



Aviation & Missile Technology Consortium™

PROPOSAL PROCESS REVIEW AND TRAINING

- Terminology
- Solicitation for Enhanced Whitepapers and Draft SOWs
- BIDS Submission Process
- Competitive Evaluation
- Source Selection and Selection Notifications
- Cost Proposals
- Warranties and Representations
- Cost Share
- Points of Contact

- **“Project Agreement Holder (PAH)”**
 - the consortium member entity issued a Project Agreement by the CAO for the Government-selected Prototype Project
- **“Consortium Administrative Organization (CAO)”**
 - the organization acting on behalf of the Consortium to execute and administer the efforts under the Other Transaction Agreement (OTA).
- **“Agreements Officer Representative (AOR)”**
 - The Government individual designated by the Government on a per-project basis to monitor all technical aspects and assist in administration of the specific project

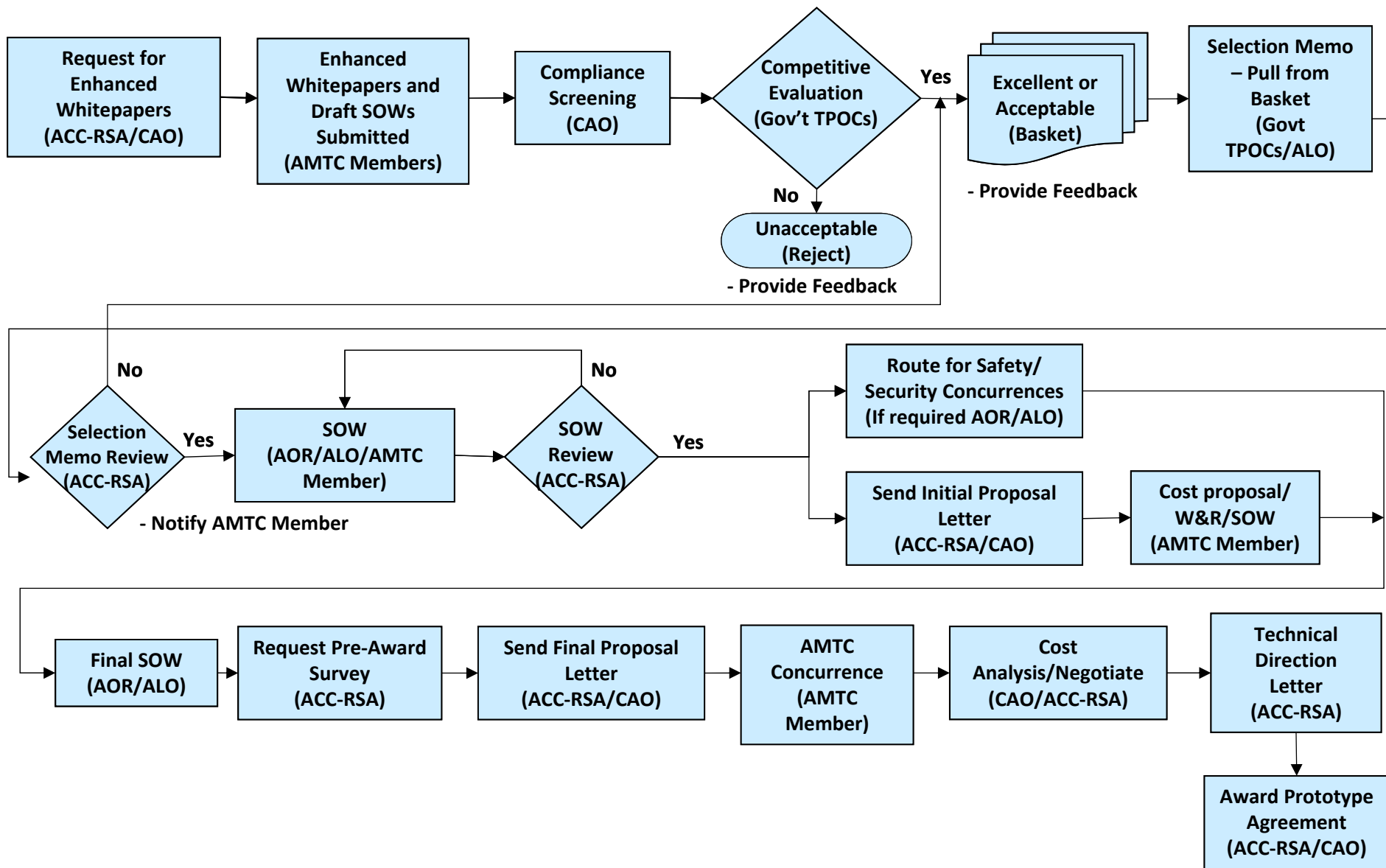
- **“Request for Enhanced Whitepapers (RWP)”**
 - the announcement by the Government, through the CAO (ATI), requesting whitepapers to fulfill a requirement(s) in the designated Objective Area(s)
- **“Base Agreement”**
 - the agreement between the AMTC CAO (ATI) and AMTC member organization that serves as the baseline agreement for all future funded Project Agreements and directly flows down applicable terms and conditions from the Other Transaction Agreement
- **“Project Agreement”**
 - the agreement between the CAO and the Project Agreement Holder (PAH) for the performance of the Prototype Project effort selected by the Government for funding, which establishes the scope of work and terms and conditions for performance



QUARTERLY SOLICITATION CYCLE

Event Description	AMTC 19-01	AMTC 19-02	AMTC 19-03	AMTC 19-04
Submission Window for Objective Requirements	27 Aug - 7 Sep 18	15-26 Oct 18	21 Jan - 1 Feb 19	29 Apr - 10 May 19
Technical Manager Reviews	10-14 Sep 18	29 Oct - 2 Nov 18	4-8 Feb 19	13-17 May 19
Coordination with Technical Liaison for Corrections	10-14 Sep 18	5-9 Nov 18	11-15 Feb 19	20-24 May 19
AO and Legal Review of ORDs	14-23 Sep 18	13-16 Nov 18	18 Feb - 1 Mar 19	27-31 May 19
Final approval to release RWP to CAO	24 Sep 18	19 Nov 18	4 Mar 19	31 May 19
CAO review of ORDs	24-25 Sep 18	20 Nov 18	5-7 Mar 19	3 Jun 19
Release of RWP to Consortium	25 Sep 18	20 Nov 18	8 Mar 19	4 Jun 19
Enhanced Whitepaper Submittal VIA BIDS	16 Oct 18	17 Dec 18	29 Mar 19	25 Jun 19
Technical Evaluation Due	24 Oct 18	4 Jan 19	5 Apr 19	3 Jul 19
Technical Consensus Evaluations Due	7 Nov 18	18 Jan 19	19 Apr 19	17 Jul 19
ACC and Legal Review of Consensus Evaluations	21 Nov 18	1 Feb 19	3 May 19	7 Aug 19
Enhanced Whitepaper Feedback to AMTC Members	21 Dec 18	22 Feb 19	24 May 19	30 Aug 19

ENHANCED WHITEPAPER PROCESS



- The Enhanced Whitepaper Template and Statement of Work template are **MANDATORY**
- Full Cost Proposals are not required unless the Enhanced Whitepaper is selected for award.
- Speak with the Technical Liaisons in the Objective Requirement Document (ORD), up until Enhanced Whitepaper submission.
- Speak to the AMTC CAO at any point during the process. Ask for input and guidance as needed.
 - kate.sheets@ati.org

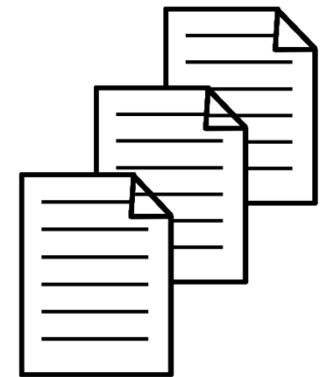
Submit Prior To The Deadline

Neither the government nor ATI can make allowances/exceptions for submission problems encountered by the offeror using system-to-system interfaces with BIDS. If the offeror receives errors and fails to upload the full submission prior to the submission deadline, the submission will not be accepted. **SUBMIT EARLY.**

- **Objective Requirements Document (ORD)**
 - Objective Area Requirements
- **Request for Enhanced Whitepapers (RWP)**
 - Submission Requirements and Deadline for Enhanced Whitepapers
- **Appendix I – Mandatory Enhanced Whitepaper Template**
- **Appendix II – Quad Chart Instructions**
- **Appendix III – AMTC Award Process and Requirements**
 - General Process Info
 - Cost Proposal Requirements
 - Exhibit 1 - Warranties and Representations
 - Exhibit 2 - SOW Template
- **AMTC Base Agreement (DRAFT)**
 - Must agree to abide by Terms and Conditions on cover page of Enhanced Whitepaper

Documents Available on Respective Members Only site

- Appendix I to the Request for Enhanced Whitepapers is the MANDATORY Enhanced Whitepaper Template
- Enhanced Whitepapers shall be UNCLASSIFIED.
- Limited to 15 pages plus a cover page (16 pages total)
 - Data Right Assertions are to be discussed in the Statement of Work.
- **Enhanced Whitepapers must be submitted in BIDS as a MS Word (.docx or .doc) or **Adobe** (.pdf) file that is 5MB or less in file size.**



Only those AMTC Members in “Good Standing” prior to the due date for Enhanced Whitepapers will be eligible to have their submissions evaluated

Cover page

SECTION 1: TECHNICAL

- Section 1.1: Prototype Project
- Section 1.2: Objective Area Requirement
- Section 1.3: Technical Approach
- Section 1.4: Risk Identification and Mitigation
- Section 1.5: Test/Evaluation
- Section 1.6: Schedule

SECTION 2: ESTIMATE

- Section 2.1: Estimate Summary – Also Required in BIDS Submission Form
- Section 2.2: Estimate Rationale

SECTION 3: OTHER TRANSACTION AUTHORITY APPROACH

- Also Required in BIDS Submission Form

Must explain approach on how the Offeror intends to comply with Section 2371b of Title 10, Amendments to Other Transaction Authority, of the National Defense Authorization Act (NDAA) for Fiscal Year 2018.

- Minimally should provide statement that you are a nontraditional or a nonprofit research institution, you intend to have significant nontraditional or nonprofit research institution participation, you intend to provide 1/3 cost share, or that all participants (other than the Federal Government) will be small businesses or nontraditionals.
- Similar info is required in BIDS Submission Form

Signed Warranties and Representations are NOT required with the Enhanced Whitepaper submission, but will be required prior to award.



NONTRADITIONAL DEFENSE CONTRACTOR DEFINITION

“Nontraditional Defense Contractor” means an entity that is not currently performing and has not performed, for at least the one-year period preceding the issue date of the RWP, any contract or subcontract for the Department of Defense that is subject to full coverage under the cost accounting standards prescribed pursuant to section 1502 of title 41 and the regulations implementing such section. A nontraditional defense contractor can be at the prime level, team members, subcontractors, lower tier vendors, or "intra-company" business units (provided the business unit makes a significant contribution to the prototype project).



NONPROFIT RESEARCH INSTITUTION DEFINITION

“Nonprofit Research Institution” means a university or other institution of higher learning, or an organization of the type described in Section 501(c)(3) of the Internal Revenue Code of 1954 that is exempt from taxation under Section 501(a) of the Internal Revenue Code, or any nonprofit scientific or educational organization qualified under a State nonprofit organization statute.

EXHIBIT 2: SOW Template

HEADER INFORMATION

Project Identifier: {AMTC-XX-XX-XXXX} *(to be updated if selected for award)*

Objective Requirement: {e.g. GM001}

Organization: {contractor name}

Title: {title of proposal}

Place of Performance: The below list includes all places of performance. Any changes to place of performance must be approved in writing by the CAO based on AOR and AO approval.

Organization Name	Address	CAGE	Unclassified or Classified Work

SECTION 1: Introduction/Background

- Brief statements on the effort's background (who, what, why, etc.) in language understandable to all reviewers (including non-technical reviewers)

SECTION 2: Scope/Project Objective

- Specifically describe the scope that this project will cover

SECTION 3: Applicable Documents

- Insert the applicable documents, if known

SECTION 4: Requirements

- Outline the proposed tasks and subtasks

SECTION 5: Deliverables

- Outline proposed deliverables and restrictions

SECTION 6: Milestone Payment Schedule

- Outline the proposed milestones, dates, and amounts

SECTION 7: Shipping Provisions

- **To be completed by the Government if selected for award**

SECTION 8: Data Reporting

- **To be completed by the Government if selected for award**

SECTION 9: Safety

- To be completed by the Government if selected for award

SECTION 10: Environmental Requirements

- To be completed by the Government if selected for award

SECTION 11: Data Rights and Copy Rights

- Outline any items to be furnished to the Government with restrictions

SECTION 12: Security Classification

- To be completed by the Government if selected for award

SECTION 13: Government Furnished Items

- Outline any physical assumed to be provided by the Government

SECTION 14: AOR and Alternate AOR:

- To be completed by the Government if selected for award

Objective Requirement: Enter the requirement # the EWP is submitted under
Title: Enter the title of the Enhanced Whitepaper

Place photograph or engineer's diagram of the project's prototype end-item or technology advancement.

- Ideally, this will convey the main idea of the final capability/use of the prototype.
- It should further define an idea of the size and weight of the end item

Starting TRL/MRL: Projected Ending TRL/MRL:

Operational Capability:

- Describe capabilities the prototype technical solution will provide to meet technology gap or requirement.
- List key aspects of new technologies, performance and/or capability improvements that will enhance mission effectiveness.
- List end items, programs of record and DoD products that will be influenced by this solution.
- List Services & Government program offices and/or laboratories that will directly benefit
- Identify any unique partnerships or teaming opportunities.

Proposed Technical Approach:

- Describe the technology involved and how it will be used to solve the problem or enhance the mission effectiveness of military personnel
- Describe the directly relevant tasks to be performed that will improve platforms, systems, components, and/or materials that will be acquired or used by the DoD.
- Include anticipated TRL/MRL transition points within this proposed project

Estimated Cost and Period of Performance:

- Include total cost and POP for all tasks

Prototype Deliverables:

- Prototype deliverables shall be listed.

Contact Information:

- Offeror company name, POC, phone number, and e-mail address.

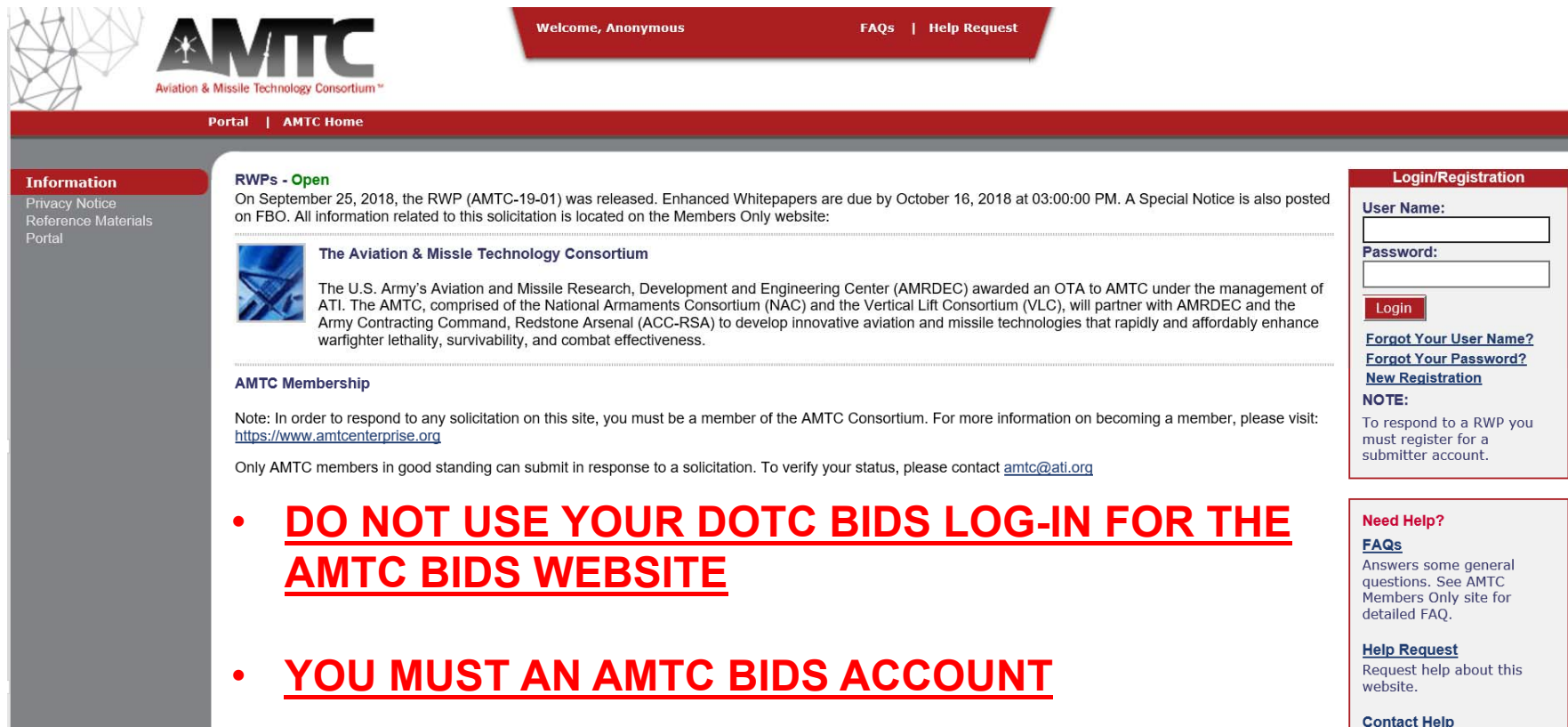
Non-proprietary / Proprietary

- Not evaluated, but important collaboration tool
- It is requested that AMTC members submit a quad chart(s) at the time of Enhanced Whitepaper submission.
- If the Enhanced Whitepaper is placed in the “basket”, the quad charts will be made available to AMTC customers for review and consideration for future funding.
- Offerors shall prepare and upload to BIDS a one-page (8 ½ by 11 inches) non-proprietary and/or a proprietary quad chart.
- Non-propriety quad charts will be posted on the respective Members Only website.
- Proprietary quad charts will be posted on a separate Government Only website.

BIDS Submission

Note: Participate in Proposers Conferences for full details

Visit the AMTC BIDS Page at:
<https://ati.acqcenter.com/AMTC/BIDS.NSF>



The screenshot shows the AMTC website interface. At the top, there is a navigation bar with "Welcome, Anonymous" and "FAQs | Help Request". Below this is a secondary navigation bar with "Portal | AMTC Home". The main content area is divided into several sections:

- Information:** A sidebar menu with links for "Privacy Notice", "Reference Materials", and "Portal".
- RWPs - Open:** A section titled "RWPs - Open" with a sub-header "The Aviation & Missile Technology Consortium". The text states: "On September 25, 2018, the RWP (AMTC-19-01) was released. Enhanced Whitepapers are due by October 16, 2018 at 03:00:00 PM. A Special Notice is also posted on FBO. All information related to this solicitation is located on the Members Only website:". Below this is a small image of a globe and a paragraph describing the consortium's mission: "The U.S. Army's Aviation and Missile Research, Development and Engineering Center (AMRDEC) awarded an OTA to AMTC under the management of ATI. The AMTC, comprised of the National Armaments Consortium (NAC) and the Vertical Lift Consortium (VLC), will partner with AMRDEC and the Army Contracting Command, Redstone Arsenal (ACC-RSA) to develop innovative aviation and missile technologies that rapidly and affordably enhance warfighter lethality, survivability, and combat effectiveness."
- AMTC Membership:** A section titled "AMTC Membership" with a note: "Note: In order to respond to any solicitation on this site, you must be a member of the AMTC Consortium. For more information on becoming a member, please visit: <https://www.amtcenterprise.org>". Below this is another note: "Only AMTC members in good standing can submit in response to a solicitation. To verify your status, please contact amtc@ati.org".
- Login/Registration:** A section titled "Login/Registration" with a "User Name:" field, a "Password:" field, and a "Login" button. Below the fields are links for "Forgot Your User Name?", "Forgot Your Password?", and "New Registration". A "NOTE:" section states: "To respond to a RWP you must register for a submitter account."
- Need Help?:** A section titled "Need Help?" with a "FAQs" link and a "Help Request" link. Below these are links for "Contact Help".

Two prominent red callouts are overlaid on the page:

- DO NOT USE YOUR DOTC BIDS LOG-IN FOR THE AMTC BIDS WEBSITE**
- YOU MUST AN AMTC BIDS ACCOUNT**

Login/Registration

User Name:

Password:

Login

[Forgot Your User Name?](#)
[Forgot Your Password?](#)
[New Registration](#)

NOTE:
To respond to a RWP you must register for a submitter account.

- See Submitter Quickcard on Members Only Site
- Go to <https://ati.acqcenter.com/AMTC/BIDS.NSF>
- Register as a new user
 - In the Login panel, click “New Registration.”
 - Click on “Submitter” as the registration type.

Please select the type of account you are registering for:

Government

- [Government Requirement Submitter/Evaluator/AOR](#) – Select this in order to evaluate whitepapers and proposals.

Industry

- [Submitter](#) - Select this in order to submit responses to solicitations.

Registration

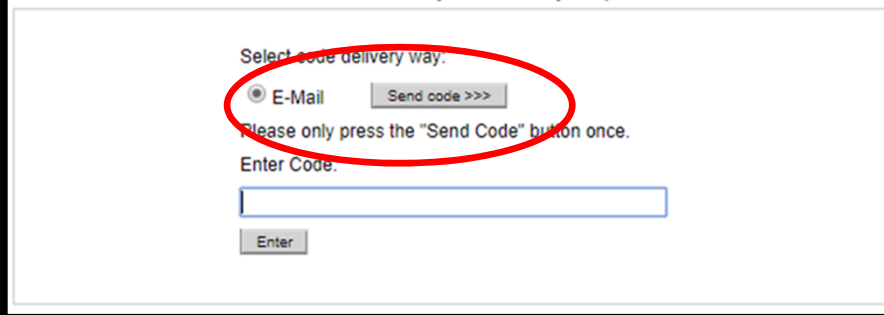
Fields marked with an asterisk (*) are required.

Registration Information

Registration Type:	Submitter
* First Name:	<input type="text"/>
* Last Name:	<input type="text"/>
* Password:	<input type="password"/> Passwords must be at least 12 characters long. They must contain two each of uppercase, lowercase, numerical, and special characters.
* Password Confirmation:	<input type="password"/>
* Submitter Login ID:	<input type="text"/>

User accounts without a mobile phone number will receive a log-in code via email

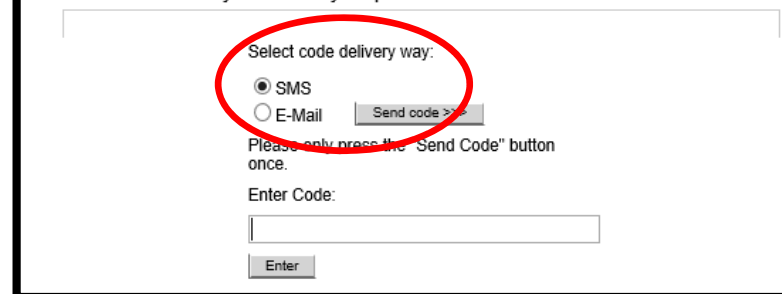
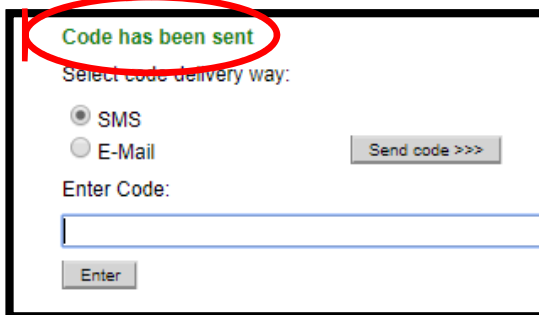
Protecting the data that has been included on the BIDS website is a top priority. To improve safeguarding of this information and in response to DoD cybersecurity requirements, we are implementing **Multi-Factor Authentication (MFA)** for controlled access to the website. MFA is a method of control where access is granted only after successfully presenting several separate pieces of evidence - typically a username/password, followed by a second factor like a one-time code provided at time of log-in. You may choose to have this code sent to your email (default method – if no cell phone is provided in profile, it will be automatically sent to your email) or through a text message on your cell phone. The option for receiving the code via text (SMS) will not be available until a cell-phone number has been provided in your BIDS profile. Please contact bidshelp@acqcenter.com with any issues associated with the multi-factor authentication. We understand this change impacts your time and convenience, but it is critical that we adhere to DoD cybersecurity requirements.



Only click “Send code” once. You will see confirmation in green font once the code has been sent. Repeated attempts will generate differing codes

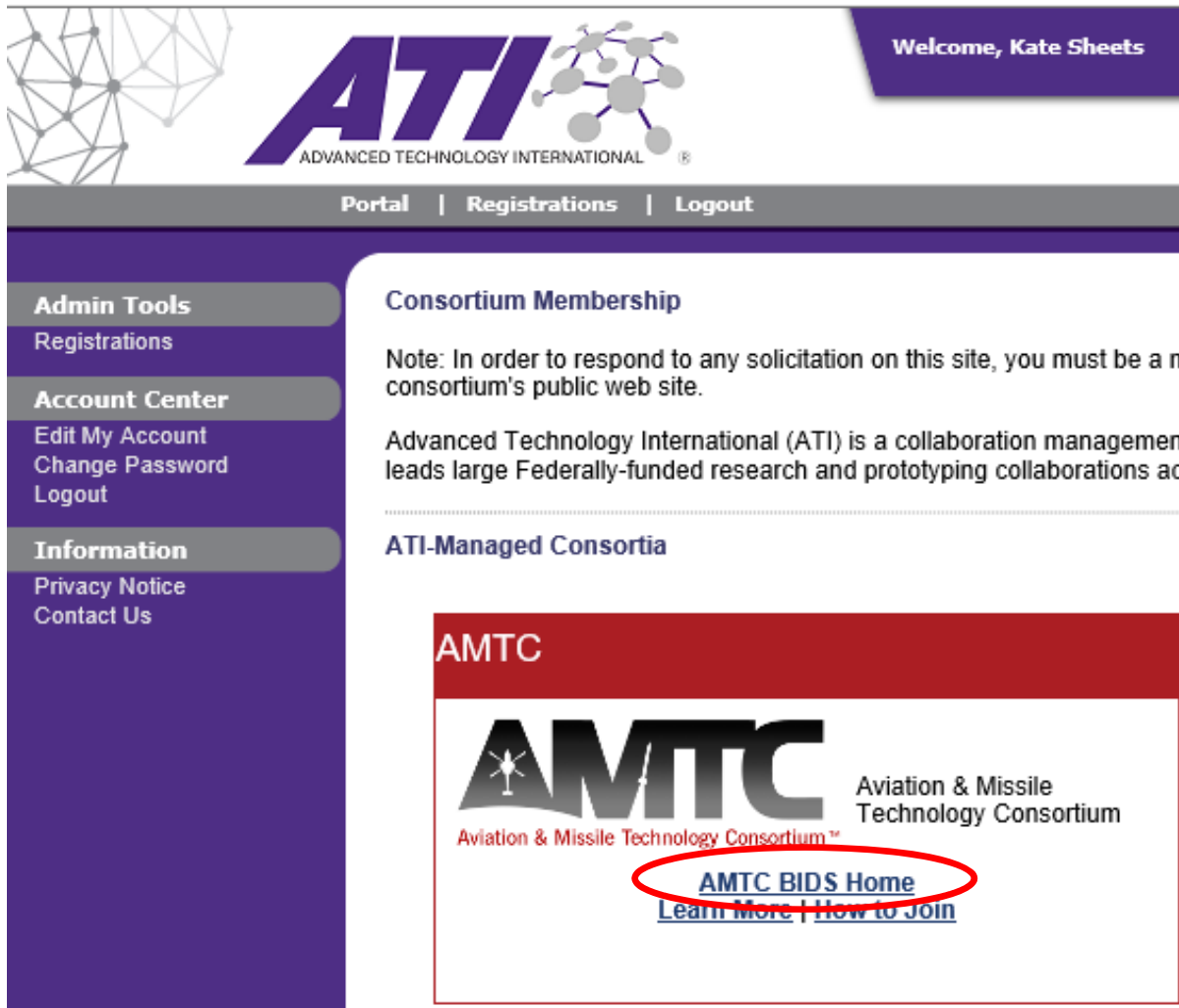
User accounts with mobile phone numbers will have option of a log-in code being sent via email or SMS (text)

Protecting the data that has been included on the BIDS website is a top priority. To improve safeguarding of this information and in response to DoD cybersecurity requirements, we are implementing **Multi-Factor Authentication (MFA)** for controlled access to the website. MFA is a method of control where access is granted only after successfully presenting several separate pieces of evidence - typically a username/password, followed by a second factor like a one-time code provided at time of log-in. You may choose to have this code sent to your email (default method – if no cell phone is provided in profile, it will be automatically sent to your email) or through a text message on your cell phone. The option for receiving the code via text (SMS) will not be available until a cell-phone number has been provided in your BIDS profile. Please contact bidshelp@acqcenter.com with any issues associated with the multi-factor authentication. We understand this change impacts your time and convenience, but it is critical that we adhere to DoD cybersecurity requirements.

Type in the code, then click “Enter”

- Click on “AMTC BIDS Home”



The screenshot shows the AMTC website portal. At the top left is the AMTC logo with the tagline "Aviation & Missile Technology Consortium™". To the right is the text "ENHANCED WHITEPAPER SUBMISSION CONT.". Below this is a dark horizontal bar. The main content area has a purple header with "Welcome, Kate Sheets" on the right. Below the header is a navigation bar with "Portal | Registrations | Logout". On the left is a sidebar menu with sections: "Admin Tools" (Registrations), "Account Center" (Edit My Account, Change Password, Logout), and "Information" (Privacy Notice, Contact Us). The main content area has a section titled "Consortium Membership" with a note: "Note: In order to respond to any solicitation on this site, you must be a member of the consortium's public web site." Below this is a paragraph: "Advanced Technology International (ATI) is a collaboration management organization that leads large Federally-funded research and prototyping collaborations across various industries." Below that is a section titled "ATI-Managed Consortia". At the bottom is a red banner with "AMTC" and a white box containing the AMTC logo and tagline. Below the logo is a red oval around the text "AMTC BIDS Home" with links "Learn More" and "How to Join".

- The Competitive Evaluation will result in one of the following:



“Excellent” or **“Acceptable”** will be placed in the Basket

-or-



“Unacceptable” will NOT be placed in the Basket

- All Offerors will be provided feedback based on these evaluations.
- All Enhanced Whitepapers placed in the electronic Basket must be awarded prior to the expiration date, which is three (3) years from the date that the corresponding RWP closed.

- Integrated assessment of the following:
- Likelihood of the proposed solution to successfully achieve the requirement as defined in the Objective Requirements Document (ORD).
- Adequacy of the technical approach, including complete and clear processes to execute the effort.
 - Demonstrated ability of the proposed effort to advance the technology maturity level.
 - Ability to demonstrate projected performance improvements.
- Extent to which potential risks are mitigated.
- Extent to which the Enhanced Whitepaper identifies how the prototype will be evaluated for technical feasibility, manufacturing feasibility or military utility.
- Extent to which the proposed schedule is realistic and achievable.
- Extent to which the cost/price estimate provided is appropriate for the proposed scope or approach.



Enhanced Whitepapers are Rated, not Ranked

Technical Questions:

1. Is this a Prototype Project?
2. What is the resulting prototype(s) deliverable going to be?
3. What is the prototype quantity for each item(s) identified in #2 above?
4. Does the proposed technology address the objective requirement, either fully or in part? [Y/N]
5. Explain the overall technical approach that the contractor will use to reach the end objective.
6. In your technical opinion, is this approach adequate to successfully reach the proposed technology solution? Why or why not?
7. Identify any distinct strengths and/or weaknesses with the technical approach.
8. In your technical opinion, what are the Government's assessed risks to this technical approach?
9. In your technical opinion, to what extent can the risks be mitigated?
10. How will the final prototype(s) be tested/evaluated?
11. Who is performing the testing? [Government/ Contractor]
12. Where is the testing being performed?
13. In your technical opinion, is the proposed testing adequate to fully assess the prototype's feasibility? [Y/N]
14. Discuss why or why not the proposed schedule is realistic and achievable.

- **Competitive Evaluation Merit Rating:**

EVALUATION	MERIT RATING
The Enhanced Whitepaper demonstrates a thorough approach that is expected to exceed project requirements and objectives. The technical benefits outweigh the project risk (technical and schedule) for a development effort at this stage.	Excellent
The Enhanced Whitepaper demonstrates an adequate approach that is expected to meet project requirements and objectives. The project risk (technical and schedule) is considered acceptable for a development effort at this stage.	Acceptable
The Enhanced Whitepaper does not demonstrate an approach that is expected to meet project requirements and objectives. The path does not appear feasible, or does not provide the Government with a desired new or enhanced capability. The project risk (technical and schedule) is considered too high for a development effort at this stage.	Unacceptable

- **Estimate:**

- The Government Technical Evaluators will determine if the overall estimate is deemed (I) Insufficient, (S) Sufficient, or (E) Excessive

An Enhanced Whitepaper that receives an overall Competitive Evaluation merit rating of **Unacceptable** will be rejected and will NOT be placed in the Basket.

- Enhanced Whitepapers that simply provide capability statements without specifically stating the prototype deliverables and associated quantities will likely fail to comply.
- Enhanced Whitepapers need to specify exactly what work will be done and what will be delivered, and not be open-ended engineering service type of arrangements.



Next Steps...

- **Government documents the rationale for a selection decision in a Selection Memo, which will be reviewed and approved by ACC-RSA.**
 - Based on supporting rationale an Enhanced Whitepaper rated “Acceptable” may be selected for award over one rated “Excellent”
- **Once notified of selection, AMTC Member collaborates with Government customer to finalize the SOW**
- **Once the Draft SOW is approved, the Proposal Letter process begins**

Next Steps...

- **Submit the following in accordance with Appendix III – AMTC Award Process and Requirements**
 - Warranties and Representations
 - Concurrence to SOW
 - Full Cost Proposal
- **The Cost Proposal Formats provided are NOT mandatory. Offerors are encouraged to use their own (compliant) cost formats**
- **Cost analyzed with respect to cost reasonableness, completeness and realism**

- **Offerors shall submit Warranties and Representations**
 - Exhibit 1 to Appendix III – AMTC Award Process and Requirements
- **In accordance with Section 2371b of Title 10, Amendments to Other Transaction Authority, of the National Defense Authorization Act (NDAA) for Fiscal Year 2018, each Prototype Project awarded under an OTA must meet at least one of the following conditions:**
 - At least one nontraditional defense contractor or nonprofit research institution participating to a significant extent in the prototype project.
 - 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.
 - 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.

- Complete Section A with Offeror’s information

A. Prime Contractor: The prime contractor must complete the following table.	
1. Legal Name:	2. DUNS #:
3. Point of Contact:	
4. Prime Contractor is a nontraditional defense contractor. Prime Contractor certifies that it has not performed, for at least the one-year period preceding the issue date of the solicitation, any contract or subcontract for the Department of Defense that is subject to full coverage under the cost accounting standards prescribed pursuant to Section 1502 of Title 41 and the regulations implementing such section. (Y/N)?	
5. Prime Contractor is a nonprofit research institution. (Y/N)?	
6. Prime Contractor will provide at least one third of the total cost of the prototype project out of funds provided by sources other than the Federal Government. (Y/N)?	
7. Prime Contractor is a small business in accordance with Section 9 of the Small Business Act (15 U.S.C. 638). (Y/N)?	
8. Prime Contractor has performed R&D under a FAR based contract within last 12 months. (Y/N)?	
<i>Note: This is for informational purposes only.</i>	

- Fill out Section B as needed. See Exhibit 1 for additional detail.

Cost Share:

- The resources expended by the PAH on the proposed project SOW and subject to the direction of Government project management. Cost sharing includes any costs a reasonable person would incur (necessary to) carrying out project SOW, but does not involve funds directly to USG. There are two types of cost sharing as follows: **(1) Cash:** Outlays of funds to perform the project; and **(2) In-Kind:** Reasonable value of equipment, materials or other property used in performance of the project.
- If cost share is proposed, the following must be provided:
 - Description of each cost share item proposed;
 - Proposed Dollar Value of each cost share item proposed;
 - Valuation Technique used to derive the cost share amounts (e.g., vendor quote, historical cost, labor hours and labor rates, number of trips.)

- **“Cash Contribution”**

- Project Agreement Holder (PAH)’s financial resources expended to conduct Project Agreement SOW. Cash contributions include funds the PAH will spend for labor (including benefits and direct overhead), materials, new equipment (prorated if appropriate), and subcontractor efforts expended on a Project SOW.

- **“In-Kind Contribution”**

- Reasonable value of in-place equipment, materials or other property used in performance of the project SOW

- **Examples of Unacceptable Cost Share Sources:**

- Costs incurred before POP
- Foregone fees or profits
- Foregone G&A or cost of money applied to a base of IR&D
- Bid and proposal costs
- Value claimed for intellectual property, prior research, or corporate goodwill
- Parallel research or investment not part of the SOW
- Off-Budget Resources

- The Government will monitor the technical work performed and technical compliance under each funded Project Agreement.
- The CAO will provide administrative support on the Project Agreements.
- The Project Agreement Holder (PAH) is solely responsible for performance of the project.
- **PAHs are strongly encouraged to communicate with AOR and CAO throughout performance**

Kate Sheets

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Chester Andrews

Sr. Program Manager

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General and Membership Questions

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Questions?

