



Building Maintenance & Operations (BMO) Government-Wide, Strategic Sourcing Solution

The BMO and BMO SB ORDERING GUIDE

This Ordering Guide sets forth the procedures for issuing task orders against the BMO/BMO SB contracts to fill agencies' mission requirements for "Operations and Maintenance" and "Facilities Support" services.

Federal Acquisition Service (FAS), BMO Strategic Sourcing Solution

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Introduction

Thank you for choosing the Building Maintenance and Operations (BMO) Strategic Sourcing contracts to fulfill your Operations and Maintenance, and Facilities Support service needs!

BMO Government-Wide Contracts consist of two different groups of awardees: BMO (unrestricted solicitation) and BMO SB (small business set-aside solicitation). The BMO Unrestricted and the BMO SB vehicles provide a common architecture and platform across the Federal Government for the acquisition of Operations and Maintenance, and Facilities Support service requirements. These requirements often necessitate the integration of several building maintenance and operations services. **See Appendix A for Service Category Definitions.**

Service Categories Included in BMO and BMO SB	
HVAC Maintenance	Other Facilities Management Related Services
Plumbing and Pipefitting	Commissioning Services
Elevator Maintenance	Elevator Inspection Services
Electrical Maintenance	Janitorial
Fire Alarm System Maintenance and Repair	Landscaping/Grounds Maintenance
Fire Suppression (Water-Based) System Preventative Maintenance and Repair	Architectural and Framework Building Maintenance Services
Roofing Services	Pest Control
Building Management Services	Waste Management and Recycling Services

BMO/BMO SB is a family of multiple-award (MA), Indefinite Delivery, Indefinite Quantity (IDIQ), ten-year (five-year base and one, five-year option) contracts for Government-wide service based requirements which are available for use by all Federal agencies and other entities as listed in the GSA Order, OGP 4800.2I, Eligibility to use GSA Sources of Supply and Services, as amended. The BMO/BMO SB contracts were awarded under Full and Open competition. The maximum dollar ceiling for each individual task order placed under BMO/BMO SB for Phase I/Zone 1 is \$15B and for Phase II/Zones 2-6 is \$27B.

Awarded contracts provide coverage for specific geographic areas or zones of Phase I/Zone 1 and Phase II/Zones 2-6, which includes:

- Zone 1 - Delaware, Maryland, New Jersey, New York, Pennsylvania, Virginia, West Virginia and the District of Columbia
- Zone 2 - Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont

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- Zone 3 - Florida, Georgia, North Carolina, South Carolina
- Zone 4 - Oklahoma, Texas
- Zone 5 - California, Nevada
- Zone 6 - Kansas, Illinois, Iowa, Missouri, Nebraska

When awarded all contractors certified that they were able to provide coverage for the entirety of the zone(s) they are awarded.

Who is this Guide Written for?

This guide is written for warranted Federal Ordering Contracting Officers (OCO's) considering or intending to use the BMO/BMO SB contract vehicles. It explains how BMO/BMO SB is used to satisfy an Operations and Maintenance and/or Facilities Support service based requirement. The Guide addresses contracting issues and concepts unique to BMO/BMO SB. As always, OCO's shall follow FAR regulations and their agency specific policies as well as adhere to the terms of the contract. This Guide does not address general contracting issues or concepts unless necessary for complete understanding.

This Ordering Guide will help ordering offices to effectively use the BMO/BMO SB contracts to deliver solutions to meet mission needs. Information to assist customer agencies in using the BMO/BMO SB contracts is also available online at www.gsa.gov/bmo. The BMO website includes the following resources:

- The Ordering Guide
- Document Library
- Pre-Award Scope Review process for the OCO
- Frequently Asked Questions
- List of Awarded Contractors, their MA-IDIQ contract numbers and contact information
- Training
- Delegation of Procurement Authority (DPA) process for the OCO
- A link to the Category Hallway

Scope of the BMO and BMO SB Contracts

The scope of BMO/BMO SB spans many areas of expertise and includes the primary services required to provide a total solution to maintain and operate federal buildings and assets. The BMO/BMO SB contracts are setup to allow agencies the flexibility of purchasing services individually or in combination for a total solution. See www.gsa.gov/bmo for a listing of the awarded vendors and the service categories for each vendor.

Services Not in Scope of BMO and BMO SB

BMO/BMO SB task orders shall not include any of the following:

- Telecommunication systems
- Furnishings (not installed as fixtures)
- Equipment owned by servicing public utilities
- Computers and IT equipment (not as a part of an O&M solution)
- Personally owned appliances (e.g. heaters, coffee makers, microwaves, etc.)
- Architect & Engineering (A&E) Services
- Asbestos removal and abatement
- Inherently Governmental Functions as defined in FAR Subpart 2.101

Who Can Use BMO and BMO SB?

BMO/BMO SB contracts may be used by all Federal agencies and other entities as listed in the GSA Order, OGP 4800.2I, Eligibility to use GSA Sources of Supply and Services, as amended.

How Do I Begin Using BMO and BMO SB?

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

- Be a warranted Federal Contracting Officer (CO) in good standing
- Formally apply for and receive a DPA
 - Attend a specialized BMO/BMO SB 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 www.gsa.gov/bmo. 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 BMO/BMO SB 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 BMO and BMO SB contracts on behalf of your agency. Agency CO’s that do not have a DPA may not use another CO’s DPA 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 BMO/BMO SB contracts except as authorized by a bona-fide written order signed by an OCO having a written, GSA issued, BMO/BMO SB DPA. **A Sample DPA is provided in Appendix B for your review.** The DPA letter lists the responsibilities you must meet as an authorized user of BMO and BMO SB contracts in order to keep your DPA active.

DPA training may be completed via conference call, meeting space, or in person depending on circumstances. DPA’s may be revoked at the discretion of the BMO/BMO SB Contracting Officer.

Reassigning Task Orders for Administration

BMO/BMO SB task orders can only be re-assigned for administration to other agency CO’s who have been issued a BMO/BMO SB DPA. Agencies should plan for workplace turnover and development of qualified OCO’s 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 BMO/BMO SB contracts. Among the responsibilities GSA will meet are:

- Monitoring and evaluation of performance against the IDIQ contract requirements by each contract holder
- Have exclusive, non-delegable rights to modify IDIQ contract terms and conditions

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- Provide advice and guidance to ordering/requiring activities, OCO's and contractors regarding all BMO/BMO SB procurement-related matters
- Conduct meetings with BMO/BMO SB prime contractors as scheduled and/or necessary
- Maintain transactional data

Requiring Activity Responsibilities

- Define task order requirements
- Prepare SOW/PWS/SOO for task order RFP's
- Certify funds availability and allocate funds for requirements
- Review invoices for accuracy and submit payment in a timely manner
- Assist OCO with quote/proposal evaluation
- Assist OCO with performance monitoring and appraisal

OCO Responsibilities

The OCO shall comply with the BMO/BMO SB IDIQ contract terms and conditions, the BMO/BMO SB Ordering Guide, the Federal Acquisition Regulation (FAR) and/or authorized agency supplement or exception, applicable agency-specific statutes and policies, and the additional responsibilities defined in the BMO/BMO SB DPA.

The OCO is encouraged to contact the BMO/BMO SB CO, BMO/BMO SB PM or designated personnel for any BMO/BMO SB related assistance including but not limited to, the following:

- Training on the BMO/BMO SB program and ordering procedures
- Task order scope compliance with BMO/BMO SB
- Task order solicitation development
- Assistance on disputes, claims, or protests under BMO/BMO SB
- Contractor performance under BMO/BMO SB

The OCO duties include, but are not limited to:

- Requesting and receiving a Delegation of Procurement Authority (DPA) prior to soliciting and awarding a task order under BMO/BMO SB
- Complying with the terms and conditions of BMO/BMO SB
- Complying with the ordering procedures outlined in FAR Subpart 16.505, and other agency specific regulatory supplements
- Issuing task order solicitations under the proper BMO/BMO SB MA-IDIQ Contract Number and NAICS Code
- Complying with Inherently Government Functions policy as outlined in FAR 7.503
- Allowing a reasonable time for fair opportunity proposal submission
- Resolving any performance issues, disputes, claims or protests at the task order level
- Responding to all Freedom of Information Act (FOIA) requests at the task order level
- Entering task order performance evaluation in the Contractor Performance Assessment Reporting System (CPARS) or alternative past performance assessment reporting system mandated by customer agencies that do not require the use of CPARS
- Closing out task orders in a timely manner

Ordering Procedures for BMO/BMO SB Task Orders

All task orders under BMO/BMO SB must:

- Be solicited and awarded by an OCO with a Delegation of Procurement Authority (DPA)

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- Be within the scope of BMO/BMO SB and all other terms and conditions of the BMO/BMO SB contracts
- Identify the BMO/BMO SB Labor Categories and Services Occupational Codes (**See Appendix C**)
- Be solicited and awarded under the proper BMO/BMO SB MA-IDIQ Contract Number and NAICS Code
- Identify the proper Product Service Code (**See Appendix D**)
- Comply with the ordering procedures at FAR 16.505, including Fair Opportunity procedures at FAR 16.505(b)(1), and other applicable agency specific regulatory supplements

The OCO must tailor all optional clauses, provisions, and other applicable terms and conditions specific to the task order solicitation and award.

What are some of the benefits of using BMO/BMO SB?

BMO/BMO SB is flexible, easy to use, and allows agencies to:

- Utilize various contract types at the task order level: Fixed-Price (all types), Time-and-Materials, and Labor-Hour, including hybrid mixtures of contract types
- Utilize incentives, performance based measures, multi-year and/or option periods at the task order level
- Easily compare prices across vendors due to standardized Labor Categories based on OMB's Standard Occupational Classifications
- Establish CLIN structures tailored to individual task order requirements
- Help in achieving agency small business and socioeconomic goals
- Acknowledge that for other than small businesses, small business subcontracting plans have already been approved and incorporated into the IDIQ
- Include 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
- Acknowledge that responsibility determinations have already been completed for all contract holders in accordance with FAR Part 9, at the parent contract level
- Obtain acquisition support through BMO/BMO SB website resources and the National Customer Service Center (NCSC) customer service hotline
- Share lessons-learned and best practices

Options for Accessing the BMO/BMO SB Contracts

Orders issued against BMO/BMO SB vehicles are considered Interagency Acquisitions (except orders issued by GSA for GSA as the requiring agency). Agencies with designated OCO's may issue orders directly against BMO/BMO SB or enter into a Memorandum of Agreement (MOA) with a Servicing Agency to issue the task order. MOA's 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 BMO/BMO SB orders.

THE ORDERING PROCESS

Step 1: Acquisition Planning

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

Generally, OCO's shall follow the ordering procedures in FAR Subpart 16.505. Unless an authorized exception applies, fair opportunity procedures prescribed for the dollar value 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 should be prepared as part of the planning process. Any required notices and postings must also be issued.

Which BMO Vehicle to Use, BMO or BMO SB?

Which BMO 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. GSA encourages the practice of considering the small business awardees to fill your requirement first. Case law suggests (see MORI Associates- US Court of Federal Claims No. 10-298C, December 21, 2011, 102 Fed. Cl. 503) 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 BMO family of contracts is structured in accordance with this. When a Small Business set-aside is to be accomplished, use BMO SB as these contracts are awarded exclusively to small businesses. When a Small Business set-aside will not be accomplished, the use of BMO Unrestricted is appropriate.

Set-Asides for Socioeconomic Competition under BMO SB

BMO Small Business (SB) is a total small business set-aside contract. All orders issued under BMO SB are automatically considered set-aside for small business as only small businesses were awarded a BMO SB contract.

Except as otherwise stated in the 8(a) instructions section below, or unless the order solicitation explicitly requires size/socioeconomic re-certification at the order level, the ordering contracting officer shall rely on the size/socioeconomic status shown in the BMO SB Contractor list available here: www.gsa.gov/bmo. All BMO SB Contractors' size/socioeconomic status remains unchanged in each of their BMO SB contracts unless modified by a FAR 52.219-28 re-representation.

The ordering contracting officer has discretionary authority under FAR 19.502-4(c) and FAR 16.505(b)(2)(F) to further set-aside orders for any of the small business concerns identified in FAR [19.000\(a\)\(3\)](#) when it is anticipated that quotes will be obtained from at least two eligible small business concerns for which the order is to be set-aside..

Per FAR 19.000(a)(3), small business concerns eligible for competitive set-aside are identified as follows:

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1. 8(a) small business participants (See “Special Instructions Regarding Orders Set-Aside for 8(a) Competition” in the next section)
2. HUBZone small business concerns
3. Service-disabled veteran-owned small business (SDVOSB) concerns
4. ** Economically disadvantaged women-owned small business (EDWOSB) concerns eligible under the Women- owned Small Business Program and Repository
5. ** Women-owned small business (WOSB) concerns eligible under the WOSB Program and Repository

** EDWOSB and WOSB competitive set-asides are subject to specific North American Industry Classification System (NAICS) industry groups in which EDWOSBs and WOSBs are underrepresented. The eligible NAICS Codes for EDWOSB and WOSB set-asides are subject to change by the SBA. See sba.gov/wosb for the updated list of NAICS Codes to determine BMO SB Pool NAICS availability for EDWOSB or WOSB set-asides.

When setting aside orders for socio-economic concerns, the specific small business program eligibility requirements identified in FAR Part 19 apply. For 8(a) task orders, Ordering Contracting Officers (OCO’s) can verify that a vendor is still active within the 8(a) program by referring to their 8(a) Program Exit Date on the BMO matrices found here: www.gsa.gov/bmo.

Small businesses retain their small business size status and socio-economic status (with the exception of 8(a) contractors that have exited the 8(a) program) for the 5-year base period under BMO SB. If a contractor exits the 8(a) program during the course of a task order period of performance, they maintain their 8(a) status for that task order as long as it was awarded while the vendor was still active in the program. Accordingly, OCO’s should not use SAM to determine the size status applicable to a BMO SB vendor. For BMO SB prime contractors, OCO’s should use the spreadsheet found at www.gsa.gov/bmo in order to determine the socioeconomic status of companies on BMO SB.

Special Instructions Regarding Orders Set-Aside for 8(a) Competition

BMO SB and 8(a)					
I WANT TO	Allowable	Credit with 8(a) program	Credit for Small Disadvantaged	SBA Offer and Acceptance Required?	Citations
Set aside an order for 8(a) Business Development Program Participants who hold a BMO contract	Yes	Yes	Yes	Yes	FAR 19.804-6(a) FAR 16.505(b)(2)(F)
Direct Award (Sole Source) to 8(a)	No	n/a	n/a	n/a	13 CFR 124.503(h)(2)(ii)
Award an order to a contractor designated as an 8(a) SDB under the BMO contract, without setting aside the order	Yes	No	Yes	No	

The BMO SB contract was not set aside for participants in SBA's 8(a) Business Development (BD) Program. At their discretion, Contracting Officers may set aside orders for 8(a) program participants, per FAR 19.502-4(c) and FAR 16.505(b)(2)(F). In accordance with FAR 19.804-6(a), an individual order must be offered and accepted by SBA into the 8(a) program at the task order level, if the multiple award contract was not set aside for exclusive competition among 8(a) contractors. Ordering COs should follow the offer/acceptance procedures as provided in their agency's SBA Partnership Agreement, and detailed by SBA here: <https://www.sba.gov/contracting/contracting-officials/sba-agencies-partnership-agreements>. Orders issued to 8(a) Business Development participants will count toward the ordering agency's Small Disadvantaged Business (SDB) goals.

Suggested Solicitation Language

Below is suggested solicitation language when setting aside orders for 8(a) competition under BMO SB:

This task order under BMO SB is 100 % set-aside for 8(a) SBA Business Development Program Participants. Only BMO SB contractors designated as an 8(a) Small Disadvantaged Business in their BMO SB contract are eligible to compete.

Competition Considerations

Keep in mind that setting aside orders to SBA 8(a) Business Development Program (BD) participants may reduce competition, as it requires verification from SBA prior to the award of an order, that a concern is an eligible 8(a) participant in accordance with 13 CFR 124.503 (h)(2)(iv). As a result, BMO SB 8(a) contractors whose 8(a) program term has expired will be ineligible for award of the order.

Note: For orders awarded in accordance with FAR 19.8, and not specifically set aside for 8(a) BD participants, ordering agencies will receive credit toward their SDB goals for awards made to contractors designated as 8(a) under the BMO contract, regardless of their current status in the 8(a) program. According to FAR 19.804-6 (c), "agencies may continue to take credit toward their prime contracting small disadvantaged business or small business goals for orders awarded to 8(a) participants, even after the contractor's 8(a) program term expires, the contractor otherwise exits the 8(a) program, or the contractor becomes other than small for the NAICS code assigned under the 8(a) contract." Note however, that if an 8(a) contractor re-represents as other than small in accordance with FAR 19.301-2, the ordering agency may not credit subsequent orders to that contractor towards the agency's small disadvantaged business or small business goals.

In the event of any regulatory changes during the duration of BMO SB, the BMO SB CO reserves the right to unilaterally modify BMO SB to reflect the change at no additional cost to the Government.

How to Set-Aside for 8(a) and Receive 8(a) Credit

STEP 1: Determine your requirements:

- A. Determine the anticipated total value of the task order, including options.
 - If your requirement **exceeds the \$4 million** competitive threshold, then determine if a competitive 8(a) set-aside can be accomplished [IAW FAR Subpart 16.505(b)(2)(i)(F)]. *No justification is required by the FAR when using fair opportunity Exception (F).*
- B. Determine the service category(ies) needed for task order performance.
 - **Competitive 8(a) Set-Aside:** There must be 2 or more active 8(a) businesses awarded ALL of the service categories required for your task order.

STEP 2: Research your procurement's history:

If your requirement has been procured previously, or is not a new requirement, it is important to know the procurement history. Requirements that have previously been awarded to an 8(a) company are required to stay within the 8(a) program, unless released by the SBA. However, that does not mean they are required to be awarded to the incumbent 8(a) company.

There are circumstances in which a requirement can be released from the 8(a) program. SBA regulations at 13 CFR 124.504(d), *Release for non-8(a) competition*, requires the procuring activity to submit a written request to, and receive concurrence from, the Associate Administrator for the Office of Business Development (AA/BD) to be released from the 8(a) program. In addition to other factors that SBA will consider in releasing a requirement, SBA will not concur unless the procuring activity agrees to procure the requirement as a small business, HUBZone, SDVOSB, or WOSB set-aside.

Follow-on or re-compete contracts:

- If there is 8(a) availability under BMO SB for the requirement, the OCO can conduct an 8(a) procurement under BMO SB and a release is not required from the 8(a) program.
- If the OCO cannot conduct an 8(a) procurement under BMO SB but can set-aside the requirement for a socio-economic category on the BMO SB, the OCO must obtain concurrence from the AA/BD to be released from the 8(a) program.

STEP 3: Evaluation, Offering and Acceptance:

Once the decision has been made to do an 8(a) procurement under BMO SB, “evaluation, offering, and acceptance” (FAR Subpart 19.804) must be completed at the 8(a) BMO SB task order level in order to receive 8(a) credit. Follow the offer/acceptance procedures for your agency detailed by SBA here: <https://www.sba.gov/contracting/contracting-officials/sba-agencies-partnership-agreements>. This process is not unique to BMO but is required for any procurement under the 8(a) program. This is only required for procurements that are specifically for the 8(a) program. This is not a required step for an 8(a) vendor to receive an award under a small business set-aside of any other socioeconomic type. The OCO should consider this when planning the acquisition timeline. FAR 19.804 Subpart prescribes the steps for this process.

Task Order Contract Types

Subject to FAR and agency level required consideration criteria, limitations, and/or prohibitions, you may use any appropriate contract type(s) to include:

- Fixed-Price, all types
- Time-and-materials
- Labor-Hour
- Hybrid of any of these types

If you elect to use a hybrid of contract types, please use separate line item number for the work under each contract type and annotate each line item with the associated contract type. This is important for clause implementation.

Assign a NAICS Code to Each Order

All contracts under BMO/BMO SB were awarded using NAICS 561210 and the associated small business size standard of \$38.5M. The OCO may use the IDIQ Contract NAICS (561210) and associated size determination (\$38.5M) at the task order level or select a more specific NAICS depending on the

requirement. The chart below identifies the 24 NAICS codes and associated size standards awarded under the BMO/BMO SB contracts.

BMO/BMO SB IDIQ Contracts, Primary NAICS 561210, Size Standard \$38.5 M			
Service Category	NAICS Code	NAICS Title	Size Standard
Operations and Maintenance	561210	Facilities Support Services	\$38.5 M
HVAC Maintenance	238220	Plumbing, Heating, and Air-Conditioning Contractors	\$15 M
Plumbing and Pipefitting	238220	Plumbing, Heating, and Air-Conditioning Contractors	\$15 M
Elevator Maintenance	238290	Other Building Equipment Contractors	\$15 M
Electrical Maintenance	238210	Electrical Contractors and Other Wiring Installation Contractors	\$15 M
Fire Alarm System Maintenance and Repair	561621	Security Systems Services (except Locksmiths)	\$20.5 M
Fire Suppression (Water Based) System Preventative Maintenance and Repair	238220	Plumbing, Heating, and Air-Conditioning Contractors	\$15 M
Roofing Services	238160	Roofing Contractors	\$15 M
Building Management Services	531312	Nonresidential Property Managers	\$7.5 M
Architectural and Framework Building Maintenance Services	236220	Commercial and Institutional Building Construction	\$36.5 M
Commissioning Services	541330	Engineering Services	\$15 M
Elevator Inspection Services	541350	Building Inspection Services	\$ 7.5 M
Janitorial	561720	Janitorial Services	\$18 M
Landscaping/Grounds Maintenance	561730	Landscaping Services	\$7.5 M
Pest Control	561710	Exterminating and Pest Control Services	\$11 M
Waste Management and Recycling Services	562111	Solid Waste Collection	\$38.5 M

Task Order Funding and Funding Limitations

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

Allowance for Unexpected Repairs

How could an Ordering Contracting Officer (OCO) allow for unexpected repairs under a BMO Task Order (TO)?

Two potential approaches include:

1. Including a Not to Exceed (NTE) Time and Materials (T&M) Other Direct Costs (ODC's) Contract Line Item Number (CLIN)
2. Issuing a Logical Follow-On Task Order in accordance with FAR 16.505(b)(2)(i)(C)

See Appendix I and the Acquisition Gateway for some samples of possible approaches.

The OCO shall follow FAR and agency specific guidance on determine their approach to address unexpected repairs.

Security Clearance Considerations for Task Orders

The task order solicitation should clearly express all requirements for security clearances and facility clearance levels. The OCO will add their security requirements (Government Furnished Equipment, facility and personnel), clauses, provisions, and other applicable terms and conditions specific to each task order solicitation and award.

Task Order Duration

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

Task order option periods may be exercised after the BMO/BMO 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 BMO/BMO SB contract term.

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

Minimum and Maximum Order Limitations

The minimum order limitation on this contract is \$2,500. The Government is not obligated to purchase and the contractor is not required to furnish services valued at less than \$2,500. The maximum order limitation is \$15B for Phase I and \$27B for Phase II.

Task Order Size Representation

The BMO/BMO SB program office maintains a list on the BMO website that provides the business size classification for each contractor as it pertains to their BMO/BMO SB contract. These lists are accessible by links found on the BMO Web Page (www.gsa.gov/bmo).

Labor Categories for Task Order Work

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

The list of BMO/BMO SB Labor Categories and Definitions is found in Appendix C. Each Labor Category identifies the specific Standard Occupational Classification (SOC) occupations mapped to that Labor Category.

Other Direct Costs (ODC) Support

Other ODC support, integral and necessary as part of a total integrated solution within the scope of BMO/BMO SB for which there is not a labor category specified in BMO/BMO SB or includes other direct costs such as travel, materials, equipment, subcontractors, etc., to obtain a total service solution, are allowable costs and may be included within an individual task order under BMO/BMO SB. The Contractor should propose and identify each other direct costs separately and the OCO should identify each ODC support service or other direct costs by a separate CLIN on the task order award. Agencies should follow agency specific policies as well as FAR Subpart 16.505 and FAR Part 6 regarding competition requirements as it relates to ODCs.

Labor on T&M and L-H Task Orders

The Contractor may provide separate and/or blended loaded hourly labor rates for prime Contractor labor, each Subcontractor, and/or each Division, Subsidiary, or Affiliate in accordance with the provisions set forth in FAR 52.216-29, FAR 52.216-30, or FAR 52.216-31. The OCO must identify which provision is applicable in the task order solicitation and/or Contract Line Item Number (CLIN). T&M and L-H task orders require the BMO/BMO SB standardized labor categories and their associated rates to be identified in the task order award document. Other Direct Costs (ODC's) subcontract labor shall be proposed and awarded as Materials in accordance with FAR 52.232-7, Payments under Time-and-Materials and Labor-Hour Contracts.

When preparing solicitations for T&M and/or L-H task order line items, the OCO must include the following provision in the task order solicitation.

FAR 52.216-31 Time-and-Materials/Labor-Hour Proposal Requirements--Commercial Item Acquisition

For organizations within DoD, when selecting FAR 52.216-29, the OCO must also select the appropriate DFAR's clause (such as 252.216-7002, Alternate A). OCO's shall always follow their agency's internal guidelines including required justifications and/or approvals for use of this contract type.

In accordance with BMO/BMO SB Section B.2.4, the pricing associated with the BMO/BMO SB Labor Categories are fully burdened, ceiling rates for T&M or L-H task orders since the base rate does not change with the delivery location for exempt (professional) labor categories. Contractors may offer pricing that is lower than the ceiling rates at the task order level.

Service Category Labor Standards (SCLS)

The BMO/BMO SB labor categories are subject to the Service Category Labor Standards (SCLS) (formerly known as Service Contract Act/SCA) in accordance with FAR Subpart 22.10 and other applicable agency specific regulatory supplements. The OCO must identify such work in the task order solicitation and make a determination as to whether the SCLS wage determinations are to be applied or not. BMO/BMO SB includes clauses applicable to any SCLS work that is within the scope of BMO/BMO SB.

Wage Rate Requirements

In some instances, including those that involve ODC's, where construction, alteration and repair are within the scope of BMO/BMO SB requirements may be subject to the Wage Rate Requirements (formerly known as Davis Bacon Act/DBA) in accordance with FAR Subpart 22.4 and other applicable agency specific regulatory supplements. The OCO must identify such work in the task order solicitation and make a determination as to whether the Wage Rate Requirement determinations are to be applied or not. 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.

BMO/BMO SB does NOT include clauses applicable to any construction, alteration, or repair work that is part of a total solution within the scope of BMO/BMO SB. Subsequently, the OCO must incorporate the appropriate clauses and provisions in each task order solicitation and subsequent award when the Wage Rate Requirements, Bond Information and Miller Act applies.

The OCO shall identify construction under a separate line item on their task order. The OCO is encouraged to price these services on a firm-fixed-price basis per FAR 36.207(a). The OCO must also include all applicable construction clauses and wage decisions in the task order.

Rights Reserved by the Procuring Contracting Officer

The BMO/BMO SB CO is the sole and exclusive GSA Government official with actual authority to administer and/or modify the BMO/BMO SB contract terms and conditions, monitor the Contractor's performance in the areas of contract compliance and contract administration, and assist the Contractor and OCO on matters related to the BMO/BMO SB terms and conditions. The BMO/BMO SB CO may delegate routine administrative functions to an authorized BMO/BMO SB representative.

The OCO for each task order may designate a Contracting Officer Representative (COR) to perform specific administrative or technical functions. The specific rights and responsibilities of the COR for each task order shall be described in writing, which upon request, shall be provided to the Contractor. A COR has no actual, apparent, or implied authority to bind the Government. OCOs may not transfer delegation of procurement authority to a non-delegated Contracting Officer.

Contract Access Fee (CAF)

The BMO/BMO SB CAF shall be included in each task order under a separate and distinct line item for the base year and each option period (if applicable). In response to all task order solicitations, regardless of contract type, the Contractor shall always propose a CAF rate of 2% of the total estimated task order price, including options.

BMO and BMO SB Ordering Guide

The CAF is to be included on each invoice as 2% of the total invoiced product and/or services charges. The CAF will be paid by the customer agency to the Contractor. The Contractor will report (monthly) and submit (quarterly) that collected CAF to GSA.

No later than January 15th of each calendar year, the BMO Program Office will notify the Contractor if there are any changes to the CAF rate.

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 BMO/BMO SB task orders; GSA is specifically authorized by law 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 - FAR 7.503(e) stipulates that the requirements official shall provide to the OCO, concurrent with the statement of work, a written determination that none of the functions to be performed are Inherently Governmental.
- Personal Services - FAR 37.104 characterizes personal services contracts as an employee-employer relationship between the Government and contractor's personnel. The Government is normally required to obtain its employees by direct hire under competitive appointment or other procedures required by civil service laws. Obtaining personal services by contract, rather by direct hire, circumvents those laws unless Congress has specifically authorized acquisition of the services by contract. Personal services are NOT authorized on BMO/BMO SB.
- Performance-based contracting methods are preferred
- Identify and evaluate potential organizational conflicts of interest (COI).
- Preparation of a Quality Assurance Surveillance Plan and identification of performance metrics, as applicable.
- Evaluation Factors
- Source Selection Methodology

BMO Tools and Planning Resources

As an authorized user of BMO/BMO SB, agencies have access to a number of tools and resources found in the BMO Web library which can be accessed through the link on the BMO home page at www.gsa.gov/bmo. **Appendix E, BMO Tools & Resources**, describes some of the resources available on the BMO/BMO SB website. These resources are constantly being edited, changed and updated to better assist agencies with their requirements.

Cancellation of Requirements

Cancellation of a task order solicitation is at the discretion of the OCO. However, any cancellation of task order solicitation 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 BMO/BMO SB Service Group contractors.

Pre-solicitation Scope Reviews

Task orders under BMO/BMO SB must be within the scope of the IDIQ contract as discussed in the section on "Scope of the BMO/BMO SB Contracts". GSA offers, and strongly encourages OCO's to take

advantage of, task order pre-solicitation scope reviews. This review will ensure your requirement is being placed under the appropriate contract vehicle. Reviews may be requested through the BMO website. BMO will complete or contact the customer for more information within 48 hours of the scope review request.

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) may be available to support your agency in task order solicitation, including 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 BMO Web library, including, but not limited to:

- The Ordering Guide
- Document Library
- Pre-Award Scope Review process for the OCO
- Frequently Asked Questions
- List of Awarded Contractors, their MA-IDIQ contract numbers and contact information
- Training
- Delegation of Procurement Authority (DPA) process for the OCO
- A link to the Category Hallway

The BMO/BMO SB Estimating Tool

GSA anticipates providing an automated pricing tool to assist in developing task order IGE's. It is under development but should cover all occupations in the OMB's Standard Occupational Classification (SOC) system that is mapped to BMO Labor Categories' pricing. The estimating tool once developed will be available through the GSA BMO website found at www.gsa.gov/bmo.

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. In accordance with FAR 16.505(b)(1)(ii) Fair Opportunity, "the contracting officer should keep submission requirements to a minimum." FAR 16.505(b)(1) states that the contracting officer must: (A) Develop placement procedures that will provide each awardee a fair opportunity to be considered for each order and reflect the requirement and other aspects of the contracting environment; (B) Not use any method (such as allocation or designation of any preferred awardee) that would not result in a fair consideration being given to all awardees prior to placing each order; (C) Tailor the procedures to each acquisition; (D) Include the procedures in the solicitation and the contract; and (E) Consider price or cost under each order as one of the factors in the selection decision. FAR 16.505(b)(1) also provides additional Fair Opportunity requirements for different dollar thresholds. Please be sure to reference the FAR during solicitation development.

In addition to the typical content of your solicitation, certain information particular to using BMO/BMO 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 F for consideration. Additional samples may be found on the Acquisition Gateway.

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

- Applicable NAICS, PSC Code, and Service Category(ies) covered
- SOW/PWS/SOO
- Contract Line Item Number Information
- 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

All Applicable and Required provisions/clauses set forth in FAR 52.301 automatically flow down to all BMO/BMO SB task orders, based on their specific contract type, statement of work, and dollar value. All Applicable and Required provisions/clauses that automatically flow down to task orders shall remain unchanged, throughout the entire period of performance under BMO/BMO SB. If a future Applicable or Required provision/clause are to the benefit of future task orders solicited under BMO/BMO SB, the future Applicable or Required provision/clause may be updated by FAC No. and effective date under a bilateral modification to BMO/BMO SB.

In accordance with FAR 8.005, the OCO shall, “Insert the clause at [52.208-9](#), Contractor Use of Mandatory Sources of Supply and Services, in solicitations and contracts that require a contractor to provide supplies or services for Government use that are on the Procurement List maintained by the Committee for Purchase From People Who Are Blind or Severely Disabled.” For certain task orders where supplies are anticipated to be supplied for use by the Government, the Procurement List maintained by the Committee for Purchase From People Who Are Blind or Severely Disabled is a mandatory source of supply and should be checked to see if these supplies are available from this source.

The OCO may identify any Optional, and/or Agency-Specific provisions/clauses for each individual task order solicitation and subsequent award. 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.

Emergency Services

Emergency Services and response timeframes may be designated at the task order level. The OCO shall specify all requirements for Emergency Services at the task order level.

Evaluation Factors

In accordance with FAR 16.505(b)(1)(ii), the policies in FAR Subpart 15.3 (Source Selection) DO NOT apply to the MA IDIQ ordering process. In addition, “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 the Contractor, respectively.

Step 3: Issue the Solicitation

Methods of Issuing the Task Order Solicitation

A BMO/BMO SB task order solicitation may be issued by:

- Posting the notice on GSA’s e-Buy at www.ebuy.gsa.gov
- Through the ordering agency’s preferred method

In accordance with FAR 16.505(b)(1)(i) Fair Opportunity, “The contracting officer must provide each awardee a fair opportunity to be considered for each order exceeding \$3,500 issued under multiple delivery-order contracts or multiple task-order contracts, except as provided for in paragraph (b)(2).” The use of any one of the preceding mediums to broadcast an RFP notice to all contract holders providing the service categories needed satisfies the fair opportunity notification requirement.

Contractors in Dormant Status

The BMO/BMO SB terms allow GSA to place contractors in a dormant status while they develop corrective measures for the BMO/BMO SB CO to review and approve. During dormancy, contractors may continue to work on existing task orders 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 BMO program office prior to solicitation to determine if the contractor is in dormant status. Upon receipt of solicitation for competitive procurements, the BMO/BMO SB CO will notify the OCO if any contractors in the applicable service group are under Dormant Status.

Step 4: Evaluate Proposals

OCO’s 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 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 generally no additional information is necessary to determine price reasonableness. However, OCO’s are encouraged to negotiate additional discounts off of the awarded rates.

NOTE: All costs associated with the preparation, presentation, and discussion of the Contractor’s proposal in response to a task order solicitation will be at the Contractor’s sole and exclusive expense. Vendors shall not seek reimbursement for proposal preparation costs at the task order level.

Tier Pricing Discounts

Policy established by the Office and Management and Budget (OMB M-13-02) requires that, at a minimum, tiered pricing is a characteristic that must be included in a government-wide strategic sourcing vehicle. The BMO/BMO SB contracts required contractors to offer discounts for the following tiered pricing structure which will have associated volume discounts at the task order level.

These discounts are NOT for cumulative order values, they are only offered for the value of each individual task order. For a single task order, each offeror will offer percentage discounts based on the following tiered structure:

For BMO, the tiers are as follows:

- Tier 1 - \$1M - \$4,999,999
- Tier 2 - \$5M - \$9,999,999
- Tier 3 - \$10M+

For BMO SB, the tiers are as follows:

- Tier 1 - \$500K - \$999,999
- Tier 2 - \$1M - \$1,999,999
- Tier 3 - \$12M+

The awarded discounts to the tiers will be based on a single task order total value. The contractor will be responsible for providing the awarded discounts when the total task order value falls within the ranges of the tiered structure mentioned above. If a modification to a task order increases the value into a Tier range, the discount would apply from the modification effective date forward and would not be retroactive.

Identification of Labor Categories

The Contractor shall identify both Prime and Subcontractor labor using the BMO/BMO SB Labor Categories and corresponding SOC Number that applies found in **Appendix C, Standardized Labor Categories and Definitions**.

Additionally, the following qualification chart applies:

All Labor Categories (excluding Project Management and Engineering)			
Levels	Minimum years experience	Education/Training	Definition
I	0	High School or Equivalent	A Level I category is required to have at least an entry level of minimum experience and is required to have a least a minimum education of high school or equivalent. A Level I labor category is responsible for assisting higher levels (III, IV, and V).

All Labor Categories (excluding Project Management and Engineering)			
Levels	Minimum years experience	Education/Training	Definition
II	2	High School or Equivalent with technical experience and appropriate licensing	A Level II category is required to have at least 2 years of minimum experience and is required to have at least a minimum education of high school or equivalent as well as technical experience and appropriate licensing. A Level II labor category (also referred to as Journeyman) typically performs required functions independently requiring minimal supervision and oversight.
III	4	High School/College (preferred)/ appropriate certifications and licenses	A Level III category is required to have a least 4 years of minimum experience and is required to have at least a minimum education of high school or equivalent as well as technical experience and appropriate licensing. A Level III labor category performs required functions independently and has the ability to make required decisions.
IV	6	High School/College (preferred)/ appropriate certifications and licenses	A Level IV category is required to have at least 6 years of minimum experience and is required to have a least a minimum education of high school or equivalent (college preferred) as well as technical experience and appropriate certifications and licenses. A Level IV is a senior expert, works independently, typically oversees projects and usually has some supervisory experience.

Project Manager and Engineering Labor Categories			
Levels	Minimum years experience	Education/Training	Definition
I	3	High School/Associate Degree and technical education as well as applicable licenses	A Level I category required to have a least 3 years of level of minimum experience and is required to have at least a minimum education of high school or Associate's Degree as well as applicable licenses. A Level I labor category is responsible for assisting higher levels (III, IV, and V).
II	5	College Degree (Degreed Engineer,	A Level II category required to have at least 5 years of minimum experience and is required to have a

Project Manager and Engineering Labor Categories			
Levels	Minimum years experience	Education/Training	Definition
		EE, CE, MBA)	least a minimum education of college degree (Engineering, EE, CE, MBA, etc.) technical experience and appropriate licensing. A Level II labor category performs required functions independently and has the ability to make required decisions.
III	7	College Degree (Degreed Engineer, EE, CE, MBA)	A Level III category is required to have at least 7 years of minimum experience and is required to have at least a minimum education of college degree (Engineering, EE, CE, MBA, etc.) technical experience and appropriate licensing, and appropriate certifications and licenses. A Level III is a senior expert, works independently, typically oversees projects and usually has some supervisory experience.

Contractors may deviate from the definitions above when responding to task order solicitations so long as the deviations are clearly identified in their task order proposal. For example, a Contractor might label an employee as “Level IV”, but the employee does not have a college degree. Likewise, a Contractor might label an employee as “Level II” even though the employee has more than 2 years experience. Deviations shall be clearly identified in proposals submitted in response to task order solicitations.

Step 5: Award the Task Order

Order Award Documentation

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

GSA Task Order Award and Modification Information

The OCO is encouraged to submit all task order award and modification data to the BMO program office at fssi.bmo@gsa.gov within 30 calendar days of award

A copy of the Task Order Award Information Form and the Task Order Modification Information Form are provided at [Appendix G \(Award\)](#) and [Appendix H \(Modifications\)](#) for your review.

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 in accordance with procedures found at FAR 16.505(b)(2)(ii)(D). 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

The OCO is encouraged to contact the BMO/BMO SB CO for any BMO/BMO SB related assistance including assistance with disputes, claims, or protests under BMO/BMO SB. However, the OCO is responsible for resolving any performance issues, disputes, claims, or protests at the task order level.

FAR subpart 16.505(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

At the IDIQ contract level, subject to GSAM 552.216-74, GSA has appointed the required Ombudsman to resolve complaints related to fair opportunity in the ordering process consistent with the procedures of BMO/BMO SB and to review BMO/BMO SB CO decision to place a Contractor in Dormant Status.

You can find more information about GSA's Procurement Ombudsman as well as the contact information for the GSA Procurement Ombudsman can be at <http://www.gsa.gov/ombudsman>.

Reporting Task Order Awards in FPDS-NG

Task order awards shall be reported in the Federal Procurement Data System – Next Generation (FPDS-NG) within 3 days after execution of the action. This is applicable even to agencies that may not be required to create FPDS-NG reports (i.e. agencies that do not use appropriated funds), as the Service Contract Reporting (SCR) link in SAM.GOV is activated based on FPDS-NG data. It is important that each BMO/BMO SB task order is reported as an order under the correct BMO/BMO SB contract number, identifying the appropriate NAICS Code and PSC.

It is also important that FPDS-NG accurately reflects the requirements ordered and task order solicitation procedures used against BMO/BMO 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 gets proper credit for your awards, make sure your FPDS-NG report accurately reflects the appropriate values in fields related to 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 IDIQ contract. This field cannot be changed at the task order level within FPDS-NG.

PSC Codes: Report the PSC code from the PSC's that you identified in the task order solicitation. **The BMO/BMO SB Product Service Codes (PSC's) Table is provided in Appendix D.**

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

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. For direct task order awards, use the value "SS" (sole source).

Within 30 days after a task order award, use the form at **Appendix G, Task Order Award Information Form** to report the action to GSA.

Step 6: Administer the Order/Execute the Work/Close-out

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 may 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

BMO/BMO SB includes the following FAR Clause incorporated by reference at the MA-IDIQ contract level: 52.219-14, Limitations on Subcontracting (NOV 2011).

Performance Evaluation

Each OCO is responsible for ensuring that the contractor's 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 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 (involving price or scope changes) must be reported in FPDS-NG. This is applicable even to agencies that may not be required to create FPDS-NG reports (i.e. agencies that do not use appropriated funds), as the Service Contract Reporting (SCR) link in SAM.GOV is activated based on FPDS-NG data.

Reporting Modifications to GSA

Within 30 days after awarding a task order modification (involving to price or scope changes), use the form at **Appendix H, Task Order Modification Information Form** 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: SERVICE CATEGORY DEFINITIONS

HVAC Maintenance

Services relating to the maintenance, repair and operation of heating, air conditioning, and ventilation systems, including chillers, boilers, radiators, refrigeration compressors, refrigeration units, water treatment, air ducts, Central Utility Plant (CUP), heat pumps and air handlers and or/ such equipment determined critical by the OCO or designee. Services include but are not limited to cleaning; air balancing; monitoring and maintenance of Building Automation Systems, controls and monitoring equipment, restoration and decontamination of HVAC systems or any combination; materials; tools; transportation; supervision and labor to perform all repairs; implementation and documentation of periodic preventative maintenance (PPM); and emergency service work calls to ensure continual operations of all primary systems, air handling equipment, terminal units and associated HVAC and controls equipment.

Plumbing and Pipefitting

Services related to the maintenance, repair and operation of plumbing, sanitary, sewage systems, storm water drainage systems, and central drinking water cooling and filtration systems. Services include but are not limited to maintenance and repair of all types of high temperature water and high-pressure piping systems (e.g. hydraulic, nitrogen, oxygen, steam heating, steam-generating systems, etc), utility systems, supply systems, disposal systems, plumbing fixtures, plumbing fittings, and equipment such as sewage, water, gas, and oil lines, compressed air, vacuum, and acid systems, water closets, water heaters, hydrants, backflow preventers, valves, pumps and pipes.

Elevator Maintenance

Services related to the maintenance, repair and operation of all types of elevator and escalator equipment (including hydraulic ram and dumbwaiter elevators). Services include but are not limited to the performance of full repair and maintenance services including maintenance or repair of all mechanical devices and lighting, fixtures, ballast, bulbs, lamps, tubes, intercoms, telephone devices, wiring, appurtenances mounted in or on the car, fans, air conditioning units, security systems, lenses switches, lens plates, push buttons, doors, hoistway and car doors, guides and operating devices; hoisting machines, sheaves and brakes, motors and motor generator sets; hoisting ropes, governor ropes, safety ropes, compensation ropes, operating cables, governors, safeties, interlock and contacts, guide rails and oiling devices, terminal, slowdown and leveling devices, elevator cars, counterweights, and buffers, machine rooms, hoistways and pits, automatic and manual emergency fire service (phase I and II) and emergency power operations.

Electrical Maintenance

Services related to the maintenance, repair and operation of electrical systems including instruments, apparatus and equipment. Services included but are not limited to power distribution equipment (switchgear, power panels) and backup/emergency electrical systems (uninterruptible power supply, generator) motors and controls, lighting systems, motor control centers, automatic transfer switches, transformers, electrical disconnects, circuit breakers, re-lamping, fabricating, alteration, frequency drives and testing.

Fire Alarm System Maintenance and Repair

Services related to the maintenance, repair and operation of fire alarm systems. Services include but are not limited to the performance inspection, testing, and repair of a variety of fire alarm and notification systems, equipment and components such as manual alarm devices, smoke and heat detectors, tamper switches, pressure switches, water flow switches, remote and graphic annunciators, main fire alarm panel

and components, voice alarm system, fire rated partition and assemblies, speakers and horns and other audible and visual devices, wiring circuits and junctions, all other alarm, detection and control and ancillary devices, and emergency power operations.

Fire Suppression (Water Based) System Preventative Maintenance and Repair Services

Services related to the maintenance, repair and operation of water based fire suppression systems. Services include but are not limited to the performance inspection, testing and preventive maintenance or repair services of all mechanical devices including valves, sprinklers, couplings, piping and connections, water motor gongs and alerting devices, tamper switches, pressure switches, water-flow switches, standpipes, backflow preventers, private fire service mains, fire dampers, pumps, test headers, kitchen exhaust fume hoods, grease ducts and food preparation equipment.

Roofing Services

Services related to the maintenance, repair and operation of roofing structures and surfaces. Services include but are not limited to the performance of warranty/monitoring, roof maintenance, roof inspection, roof drains maintenance, installation and site preparation, gutter cleaning, design assistance for roof information management system; green roofing maintenance, training and consultation; asbestos core testing; moisture analysis; wind uplift testing; and infrared scanning.

Building Management Services

Services related to facilities management, consulting, contractual and regulatory compliance, quality assurance, quality control, risk management, safety continuous improvement and the application of best practices. Services include but are not limited to property and facilities management, maintenance of a service call system, including logs, responses and tracking, planning, monitoring, scheduling, reporting of ongoing activities, costs/schedule tracking, clerical, administrative support, conditions assessment services and quality control software support services, BAS and Smart Building Support and computer and/or facilities management systems. The service will include adequate staff of personnel and alternates as required, with the necessary management expertise to assure performance of the work in accordance with sound and efficient management practices.

Architectural and Framework Building Maintenance Services

Services related to the maintenance and repair to the structural and framework of buildings. Services include are but not limited to interior and exterior painting, flooring replacement (e.g. carpet, tile, hardwood, laminate, etc), carpentry work, masonry work, picture hanging, locksmith services (including repining lock cylinders and cutting keys) architectural, structural, and maintenance repairs to the interior and exterior of the facility including but not limited to: exterior walls, roofing, flashing, skylights, chimneys, ventilators (and other items that pierce the roof), gutters, downspouts, splash blocks, overhangs, sidewalks, driveways, roads, curbing, parking areas, patios, exterior stairways. interior walls, floor coverings, concrete floors, hardwood flooring, carpeting, ceramic tile, interior stairways, ceilings and ceiling tile, window blinds and shades, doors, and windows.

Commissioning Services

Services related to the commissioning of buildings. Services include but are not limited to comprehensive building commissioning services on major modernization projects, and existing energy consuming buildings and facilities designed to ensure the building systems are designed and built to operate as efficiently as possible. This includes re-commissioning, retro-commissioning services metering and auditing. Energy efficient buildings certification programs such as LEED may be included.

Elevator Inspection Services

Services related to the inspection of all elevator and vertical transportation. Services include but are not limited to the performance of complete independent inspection and testing of a variety of vertical

transportation such as elevators, escalators, dumbwaiters, wheelchair lifts, and moving walkways, and include, but are not limited to systems, periodic testing, equipment and components such as hoistway and car doors, guides and operating devices; hoisting machines, sheaves and brakes, motors and motor generator sets; hoisting ropes, governor ropes, safety ropes, compensation ropes, operating cables, governors, safeties, interlock and contacts, guide rails and oiling devices, terminal, slowdown and leveling devices, elevator cars, counterweights, and buffers, machine rooms, hoistways and pits, automatic and manual emergency fire service (phase I and II) and emergency power operations.

Janitorial

Services related to internal and external daily and routine building cleaning and inspection work. Services include but are not limited to sweeping, scrubbing, waxing, window washing (interior and exterior), walls washing, dusting and polishing furniture and fixtures, sanitation and stocking, trash removal, recycling, hard floor and specialty floor care, including stripping and recoating, emptying waste cans and replacement of supplies through stocking (i.e. for toilet paper, paper towels, etc.) of all federal spaces. Services shall incorporate environmentally sustainable practices (i.e., green cleaning) to the extent practicable.

Landscaping/Grounds Maintenance

Services related to grounds and roads maintenance including snow removal, courtyards, parking areas, landscape maintenance, fence maintenance, and tree trimming. Services include but are not limited to the planning, development, maintenance, management and operations of grounds at or on Federal facilities and/or properties. These services include but not limited to mowing, lawn sprinkler systems maintenance, planting, seeding, fertilizing, raking, mulching, watering, pruning, weeding, aerating, planting, trimming, tree and plant removal, mulching, clearing of snow from parking areas, sidewalks, campuses wildlife management and applicable road areas, and application of salt, ice melt or sand to reduce slip hazards, cleaning of retention ponds, bio-filters swales and gullies, and all services related to grounds maintenance. Services shall incorporate environmentally sustainable landscaping principles to the extent practicable, including those identified in the [Guidance for Federal Agencies on Sustainable Practices for Designed Landscapes](#) and [Supporting the Health of Honey Bees and Other Pollinators](#).

Pest Control

Services related to maintenance pest control systems and removal of all pests following Integrated Pest Management (IMP) practices. Pest control services provided under this contract must conform to the Integrated Pest Management (IMP) principles. These practices include monitoring and identifying pests, preventing infestation and controlling pests. Services include but are not limited to the planning, development, management, operations; and maintenance for pest control and removal (includes insect) at or on Federal facilities and/or properties indoor and outside the federal facility (to include shrubs and trees). These services involve recommendations for pest prevention by removing, or blocking access to, pests' harborage, water, and food; using the least risky pest control methods first, such as trapping and containerized bait boxes; and using pesticides only as a last resort. If warranted, pesticide should be applied as crack and crevice treatment, inaccessible and invisible to the public. Space sprays or sprays applied to exposed surfaces should never be used for routine treatment. When they are used, tenant personnel should not be present.

Cemetery Maintenance

Services relating to the complete maintenance of the cemetery and surrounding grounds. Services include but are not limited to, grounds maintenance; tree trimming/planting/removal; landscaping; raising, setting and aligning headstones; cleaning of headstones; maintenance of pathways, drives, curbs and parking areas; trash removal; maintenance of existing fencing, railing, benches, flag poles, monuments or statues; maintenance of irrigation systems, drainage and water features.

Waste Management and Recycling Services

Services relating to building trash removal and recycling. Services include but are not limited to trash and debris, disposal and recycling services including bailing, separating, and hauling saleable wastepaper and other products. All services supporting and maintaining the recycling program, including labor, services, and supplies. HAZMAT services are not included.

Other Facilities Management-Related Services

Other Facilities Management Related Services includes requirements not specifically covered by another service category. Services may include, but are not limited to, specialized service combinations not previously grouped together, occupations involving new tasks or procedures not identified in the service categories but categorically related to the scope of facilities maintenance, and/or the maintenance of systems required to preserve and maintain the integrity of a building and the safety of those operating within.

APPENDIX B: SAMPLE DPA

MEMORANDUM FOR: Ordering Contracting Officer (OCO)

FROM: Josilyn Reed
 BMO/BMO SB Contracting Officer
 Phone
 email

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

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

GSA retains sole responsibility to administer and modify the Indefinite Delivery, Indefinite Quantity (IDIQ) contracts. GSA will evaluate the performance of BMO and BMO SB contractors against the IDIQ contract terms. It will also provide advice and guidance to agencies/OCOs on all BMO and BMO 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 BMO vehicles. Your authority to administer BMO and BMO 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 BMO and BMO SB terms and conditions, the BMO and BMO 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 in this DPA.

2. **Duration** - This DPA is applicable for all BMO/BMO SB Zones and shall remain in effect until the expiration of all BMO/BMO SB contracts or completion and closeout of any awarded task orders whose duration extends beyond the expiration of the 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 BMO/BMO 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 BMO or BMO SB scope. The BMO 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 encouraged 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 G and H of the BMO/BMO SB Ordering Guide**) to the respective BMO/BMO SB e-mail address.

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 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 Contract 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 organizations 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** - Closeout task orders IAW FAR 4.804-5 and provide the BMO Unrestricted or BMO SB CO 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 BMO program. We are committed to delivering acquisition vehicles that provide our customers with convenient access to the best qualified contractors in the Building Maintenance & Operations and Facilities Support Services-based solutions marketplace. If you have any questions regarding this DPA, the BMO vehicles, or our program in general, please feel free to contact the BMO Program Office at any time.

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

APPENDIX C: STANDARDIZED LABOR CATEGORIES AND DEFINITIONS

Please visit the BMO website at www.gsa.gov/bmo under the “BMO Awarded Vendors” tab for the Standardized Labor Categories and Definitions.

APPENDIX D: PRODUCT SERVICE CODES (PSC)

Product Service Code	Description
H335	Inspection- service and trade equipment
H341	Inspection- refrigeration, air conditioning, and air circulating equipment
H345	Inspection- plumbing, heating, and waste disposal equipment
H348	Inspect SVCS/valves
H359	Inspection- electrical and electronic equipment components
H363	Inspection- alarm, signal, and security detection systems
J034	Maint/repair/rebuild of equipment- metalworking machinery
J035	Maint/repair/rebuild of equipment- service and trade equipment
J039	Maint-repair of materials handling equip
J041	Maint-repair of refrigeration - AC equip
J043	Maint/repair/rebuild of equipment- pumps and compressors
J044	Maint/repair/rebuild of equipment- furnace, steam plant, and drying equipment
J045	Maint/repair/rebuild of equipment- plumbing, heating, and waste disposal equip
J046	Maint-repair of water purification equip
J047	Maint/repair/rebuild of equipment- pipe, tubing, hose, and fittings
J048	Maint/repair/rebuild of equipment- valves
J049	Maint/repair/rebuild of equipment- maintenance and repair shop equipment
J061	Maint/repair/rebuild of equipment- electric wire and power distribution equip
J062	Maint/repair/rebuild of equipment- lighting fixtures and lamps
J063	Maint-repair of alarm signal system
J072	Maint-repair of household furnishings
N041	Installation of equipment- refrigeration, air conditioning, and air circulation
N043	Installation of equipment- pumps and compressors
N045	Installation of equipment- plumbing, heating, and waste disposal equipment
N059	Installation of equipment- electrical and electronic equipment components
N063	Install of alarm signal system
S201	Housekeeping- custodial janitorial
S202	Housekeeping- fire protection
S205	Housekeeping- trash/garbage collection
S207	Housekeeping- insect/rodent control
S208	Landscaping/groundskeeping services
S214	Housekeeping- carpet laying/cleaning
S216	Housekeeping- facilities operations support
S218	Housekeeping- snow removal/salt
S299	Other housekeeping services
Z1AA	Maintenance of office buildings
Z1DA	Maintenance of hospitals and infirmaries
Z1DB	Maintenance of laboratories and clinics
Z1DZ	Maintenance of other hospital buildings
Z111	Maint/repair/alt- office bldgs
Z141	Maint/repair/alt- hospitals; infirmary
Z142	Maint/repair/alt- labs; clinics

APPENDIX E: BMO TOOLS & RESOURCES

Website:

The BMO Website contains many tools to assist you in effective acquisition of complex, integrated building maintenance and operations services to provide total solutions to your agency's mission requirements. The website can be accessed through the following link: www.gsa.gov/bmo.

The website contains the information and support resources such as:

BMO How to Use:

- The Ordering Guide
- Pre-Award Scope Review requests
- Link to the Acquisition Gateway

BMO Awarded Contractors:

- List of the awarded contractors under both the BMO and BMO SB Contracts
- Awarded contractors' company contact information
- Standardized Labor Categories and definitions

BMO Training:

- BMO Delegation of Procurement Authority (DPA) requests for training
- Upcoming training events

APPENDIX F: TASK ORDER SOLICITATION TEMPLATE

1.0 BMO/BMO SB Task Order Solicitation Notice

1.1 NAICS Code and Size Standard: The principle 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].

1.2 PSC Code: The services in this solicitation are best represented by PSC Code [Insert the applicable PSC Code and Title].

1.3 Service Category(ies) Covered

1.4 Extent of Competition: [Check the boxed that apply] This solicitation will be based on fair opportunity procedures; an exception to fair opportunity as designated below:

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

1.5 Types of Services and Performance Locations: Services will be performed in [Insert city(ies) and state(s)]. (If performance will be in multiple locations, 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 your statement of work. Remember that Performance Work Statements 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 work statements, 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 HVAC maintenance. These services are performed Washington, D.C. Solicitation sections 3.1, 3.2, 3.3, 3.4, and 3.5 apply.

CLIN 0002 Contract Access Fee (Cost-reimbursable)

5.0 Solicitation Provision and Clauses

5.1 In accordance with BMO/BMO SB contract Part II, Section I, all *Applicable* and *Required* provisions/clauses set forth in FAR 52.301 automatically flow down to all BMO/BMO SB task orders, based on their specific contract type (e.g. fixed price, time and materials, etc.), statement of work, competition requirements, and dollar value as of the date the task order solicitation is issued. All fill-in clauses and provisions need to be included in the task order solicitation.

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.]

[The procedures in FAR Part 15.3 (Source Selection) DO NOT apply to the MA IDIQ ordering process. 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 the Contractor, respectively.]

8.0 Government Contacts

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

APPENDIX G: TASK ORDER AWARD INFORMATION FORM

Task Order Number:

Project Title:

Independent Government Cost Estimate (IGCE):

Contract Number:

Predominant Contract Type:

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/Offer:

Fair Opportunity Exception (if applicable):

BMO and BMO SB Ordering Guide

Scope Review Process Utilized:

Ordering Contracting Officer's Name:

Ordering Contracting Officer's E-mail Address:

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

Please attach this form, along with a complete copy of the Task Order, to an e-mail addressed to FSSI.BMO@gsa.gov.

APPENDIX H: TASK ORDER MODIFICATION - 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 E-mail Address:

Please attach this form, along with a complete copy of the Task Order, to an e-mail addressed to fssi.bmo@gsa.gov.

APPENDIX I: Unexpected Repairs

Sample 1 – NTE CLIN

****Below is SOW language from an actual BMO TO****

REPAIR OF BUILDING SYSTEMS AND EQUIPMENT (CLINs 0002, 0004, 0006, 0008, 0010)

The Contractor shall provide for the repair of installed building systems and equipment included in the SOW at times other than during normally scheduled PMIS events. Service calls, if required, shall be accomplished at the rates stated in the pricing schedule of this TO within the specified not to exceed limits.

Work shall include the determination of the problem area(s) and the performance of corrective action required to restore the system / equipment to satisfactory working condition.

The Contractor is to perform all work necessary to restore inoperable or damaged equipment and systems to normal function if the total service cost is not in excess of \$5,000 per occurrence once authorized by the COR and in receipt of a Service and Supply Request Authorization Form. If the total cost is estimated to exceed \$5,000, the Contractor shall prepare an estimate for the repair detailing the labor hours, and materials before coordinating with the COR for approval to proceed with the repair.

Labor attributed to each service call shall include only time actually expended by the Contractor while on the job site and/or in the procurement of required materials.

1) Service Call Reception:

- a. During Regular Working Hours: The COR or Technical Monitor will notify the Contractor, via telephone, email and/or applicable electronic work management system of all service calls related to work during regular working hours, and then prepare a Service and Supply Request Authorization Form, as shown in the SOW Attachment E, which will comprise of the following information:
 - Classification of each call based on the definitions provided hereinafter
 - Description and location of the problem and/or required service
 - Date and time service requirement was identified/received
 - Location of Equipment, Item or system to be repaired

If a service call is under a total cost of \$5,000, the Contractor shall proceed with the repair once authorized by the COR, who will confirm that the CLIN's not-to-exceed amount has not been reached. If the total cost is estimated to exceed \$5,000, the Contractor shall prepare an estimate for the repair detailing the labor hours, and materials before coordinating with the COR to proceed with the repair after receiving authorization from the Contracting Officer (CO).

- b. After Regular Working Hours: The COR or designated facility management staff will contact the Contractor, via telephone, after hours on weekends, and during holidays. The COR or designated representative will classify each call based on the definitions provided hereinafter. The COR or designated representative will verbally identify the problem and/or required service and will prepare a Service and Supply Request Authorization Form no later than 10:00 AM on the following regular workday.
 - 2) Response to Service Calls: The Contractor shall provide adequate procedures for receiving and responding to service calls 24 hours a day, seven days a week, including weekends and holidays. A single telephone number shall be provided by the Contractor for the receipt of all service calls. Service calls shall be considered to be “received” by the Contractor at the time and date the telephone call is placed by the COR or designated representative.
 - a. Emergency Calls: Shall be responded to within two (2) hours of notification and worked on until either the issue is resolved or the equipment/system problem is remediated to a non-emergency condition.
 - b. Routine Work Orders/Calls: Shall be responded to the same day the call is received unless after 3 PM on each Federal Government work day. If a service call is received after 3 PM, the Contractor shall respond to the call the morning of the next work day no later than 11 AM.
 - 3) Completed Work Orders/Calls: On the next working day after the completion of a service call, the Contractor shall add the following information to the Service and Supply Request Authorization Form and return the completed form to the COR or designated facility representative:
 - Description of work actually completed.
 - Brief description of materials and parts used, including quantities and costs.
 - Date and time work commenced.
 - Date and time work was completed.
 - Number of labor hours, and associated cost, expended by Labor Category.

Labor Rates Applicable to Repair of Building Systems, Equipment and Spaces Time and Material CLINs

The fully-burdened labor rates below are applicable to work orders authorized under this Task Order. The rates include all direct labor and indirect costs applicable to that direct labor (such as fringe benefits, overhead, G&A, etc.) and profit. Although the labor categories below are intended to cover all requirements, this does not exclude additional BMO labor categories from being utilized under this vehicle.

BMO and BMO SB Ordering Guide

Labor Category	IDIQ Contract Level	Sep 01 2016 – Aug 31 2017	Sep 01 2017 – Aug 31 2018	Sep 01 2018 – Aug 31 2019	Sep 01 2019 – Aug 31 2020	Sep 01 2020 – Aug 31 2021
Electrician	III	\$60.43	\$60.43	\$60.43	\$60.43	\$60.43
Electrician	IV	\$69.44	\$69.44	\$69.44	\$69.44	\$69.44
Project Supervisor/Manager	III	\$95.80	\$97.72	\$99.67	\$101.66	\$103.70
Electronics Technician (Lighting/Blinds)	III	\$150.00	\$154.50	\$159.14	\$163.91	\$168.83
Electronics Technician (Lighting/Blinds)	IV	\$150.00	\$154.50	\$159.14	\$163.91	\$168.83
Laborer	III	\$28.89	\$28.89	\$28.89	\$28.89	\$28.89
Laborer	IV	\$28.89	\$28.89	\$28.89	\$28.89	\$28.89
Carpenter Maintenance	III	\$38.91	\$38.91	\$38.91	\$38.91	\$38.91
Carpenter Maintenance	IV	\$38.91	\$38.91	\$38.91	\$38.91	\$38.91
Carpenter/Woodworker Finish	III	\$44.22	\$44.22	\$44.22	\$44.22	\$44.22
Carpenter/Woodworker Finish	IV	\$44.22	\$44.22	\$44.22	\$44.22	\$44.22
Locksmith	III	\$41.24	\$41.24	\$41.24	\$41.24	\$41.24
Locksmith	IV	\$41.24	\$41.24	\$41.24	\$41.24	\$41.24
Glazer (Glass)	III	\$38.57	\$38.57	\$38.57	\$38.57	\$38.57
Glazer (Glass)	IV	\$38.57	\$38.57	\$38.57	\$38.57	\$38.57
Painter	III	\$46.93	\$46.93	\$46.93	\$46.93	\$46.93
Painter	IV	\$49.93	\$49.93	\$49.93	\$49.93	\$49.93
Mason	III	\$38.57	\$38.57	\$38.57	\$38.57	\$38.57
Mason	IV	\$38.57	\$38.57	\$38.57	\$38.57	\$38.57
Carpet Layer	III	\$37.16	\$37.16	\$37.16	\$37.16	\$37.16
Carpet Layer	IV	\$37.16	\$37.16	\$37.16	\$37.16	\$37.16
Welder	III	\$40.79	\$40.79	\$40.79	\$40.79	\$40.79
Welder	IV	\$40.79	\$40.79	\$40.79	\$40.79	\$40.79
Drywall Technician	III	\$38.57	\$38.57	\$38.57	\$38.57	\$38.57
Drywall Technician	IV	\$38.57	\$38.57	\$38.57	\$38.57	\$38.57

SERVICE AND SUPPLY REQUEST

I. Service Requests (Call) Authorization

Date & Time of Notification: _____

Equipment and Location: _____

Contract Line Item # _____

Emergency Routine

Description of Problem/Status/Comments:

II. Service or Project Requests Authorization

Date & Time of Notification: _____

Items Requested (include amount, quantity, unit price and extended total: _____

Contract Line Item # _____

Required Delivery Date _____

Remarks/Additional Information: _____

COR or Technical Monitor Signature

<i>TO BE COMPLETED BY CONTRACTOR AS APPLICABLE</i>
--

III. Cost and Price Estimates

Attach detailed estimates (labor and material costs for Time & Material requirement; fixed prices for Firm Fixed Price requirements) as required by the contract statement of work.

IV. Service Calls Reporting

Date & Time Work Commenced: _____

Date & Time Work Completed: _____

Individual(s) Performing Service: _____

Work Performed:

Number of Hours Expended by Labor Category: _____

Material Cost: _____

Work Complete: [] Yes [] No

V. Government Comments:

Contractor Representative

COR or Technical Monitor

Sample 2 – Logical Follow-on

IAW FAR 16.505(b)(2)(i)(C), Exceptions to the Fair Opportunity Process, the OCO may issue a follow-on TO on a sole-source basis in the interest of economy and efficiency because it is a logical follow-on to an order already issued under the contract, provided that all awardees were given a fair opportunity to be considered for the original order. OCO's should consider inserting the following language in the original SOW: "Additional repairs under this TO may be performed by the awardee IAW FAR 16.505(b)(2)(i)(C)." Under this approach, the OCO would negotiate and issue a follow-on TO, for repairs when needed. OCO's shall ensure compliance with FAR 16.505(b)(2)(i)(C), which deals with exceptions to the fair opportunity process, and (b)(2)(ii), which deals with justification, approval, and posting requirements for issuing a follow-on TO.