STATEMENT OF WORK (SOW)

CONNECTIONS II

Order Identification Number: [######]  
Telecommunications Expense Management Services (TEMS)

SOW Template

Issued by:

[Agency Logo]

[Name of Agency]

[Address of Agency]

DATE: [DD MM YYYY]

**Template Guidance**

**Purpose**

The purpose of this template is to provide Agencies with a baseline document for procurements involving Connections II. This template is based on previous SOWs that were vetted, and thus saves Agencies time and resources during SOW development. The Agency can start with this baseline template to create a SOW and then make alterations to the document to meet their needs. For example, an Agency may want to include a scenario or technology not within the template. In this case the Agency would add text to cover the new scenario or technical requirements.

**Conventions**

Following are the conventions used in the Template.

**Replacement Text**

[Shaded/bracketed] text is replacement text. Replacement text is surrounded by square brackets “[ ].”

Replacement Text is text the Agency needs to replace with specific information and differs by SOW. For replacement text, the pound sign “#” indicates a number is required. A number within the square brackets [15] indicates from past experience this is the value used by most Agencies, but the value can be adjusted to meet SOW and Agency needs. For example, “[15] days” shows that most Agencies require 15 days for a particular activity. If there are specific differences in the Agency’s required timeframes, such as the inclusion of a holiday or other schedule considerations, then the Agency adjusts the number of days accordingly.

After entering replacement text, delete the square brackets and remove the shading.

**Text Boxes**

Text Boxes contain information and hints on how to complete the following section of the SOW where the Text Box appears. Text Boxes also explain options within the SOW.

In addition, Text Boxes direct the deletion of pages or text, as is the case with this page. The deletion may be needed to remove information required while a SOW is authored, but not required when a SOW is released. Where options occur, instruction boxes sometime instruct an author to delete text if a certain option is selected.

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# Project Description

[Telecom Expense Management Services (TEMS)]

Note: Text boxes contain informational material that should be deleted by the Agency when finalizing this document. Please delete the box and use this space to give a short overview of the Project named above.

The Connections II Telecommunications Expense Management Services (TEMS) Statement of Work (SOW) Template is provided by the General Services Administration (GSA) to help customer Agencies contract for TEMS procurement.

The SOW Template is intended to accommodate Agency users with TEMS solutions. All task-specific sections are offered as examples of the information that should be entered by the agency. It is assumed that client agencies will have their own specific requirements with varying levels of detail and therefore parts of the SOW Template may be tailored, replaced or omitted entirely.

## Purpose

[Agency] is seeking a TEMS solution that incorporates the following functions:

* Invoice Management: Management of the submission, processing, and reconciliation of invoices, inclusive of identifying and rectifying billing discrepancies.
* Agency Charge-back: Collection and processing of all monthly billing data rendered by Telecommunications Service Providers (TSPs) for internal agency charge-back.
* Inventory Management: Maintenance of a current and accurate inventory of all State telecommunications services and selected hardware/licenses.
* Contract Management: Application that houses all State telecommunications contracts, authenticates contractor billed rates with effective contract rates, and monitors contract expiration dates and service commitment levels.
* Reporting and Analytics: Application that provides for the generation of Standard and Custom billing reports for expense management and analysis.
* Provisioning:TEMS application that will allow agencies to submit orders for telecommunications service to contracted TSP’s and integrate them with the TEMS

## Background

Use this space to describe the purpose for this task and the environment in which it will be performed.

In order to provide background information relevant to this SOW, this section should include at a minimum the following subsections:

### Organization and Mission

[Add summary Agency-specific information here].

### Objectives for [Project Name]

The objective of this Statement of Work (SOW) is to procure off-premisesTelecommunications Expense Management Services (TEMS) to handle ordering, billing, reporting and general accounting and management of [Agency’s] tecommunications products and services.

The offerer’s TEMS solution shall integrate wireless with other telecommunications management services (e.g.: wireline voice, wireline data).

## Scope

Scope information for this SOW should include at a minimum the following subsections. Please use this section to clarify extent and range of the project and agency expectations of the offeror toward its provision.

The [Agency] seeks to obtain comprehensive, lifecycle telecommunication services, wireless devices (when applicable), and rate plans for voice and data from procurement through operational use and disposal. Specifically the [Agency] is seeking is to obtain a managed service solution that:

* Provides managed wireline and wireless services;
* Optimizes the provision of service rate plans for voice and data that guarantees the best possible pricing;
* Consolidates the ordering of equipment and services under one order;
* Leverages existing wireless devices;
* Provides multiple carriers and billing formats (i.e. EDI, Electronic download, paper, etc.); and
* Provides multiple tiers of wireless devices, including Section 508 compliant devices, with Assistive Technology for people with disabilities.

The offeror shall provide complete outsourcing and consolidation of the management of the [Agency’s] wireline and mobile communications services across multiple providers for equipment ordering, service renewal and service changes. The solution shall include the full range of Telecommunications Expense Management Services (TEMS), as described in Section 2.2.

Tasks Areas:

1. Service Contract/Agreement Administration Services
2. Inventory Management Services
3. Invoice Management and Audit Services
4. Rate Plan Optimization Services
5. Management Reporting Services
6. Contract Optimization Services
7. Ordering and Procurement Services
8. Bill Payment Services
9. Dispute Recovery Services
10. Device Disposition and Disposal Services
11. Transition Services
12. Make available security features and procedures to prevent electronic serial number cloning and fraudulent use of cloned equipment and service.

### General Description of Requirements

[If applicable] The offeror shall hold project meetings to [the Agency] in [Location] and various [Agency] field office locations, and provide consultation for various ongoing TEMS related projects. These tasks shall be conducted in full coordination with [Agency] personnel and with [Agency] representatives.

The offeror shall be responsible for all resources directly associated with:

* Project Management, Scheduling, and Quality Assurance
* Permits, Licenses, Inspection Scheduling, and Fees
* All Installation Activities
* Inspections and Tests
* Final Acceptance and Work Closeout
* Warranty for hardware and systems as installed
* Safety
* Deliverables – (e.g.: Red Line drawings, Test Reports, Schedule, Project Support Agreement, etc.)
* Integrated Product Team (IPT) weekly conference call updates [if required]

All services for this task must meet all applicable Telecommunications Infrastructure and Safety Standards [e.g.: American National Standards Institute (ANSI), National Electrical Installation Standards (NEIS), Underwriters Laboratories (UL), etc.]

Suggested examples of project tasks are listed below. Agency may remove or modify the narratives as needed. This section is intended only as a high level overview.

## Requirements

The contract shall provide Telecommunications Expense Management

Services (TEMS). The telecommunications expenses to be managed encompass all of the [Agency’s] voice, data and mobility communications.

## Acquisition Type Selected

The agency will need to determine which type task order to use (e.g.: either Firm Fixed Price [FFP] or Time and Materials).

This requirement will be for a [Add Agency selected acquisition type here] task order.

This solicitation includes requirements for all labor and equipment necessary to support [task name].

The offeror shall adhere to the terms and conditions of the Connections II Contract, and shall meet and comply with the Agency-specific requirements described in this SOW.

## Period of Performance

The Tasks agreed upon by [Agency] and the offeror will remain in effect for the life of the Connections II Task Order. The offeror shall provide technical support, and shall procure and install [or recommend] equipment for these tasks. The term of the order will be from the date of award through a base period (for example, one year) plus [n] option periods. The overall period of performance is specified in the following table.

Table 1. Date of Task Order Award

|  | **Start Date** | **End Date** |
| --- | --- | --- |
| **Base Year** | <Performance\_Start\_Date> | <Performance\_End\_Date\_Base\_Period> |
| **Option Period 1** | <Performance\_Start\_Date\_Option\_Period\_1> | <Performance\_End\_Date\_Option\_Period\_1> |
| **Option Period 2** | <Performance\_Start\_Date\_Option\_Period\_2> | <Performance\_End\_Date\_Option\_Period\_2> |
| **Option Period 3** | <Performance\_Start\_Date\_Option\_Period\_3> | <Performance\_End\_Date\_Option\_Period\_3> |
| **Option Period n** | <Performance\_Start\_Date\_Option\_Period\_n> | <Performance\_End\_Date\_Option\_Period\_n> |

***[Note: This table is for illustration purposes only. Connections II ends January 2021. An order placed before January 18, 2021 can remain active up to January 2026, if so planned. The Agency has the option to add or remove years in order to complete the [Project Name].]***

## Place of Performance

The offeror shall comply with the geographic requirements specified in this solicitation to provide support. The Place of Performance will be specified in *Attachment B – Support Locations*.

## Local Codes, Licensing, and Permit Requirements

[If applicable] In the performance of this task order, the offeror agrees to abide by all laws, codes, rules and regulations set forth with regard to the equipment by municipal or State authorities having jurisdiction in effect on the date of this task order. The offeror shall be responsible for obtaining all local licenses and permits. This section applies to all tasks associated with this task order.

## Security Requirements

Agency-specific information can be inserted here.

All documentation (i.e., DD 254) required for security certification will be the responsibility of the offeror and the client Agency.

The solution Shall meet FISMA Security Requirements at the Moderate level. If cloud solution, be FedRAMP certified or if hosted solution, be capable of receiving an Authority to Operate (ATO).

## Government Furnished Equipment

Agency-specific information can be inserted here [current wireless device inventory, Routers, switches, PBX, etc.]**.**

## Offeror Furnished Equipment

The offeror shall furnish all necessary tools, equipment and materials required for performing all work associated with the completion of this requirement, which also includes testing and installation.

## Fair Opportunity

This SOW will be released for Fair Opportunity under Federal Acquisition Regulation (FAR) 16.505.

# Statement of Work

* The offeror shall provide TEMS that is an existing, established software platform solution.
* TEMS shall be an off-premise offeror-hosted system providing workflow support for ordering, approval, and fulfillment of service orders, validation of the inventories and billing, as well as tracking and management of disputes.
* Data Privacy complying with local legislation and Commission policy requirements.
* Contractual commitments for the process and timely presentation of billings on a monthly basis.
* Service Level Agreements (SLAs) that will support the delivery and quality of the information and deliverables on a monthly basis, including but not limited to both planned and unplanned system maintenance and system uptime.

## System Security

1. The system shall include a secure, web-interface database to provide oversight, detect billing errors, and flag excessive expense.
2. The system shall require all users to authenticate their identity with a unique User ID and password.
3. The system shall enforce a password construction standard.
4. Offeror and system account passwords shall be changed before the system is

placed into production.

1. A password protected screensaver shall be used on all graphical electronic devices that will be unlocked only if a password is provided .
2. The system shall be able to enforce role-based or least privilege access controls. (e.g., where some authorized users have more privileges than others based on their duties). Privileges shall be assignable at both an individual and group level.
3. All anonymous and guest accounts shall be disabled prior to the system being placed into production.
4. User accounts shall be audited for weak or non-existent passwords or elevated security privileges.
5. The system shall provide the option of presenting modified Home Page screens based on the user permission level.
6. After a period of session inactivity, the user shall be automatically logged out of the system.
7. The system shall be capable of safeguarding Personally Identifiable Information (PII).
8. The system shall safeguard data containing authorization codes, User IDs, and passwords.
9. The system shall support forced changes for aged passwords at intervals determined by the [Agency].
10. The system shall enable two-factor security verification, if desired by the [Agency].
11. The system shall store challenge questions and answers for each user. During the authentication process, the user shall be challenged if the system does not recognize the user’s equipment.
12. User accounts shall be set to deactivate or be manually deactivated after a period of inactivity.

## Task Areas

The following sections describe the full range of offeror support services, equipment, and equipment services that may be needed, including the performance measures to be used to assess the quality and timely delivery of the following required tasks:

### Task 1 - Service Contract/Agreement Administration Services

The offeror shall:

1. Maintain accurate copies of the [Agency’s] wireline and wireless service agreements, contracts, and other records with carriers within the system that specify the pricing, terms and conditions of wireless services provided.
2. Monitor key events associated with wireless service contracts and agreements including, but not limited to: expiration dates, annual review dates, thresholds for additional discounts, notification deadlines for various contract or agreement options, etc…The offeror shall provide the [Agency] COTR a listing of the upcoming key events with potential recommended actions on a time periods desired by the [Agency] .
3. Monitor [Agency] spending levels, service line counts, or other measurable indicators that have been agreed upon between the [Agency] and the wireless carriers. The intent will be to track the [Agency’s] attainment of any commitment levels or spending obligations. The offeror shall consult with the [Agency] on strategies to address potential shortfall scenarios.
4. Meet regularly with the [Agency] to develop strategy and guidance for dealing with carrier contract related issues, practical strategies for achieving optimal pricing or service terms, and methods to maximize negotiation strength with carriers.

1. Advise the [Agency] on potential impacts to their contracts or agreements by innovations in the industry or by new service offerings, and assist with developing strategies to meet these challenges.

### Task 2 - Inventory Management Services

The offeror shall:

1. Take necessary action to maintain an accurate master inventory of all wireless devices and services in current use by the [Agency]. Inventory accountability shall be maintained from requisition through disposal or final disposition of the service line and device.
2. Exchange wireless inventory data to/from [Agency] asset or property management systems, or make necessary accommodations within the offeror’s data systems that allow them to be used in lieu of and in compliance with the [Agency’s] asset/property management policies and procedures.
3. Work with the [Agency] to support and accommodate asset tagging of controlled devices with [Agency]-approved labels as part of the requisition or deployment processes.
4. Establish a process with the [Agency] to accommodate moves, adds, changes, and deletions (MACDs) of service lines and devices in order to maintain the accurate master inventory of services and devices.
5. Provide the capability to generate and deliver to [Agency] inventory managers both standard periodic inventory reports as well as custom-designed and ad hoc reports both a summary level, and at various organizational or inventory account levels, depending on the level of detail and information provided by the [Agency].
6. Support periodic government audits of inventory accounts by providing inventory listings and cooperating with [Agency] agency audit officials.

### Task 3 - Invoice Management and Audit Services

The offeror shall:

1. Collect, process, and validate paper and electronic invoices received from multiple carriers in multiple billing formats against [Agency] information, ordering records, and wireless contract or service agreement terms maintained in the offeror’s data system.
2. Store a copy of every invoice received from carriers in PDF format, each month, within the system for easy future reference.
3. Audit all carrier invoices billed to the [Agency] in an effort to realize audit savings on behalf of the [Agency]. At a minimum, auditing should include:

* Validation of account ownership and service existence
* Verification of rates, charges, and discounts
* Verification of correct account numbers and phone numbers associated with accounts
* Identification and recovery of missing carrier invoices
* Analysis of invoices for abuse, misuse and fraud
* Overbilled or Underbilled amounts for any mobile line in any month

1. Enable a dispute initiation from the system with a carrier at the time of the audit. The system shall keep track of the disputes so initiated as well as their resolutions status.
2. Allocate cost information from the carrier invoices across the [Agency]’s organizational units or financial accounts to provide increased visibility and accuracy for [Agency] cost and spend management functions.
3. Prevent charges for any phone numbers, that have been previously disconnected, from being paid without Agency approval.
4. Prepare monthly reports identifying billing and invoicing errors for [Agency] claim and dispute submittal.
5. Integrate invoice data with the offeror’s procurement and inventory management data records to enable and support spend, inventory and usage analysis by the offeror and [Agency] telecommunications managers.
6. Prepare monthly standardized management reports detailing spending levels and trends by carrier, regions, business units, service lines and service types. Provide the capability to generate custom-designed and ad hoc spending reports at both a summary and various organizational or financial account levels.
7. Prepare and provide necessary electronic reports or formatted data feeds to the [Agency’s] bill payment.
8. Provide recommendations to the [Agency] on areas for improvement and savings regarding the [Agency’s] invoice process.
9. Provide help desk support Monday - Friday between the hours of [8:00 a.m. – 6:00 p.m.] (EST) to answer billing and invoicing questions from [Agency] account managers.

### Task 4 - Rate Plan Optimization Services

The offeror shall:

1. On a [quarterly] basis, provide recommendations for rationalization of rate plan types, number of service lines with specific carriers, the number of total carriers, and other opportunities that might lower total cost while maintaining or improving the quality of wireless service provided to [Agency] users.
2. Calculate [Agency] costs based on actual monthly usage patterns of users and determine where individual account and rate plan changes should be made to lower future costs.
3. Work with the [Agency] to carry out and implement approved optimization recommendations and changes intended to lower overall total cost.
4. Continuously track and report savings derived from the rate plan optimization efforts on at least a [quarterly] basis.

### Task 5 - Management Reporting Services

The offeror shall:

1. Compile, prepare, and deliver in electronic format standard reports that detail the following about the [Agency]’s wireline and wireless telecommunications:

* Spending and expense levels, patterns and trends
* Usage levels, patterns, and trends
* Rate plan profile
* Wireless device inventories
* Wireless service line inventories
* Invoice and billing statuses
* Claims status
* Savings generated or attributable to TEMS
* Reports needed for submission to OMB, as required

1. Deliver standard reports as specified by the [Agency].
2. Provide standard reports on each of the reporting areas that details and organizes the information by the [Agency’s] designated organizational breakdown or reporting structure and wireless telecommunications service provider.

### Task 6 - Contract Optimization Services

The offeror shall:

1. Perform a comprehensive assessment of the [Agency’s] existing service contracts and agreements to identify improvement and cost savings opportunities. This includes benchmarking the [Agency’s] existing pricing, service terms and conditions with those of other federal and commercial entities and accepted “Best Practices” to identify recommended changes.
2. Make specific recommendations for rationalization of rate plan types, migration of service lines between specific carriers, changing the number of total carriers, changes in contract terms and conditions, and other opportunities that might lower total cost while maintaining or improving the quality of service provided to [Agency] users.
3. Work with the [Agency] to carry out and implement approved contract optimization recommendations, changes, and sourcing/competitive bidding among carriers intended to lower overall total cost.
4. Track and report savings derived from optimization efforts. Reports should show the recovery of any historical billing errors as well as the future impact of the optimization.

### Task 7 - Ordering and Procurement Services

The offeror shall:

1. Provide a centralized web-based ordering portal to facilitate the requisition of new wireless service, devices, and accessories from [Agency]-approved suppliers. The ordering portal should support the [Agency’s] approved mobile policies and workflow for coordinating and approving wireless service requisitions and should allow for the assignment of individuals with specific workflow approval responsibilities or roles.
2. Enable [Agency] end-users to access this ordering portal via a Single-Sign-on process that avoids new sign-on credentials for the ordering portal. Upon arrival in the ordering portal, an end-user should only see the catalog items appropriate for that end-user’s system privileges.
3. Enable [Agency] administrators to designate at least three custom fields that can accommodate any tracking needs unique to the [Agency].
4. Provide automation of procurement transactions across multiple wireless carriers including moves, adds, changes, disconnects (MACDs) along with any required [Agency] coordination and approvals.
5. Integrate and align ordering and procurement process with [Agency’s] personnel and manpower systems taking into consideration multiple approval hierarchies and functional or business units [if necessary].

1. Track orders and order changes from order initiation through delivery and entry of the asset’s information into the [Agency] approved property management system.
2. Provide designated [Agency] representatives visibility and monthly management reports on the status of all orders and order changes. The visibility and status of individual orders should also be continually available to [Agency] representatives through the ordering portal.

### Task 8 - Bill Payment Services

The offeror shall:

1. Provide ongoing services to receive, validate, code for chargeback, and, pay all telecommunications service provider invoices.

1. Provide reports, information, and data in electronic format as necessary to request [Agency] funding to pay telecommunications service provider invoices and to update the [Agency’s] general ledger or financial management system with the correct chargeback information.
2. Provide on-going support services as necessary to update and maintain the accuracy and currency of account lists, supplier, and [Agency] information in the TEMS data and payment systems.
3. Provide standard management reports identifying the payment status of invoices, balance of any [Agency] funds held by the offeror for payment of invoices, and any received invoices awaiting payment or affected by a dispute or claim.
4. Assist the [Agency] by identifying opportunities and facilitating account consolidation efforts with individual wireless providers to streamline payment processes.

### Task 9 - Dispute Recovery Services

The offeror shall:

1. Collect and prepare support material necessary to file and defend claims submitted to the carriers for billing and account corrections.
2. Research, review, dispute, and track all potential billing errors and represent the [Agency] as an authorized agent with all carriers and wireless telecommunications suppliers.
3. Submit written claims to wireless carriers and suppliers, including reasonable and necessary support documentation, to identify and recover any audit savings for the [Agency].
4. Handle and track all claims through final resolution. Upon expiration of an awarded task order the offeror shall continue to handle and track claims filed with carriers on or before the task order expiration date through final resolution [or for period of time to be determined by the Agency].
5. Provide the [Agency] with monthly reports detailing the status of claims filed with the carriers, billing accuracy rates for individual carriers, and the amount of any savings or additional cost recovered or incurred as a result of the audit and dispute recovery efforts.

### Task 10 - Device Disposition/Disposal Services [Optional]

The offeror shall:

1. Comply with Title 40 of United States Code and 41 Code of Federal Regulations (CFR), Chapter 102, for the disposition, replacement, sale, exchange or disposal of electronics devices and personal property.
2. Develop and implement an [Agency]-approved wireless device disposition, replacement, sale, exchange, and disposal process that integrates with the TEMS inventory management system and/or the [Agency] property management process and procedures.
3. Collect and stage devices for disposition, replacement, sale, exchange or disposal in accordance with the [Agency]-approved process.
4. Redeploy assets not intended or ready for disposal, replacement, sale or exchange and update the TEMS inventory management database to reflect the change in status.
5. Transfer assets intended for disposal, sale, or exchange and update the TEMS inventory management database to reflect the change in status.

1. Maintain an auditable record of each item’s final disposition status and deliver monthly disposition reports to the [Agency] that allows them to meet the personal property management reporting requirements of 41 Code of Federal Regulations (CFR), Chapter 102.

### Task 11 – Transition Services [Optional]

The offeror shall:

1. Develop a Transition Plan for transferring TEMS responsibility from this contract to the ordering [Agency]. The transition plan shall identify what actions would be necessary, both from the offeror’s perspective as well as those actions that the [Agency] needs to to take, to smoothly transfer and assume ownership of information, data, and any management responsibility. The Transition Plan shall address any known risks, foreseeable problems, and identify the additional resources and cost, if any, required to mitigate these risks and ensure a successful transfer of responsibility.

1. Execute all actions called out in the Transition Plan and manage the completion of those tasks to ensure successful transfer of TEMS responsibility by the agreed upon transition date.

Deliver to the [Agency] all [Agency] telecommunications services accounts, inventory, invoice, and other data resident in the system necessary to enable the [Agency] to assume ownership of the system. This information should include a listing of the names, phone numbers and e-mail addresses of all carrier Points of Contact (POC) that the offeror works with to manage the [Agency’s] accounts and invoices. All data will be delivered to the [Agency] in electronic format to enable electronic transfer into other data systems.

### Security Features [Optional]

* Make available security features and procedures to prevent electronic serial number cloning and fraudulent use of cloned equipment and service. Mobile Device Management
* Mobile Threat Detection Applications
* Derived Credentials

## Hours of Operations

[The average number of people within the facility Monday through Friday is approximately (number), except during Federal Holidays, weekends or other closures.]

# Labor Types

The offeror shall provide Labor Types for both professional and technical expertise that fully meet the requirements of all tasks in support of the solutions specified in this SOW, including full life cycle management as applicable, and the analysis, planning, design, specification, implementation, integration and management of required services and equipment.

The offeror shall be responsible for all education and skills-based training necessary to ensure that all staff assigned to the project are qualified to perform the work. The offeror shall develop in-house orientation and training courses for offeror staff, the work to be performed, and the associated duties, responsibilities, security guidelines, policies, operating procedures, etc. The [Agency] will review these materials at the request of the offeror.

The offeror shall provide [if applicable]:

* Installation and or training support to Government-site(s), as identified in *Attachment B – Support Locations*.
* Proposed Labor Types for each task as specified in *Attachment D – Pricing Template.*

## Personnel Requirements

The offeror has ultimate responsibility for managing the order, for achieving the expected performance results, and for determining the appropriate staffing in support of its technical approach.

* The offeror shall provide experienced personnel to perform the required services. The Government and the offeror understand and agree that the services to be delivered are non-personal.
* Offeror personnel shall obtain authorization to have access to [Agency] support sites and Government facilities, and shall obtain Common Access Cards (CACs) for computer access, if required.
* All offeror employees shall be fluent in spoken and written English.
* Background Checks [As required]: All [Project Name] offeror employees shall submit a Questionnaire for National Security Positions (SF-86) to the [Agency] Personnel Security Manager. A favorable SF-86 is required before gaining access to a U.S. Government Local Area Network (LAN), if required. The offeror, when notified of an unfavorable determination by the Government, shall withdraw the employee from consideration from working under the order [As required].
* The contracting officer may require the offeror to remove from the job site any offeror employee who is identified as a potential threat to the health, safety, security, general well-being or operational mission of the installation and its population.
* In order to ensure a smooth and orderly startup of work, the key personnel specified in the offeror's proposal shall be available on the effective date of the order. If these personnel are not made available at that time, the offeror shall notify the contracting officer and show cause. If the offeror does not show cause, the offeror may be subject to default action.
* The offeror-supplied personnel are employees of the offeror and under the administrative control and supervision of the offeror. The offeror, through its personnel, shall perform the tasks prescribed herein. The offeror shall select, supervise, and exercise control and direction over its employees (including offeror subofferors) under this order. The Government shall not exercise any supervision or control over the offeror in its performance of contractual services under this order. The offeror shall be accountable to the Government for the action of its personnel.

## Personnel Security Requirements

* The offeror is required to identify the teams by providing the United States Government-Contracting Officer Technical Representative (USG-COTR) with the names, social security numbers, and security clearances held by each individual of each installation team.
* The Government may require security clearances for performance of this task order. The offeror must obtain these clearances before beginning work on the task order (Agency will not allow contract employees without clearance in any of its facilities). The offeror must obtain these clearances by using the eQIP system. If satisfactory security arrangements cannot be made with the offeror, the required services must be obtained from other sources.
* The level of classified access required will be indicated on **DD-254** or other appropriate form incorporated into each request requiring access to classified information. Offeror personnel are required to have background investigations for suitability if they occupy positions of trust (e.g., systems administration) even if they do not have access to classified information.
* Necessary facility and/or staff clearances must be in place prior to start of work on the task order.
* Offerors are responsible for the security, integrity and appropriate authorized use of their systems interfacing with the Government and or used for the transaction of any and all Government business. The Government, through the Government's Contracting Officer, may require the use or modification of security and/or secure communications technologies related to Government systems access and use.
* The Government, at its discretion, may suspend or terminate the access and/or use of any or all Government access and systems for conducting business with any/or all offerors when a security or other electronic access, use or misuse issue gives cause for such action. The suspension or termination may last until such time as the Government determines that the situation has been corrected or no longer exists.

## Proposed Personnel

The offeror shall assemble a [Project Name] project team with the required knowledge and experience to perform the work described under this task order, and if applicable, any additional qualifications described in *Section 3.3 ‑ Special Qualifications and Certifications*.

The core project team shall be composed of qualified professionals with strong technical backgrounds. The Offeror shall propose appropriate Connections II Labor Type(s) and personnel experience levels (a mix of senior, mid, and entry levels) that meet the minimum required qualifications, based on the complexity and scale of the [Agency]’s specific [Project Name] tasking. [If additional labor types are necessary, the offeror may request a modification to add them to the contract.]

The offeror shall ensure that its employees have all required professional certifications and licenses (current and valid) for each applicable task and labor type category before commencement of work.

The offeror shall identify, by name, the proposed Key Personnel (e.g., the key management and technical personnel who will work under this order, such as the Project Manager.

The proposed [Project Name] project team structure and an organizational chart shall be included in the proposal, with the names, positions, and resumes of any proposed key personnel.

## Special Qualifications and Certifications

Insert in this section any additional special qualifications, certifications, license requirements, etc. that pertain to this particular task.

The PM should possess the intellectual and leadership qualities necessary to plan, manage, develop, articulate and carry out to completion the [Project Name] project. [If required, the proposed PM shall have a PMP certification, and shall have experience developing a PMP for large, complex projects similar to [Project Name].

# Travel and Other Direct Costs (ODC/Un-priced Items)

## Travel

The offeror shall comply with the Travel and Per Diem requirements as described in Section G.5.1.2 of the Connections II contract including conditions and limitations applying to travel associated with work performed under this SOW.

### Local Travel

If travel within the local vicinity is required, travel reimbursements for local travel are not authorized; neither is the use of a Government vehicle.

### Distance Travel

If travel outside the local vicinity is required, costs incurred by offeror personnel for travel, including costs of lodging, other subsistence, and incidental expenses, shall be considered reasonable and allowable only to the extent that they do not exceed the rates and amounts set by the Federal Travel Regulations. See FAR 31.205-46 (a)(2)(i).

As part of the Price Proposal, the offeror shall provide any anticipated travel costs, to include origination, destination, and the number of trips, number of persons, and a breakdown of lodging, meals, transportation, and related costs.

Prior written approval by the [Agency] contracting officer is required for all travel directly and identifiably funded by the [Agency] under this order. The offeror shall therefore present to the contracting officer an itinerary for each planned trip, showing the name of the traveler, purpose of the trip, origin/destination (and intervening stops), and dates of travel, as far in advance of the proposed travel as possible, but in no event less than three weeks before travel is planned to commence.

For cost effectiveness, economy class travel must be used on all official travel funded under this Task Order. Business class travel shall only be used under exceptional circumstances, and in compliance with the Federal Travel Regulations (FAR 31.205.46).

## Other Direct Cost (ODC/Un-priced Items)

For other direct costs proposed (e.g. travel, per diem, etc.), which are considered necessary for the completion of the work, the offeror shall provide sufficient information to establish the basis for the estimate of such cost.

The Offeror shall provide a breakdown for un-priced items and/or Other Direct Costs (ODC) in the Price Proposal. The breakdown shall identify any “open market” items.

# Invoice Requirements

The offeror shall meet and comply with the Billing and Invoice requirements as described in **Sections C.3.4 Billing, G.5.1 General Billing Requirements, and G.6 Payment of Bills** of the Connections II contract. The baseline requirements for Connections II contract for Invoicing and Billing including the handling of the Associated Government Fee, approval for payment of supplies/services, resolution of billing disputes, and the option for the [Agency] to pay by electronic funds transfer shall apply.

## Detail Billing Requirements

The offeror shall comply with the detailed billing requirements defined in **Section C.3.4** and the general billing requirements in **Section G.5** of the Connections II contract when submitting a proper bill for each order.

## Invoice Address, Data Format and Delivery Method

The offeror shall be capable of directly billing each customer at the address given by the [Agency] in the order and shall also have the capability to centrally bill designated customers through GSA. The baseline requirements for direct and centralized billing as defined **Section C.3.4** of the Connections II contract shall apply.

### Invoice Address

The Offeror shall send invoices directly to the address (electronic mail or postal/physical address) designated by the [Agency’s] authorized Ordering Entity. This address will be determined at the time the order is placed.

|  |
| --- |
| **Remove this context box when finalizing the SOW**  The Agency has two options for how to receive invoices whether by electronic (email method) or to require hard copies. Or both. Suggested Requirements:  The offeror shall provide the signed original invoice via email:  [Agency provide an email here]  The offeror shall also provide via postal/physical address an additional copy of the invoice to the Contracting Officer and COR or provide [n] copies of the signed original to:  Name of Agency Department  POC Name/Position and Title  Email  Mailing Address  Street, City, Zip  Inquiries regarding payment of invoices should be directed to [Agency provides an email here] |

### Invoice Submission

The offeror shall comply with the detail billing requirements defined in Section C.3.4 and the general billing requirements in Section G.5 of the Connections II contract when submitting a proper bill for each order.

A proper invoice must include the following items:

* Offeror name and address
* Offeror representative
* Contract number
* Order number(s)
* Accounting Control Transaction (ACT) number assigned by the Operational Contracting Officer (OCO) on the order
* Period of performance (month services performed for work request orders, month
* Deliverable completed for fixed price orders)
* Bill number
* Customer’s name and address
* For Fixed Price Orders, products delivered and accepted, listed by deliverable number;
* For Time and Materials orders, labor charges accepted during the period of performance
* Travel and per diem charges
* Total billed amount
* Prompt payment discount offered (if applicable)

### Billing Cycle and Data Elements

The offeror shall invoice on a monthly basis. The invoice shall include the period of performance covered by the invoice. The labor categories with total labor hours incurred for the period and other direct costs shall be reported on the invoice and shall be calculated for the current billing month. A Year-to-date total from project inception to date shall also be provided. If subcontracting is proposed, one consolidated invoice from the prime offeror shall be submitted in accordance with other terms and conditions of the Request for Quotation (RFQ)

|  |
| --- |
| **Remove this context box when finalizing the SOW**  The Agency has option to specify the format and agency-specific data elements for invoice content.  Suggested Requirements:  The offeror shall provide the invoice data in spreadsheet form with the following detailed information. The listing shall include separate columns and totals for the current invoice period and the project to date. The following data elements shall be provided on the Invoice, at a minimum:   * Labor Type (Offeror Employee) * CONNECTIONS II labor category * Monthly and total cumulative hours worked * Burdened hourly labor rate * Cost incurred not billed |

### Electronic Funds Transfer (EFT)

|  |
| --- |
| **Remove this context box when finalizing the SOW**  Agency has option to specify the method of delivery for invoice and payments.  Insert additional agency-specific requirements here.  Below is a standard ‘boilerplate” requirements for EFT. |

The offeror shall cooperate with the Government to allow payment of bills via Electronic Funds Transfer (EFT) to the extent feasible in accordance with Section G.6.3 Use of **Electronic Funds** Transferof the Connections II contract.

## Billing for Other Direct Costs (ODCs) or Unpriced Item

The offeror may invoice monthly on the basis of cost incurred for ODC or unpriced item.  The invoice shall include the period of performance covered by the invoice and the item number and title.

|  |
| --- |
| **Remove this context box when finalizing the SOW**  Agency has option to specify the format and agency-specific data elements for ODC and unpriced items.  Suggested Requirements:  The offeror shall provide the following detailed information for each invoice submitted, as applicable.  Spreadsheet submissions, in MS Excel format, are required.   * ODCs or unpriced items purchased * Date delivery accepted by the Government * ODC or unpriced item number * Project to date totals * Cost incurred not billed * Remaining balance of each item |

# Section 508

All Electronic and Information Technology (EIT) procured through this task order must meet the applicable accessibility standards at 36 CFR 1194, unless an [Agency] exception to this requirement exists. The Section 508 Standards Summary is viewable at: <https://www.section508.gov/index.cfm?fuseAction=stdsSum#technical>

The offeror shall indicate for each line item in the schedule whether each product or service is compliant or noncompliant with the accessibility standards at 36 CFR 1194. Further, the proposal must indicate where full details of compliance can be found (e.g., the offeror's website or other exact location).

# Proposal Instruction to Offerors

This section provides instructions to prospective offerors on preparing and submitting a proposal in response to this solicitation.

**SOLICITATION CLOSING DATE AND TIME: ALL OFFERS MUST BE RECEIVED ON OR BEFORE [State deadline time here]:**  [DD MM YYYY].

**REQUIRED SUBMISSIONS:**

Proposal shall be submitted to the attention of: [Agency Point of Contact]

**HARD COPY ADDRESS:** **ELECTRONIC COPY:**

Agency Name and Email Address

POC Name

Mailing Address

Telephone

Email

No offer received after the due date and time will be considered.

## General Instructions

### Materials Submitted

The Offeror is advised that all submissions and related material become the property of the U.S. Government and will not be returned. The technical and price proposals, if accepted by the Government, will form binding parts of the task order that results from this solicitation. Therefore, care must be taken to properly address the requirements set forth in each of the tasks. In the event of any conflict between the Connections II contract and the proposal in any resulting task order, the Connections II Contract shall govern.

### Format

[If the Agency wishes to use electronic format only, it may delete references to hard copy submittal in the sample text below.]

All materials shall be in typeface Times New Roman or Arial (no smaller than 11 point), double-spaced on 8½” x 11” white paper with one inch margins all around. Tables and illustrations may use a reduced font style, but not less than 8 point, and may be single-spaced. Each page must identify the submitting Offeror in the header or footer.

The offeror’s proposal shall consist of physically separate volumes that are individually titled and numbered on the exterior of the top covers as stated in Table 2 below. **DO NOT INCLUDE PRICING IN THE TECHNICAL AND PAST PERFORMANCE VOLUMES:** THE OFFEROR IS ADVISED THAT COMBINING TECHNICAL AND PRICING VOLUMES IN THE OFFEROR’S PROPOSAL IS NOT RESPONSIVE TO THE SOW.

Table 2. Number of each Type of Proposal Volume

| **Volume** | **Volume Title** | **Copies** | **Format** | **Page Limitations** |
| --- | --- | --- | --- | --- |
| Volume I | Technical Proposal  Technical Approach  Management Approach | 1 Hard Original +  [n] Hard Copies + 1 Electronic Copy | PDF | [n] pages maximum not including Executive Summary (specify max. length) |
| Volume II | Price Proposal | 1 Hard Original  1 Electronic Copy | EXCEL – Pricing Template | No page limit |
| Volume III | Appendices  Past Performance  Resumes of Key Personnel  PMP [if required] | 1 Hard Original +  1 Electronic Copy | PDF  PDF  PDF | [n] pages  [n] pages maximum per Resume  No page limit |

### Proprietary Data

Each page of the offeror’s proposals shall be reviewed and marked as to proprietary data content by the offeror in strict compliance with FAR 52.215-1. Also see FAR 3.104-4. A single blanket statement at the front of the proposal is not acceptable. Failure to mark every page will subject the proposal to public release through Freedom of Information Act (FOIA) requests.

## Preparation of Technical Proposal

The Technical Proposal in response to this solicitation shall address how the offeror intends to carry out the SOW requirements contained in *Section 2*. The offeror’s Technical Proposal must demonstrate a clear understanding of the requirements, the adequacy of the solution approach in meeting the goals and objectives of the [Project Name] project, and fulfill the offeror’s implementation responsibilities.

Technical Proposals are limited to [n] pages in length and shall be written in English. Each page must be numbered consecutively. Pages that exceed the page number limitation will not be evaluated.

Any page in the Technical Proposal that contains a table, chart, graph, etc., not otherwise specifically excluded below, is included within the above page limitation for the Technical Proposal. All critical information from appendices shall be identified and summarized in the Technical Proposal. Not included in the page limitation are the following:

* Cover/Title Page
* Table of Contents
* Executive Summary (2 pages maximum)
* Dividers
* Table summarizing qualifications of proposed personnel

The Technical Proposal will consist of the following information:

* Technical Approach
* Task 1
* Task 2
* Task [n]
* Management Approach
* Overall management approach summary
* Project Management Plan [if required]
* Proposed Personnel Qualifications and Certifications
* Resumes of Key Personnel
* Past Performance
* Past Performance Worksheet

The Technical Proposal shall include a detailed description of the offeror’s technical solution for each task in Section 2, including the associated equipment, equipment services, labor, and installation. At a minimum, the offeror shall organize its response in the Technical Proposal to contain the following information.

### Executive Summary

This section summarizes the key elements of the offeror’s strategy, approach, methodologies, personnel and implementation plan. The Executive Summary will not count towards the [n] page limitation and shall not exceed 2 pages in length.

### Technical Approach

The offeror’s Technical Approach shall demonstrate a clear understanding of the requirements. The Technical Approach shall include a description of the overall approach and the specific strategy (i.e., implementation plan, testing methodology and risk mitigation strategy) being proposed to complete this task order. The Technical Approach shall be specific and complete, presenting concisely how the offeror will fulfill the task requirements described in Section 2. Marketing literature is not acceptable.

### Management Approach

The detail requested from the offeror supporting its management approach should be relative to the size and complexity of the overall task. For simple and straightforward jobs, for example, the plan may simply be a high-level completion schedule.

[Optional: The offeror shall submit a management approach summary that includes the offeror’s approach to meeting the requirements of the SOW. This shall include a high-level completion schedule describing all key activities and associated completion dates in Gantt chart format. The offeror shall also submit a draft Project Management Plan (PMP) based on the offeror’s proposed technical approach using *Attachment A ‑ Project Management Plan*. The offeror’s PMP will be evaluated as part of the offeror’s management approach. The PMP shall be submitted as an appendix in Volume III with no size limit if required.]

### Proposed Personnel Qualifications and Certifications

The offeror shall describe the skills, qualities and capacities of its proposed Project Manager and other key personnel to meet both the minimal qualifications described in *Section 2* as well as their ability to meet the task order implementation and schedule challenges.

The offeror shall include in an appendix in Volume III the resumes for all the proposed key personnel candidates, up to a total number of [n]. Key personnel resumes may not exceed [2] pages in length and shall be in chronological order starting with most recent experience.

Each key personnel resume shall be accompanied by a signed letter of commitment from each candidate indicating his/her: (a) availability to work in the stated position, in terms of months; after award; and (b) intention to support and work for a stated term of the service. [Optional: The offeror's proposed key personnel shall also submit a minimum of three (3) references of professional contacts within the last three years. The offeror should provide a current phone, fax address, and email address for each reference contact.]

### Past Performance

The offeror shall use the past performance template provided in *Attachment E – Past Performance* Worksheet. The offeror shall provide [n] past performance references for projects of a similar type, size and scope to that described in the solicitation, and submit them as an appendix in Volume III.

When providing past performance, the references provided shall include solution installations that are similar to the solution being offered within this Request for Proposal (RFP)/SOW.

If other partner solutions are being used to fulfill the requirement identified in the RFP/SOW, describe how the solution has been tested and sold to other government agencies. Also explain if the solution is working at full capacity today.

Offerors shall submit the following information as part of their proposal:

* The offeror shall describe its past performance directly related to contracts it has held within the last 5 years that are similar in scope, magnitude and complexity. Offerors shall provide a minimum of three (3) relevant examples of installation and integration of Wireless Access Points within existing networks projects the offeror has completed.
* Offerors shall provide relevant past performance documentation and references for services comparable to those described in the SOW. Past performances listed may include those entered into by the Federal Government, state and local government agencies, and commercial entities. Offerors should notify each of their private-sector (commercial) references that they may be contacted by the [Agency] and authorize them to provide the past performance information requested. References other than those identified by the offeror may also be contacted by the Government, and the information received from them may be used in the evaluation of the offeror’s past performance.

The offeror shall provide with the proposal a summary of the required past performance information as shown in *Attachment E ‑ Past Performance Worksheet*.

## Preparation of Price Proposal

Below is suggested text. Please modify or delete text as needed.

The offeror shall submit their Price Proposal in the form of a Microsoft Excel Workbook, which is included as *Attachment D – Pricing Template.*  The Pricing Template is used to facilitate the delivery of prices in the required format. In populating all Excel worksheets, the offeror shall present the data (e.g., item number, unit prices, quantities, and summarized prices) in a manner where all computations can be traced to the maximum extent possible. The offeror may add rows, columns, or worksheets to accommodate the required pricing information.  See also: *Attachment C – Pricing Requirements.*

[Failure by the offeror to use the prescribed pricing template may result in non-compliance.] The Price Proposal (Volume II) must be submitted under separate cover from the Technical Proposal (Volumes I and III). There is no page limit for the Price Proposal. The offeror must provide sufficient detail and supporting information to allow a complete analysis of each line item price.

# Evaluation Factors and Basis for Award

The Government will evaluateeach of the offeror’s proposals to determine if the support services offerings satisfy the specific requirements under each task. The evaluations will be based on the evaluation factors defined in this section.

## Evaluation Methodology and Basis for Award

Suggested General Evaluation Language   
(Agency may remove or modify the text below)

The Government may award a contract based on the initial proposal without discussions or negotiations with offerors, in accordance with FAR 52.215-1. Therefore, it is important that each proposal be fully compliant, without exception to any requirement, clause or provision. Offerors should submit initial proposals which respond most favorably to the SOW’s requirements.

The Government intends to evaluate offeror’s proposals in accordance with Section 7 of this SOW and make a contract award to the responsible offeror whose proposal represents the best value to the U.S. Government.

The Technical Proposal will be evaluated by a technical evaluation committee using the technical criteria shown below.

Price has not been assigned a numerical weight. Offerors are reminded that the Government is not obligated to award a negotiated contract on the basis of lowest proposed price, or to the offeror with the highest technical evaluation score. Agencies must state the following when using tradeoff process: ‘The solicitation shall state whether all evaluation factors other than cost or price, when combined, are significantly more important than, approximately equal to, or significantly less important than cost or price.’

As technical scores converge, price may become a deciding factor in the award. Therefore, after the final evaluation of proposals, the contracting officer will make the award to the offeror whose proposal offers the best value to the Government considering both technical and price factors.

## Evaluation Approach – Trade Off or Lowest Price Technically Acceptable

Note: The Agency is required to select the evaluation approach (i.e., Trade Off or Lowest Price Technically Acceptable (LPTA) Approach. Once a method has been selected, delete all information in this SOW relevant to the method that was NOT selected.

Suggested Evaluation Language if Trade-Off Approach is Selected by the Agency   
(Agency may remove or modify the text below)

The Government anticipates awarding a task order to the offeror whose quote represents the best value, price and other factors considered.

The Government intends to evaluate proposals and may award a contract without discussions. However, the Government reserves the right to conduct discussions if determined by the contracting officer to be necessary. Therefore, each initial offer should contain the offeror’s best proposal from both a price and a technical standpoint.

Proposals received in response to this solicitation will be evaluated by the [Agency] pursuant to the FAR and in accordance with FAR 52.215-1, and as set forth in *Section 6 ‑* Proposal Instructions, one award will be made by the contracting officer to the responsible offeror whose proposal, conforming to the solicitation, is determined most advantageous to the Government, all technical and price factors considered.

The formula set forth herein will be used by the contracting officer as a guide in determining which proposals will be most advantageous to the Government.

Suggested Evaluation Language if LPTA Approach is Selected by the Agency   
(Agency may remove or modify the text below)

The lowest price technically acceptable source selection process is appropriate when best value is expected to result from selection of the technically acceptable proposal with the lowest evaluated price.

The evaluation factors and significant sub-factors that establish the requirements of acceptability should be set forth in this section.

If the contracting officer documents the file pursuant to 15.304(c)(3)(iii), past performance need not be an evaluation factor in lowest price technically-acceptable source selections.

If the contracting officer elects to consider past performance as an evaluation factor, it shall be evaluated in accordance with 15.305. However, the comparative assessment in 15.305(a)(2)(i) does not apply.

If the contracting officer determines that the past performance of a small business is not acceptable, the matter shall be referred to the Small Business Administration for a Certificate of Competency determination, in accordance with the procedures contained in subpart and U.S.C. 637(b)(7).

Award will be made to the offeror whose proposal represents the lowest price technically acceptable as defined in FAR 15, Subpart 15.101-1. The offeror’s proposal will be evaluated with regard to its ability to meet the tasks set forth in the SOW. To result in an award, the offeror’s proposal must demonstrate the ability to satisfy all technical requirements as set forth in Section 2, and must conform to all required terms and conditions.

The award will be made on the basis of the lowest-evaluated price of proposals meeting or exceeding the acceptability standards for non-price factors.

Proposals will be evaluated for acceptability but not ranked using non-price factors.

## Technical Evaluation Criteria

The Government will review the responses to this solicitation to ensure that offerors have addressed the requirements for Tasks 1 [through n] and are sufficient in detail and clarity to allow the Government to determine if the proposed support services, equipment, and equipment services are acceptable. If they are found unacceptable, the Government retains the right to conduct further discussions.

The Government will evaluate the offeror’s proposal based upon the following four factors: technical approach, management approach, proposed personnel, and past performance*.* Within these factors, the Government will evaluate the sub-factors identified in Table 3 below. To achieve an acceptable rating, the offeror’s Technical Proposal must achieve a pass rating on all sub-factors.

The Agency is required to develop a Source Selection Plan (SSP)/Technical Evaluation Plan (TEP) to describe how each of these factors will be rated. Depending on the approach used, the SSP/TEP may select an adjectival rating system, a points system, or any other approved system.

Table 3. Offerors’ Proposal Factors and Sub-factors

| Technical Evaluation Criteria |
| --- |
| * Factor 1 ‑ Technical Approach |
| * Sub-factor 1 ‑ Task 1 |
| * Sub-factor 2 ‑ Task [n] |
| * Factor 2 ‑ Management Approach |
| * Sub-factor1 – Management Approach Summary [and Project Management Plan] |
| * Factor 3 ‑ Proposed Personnel |
| * Sub-factor 1 ‑ Project Manager Qualifications/Certifications |
| * Sub-factor 2 ‑ Technical and Other Personnel Qualifications/Certifications |
| * Factor 4 ‑ Past Performance |
| * Sub-factor 1 ‑ Past Performance History/Track Record |

Suggested Evaluation Language for Technical Evaluation of Technical Criteria   
(Agency may remove or modify the text below)

The following evaluation criteria will serve as the standard against which all proposals will be evaluated and will serve to identify the significant discussion items that offerors should address in their proposals.

The factors and sub-factors are presented below. Factors are [of equal importance or listed in descending order of importance]. Sub-factors are [of equal importance or listed in descending order of importance].

Factor 1 ‑ Technical Approach. The extent to which the proposal demonstrates a clear understanding of the statement of work and the degree to which the proposed implementation approach is technically and managerially sound and likely to meet the objectives of the [Project Name] project as described in this solicitation. The technical approach must be realistic, directly relevant to the achievement of results and must seek to maximize results within budget resources.

* Sub-Factor 1 ‑ Planning and Design. The extent to which the proposed solution meets all the [technical] requirements of Task 1.

Factor 2 ‑ Management Approach

* Sub-Factor 1 ‑ Project Management. The proposed solution shall describe the extent to which it uses a program management approach appropriate to the size and complexity of the project, and clearly demonstrate how the proposed technical solution for each task will achieve expected results. The offeror’s project management summary and schedule [and its formal Project Management Plan (using the template found in Attachment A)] will be evaluated against these criteria.

Factor 3 ‑ Proposed Personnel

* Sub-Factor 1 ‑ Qualifications and Demonstrated Ability of the Project Manager (PM). The proposed PM shall demonstrate the qualifications and ability to successfully lead this project, including the ability to work constructively at multiple levels of organizations, including senior levels of Government and business.
* Sub-Factor 2 ‑ Qualifications and Demonstrated Ability of the Proposed Technical Staff and Key Personnel. The members of the proposed project team, including Subject-Matter Experts (SMEs), shall demonstrate the experience and ability to successfully meet the project milestones, targets, and goals.

Factor 4 ‑ Past Performance

* Sub-Factor 1 ‑ Past Performance. The offeror and major subofferor(s) past performance will be evaluated. A major subofferor (if applicable) is defined as a subofferor named in the proposal whose total price exceeds 15% of the offer’s bottom line total price, including fixed fee. The contracting officer will utilize existing databases of offeror performance information (i.e., PPIRS) and solicit additional information from the references provided in this SOW. The [Agency] may also use performance information obtained from sources other than those identified by the offeror/subofferor.

## Price Evaluation Criteria

Suggested Evaluation Language for Price Evaluation Criteria   
(Agency may remove or modify the text below)

No points are assigned to the price proposal evaluation. While the technical evaluation criteria are significantly more important than price, price remains important.

Price will primarily be evaluated for realism, allow-ability, and reasonableness.

This evaluation will consist of a review of the price portion of an offeror’s proposal to determine if the overall price proposed is realistic for the work to be performed, if the price reflects an accurate understanding of the requirements, and if the price is consistent with the Technical Proposal.

Evaluation of the price proposal will consider but not be limited to the following:

* Price reasonableness, price realism and completeness of the price proposal and supporting documentation
* Overall price control/price savings evidenced in the proposal (avoidance of prices that exceed reasonable requirements)
* The amount of the proposed fee, if any

Price realism is an assessment of the accuracy with which proposed prices represent the most probable cost of performance within each offeror’s technical and management approach. A price realism evaluation will be performed as part of the evaluation process as follows:

* Verify the offeror’s understanding of the requirements
* Assess the degree to which the price proposal accurately reflects the technical approach
* Assess the degree to which the prices included in the Price Proposals accurately represent the work effort included in the respective Technical Proposals

The results of the price realism analysis will be used as part of the [Agency’s] best value/tradeoff analysis.

Although technical evaluation criteria are significantly more important than price, the closer the technical evaluation scores of the various proposals are to one another, the more important price considerations will become. The evaluation of proposed prices may therefore become a determining factor in the award as technical scores converge.

# Task Order Award

The Task Order Award will be made to the responsible offeror whose proposal is in the best interest of the [Agency], given the outcome of the [Agency]’s evaluation of each offeror’s technical excellence, management and business risk factors, and proposed price. In selecting the Task Order Award, the [Agency] will consider the quality offered for the evaluated price. The relative quality of offers will be based upon the [Agency]’s assessment of the tradeoffs between the technical excellence offered in the offeror’s proposal and whether it provides added value, added capability, and/or reduced management and business risk.

# Organizational Conflicts of Interest

The guidelines and procedures of FAR Subpart 9.5 will be used in identifying and resolving any issues of organizational conflicts of interest at the task order level.

In the event that a task order requires activity that would create or has created an actual or potential conflict of interest, the offeror shall:

* Notify the task order Contracting Officer (CO) of the actual or potential conflict, and not commence or continue work on any task order that involves a potential or actual conflict of interest until specifically notified by the task order CO to proceed.
* Identify the conflict and recommend to the task order CO an alternate tasking approach which would avoid the conflict.

If the task order CO determines that it is in the best interest of the Government to issue or continue the task order, notwithstanding a conflict of interest, a request for waiver shall be submitted in accordance with FAR 9.503. In the event that the offeror was aware of facts required to be disclosed or the existence of an actual or potential organizational conflict of interest and did not disclose, when known, such facts or such conflict of interest to the task order CO, the Government may terminate this contract for default.

In the event that a task order issued under this contract requires the offeror to gain access to proprietary information of other companies, the offeror shall be required to execute agreements with those companies to protect the information from unauthorized use and to refrain from using it for any purpose other than for which it was furnished.

# List of Acronyms

|  |  |
| --- | --- |
| **ACT** | **Accounting Control Transaction** |
| **ATO** | **Authority to Operate** |
| **CAC** | **Common Access Card** |
| **CFR** | **Code of Federal Regulations** |
| **CO** | **Contracting Officer** |
| **COR** | **Contracting Officer Representative** |
| **COTR** | **Contracting Officer Technical Representative** |
| **EFT** | **Electronic Funds Transfer** |
| **EIT** | **Electronic Information Technology** |
| **FAR** | **Federal Acquisition Regulation** |
| **FFP** | **Firm Fixed Price** |
| **GSA** | **General Services Administration** |
| **GUI** | **Graphical User Interface** |
| **IP** | **Internet Prtocol** |
| **IPT** | **Integrated Product Team** |
| **LAN** | **Local Area Network** |
| **MACD** | **Moves, Adds, Changes, and Deletions** |
| **MDM** | **Mobile Device Management** |
| **OCO** | **Operational Contracting Officer** |
| **ODC** | **Other Direct Costs** |
| **PM** | **Project Manager** |
| **PMP** | **Project Management Plan** |
| **POC** | **Point(s) of Contact** |
| **RFQ** | **Request for Quotation** |
| **RFP** | **Request for Proposal** |
| **SLA** | **Service Level Agreement** |
| **SME** | **Subject Matter Expert** |
| **SOW** | **Statement of Work** |
| **SSP** | **Source Selection Plan** |
| **TEMS** | **Telecom Expense Management System** |
| **TEP** | **Technical Evaluation Plan** |
| **TSP** | **Telecommunications Service Provider** |
|  |  |

# Attachments

Double-clicking the attachments may produce the error “Word cannot start the converter mswrd632.wpc,” which is a known Microsoft issue (<http://support.microsoft.com/kb/973904>). Microsoft provides the following workaround: right-click on the embedded attachment (instead of double-clicking) and then select “Document Object” and then use “Open” (instead of “Convert”) from the pop-up menu.

## Attachment A – Project Management Plan



## Attachment B – Support Locations



## Attachment C – Pricing Requirements



## Attachment D – Pricing Template



## Attachment E – Past Performance Worksheet



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## Attachment F – Task Order Deliverables Performance Matrix



## Attachment G –Implementation Checklist



## Attachment H – Service Level Agreements (SLAs)

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