ask Offerors to team with other Offerors when it is in the Government's interests.

6. Points of Contact

All questions concerning this CIR shall be submitted via email to the Cornerstone Consortium Management Team, usarmy.ria.ccdc-cbc.mbx.cornerstone-ota@army.mil, and Agreement Specialist, Claire Dowd:claire.m.dowd.civ@army.mil. Please reference the specific CIR Number and title with any inquiries.

7. Attachments

Attachment 0001: National Imperative for Industrial Skills Initiative: Statement of Objectives

Attachment 0002: Representation and Certification

Attachment 0003: National Imperative for Industrial Skills Initiative: Background and Acquisition Operational Concept