



Proposal Preparation Instructions

Definition: OpenSFS Scalable File System Development Proposal Preparation Instructions

Solicitation Number W4570

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1. Proposal Preparation Instructions

1.1. General Requirements.

The Offeror's proposal shall be in three parts: a Technical Proposal, a Past Performance Volume, and a Business Management Proposal. Proposals shall be submitted electronically. Electronic submission is via email to the OpenSFS Subcontract Administrator using the email address proposals@lists.opensfs.org.

1. The Technical Proposal, Past Performance Volume and Business Management Proposal must be in separate files.
2. Only commonly used formats (such as Adobe PDF or Microsoft Office files) will be accepted. An Offeror may send the Response as a series of emails, or contact the OpenSFS Subcontract Administrator for instructions on using an ftp-based service for delivery of larger files.
3. File names shall clearly indicate which file(s) represent the Technical Proposal, the Past Performance Volume and the Business Management Proposal.
4. The page size shall be standard 8.5x11. Foldouts for large or complex diagrams are permitted. Color is permitted. Font size should not be smaller than 11 pt, except where the readability of text in a Figure benefits from a smaller size.

1.2. Format for the Technical Proposal

The Technical Proposal shall not exceed 5 pages per technical element proposed.

The Offeror must provide technical information in sufficient detail to allow OpenSFS to fully evaluate the proposal against all evaluation factors. OpenSFS may assume that the Offeror fails to comply with the Technical Specifications if this section is incomplete.

1.3. Format for the Past Performance Volume

The Past Performance Volume shall not exceed 5 pages.

1.4. Format for the Business Management Proposal

The Business Management Proposal does not have a page limit.

2. Technical Proposal Preparation Instructions

2.1. Qualification Criteria

The Offeror shall describe any exceptions taken to elements within the Technical Specifications (Lustre feature development, Parallel File System Tools, Addressing Lustre Technical Debt, and Parallel File System Incubators) and describe proposed methods for mitigating the impact of an offer that does not meet one or more critical elements. Responses in this section do not count against the Technical Proposal page count limitation.

2.2. Technical Elements of the Offeror's Proposal

Provide a high level description and plan that describes how the work will be achieved. This should be from a technical perspective and separately from a management perspective. Offeror may elect to reply to one or more elements of the Technical Specifications. If solutions will be based on existing designs, documents detailing these designs should be provided if available. Offeror shall refer to the Example Statement of Work, Management, and Reporting document for additional information on Milestones and Management and Reporting requirements.

The proposal should describe the following high-level goals while also meeting the specific requirements and deliverables in the Technical Specifications:

- Work in a collaborative fashion with OpenSFS participants.
- Solutions shall be based on Open Source Software.
- Solutions shall be storage vendor neutral by being applicable to a broad spectrum of storage solutions.
- Solutions shall reduce existing technical debt within the code base and avoid introducing additional technical debt.
- Solutions shall be accompanied by clear and detailed documentation spanning architecture to documentation of the code itself.
- All development shall be conducted in an Open Source development model in publicly available source repositories.
- Contribution of solutions shall be conducted under the OpenSFS contributor agreement.

3. Past Performance Volume Preparation Instructions

3.1. Past Performance

The Offeror shall provide a written description of projects similar in type and complexity as this project that the Offeror has completed in the past 3 years. The Offeror shall include technical and business contact points by name, title, address, telephone number and an e-mail address. The Offeror is encouraged to include a self-assessment of their performance on these projects. The Offeror should discuss lessons learned from these projects and how those lessons have been incorporated into improved products and processes.

3.2. Corporate Capability

The Offeror shall address the following elements:

- Commitment to high performance parallel file systems including a strong product roadmap and commitment to advancing the state of the art through investment in development and research appropriate for the size of the company.

- Commitment to Open Source software including previous contributions to open source software relevant to parallel file systems.
- Management and corporate capability, including identifying and managing risk throughout the project.
- Assessment of project risks with regard to how the Offeror shall meet the technical, support, and schedule requirements of this solicitation.
- Assessment of named individuals assigned to roles on this Project.

4. Business Management Proposal Preparation Instructions

4.1. Signature

The Offeror shall provide a completed, signed copy of the Solicitation and Offer.

4.2. Price Information

The Offeror shall submit the following information as part of their proposal:

Separate prices for individual milestones proposed by Offeror.

Pricing for and description of equipment (such as test and development systems) required by Offeror to successfully complete the proposed work.

4.3. Milestone Schedule

The Offeror shall provide a payment milestone schedule that coincides with the proposed milestone schedule in the Example Statement of Work, Management, and Reporting Document. Offeror may propose alternative milestones and an alternative schedule based on Offeror's assessment of the proposed work.

The Offeror shall describe the personnel staffing plan to carry out the proposal to include estimated hours to complete proposed milestones.

4.4. Additional Information

4.4.1. Royalty Information.

The Offeror shall include in this section:

1. Cost or charges for royalties. If your proposal includes costs or charges for royalties you must include the following information for each separate item of royalty or license fee:
 - a. Name and address of licensor
 - b. Date of license agreement
 - c. Patent numbers, patent application serial numbers, or other basis on which the royalty is payable

- d. Brief description, including any part or model numbers of each contract item or component on which the royalty is payable
 - e. Percentage or dollar rate of royalty per unit
 - f. Unit price of contract item
 - g. Number of units; and
 - h. Total dollar amount of royalties
2. Copies of current licenses. In addition, at our request before execution of the subcontract, you must furnish a copy of the current license agreement and an identification of applicable claims of specific patents or other basis upon which the royalty may be payable.

4.4.2. Other Information.

The Offeror shall include in this section:

- a. Any exceptions that you take to the provisions of this solicitation.