OASIS SB ORDERING GUIDE

This Ordering Guide sets forth the procedures for issuing task orders against the OASIS SB contracts to fill agencies' mission requirements for complex, integrated professional services.

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Introduction

Thank you for choosing the OASIS family of vehicles, specifically OASIS SB, to fulfill your complex, integrated professional service needs!

The OASIS (unrestricted awards) and OASIS SB vehicles provide a common architecture and platform across the Federal Government for the acquisition of complex professional service requirements. These requirements typically necessitate the integration of several professional service disciplines: primarily management consulting, program management, logistics, engineering, scientific, and financial management.

OASIS SB is a collection of multiple-award, (MA), Indefinite Delivery, Indefinite Quantity (IDIQ), ten-year (five year base and five-year option period) contracts with no maximum on the total value of orders that can be placed under the contracts. The OASIS SB contracts were awarded as 100% Small Business set-asides.

Online resources supporting the use of OASIS SB are available at www.gsa.gov/Oasis. Available resources include: copies of the contracts and contract modifications; a list of the industry partners who were awarded OASIS SB contracts; and much more. This guide describes the ordering process for agency users, highlighting procedures specific to the OASIS SB contracts.

Who is this Guide written for?

This guide is written for warranted Federal ordering contracting officers considering or intending to use the OASIS SB contract vehicle. It explains how OASIS is used to satisfy a professional service based requirement that will not be set aside for small business. The Guide addresses contracting issues and concepts unique to OASIS. It does not address general contracting issues or concepts unless necessary for complete understanding. The Guide presumes the ordering contracting officer is proficient in his or her duties.

This Ordering Guide will help ordering offices to effectively use the OASIS SB contracts to deliver solutions to mission needs. Information to assist customer agencies in using the OASIS SB contracts is available online at www.gsa.gov/oasis. The site includes copies of the contracts and contract modifications, lists of the industry partners that were awarded OASIS contracts, and many other useful documents.

Scope of the OASIS SB contracts

The OASIS SB contracts are intended to provide professional services through the effort of bona-fide executive, administrative, and professional employees as defined in Part 541 of Title 29, Code of Federal Regulations (CFR).

The services under OASIS SB span many areas of expertise and mission spaces. The primary professional service disciplines integrated under the contracts to provide a total solution to agency needs are: Program Management, Management Consulting, Engineering, Scientific, Logistics, and Financial. The scope also allows ancillary services and costs necessary to complete a total solution through a professional service objective.

OASIS covers services that are: commercial and non-commercial; classified and non-classified; CONUS and OCONUS. All OASIS SB task orders must be within scope of the OASIS SB. Review Section C of the MA IDIQ contract for a more complete understanding of the scope.

Services Not Allowed On OASIS SB Task Orders

OASIS–SB task orders shall not include any of the following:

- Inherently governmental functions –see the prohibition at FAR subpart 7.503(a)
- Personal services as defined in FAR subpart 37.104(a)
- Architect & Engineering (A&E) Services subject to the Brooks Act and FAR Part 36 acquisition procedures
- Requirements where the primary objective is to obtain IT products and/or services or any ancillary service as defined in contract paragraph C.4
- A requirement that primarily uses employees not employed in a bona fide executive, administrative, or professional capacity as defined in 29 CFR Part 541 and/or employees primarily employed as laborers or mechanics as defined in FAR Subpart 22.401

What are Pools?

OASIS SB consists of 7 Pools covering different NAICS codes and size standards. All NAICS codes in each Pool have the same Small Business Size Standard. Each Pool has a unique SB Size Standard. Each Pool is actually a different contract. Some contractors won contracts in more than one pool and were awarded separate contracts for each of those pools. **The OASIS SB Pools are listed and described in Appendix A for review prior to selecting a NAICS code to assign to each task order.**

Who can use OASIS SB?

OASIS contracts may be used by all federal agencies, including the Department of Defense (DoD), but are not open to state and local governments at this time.

How Do I Begin Using OASIS?

In order to solicit and place a task order under OASIS, you must obtain a Delegation of Procurement Authority (DPA) from the OASIS Contracting Officer or delegated program official. In order to do this, you must:

- Be a warranted Federal Contracting Officer (CO)[1] in good standing
- Formally apply for and receive a DPA
    - Attend a specialized OASIS training course

How Do I Request a DPA?

To request a DPA, please visit the "Delegation of Procurement Authority Request" section located on our Web site at gsa.gov/OASIS. Follow complete instructions on the Web site.

DPAs are issued to individuals, not to agencies at-large. Agencies may have as many of its contracting officers as it wishes apply for a DPA. Once an agency CO receives a DPA from the OASIS CO, he/she is officially known as an Ordering Contracting Officer (OCO). An OCO has the authority to solicit, award, administer, and modify task orders against the OASIS and OASIS SB contracts on behalf of your agency. Agency COs that do not have DPAs may not use the DPA of an agency OCO as authority to solicit and award task or delivery orders.

No work may be performed, no obligation may accrue and no payment may be made against the OASIS contracts except as authorized by a bona-fide written order signed by an OCO having a written, GSA issued, OASIS DPA. **A sample DPA is provided in Appendix B for your review. It lists the responsibilities you must meet as an authorized user of OASIS and OASIS SB contracts in order to keep your DPA active.**

DPA training may be done via conference call, web-ex, or in person depending on circumstances. DPAs may be revoked at the discretion of the OASIS/OASIS SB Contracting Officer.

Reassigning Task Orders for Administration

OASIS SB task orders can only be reassigned for administration to other agency COs who have been issued an OASIS SB DPA. Agencies should plan for workforce turnover and

development of qualified OCOs to administer task orders. GSA will work with agencies to expedite training and DPA issuance when personnel turnover is sudden and unexpected.

Roles and responsibilities

GSA is responsible for award, administration, and management of the OASIS SB contracts. Among the responsibilities GSA will meet are:

- Monitoring and evaluation of the performance against the master contract requirements by each contract holder
- Have exclusive, non-delegable rights to modify Basic Contract terms and conditions
- Provide advice and guidance to Ordering/requiring activities, OCOs and contractors regarding all OASIS procurement-related matters
- Conduct Meetings with OASIS prime contractors as scheduled and/or necessary

Requiring Activity Responsibilities:

- Defines task order requirements
- Prepares SOW/PWS/SOO for task order RFPs
- Funds requirements
- Ensures IT capital planning when appropriate
- Assists OCO with quote/proposal evaluation
- Assists OCO with performance monitoring and appraisal

OCO Responsibilities:

You are expected to comply with the OASIS master contract terms and conditions, the OASIS ordering guide, the Federal Acquisition Regulation (FAR) or authorized agency supplement or exception thereto, applicable agency-specific statutes and policies, and the additional responsibilities defined in the OASIS DPA.

What ordering procedures apply to OASIS task orders?

The OASIS contracts are IDIQ contracts. Applicable ordering procedures exist at FAR 16.505.

What are some of the benefits of using OASIS?

OASIS is flexible, easy to use, and allows agencies to:

- purchase commercial or non-commercial services

- use any contract type, including hybrid mixtures of contract types
- establish CLIN structures tailored to individual task order requirements
- order work within CONUS and outside CONUS
- meet or exceed small business goals in all categories
- determine labor category price estimates for up to 640 precise geographic locations ranging from state to metropolitan area to non-metropolitan area, and even the territories of Guam, Puerto Rico, and the Virgin Islands
- add labor categories at the task order level, if necessary
- include ancillary services and other direct costs (ODCs) at the task order level as needed
- access templates and sample acquisition documents
- access transactional data and data analytics for spend analysis and market research
- obtain acquisition support through a robust Web library and customer service hotline, and
- share lessons-learned and best-practices

Options for accessing the OASIS contracts

Orders issued against OASIS SB vehicles are considered Interagency Acquisitions[2] (except orders issued by GSA for GSA as the requiring agency). Agencies with designated OCOs may issue orders directly against OASIS SB or enter into a Memorandum of Agreement (MOA) with a Servicing Agency to issue the task order. MOAs can be for cradle-to-grave services.

GSA has specific statutory authority under 40 U. S. C. 501 to purchase supplies and non-personal services on behalf of other agencies. Therefore, the Economy Act does not apply to OASIS orders.

THE ORDERING PROCESS

Step 1: Acquisition Planning

Orders against multiple-award IDIQ contracts, such as OASIS SB, are not exempt from Acquisition Planning as prescribed in FAR Part 7.
Conduct market research for your requirement in accordance with regulation as you would do with any procurement. You are encouraged to submit Requests for Information (RFI), draft solicitations, and other documents to OASIS and/or OASIS SB contract holders as part of your market research efforts.

Generally, OCOs shall follow the ordering procedures in FAR Subpart 16.505. Unless an authorized exception applies, fair opportunity procedures prescribed for the dollar value[3] of the task order must be used. When the OCO plans to award an order based on an exception to fair opportunity, applicable Justifications and Approvals[4] should be prepared and obtained as part of the planning process. Any required notices and postings must also be issued.

Important considerations in developing your acquisition plan include:

Which OASIS Vehicle To Use

Which OASIS vehicle you will use depends on the determination made in the acquisition planning process as to whether or not your requirement should be set-aside for small business. Agencies have differing standards, interpretations, and policies regarding set-aside determinations. The OASIS contracts and program office offer no opinion on any agency's decision making process concerning this issue. Case law suggests (see MORI Associates – US Court of Federal Claims No. 10-298C, December 21, 2011) that the determination to set-aside a procurement for Small Business or not is part of the acquisition planning process and to be done prior to contract selection. The OASIS family of contracts is structured in accordance with this. When a Small Business set-aside is to be accomplished, use OASIS SB as that is a 100% Small Business set-aside family of contracts. When a Small Business set-aside will not be accomplished, use OASIS.

Set-Asides For Exclusive Socioeconomic Competitions And Direct Awards

Once you have decided OASIS SB is the appropriate vehicle to satisfy your agency needs, OASIS SB contract section H.3.1 provides additional flexibility in meeting small business goals in all categories. The 2010 Small Business Jobs Act[5] amended the rules for Small Business participation in MA IDIQ contracts and orders. It gave agencies the discretion to set aside orders against MA IDIQ contracts for any of the small business concerns identified in FAR 19.000(a)(3) which includes the socioeconomic groups identified in the following paragraphs.

In structuring the OASIS SB contracts, GSA balanced a number of considerations, among them the preference for competition and managing small business goals, in deciding whether and how to apply the statutory discretion to set aside task orders. GSA established the rule for setting aside task orders for socioeconomic groups under OASIS SB as discussed in the next paragraph.

An OASIS SB task order solicitation may be a competitive set-aside for a specific socioeconomic group when it is anticipated that offers will be obtained from at least three responsible small business concerns within a specific socioeconomic group under the corresponding NAICS Pool (See contract Section H.4.2.1). A specific socioeconomic group for competitive set-asides is identified as one of the following only:

- 8(a) business development participants (see FAR subpart 19.12)
- HUBZone small business concerns (see FAR subpart 19.13)
- Service-disabled veteran-owned small business (SDVOSB) concerns (see FAR subpart 19.14), and
- Economically disadvantaged women-owned small business concerns and women-owned small business concerns eligible under the Women-Owned Small Business Program (see FAR subpart 19.15)

When setting aside orders for socioeconomic concerns, the specific small business program eligibility requirements identified in FAR part 19 apply.

The OASIS SB contract also authorizes the OASIS OCO to choose to issue a direct award to a HUBZone, SDVOSB, or 8(a) contract holder, as authorized by statute (see FAR 16.500(b) and 6.302-5(b)). Please follow specific FAR and Agency guidance in making direct awards.

Task Order Contract Types

Subject to FAR and Agency level required consideration criteria, limitations, and/or prohibitions, you may use any appropriate contract type. These generally include, but aren't limited to:

- Fixed-Price, all types
- Cost-reimbursement, all types
- Time-and-materials
- Labor-Hour
- Hybrids of any of these types

If you elect to use a hybrid of contract types, please use separate Contract Line Item Numbers (CLINs) for the work under each contract type and annotate each CLIN with the associated contract type. This is important for clause implementation.

Assign a NAICS Code to Each Order

The OCO must assign a North American Industry Classification System (NAICS) code to each task order solicitation. The size standard applicable to your task order is determined by the NAICS code selected. **The NAICS code assigned should reflect the principal nature of the work required under the task order**. The charts in **Appendix A** identify the seven NAICS pools and associated size standards under OASIS. Some pools have more than one NAICS code included, but all of the NAICS codes in each pool share the same size standard.

CAUTION: In accordance with regulation, OCO's must select the task order NAICS code based upon the work to be performed and not based upon the applicable size standard or program office supported. The OASIS contracting staff will review every solicitation issued under OASIS SB to ensure the integrity of Pool utilization. Apparent discrepancies will be brought to the OCO's attention. If Pool selection is deemed inappropriate, the OASIS SB Contracting Officer may rescind the OCO's Delegation of Procurement Authority.

The NAICS code you assign will not necessarily be the same code assigned to the task order award report in the Federal Procurement Data System – Next Generation (FPDS-NG). You will read more detail on this issue in "Step5: Award the task order."

Each OASIS SB Pool is a distinct contract. Accordingly, the fair opportunity process for each order only applies to the OASIS SB contractors that were awarded contracts within the NAICS pool being solicited.

Task order funding and funding limitations

All task orders must be funded by the agency requiring and requesting services under OASIS SB. However, Orders placed under OASIS SB may not be used to circumvent conditions and limitations imposed on the use of funds[6].

Security Clearance considerations for classified orders

The task order solicitation should clearly express all requirements for security clearances, both facility and personnel. Please adhere to all classified handling procedures at all times.

Task order duration

The period of performance for each task order awarded under OASIS SB shall be specified in the task order by the ordering agency. Task orders must be solicited and awarded prior to the OASIS SB term expiring and may extend up to 5 years after the OASIS SB term expires.

Task order option periods may be exercised after the OASIS SB term expires as long as the final task order option period does not extend the cumulative term of the task order beyond 5 years after the expiration of the OASIS SB term.

After the OASIS SB contracts terms expire, the OASIS SB contracts will remain active for administration only. The OASIS SB contracts shall govern the terms and conditions of active task orders to the same extent as if they were completed during the OASIS SB term.

Minimum and maximum order limitations

The minimum per order limitation on this contract is valued at the SAT. The Government is not obligated to purchase and the contractor is not required to furnish services valued at less than the SAT. There is no maximum per order limitation under OASIS SB.

Task order size representation

The OASIS program office maintains a list, in spreadsheet format, on the OASIS website that provides the business size classification for each contractor as it pertains to their OASIS SB contract.

Labor Categories (LCATS) Necessary To Perform The Task Order Work

In preparation for developing the Independent Government Estimate of performance, any negotiations that may be necessary with potential Offerors, and preparation of the task order solicitation, requirements personnel should determine the array of labor categories that are necessary to perform the task order work.

OASIS SB contains 104 priced LCATs that are mapped to 127 of the 840 occupations found in the OMB Standard Occupational Classification (SOC) System. The list of OASIS SB LCATs is found in the OASIS SB contract at Section J.1., Attachment (1). Each LCAT identifies the specific SOC occupations mapped to that LCAT. The remainder of the 840 SOC occupations that were not included in the OASIS SB LCATS are considered Ancillary occupations that may be used to provide the Ancillary labor services allowed and defined under OASIS SB, contract section C.4.

The 840 occupations in the SOC are considered to belong to one of two categories: Primary or Ancillary occupations. Primary occupations are those 127 that are mapped to the OASIS SB priced LCATs. Ancillary occupations comprise the remainder of the 840 that are added at the task order level as ancillary labor. Any of the remainder of the 840 may be used as long as they are necessary to provide a total professional service solution to your agency needs. Ancillary occupations fall into three general categories:

1. Professional service labor considered within the primary scope of OASIS SB but not priced at the master IDIQ contract level and that is not subject to the SCA
2. Technical or semi-skilled labor (both blue and white collar) and
3. Unskilled or low skilled (blue and white collar) labor

OASIS SB contract section B.3.1 defines specialized professional services labor as bona fide executive, administrative, or professional skills for which the expertise required or duties performed are within the scope of OASIS SB but, are so specialized that they are not

explicitly defined in any labor category description in Section J.1., Attachment (1). The contract also provides that the Contractor propose specialized professional services labor when proposing ancillary support; however, the OCO will determine whether circumstances merit the use of specialized professional skills. Whenever possible, this specialized professional labor shall be mapped to an OMB SOC.

The task order solicitation should provide instructions to the Offerors on how to identify and call attention to the intent to use Specialized Professional labor. The proposal should include, at a minimum:

- The proposed labor category title
- Expertise and qualifications required by the specialized labor category
- Duties to be performed by the specialized labor
- Segment of the statement of work that the specialized labor will perform with references to statement of work sections
- An explanation of why the specialized labor is required with a discussion of which OASIS LCATs in contract Section J-1, Attachment J1 were considered and why they were not appropriate or did not fit the task order requirements
- A discussion of the OMB SOC occupations that were examined to determine if the specialized labor could be mapped to an OMB SOC occupation, and
- The OMB SOC occupation that maps, if applicable.

NOTE: If the Agency determines during requirements development that specialized professional labor would be required to support segments of the task order work, it should state so in the task order solicitation and should, at minimum, include the elements discussed above. To ensure that all offers still use the same vocabulary and can be compared on an “apples to apples” basis, including specialized labor categories in the solicitation, where possible, is preferential over allowing contractors to create and offer specialized labor categories.

Labor on T&M and L-H task orders

For T&M and L-H task orders, the OCO must identify the appropriate provision among those identified in OASIS SB contract section B.2.5. In accordance with that same section, the OASIS SB standardized labor categories and their associated rates must be identified in the task order award document. Ancillary subcontract labor is to be proposed and awarded as Material.

In accordance OASIS SB Section B.2.5.1, the pricing associated with the OASIS LCATs are ceiling rates for T&M or L-H task orders/CLINs placed on a sole source basis or when adequate price competition is not anticipated. That pricing does not apply to fixed-price, cost-reimbursement, or T&M/LH task orders when adequate price competition is anticipated.

If you are performing a sole source, time and material or labor hour task order procurement and need the awarded ceiling rates of a given OASIS SB contractor, please request these rates from the OASIS SB Contracting Officer for the specific contractor that you are dealing with.

Service Contract Act (SCA)

OASIS SB labor categories are considered bona-fide executive, and/or administrative, professional labor and are exempt from the SCA. OCOs may order, as ancillary support, any labor typically found in the Department of Labor's Directory of Occupations for SCA labor and necessary to deliver a total mission solution integrated across professional disciplines and/or the enterprise. Consult with local counsel on whether the amount of SCA labor in the task order requires incorporation of SCA clauses and wage determinations[7].

Davis-Bacon work

Minor amounts of construction, alteration, or repair may be included as ancillary services in task orders when integral and necessary to delivering a total professional service solution to a mission need. The OCO is responsible for ensuring that construction, alterations, or repairs are covered by the purpose element of the appropriation used to fund the construction portion of the task order.

The OCO shall identify construction under a separate CLIN and shall price it on a firm-fixed-price basis. The OCO must also include all applicable construction clauses and wage decisions in the task order.

Rights in Data

There are multiple *Rights in Data* clauses in the Basic Contract. The OCO should ensure that the applicable *Rights in Data* clause(s) is (are) clearly assigned in each task order solicitation and resulting task order. *Rights in Data* is a highly specialized area and OCOs should seek advice from qualified professionals on these issues to ensure the proper clause is in effect for their task order.

Rights reserved by the Procuring Contracting Officer

Only the OASIS SB CO is authorized to modify the OASIS SB contract terms and conditions and to delegate OASIS SB procurement authority. OCOs may not transfer delegation of procurement authority to a non-delegated Contracting Officer. Only a warranted OCO having written authority/delegation from the OASIS SB PCO may make any required change to a previously issued task order.

Contract Access Fee (CAF)

The OASIS SB CAF should be included in each task order under a separate Contract Line Item Number (CLIN). GSA established a tiered access fee structure for OASIS SB as shown in the following table:

OBLIGATION DOLLARS RANGE		FEE RATE
$ -	$ 100,000,000	0.75%
$ 100,000,001	$ 250,000,000	0.50%
$ 250,000,001	$ 500,000,000	0.25%
$ 500,000,001	Over	0.10%

An agency may enter into a Memorandum of Understanding with GSA for a lower CAF rate in exchange for a commitment to a specific level of obligations per year. The MOU will specify the terms for duration and adjustment of the CAF rate. Otherwise, the CAF rate will start at the highest tier, .75%, and may be adjusted in subsequent years.

If an agency contracting office reaches the top end of an obligation range during a calendar year, it qualifies for the CAF rate at the next higher obligation range in the succeeding calendar year. If an agency contracting office is paying at a lower tier rate and obligations fall below the minimum for that tier rate in a given fiscal year, that agency will revert to the tier rate corresponding next lower obligation range for the next fiscal year.

On all task order solicitations, regardless of contract type, the Contractor shall include CAF in their cost or pricing proposals as a separate and distinct Contract Line Item Number (CLIN).This CLIN shall be established as a Cost Reimburseable CLIN. In order to avoid potential funding issues, Contractors shall propose a CAF of .75% in response to all task order solicitations. The actual amount to be charged to the client and funded by the client, however, will depend upon the prior year's business volume on OASIS or whether the client contracting office has an MOU in place with the OASIS Program Office. The OASIS Program Office will provide the applicable CAF rate to the Contractor.

Other significant planning considerations

Other key considerations to address in developing your acquisition plan and preparing for task order solicitation include:

- Economy Act – does not apply to OASIS SB task orders; GSA is specifically authorized by law[8] to purchase supplies or non-personal service on behalf of other agencies. No documentation is required unless mandated by your agency's policy.
- Inherently Governmental Functions – Requirements official should provide the OCO with a written determination that these are not included in the scope.[9]
- Personal services are not authorized on OASIS SB.
- Commerciality determination.[10]
- Performance-based contracting methods are preferred.[11]
- Identify and evaluate potential organizational conflicts of interest (COI).[12]
- Preparation of a Quality Assurance Surveillance Plan and identification of performance metrics as applicable.[13]

- Evaluation Factors
- Source Selection Methodology

Planning support resources

As an authorized user of OASIS SB, you have access to a number of planning support resources found in the OASIS Web library which can be accessed through the link on the OASIS home page at www.gsa.gov/OASIS. **Appendix C** describes the resources available to OASIS SB Users. These resources are constantly edited and changed. Not all resources may be available at the beginning of the OASIS SB contract life.

Cancellation of requirements

Cancellation of a task order Request for Proposal (RFP) is at the discretion of the OCO. However, cancellation of task order Request for Proposals should be given serious consideration prior to cancellation. It is a good practice for the OCO to document the cancellation decision rationale and communicate the rationale with the affected OASIS SB Pool.

Pre-solicitation scope reviews

Task orders under OASIS SB must be within the scope of the master IDIQ contract as discussed in the section on "Scope of the OASIS SB contracts." GSA will perform post-award scope reviews to ensure the OASIS SB contracts are being used properly. However, GSA offers, and strongly encourages OCOs to take advantage of, pre-solicitation scope reviews. This review will ensure your requirement is being placed under the appropriate contract vehicle. Reviews may be requested through the OASIS SB website.

Step 2: Define the requirements and develop the solicitation

Requirements development support resources

Agencies have access to a considerable array of support resources during the requirements development phase. GSA's Assisted Acquisition Service (AAS) is available on a fee basis to support defining your requirements and developing the solicitation package. Alternatively, for those agencies that prefer to perform these functions in-house, numerous aids are available online at the OASIS Web library, including, but not limited to:

- Sample performance based statements of work, PWSs, SOOs;
- Templates for D&Fs, Justifications and Approvals (J&A's) and similar type documents;
- Contract terms and conditions;
- OMB guidance[14] on structuring contracts, including:
    - Increasing competition;
    - Using PBSA and commercial solutions;

    - Selecting the best contract type;
    - Mitigating risk on cost-reimbursement and T&M/L-H types;
    - Using incentives effectively; and,
    - Transitioning to lower risk contract types.
- Best Practices postings and chat rooms; and
- OASIS Estimating tool

The OASIS Estimating Tool

GSA provides an automated pricing tool to assist in developing task order IGEs. It covers all occupations in the OMB's Standard Occupational Classification (SOC) system that are mapped to OASIS SB LCATS pricing associated with 640 specific geographic locations in the U.S. and its territories. The estimating tool is available through the GSA OASIS website.

Developing the Solicitation

Use the solicitation form and format for task orders normally prescribed and used by your agency for task order solicitations, consistent with FAR 16.505 procedures.

NOTE: Use of the Uniform Contract Format found in FAR 15.2 is not required for OASIS SB orders. Furthermore, we do not recommend its use for OASIS SB orders as it can lead to confusion between the ordering procedures found in FAR 16.505 versus source selection procedures found in FAR 15.3, which are not applicable to OASIS SB task orders.

In addition to the typical content of your solicitation, certain information peculiar to using OASIS SB appropriately should be added, emphasized, or highlighted in your solicitation. That information will be discussed and explained in the succeeding paragraphs. A task order solicitation template is provided in **Appendix D** for consideration.

In addition to the information required by FAR 16.505(a)(7), all task order solicitations shall be requests for proposals (RFPs) and shall provide the following information at a minimum:

- Pool Number Being Solicited
- Applicable NAICS and PSC Code (see OASIS Pool/PSC Crosswalk Table at **Appendix E**)
- SOW/PWS/SOO
- Type of Services (Commercial or Non-Commercial)
- Contract Line Item Information (CLIN Structure)
- Evaluation Factors
- Source Selection Methodology
- Contract Type(s)
- Period of Performance
- Place of Performance
- Proposal Due Date
- Proposal Instructions

- Other Pertinent Information (for example: agency specific clauses, optional clauses, etc)

Clauses and provisions

OASIS SB contract section I.1 establishes that all Applicable and Required provisions/clauses set forth in FAR 52.301 automatically flow down to all OASIS SB task orders, based on their specific contract type (e.g. cost, fixed price etc), statement of work, competition requirements, commercial or not commercial, and dollar value as of the date the task order solicitation is issued.

However, the OCO must identify in the task order solicitation whether FAR Part 12 commercial clauses/provisions apply or do not apply. Furthermore, the OCO must identify any Optional, and/or Agency-Specific provisions/clauses for each individual task order solicitation and subsequent award. For Optional and/or Agency-Specific provisions/clauses, the OCO must provide the provision/clause Number, Title, Date, and fill-in information (if any), as of the date the task order solicitation is issued.

Evaluation Factors

The procedures in FAR Part 15.3 (Source Selection) DO NOT apply to the MA IDIQ ordering process[15]. In accordance with FAR 16.505, "***The contracting officer may exercise broad discretion in developing appropriate order placement procedures. The contracting officer should keep submission requirements to a minimum. Contracting officers may use streamlined procedures, including oral presentations***."

The task order solicitation and award process should be as streamlined as practical to reduce solicitation and proposal preparation costs and time for both the Government and Contractor, respectively.

Step 3: Issue the solicitation

Methods of issuing the task order solicitation

An OASIS SB task order solicitation may be issued by:

- Posting the notice on GSA's e-Buy at http://www.ebuy.gsa.gov.
- Using the "OASIS SB Awardees" link at http://www.gsa.gov/oasis under the tab entitled *OASIS SB Contract Holders* to initiate a global e-mail.
- Through the ordering agency's preferred method (**NOTE**: The OASIS program office **MUST** be included in any distribution of task order solicitations. Failure to do so may result in rescission of your DPA.)

The use of any one of the preceding mediums to broadcast an RFP notice to all contract holders within a given Pool satisfies the "fair opportunity" notification requirement.

Contractors in Dormant Status

The OASIS SB terms allow GSA to place contractors in a dormant status while they develop corrective measures for the OASIS SB CO to review and approve. During dormancy, contractors may continue to work on existing task order awards, but are prohibited from competing for new task order awards. GSA will maintain a list of contractors in dormant status. If conducting a sole source procurement, the OCO should check with the OASIS program office prior to solicitation to determine if the contractor is in dormant status. Upon receipt of solicitation for competitive procurements, the OASIS SB CO will notify the OCO if any contractors in the applicable Pool are under Dormant Status.

Step 4: Evaluate Proposals

OCOs should evaluate proposals based on the methodology stated in the task order solicitation to maintain fairness in the ordering process and mitigate protest risk.

Price

The OCO is responsible for analyzing order proposals and documenting the cost or price evaluation to include a determination that the final agreed to price is fair and reasonable, irrespective of contract type(s). When adequate price competition exists (see FAR 15.403-1(c)(1)) generally no additional information is necessary to determine price reasonableness.

Cost-reimbursement type orders

All OASIS SB contractors have accounting systems that have been determined to be adequate to support cost reimbursement contracts.

Identification of Labor

OASIS Contract section B.2 establishes that “Except for ancillary labor as defined under Section B.3., when responding to a request for proposal under task order solicitations, regardless of contract type, the Contractor shall identify both Prime and Subcontractor labor using the OASIS Labor Categories and corresponding SOC Number that applies. The Contractor may deviate from the Junior, Journeyman, Senior, and Subject Matter Expert (SME) definitions in Section J.1., as long as the Contractor clearly identifies the deviation in their proposals. Additionally, the following qualification substitution chart applies:”

Bachelor's Degree	6 years work experience may be substituted for a Bachelor's Degree	Associate's Degree plus 4 years work experience may be substituted for a Bachelor's Degree
Master's Degree	12 years work experience may be	Bachelor's Degree plus 8 years work experience

	substituted for a Master's Degree	may be substituted for a Master's Degree
Doctorate's Degree	20 years work experience may be substituted for a Doctorate's Degree	Bachelor's Degree plus 16 years work experience, or a Master's Degree plus 12 years work experience may be substituted for a Doctorate's Degree

OCOs should evaluate any identified deviations from the OASIS definitions of Junior, Journeyman, Senior, and Subject Matter expert. As part of that evaluation, the OCO should consider any potential impacts on the agency's requirements in terms of performance and price and document the rationale for acceptance of any proposed deviation.

Step 5: Award the task order

Order Award Documentation

Document your task order awards in accordance with regulation and local policy.

GSA copy of the task order

Submit an OASIS SB Task Order Award Information Form with an electronic copy of the task order award to the OASIS SB CO within 5 days after award. A copy of the Award Information Form is provided at **Attachment F** for your review. A copy is also available on the OASIS website.

Public notice of awards not providing for fair opportunity

For orders based on an exception to fair opportunity, the OCO must post the required public notice[16] within 14 days after placing the order. If exception (A) (urgency-unacceptable delay) is used, the public notice must be posted within 30 days after placing the order. This posting requirement includes posting the justification approved for the exception at the Government point of entry: www.fedbizopps.gov. Note the actions excluded from this requirement are disclosures that would compromise national security and small business set-asides authorized by FAR subpart 16.505(b)(2)(i)(F).

Order Level Protests

All protests at the task order level are handled by the agency soliciting the task order. FAR subpart16.505 (a)(10) prohibits protests under FAR subpart 33.1 in connection with the issuance or proposed issuance of task orders against an MA IDIQ contract except for:

- a protest on the grounds that the Order increases the scope, period of performance, or maximum value of the contract; or
- a protest on orders valued in excess of $10 million.

FAR 16.505(a)(10)(i)((B) grants sole authority to hear protests of orders in excess of $10 million and filed in accordance with the procedures at FAR subpart 33.104 to the GAO.

Ombudsman

GSA has appointed the required[17] Ombudsman to resolve complaints related to fair opportunity in the ordering process. The Ombudsman is Ms. Millisa Gary, Federal Acquisition Policy Division, 1800 F ST NW Room: 2nd Floor, Washington DC 20405-0001. millisa.gary@gsa.gov.

Reporting task order awards in FPDS-NG

Contract actions are reported in the Federal Procurement Data System (FPDS) within 3 days after execution of the action.. It is important that each OASIS SB task order is reported as an order under the correct OASIS SB contract number.

It is important that FPDS-NG accurately reflects the requirements ordered and task order solicitation procedures used against OASIS SB. To that end, several of the many data elements in the FPDS merit discussion. These discussions are based on the FPDS-NG Data Element Dictionary, Version 1.4.4, dated June 28, 2013. If a more current Data Dictionary is in force at the time of your task order, adjust the guidance accordingly.

To ensure that your agency get proper credit for your SB awards. Make sure your FPDS-NG report accurately reflects the appropriate values in fields related to SB award data.

NAICS Codes: The FPDS-NG system will propagate the NAICS code field in your task order action report with the NAICS code reported for the master IDV contract. Due to system limitations, NAICS codes populated in FPDS for task orders in pools 1, 2, 3, and 4, may be different from the NAICS code you assigned to the task order solicitation. Review **Appendix A**. The NAICS codes that should populate based on the pool in which your order was competed are:

OASIS POOL	PREDOMINANT NAICS CODE
1	541330 Engineering
2	541219 Other accounting services
3	541330 Exception A-Engineering for Military and Aerospace Equipment and Military Weapons
4	541712 Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)
5A	541712 Exception B Research and Development in Aircraft Parts, and Auxiliary Equipment, and Aircraft Engine Parts
5B	541712 Exception C Research and Development in Space Vehicles and Guided Missiles, their Propulsion Units, their Propulsion Units Parts, and their Auxiliary

	Equipment and Parts
6	541712 Exception A Research and Development in Aircraft

PSC Codes: Report the PSC code from the Pool/PSC Crosswalk Table that you identified in the task order solicitation. The Pool/PSC Crosswalk Table is provided in **Appendix E**.

Solicitation Procedures: (FPDS-NG data element 10M) Select "MAFO" (Multiple-Award Fair Opportunity) as the value for this data element.

Type of Set-aside: (FPDS_NG data element 10N) If you use "CSA" or "SS" as the value for data element 10R-Fair Opportunity/Limited Sources, "Type of Set-Aside" will be required. Select the value from the table given that reflects the type of set aside (e.g., "SDVOSBS" for SDVOSB Sole Source, "SDVOSBC" SDVOSB Set-aside).

Fair Opportunity/Limited Sources: (FPDS-NG data element 10R) If the task order was competed under fair opportunity procedures, select "FAIR" as the value for this element If an exception (A through E) to fair opportunity was used, select the appropriate code under this data element for the exception that applies. If Exception (F) was used, select "CSA" (competitive set-aside) as the value for the element. For direct task order awards, use the value "SS" (sole-source)

Step 6: Administer the order/execute the work/close-out the order

Quality Assurance – Contractor Surveillance

The OCO is responsible for ensuring contractor performance meets the minimum requirements established in the order, documenting the order file and communicating with the contractor to ensure the Government is receiving the contracted services. Monitoring contractor performance should be delegated to a contracting officer's representative (COR). The specific authority/limitations of the COR should be delineated in an appointment letter, a copy of which should be provided to the contractor.

Subcontracting and limitations on subcontracting

OASIS SB includes the version of the FAR clause 52.219-14, Limitations on subcontracting, current at the time of solicitation for the master IDIQ contract awards. The current clause imposes the limitation based on the percentage of personnel costs attributed to the prime contractor's own resources at the contract level, which is cumulative for all task orders performed by each OASIS SB prime contractor within each Pool. Compliance with this contract term will be monitored and enforced by the OASIS SB CO.

For master contract purposes, individual task orders are not subject to the limitation on subcontracting requirements of FAR 52.219-14 or any other limitation on subcontracting except as applicable for direct awards. OASIS SB Primes may subcontract with any

company they see fit to provide the best solution for a given task order requirement. However, Ordering Contracting Officers MAY impose task order specific limitations on subcontracting for individual task orders. If implemented at the task order level, ordering contracting officers are 100% responsible for monitoring and enforcing any such limitations. Ordering Contracting Officers are advised to exercise caution in establishing limitations on subcontracting at the task order level.

Performance Evaluation

Each OCO is responsible for ensuring that the contractors' performance on each order is reported in CPARS in accordance with the policies in FAR subpart 42.15. Follow your agency procedures for preparation, review, and submission of performance reports. GSA will consider task order performance information as part of performance evaluations at the master IDIQ contract level. Task order performance may also be considered in placing contractors in a dormant status.

Reporting Modifications in FPDS-NG

All task order modifications must be reported in FPDS-NG. Review **Appendix A** regarding NAICS codes.

Reporting Modifications to GSA

Within 5 days after awarding a task order modification, use the form at **Appendix G** to report the action to GSA.

Task Order Closeout

Task order files shall be closed out in accordance with the policies in FAR Subpart 4.804-1 or, if the task order is administered by another office, 4.804-2. The procedures prescribed in 4.804-5 shall be used except when it is appropriate to use the quick closeout procedures in FAR subpart 42.708.

APPENDIX A: OASIS SB NAICS CODE POOLS

OASIS SB Pools 1, 2, 3, and 4 contain multiple NAICS codes, while pools 5A, 5B, and 6 each contain a single unique NAICS code/exception. FAR 19.303(a) requires the Contracting Officer (OCO) to determine the appropriate NAICS code and related small business size standard and include them in all solicitations above the micro-purchase threshold. FAR 19.102(b)(1) requires that the NAICS code assigned describe the principal nature of the service being acquired. Task order solicitations under pools 1, 2, 3 or 4 should identify the NAICS code from the applicable pool that meets that criterion. Pools 5A, 5B, or 6 should be used if the NAICS code/exception designated for the applicable pool meets the "principal nature" criterion.

FPDS-NG is currently designed to accept only one NAICS code to be associated with a procurement action. For this reason, GSA designated a "primary" NAICS code for each of pools 1, 2, 3, and 4. The primary code in each of those pools is the NAICS code that GSA assigned to the FPDS-NG procurement action report for each of the IDV awards in the pool. When a task order award report is being prepared in FPDS-NG, the system will auto-populate this NAICS code in the action report. This is simply a limitation of the FPDS-NG system and has no bearing on individual task order NAICS code assignments.

Primary codes for each pool are:

Pool	Primary NAICS Code	Small Business Size Standard
1	541330	$14 million
2	541219	$19 million
3	541330 Exception A	$35.5 million
4	541712	500 employees
5A	541712 Exception B	1,000 employees
5B	541712 Exception C	1,000 employees
6	541712 Exception A	1,500 employees

Tables of each NAICS Code Pool are below.

OASIS SB MA IDIQ CONTRACT POOL 1 $14 MILLION SIZE STANDARD			
NAICS CODE	**DESCRIPTION**	**NAICS CODE**	**DESCRIPTION**
541330	Engineering	541810	Advertising Agencies
541360	Geophysical Surveying and Mapping Services	541820	Public Relations Agencies
541370	Surveying And Mapping (Except Geophysical) Services	541830	Media Buying Agencies
541380	Testing Laboratories	541840	Media Representatives
541611	Administrative, Management ,and General Management Consulting Services	541850	Media Representatives
541612	Human Resources Consulting Services (2007), Human Resources and Executive Search Consulting Services (2002)	541860	Outdoor Advertising
541613	Marketing Consulting Services	541870	Direct Mail Advertising
541614	Process, Physical Distribution, and Logistics Consulting Services	541890	Other Services Related to Advertising
541618	Other Management Consulting Services	541910	Marketing Research and Public Opinion Polling
514620	Environmental Consulting Services	541990	All Other Professional, Scientific, and Technical Services
541690	Other Scientific and Technical Consulting Services		

OASIS SB MA IDIQ CONTRACTS POOL 2 $19 MILLION SIZE STANDARD		OASIS SB MA IDIQ CONTRACTS POOL 3 $35.5 MILLION SIZE STANDARD	
NAICS CODE	**DESCRIPTION**	**NAICS CODE**	**DESCRIPTION**
541211	Offices of Certified Public Accountants	541330 Exception A	Engineering for Military and Aerospace Equipment and Military Weapons
541213	Tax Preparation Services	541330 Exception B	Engineering for Contracts and Subcontracts for Engineering Services Awarded Under the National Energy Policy Act of 1992
541214	Payroll Services	541330 Exception C	Engineering for Marine Engineering and Naval Architecture
541219	Other Accounting Services		
541720	Research and Development in the Social Sciences and Humanities		

OASIS SB MA IDIQ CONTRACTS POOL 4 500 EMPLOYEE SIZE STANDARD		OASIS SB MA IDIQ CONTRACTS POOL 5A 1,000 EMPLOYEE SIZE STANDARD	
NAICS CODE	**DESCRIPTION**	**NAICS CODE**	**DESCRIPTION**
541711	Research and Development in Biotechnology	541712 Exception B	Research and Development in Aircraft Parts, and Auxiliary Equipment, and Aircraft Engine Parts
541712	Research and Development in the Physical, Engineering, and Life Sciences (except Biotechnology)		

OASIS SB MA IDIQ CONTRACTS POOL 5B 1,000 EMPLOYEE SIZE STANDARD		OASIS SB MA IDIQ CONTRACTS POOL 6 1,500 EMPLOYEE SIZE STANDARD	
541712 Exception C	Research and Development in Space Vehicles and Guided Missiles, their Propulsion Units, their Propulsion Units Parts, and their Auxiliary Equipment and Parts	541712 Exception A	Research and Development in Aircraft

APPENDIX B: SAMPLE DPA

MEMORANDUM FOR: Ordering Contracting Officer (OCO)

FROM: Tommy Thomas
OASIS Contracting Officer
(817) 978-4656 (Office) (817) 574-2437 (Fax)
oasis@gsa.gov

Valerie Bindel
OASIS SB Contracting Officer
(817)-850-8375 (Office) (817) 574-2437 (Fax)
oasissb@gsa.gov

SUBJECT: Delegation of Procurement Authority (DPA) as OCO to Compete, Award and Administer OASIS and OASIS SB task orders

The purpose of this DPA is to ensure that the roles and responsibilities between the OASIS and OASIS SB COs and the OCO are clearly established in order to ensure proper use of the OASIS vehicles while promoting public policy objectives.

GSA retains sole responsibility to administer and modify the basic Indefinite Delivery, Indefinite Quantity (IDIQ) master contracts. GSA will evaluate the performance of OASIS and OASIS SB contractors against the master contract terms. It will also provide advice and guidance to agencies/OCOs on all OASIS and OASIS SB procurement matters.

The authority granted to you under this DPA is limited to those requirements of your agency that are within scope of the OASIS vehicles. Your authority to administer OASIS and OASIS SB task orders covers all task orders awarded by you or another OCO possessing a valid DPA in your current warranting organization. The DPA authority does not extend to administration of task orders awarded by OCOs outside your current warranting organization unless:

1. Your agency is a servicing agency as defined in OMB Memorandum “Improving the Management and Use of Interagency Acquisitions, June 6, 2008; and,
2. Your agency enters into a Memorandum of Understanding with the Agency that awarded the task order in accordance with FAR 17.502-1(b)(1) specifically for administration only of the task order.

You will act as the central point of contact under each task order and are responsible for coordinating with the awarded Contractor, the Client (the funding organization/receiver of goods or services) and GSA. This applies regardless of whether your contracting organization is acting as the Servicing Agency on behalf of a client outside your agency or is within the requiring Agency and is contracting for its own requirement. You will perform all required pre and post award functions associated with the task order subject to the following terms and conditions of this DPA:

1. **Compliance** – You are expected to comply with the OASIS or OASIS SB terms and conditions, the OASIS or OASIS SB ordering guides, the Federal Acquisition Regulation (FAR) and the authorized agency FAR supplement or exception thereto, applicable agency-specific statutes and policies, and the additional responsibilities defined in this DPA.
2. **Duration** – This DPA is effective until the expiration of the respective OASIS or OASIS SB contract or completion and closeout of any awarded task orders whose duration extends beyond the expiration of the respective contract, whichever is later. You are also required to maintain a valid warrant authority. Notwithstanding the preceding, this DPA is portable under certain conditions. If you change organizations within the larger Agency, or move to a new Agency but will continue to be warranted, the DPA is portable. However, you must notify the OASIS and OASIS SB COs of the move or reassignment and provide information on the new warrant when it is issued. Re-training is not required unless there is a break of more than ninety days in possession of a current warrant or serving in a Contracting Officer position. The DPA cannot be re-delegated.
3. **Revocation** – GSA may revoke this DPA at any time for failure to comply with treaty, law, regulation, ethical standards and applicable federal acquisition policies and procedures. GSA will be cognizant of the need to ensure task order continuity if such actions are initiated.
4. **Scope Compliance –** Ensure that task order work is within the OASIS or OASIS SB scope. The OASIS program team is available to assist with this determination at any time upon request.
5. **Administrative Reporting –** Upon award, OCOs are responsible for reporting the task order award action in the Federal Procurement Data System – Next Generation (FPDS-NG). In addition to FPDS-NG reporting, OCOs are required to provide a complete copy of the task order, e.g., the signature page, the work statement and the line items (equivalent to Sections A-J of the Uniform Contract Format, or equivalent if a commercial services task order), any subsequent modifications and the task order information form(s) included with this DPA **(see Appendices C and D to the OASIS and OASIS SB (Ordering Guides)** to the respective OASIS or OASIS SB email address or fax number.

The OCO is responsible for complying with all FAR-based rules when competing, awarding and administering Task Orders. The following list, while not all-inclusive, represents key areas of responsibility:

- **Fair Opportunity** – Ensure that all contractors are provided a fair opportunity to be considered in accordance with FAR 16.505, or authorized agency supplements or exceptions thereto, prior to Task Order award. Any exceptions to fair opportunity to be considered ("fair opportunity exceptions") must be consistent with FAR 16.505 or authorized agency supplements or exceptions thereto or as otherwise required or allowed by statute. The OCO must comply with the requirements to prepare justifications and obtain approvals of justifications for exceptions to fair opportunity in accordance with FAR 16.505..
- **Funding** – Verify that funding is available. Comply with appropriations law and financial policy. Ensure timely obligation of funds, and de-obligation and disposition of excess funds.
- **COR**– If a Contracting Officer's Representative (COR) is appointed to perform order monitoring and oversight functions, you must ensure that the extent of their authority and responsibilities is clearly defined.. The COR's appointment should be in writing and a copy provided the Contractor in order to establish clear roles and responsibilities during task order administration. Ensure that any COR you designate is properly equipped, trained and qualified to handle those responsibilities pursuant to your agency policy.
- **Task Order Protests, Disputes and Claims** –Receive and respond to task order protests, disputes and claims. The warranting agency is responsible for the OCO's decisions and actions as a warranted contracting officer.
- **Monitor, Evaluate and Report Contractor Performance** – Assure contractor performance and support compliance with both task order terms and conditions. Take appropriate action to maintain the Government's rights. OCOs should conduct contractor performance evaluations IAW FAR 42.15, and applicable agency policies. Interim performance evaluations are encouraged for each task order. OCOs should use their organization's designated contractor performance reporting system to record performance.
- **Cost or Price Analysis and Audits** –Perform and document cost analysis and/or price analysis (FAR 15.4) as appropriate in determining the overall task order price to be fair and reasonable, as well as respond to any related audits.
- **Prompt Payment** – Ensure prompt payment of contractor invoices and prompt rejection of nonconforming invoices.
- **Task Order Closeout** –Close out task orders IAW FAR 4.804-5 and provide the OASIS or OASIS SB Contracting Officer a task order closeout completion statement.
- **Requests for Information** – Respond to any requests for information pertaining to task orders awarded or administered by you including but - not limited to, Freedom of

Information Act requests, and inquiries/audits by: Congress, Inspectors General, the Small Business Administration, the General Accountability Office and the GSA.

Thank you for your interest in GSA's OASIS program. We are committed to delivering acquisition vehicles that provide our customers with convenient access to the best qualified contractors in the professional services-based solutions marketplace. If you have any questions regarding this DPA, the OASIS vehicles, or our program in general, please feel free to contact the OASIS Program Office at any time.

For more information about the OASIS contracts addressed in this DPA, please visit our website at www.gsa.gov/oasis. You will find links to copies of the OASIS and OASIS SB contracts and other useful information, including various points of contact.

APPENDIX C: OASIS TOOLS AVAILABLE TO THE OCO

Web Library:

The OASIS Web Library contains many tools to assist you in effective acquisition of complex, integrated professional services to provide total solutions to your agency's mission requirements. The Library can be accessed through the following link: [https\\link goes here].

The Library contains the following information and support resources:

Contract information:

- List of all approved OASIS contractors, their contract numbers, and contact information;
- Complete copies of each contract to include contract terms and conditions;
- Contract modifications, with the conformed version of the contract;

Reference information and helpful documents:

- DPAs;
- The OASIS Ordering Guide;
- The Master Contract QASP
- Sample Task Order QASP;
- Guide on how to develop a performance-based (PB) SOW;
- Task order RFP templates;
- Tips on making commerciality determinations;
- Customer satisfaction forms;
- Frequently Asked Questions;
- Matrix of FAR contract clauses for OASIS; and
- Guidelines on meeting Fair Opportunity provisions.

Reports resources:

- Past performance surveys;
- A wide range of management type reports;
- The ability to perform ad hoc reporting; and
- Semi-annual reviews;
- Trend analysis; and
- Dashboard for socio-economic achievements.

OASIS Program information:

- Detailed information about OASIS events
- Best practices customer chat room;
- Marketing materials;
- Bulletin board of upcoming shows, meetings, working groups, Governance Board meetings, etc;

- Press releases;
- Success stories;
- Lessons learned - The Library is updated with lessons learned as agency users encounter situations of significance and wish to share the experience. Topics in lessons learned cover any aspect of the acquisition life-cycle related to purchasing services through the OASIS vehicle. Contact information enables you to network with your acquisition peers across the Federal government; and
- Governance Board documents.

APPENDIX D: TASK ORDER SOLICITATION TEMPLATE

1.0 OASIS SB Task Order Solicitation Notice

1.1 OASIS SB Pool Being Solicited: [insert the Pool number]

1.2 NAICS Code and Size Standard: The principal nature of the requirements described in this solicitation is consistent with services performed by industries in the [insert the NAICS code and title] with a size standard of [insert small business size standard].

1.3 PSC Code: The services in this solicitation are best represented by PSC Code [insert the applicable PSC Code and title].

1.4 Extent of Competition: [check the boxes that apply] This solicitation will be based on [_] fair opportunity procedures; [_] an Exception to Fair opportunity as designated below; [_] a direct award under the OASIS SB section H.3.1 authority.

1.4.1 Exception: [_]A [_]B [_]C [_] D [_]E [_]F (set-aside category below)

1.4.2 Set-aside for: [_] 8(a) [_] HUBzone [_] SDVOSB [_] Women-owned

1.4.3 Direct award category: [_] 8(a) [_] HUBzone [_] SDVOSB

1.5 Types of Services and Performance Locations: [check the boxes that apply] The services in this solicitation are:

1.5.1 [_] classified [_] unclassified [_] a mix
1.5.2 [_] commercial [_] non-commercial [_] a mix

Services will be performed in [insert city(ies), state(s), and/or country(ies)].

Performance locations are [_] CONUS [_] OCONUS [_] a mix, and are performed [_] on Government site [_] on Contractor's site [_] on both Government and Contractor's sites.
[if performance will be in multiple locations and/or a mix of CONUS, OCONUS, Government and Contractor sites, identify in solicitation section 2.0, Description of Services which services are performed where.]

2.0 Description of Services

[Use the format below or your agency preferred format for you statement of work. Remember that performance-based SOWs are preferred.]

2.1 Background
2.2 Scope
2.3 Statement of Work
2.4 Places of performance and work conditions/hours

3.0 Delivery and Performance Information

[Enter a table of deliverables, if applicable, and/or other applicable service delivery terms. Include performance standards and metrics that will apply to your performance-based statement of work, or performance measurements that will be used to verify non-performance-based services. Address, quantity and quality considerations, due dates, deliverable submittal instructions, and similar information related to the basis for contractor performance evaluations.]

4.0 Contract Line Items and Contract Type

[List the CLINs with their descriptions and pricing information. Remember to use separate distinct CLINs for work with different pricing types and to use a separate CLIN for the CAF. See example CLINs below]

CLIN 0001 (Firm Fixed-Price) Provide program management and oversight support services for the Citizens Assistance and Response to Emergencies (CARE) Program. These services are performed in CONUS, on Government site, in Washington, D.C. Solicitation sections 3.1, 3.2, 3.3, 3.4, and 3.5 apply.

CLIN 0002 (Cost-reimbursable, Fixed Fee) Provide Engineering and Logistics support services to the CARE Operations Centers in Washington, D.C.; New York, NY; San Francisco, CA; and Chicago, IL. These services are performed in a mix of Government and Contractor facilities as delineated in solicitation sections 3.0. 3.1, 3.6, 3.7, 3.8, and 3.9.

CLIN 0003 Contract Access Fee (Cost-reimbursable)

5.0 Solicitation Provisions and Clauses

5.1 In accordance with OASIS SB contract section I.1, all *Applicable* and *Required* provisions/clauses set forth in FAR 52.301 automatically flow down to all OASIS SB task orders, based on their specific contract type (e.g. cost, fixed price etc), statement of work, competition requirements, commercial or not commercial, and dollar value as of the date the task order solicitation is issued.

5.2 Agency specific provisions and clauses. The following provisions and clauses apply to this task order: [add any agency specific provisions and clauses here that will apply to the order solicitation and resultant task order.]

6.0 Proposal Preparation and Submission

[Insert instructions for preparation and submission of proposals. Keep submission requirements to a minimum.]

7.0 Evaluation Factors and Basis of Award

[Identify the factors to be considered in selecting a proposal for award. Tailor this section based on the dollar value of the task order.]

8.0 Government contacts

[Identify Government contacts information for solicitation inquiries and proposal submission.]

APPENDIX E: OASIS POOL/PSC CROSSWALK TABLE

Pool Number	PSC	Description
1	Multiple	All Category R Support (Professional/Administrative/Management) Codes not assigned to a different Pool
2	R703	Support - Management: Accounting
	R704	Support - Management: Auditing
	R705	Support - Management: Debt Collection
	R710	Support - Management: Financial Includes Credit Card Services
	R711	Support - Management: Banking Includes Accepting and Cashing Government Checks and Other Payment Instruments, Accepting Direct Deposits, Accepting Payments to the Government from the Public
	R712	Support - Management: Coin Minting
	R713	Support - Management: Banknote Printing
	Multiple	All Research and Development Codes under the following Categories: Category AB R&D - Community Service/Development Category AE R&D - Economic Growth Category AF R&D - Education Category AL R&D - Income Security Category AM R&D - International Affairs and Cooperation Category AQ R&D - Social Services
3	R425	Support - Professional: Engineering/Technical Includes: Systems Engineering, Technical Assistance, and Other

		Services Used to Support the Program Office during the Acquisition Cycle
4	Multiple	All Category A Research and Development Codes not assigned to a different Pool
5a	Multiple	All Research and Development Codes under the following categories: Category AC 1 R&D - Defense System: Aircraft Category AS 1 R&D - Modal Transportation: Air
5b	Multiple	All Research and Development Codes under the following Categories: Category AC 2 R&D - Defense System: Missile/Space Systems Category AR R&D - Space
6	Multiple	All Research and Development Codes under the following Categories: Category AC 1 R&D - Defense System: Aircraft Category AS 1 R&D - Modal Transportation: Air

APPENDIX F: TASK ORDER AWARD INFORMATION FORM

Task Order Number:

Project Title:

Contract Number:

Predominant Contract Type:

NAICS Pool and NAICS code assigned:

Period of Performance:

Award Date:

Initial Obligated / Funded Amount:

Receiving/Funding Agency:

Receiving Bureau:

Place of Performance:

Street Address 1

Street Address 2

City / State/ Zip

Total Estimated Value (with options):

Issued using GSA Assisted Services:

Performance-based Contract:

Fair Opportunity Conducted:

Number of Bids/Quotes/Offers:

Fair Opportunity Exception (if app):

Scope Review Process Utilized:

Specialized LCATs used/reason:

Ordering Contracting Officer's Name:

Ordering Contracting Officer's Email Address:

Feedback for the OASIS CO on your OASIS ordering experience: (Quality of Proposals, Behavior of Contractors, etc)

Please attach this form, along with a complete copy of the Task Order, to an email addressed to either oasis@gsa.gov or oasissb@gsa.gov, as applicable.

APPENDIX G: TASK ORDER MODIFICATION AWARD - INFORMATION FORM

Task Order Number:

Modification Number:

Modification Award Date:

Modification Type:

Modification Description:

Period of Performance:

Modification Obligated/Funded Amount:

Total Obligated/Funded Amount:

Ordering Contracting Officer's Name:

Ordering Contracting Officer's Email Address:

Please attach this form, along with a complete copy of the Task Order, to an email addressed to either oasis@gsa.gov or oasissb@gsa.gov, as applicable.

End Notes

[1] As defined in Federal Acquisition Regulation (FAR) Subpart 2.1 Definitions.

[2] References for Interagency Acquisitions: OMB Memorandum, "Improving the Management and Use of Interagency Acquisitions, June 6, 2008, p.2; FAR 17.5, Interagency Acquisitions, especially 17.502-1; DOD and DFAR - OUSD, DPAP Memo Oct 31, 2008, Meeting Department of Defense Requirements through Interagency Acquisitions, DFAR 217.5, DFAR 217.7802(a) and (b), and http://www.acq.osd.mil/dpap/cpic/cp/faq.html

[3] Reference FAR subpart 16.505(b)(1)

[4] Reference FAR subpart 16.505(b)(2)

[5] Section 1331 of P.L. 111-240

[6] Reference FAR Subpart 16.505(a)(8)(ii)

[7] Reference FAR subparts 37.107 and 22.1006(b)

[8] 40 U.S.C. 501, Federal Property and Administrative Services Act

[9] FAR Subpart 7.503(e)

[10] Reference FAR Subpart 10.001(a)(3)(ii) and FAR Subpart 10.002(c).

[11] Reference FAR Subparts 7.105(b)(4); 37.102(a); 37.6; and 16.505(a)(3).

[12] Reference FAR Subparts 9.5; and 9.507-1.

[13] Reference FAR Subpart 46.401.

[14] OMB Memorandum to CAOs and SPEs, October 27, 2009

[15] Reference FAR Subpart 16.505(b)(1)(ii)

[16] Reference FAR subpart 16.505(b)(2)(ii)(D)

[17] Reference 10 U.S.C. § 2304c (3) and FAR 16.505(b)(8)