[Department], [Agency]

TASK ORDER # [ ]

TASK ORDER ID [ ]

[TITLE]

for the

[CLIENT NAME]

Statement of Work/Performance Work Statement

(SOW/PWS)

DATE

1
1.0 BACKGROUND

PROVIDE THE BACKGROUND INFORMATION THAT PROVIDES A HIGH LEVEL DESCRIPTION OF THE REQUIREMENT OF THE CLIENT. KEEP SHORT/CONCISE AND FOCUS ON PROVIDING INFORMATION ABOUT THE CLIENT, MISSION, AND/OR SYSTEMS IMPACTED BY THIS TASK ORDER.
2.0 OBJECTIVES

DESCRIBE WHAT THIS TASK WILL ACCOMPLISH. THIS SHOULD REFLECT THE END STATE THE CLIENT WANTS TO ACHIEVE.
3.0 SCOPE

DESCRIBE THE TYPE OF WORK (RANGE OF TASKS) THE TASK ORDER WILL SUPPORT. USE LANGUAGE THAT IS FOUND IN THE SCHEDULE DESCRIPTION IN ORDER TO LINK THE SCOPE OF THIS TASK TO THE SCOPE OF THE CONTRACT.

The following 4 sections of the SOW/PWS describe the technical and administrative components of the requirement:

- Tasks the vendor must perform (Section 4).
- Task requirements that describe to the vendor specifics about how the vendor performs the tasks in Section 4 (Section 5).
- Other/Administrative requirements such as period of performance, FAR clauses etc that are more contract-orientated as opposed to requirement focused (Section 6).
- Invoicing Instructions (Section 7).
4.0 REQUIREMENTS

DESCRIBE THE TASKS THE VENDOR WILL PROVIDE IN SUPPORT OF THIS TASK. INCLUDE AS MANY TASKS AS REQUIRED.

- FULLY DESCRIBE THE SPECIFIC REQUIREMENTS AND WORK THE VENDOR MUST PERFORM USING PERFORMANCE-BASED LANGUAGE, IDENTIFYING THE FINAL OUTCOME, NOT HOW-TO.
- BREAKOUT EACH DISCRETE TASK SEPARATELY. EACH TASK MAY INCLUDE SUBTASKS.
- MAKE SURE TO DETERMINE THE MINIMUM REQUIREMENTS

4.1 Task 1
4.2 Task 2
4.3 Task 3
4.4 Task 4
4.5 Task 5
5.0 OPERATIONAL REQUIREMENTS

DESCRIBE THE REQUIREMENTS THAT OUTLINE HOW THE VENDOR WILL OPERATE WHILE PERFORMING THE TASKS IDENTIFIED IN SECTION 4. THIS SECTION INCLUDES, BUT IS NOT LIMITED TO, THINGS SUCH AS PROCESSES, DELIVERABLES, OPERATIONAL REQUIREMENTS.

5.1 Deliverables

DESCRIBE ALL EXPECTED DELIVERABLES AND THE TIMEFRAME FOR THEIR DELIVERY. RECOMMEND INCLUDING A TABLE, SIMILAR TO TABLE 1 BELOW THAT PROVIDES THIS INFORMATION.

Table 1 List of Deliverables

<table>
<thead>
<tr>
<th>Required Deliverables/Reports</th>
<th>Required Due Date</th>
<th>Description of Deliverable Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.1.1</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.1.2</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5.1.1 Delivery Instructions

One copy of each report will be submitted to the client representative. The contractor shall deliver each report in a mutually agreed upon format. Deliverables are to be transmitted with a cover letter, on the prime contractor’s letterhead, describing the contents.

5.1.2 Inspection and Acceptance of Services

All periodic reports and task deliverables shall be inspected, tested (where applicable), reviewed, and accepted by the Government within a reasonable period of time IAW FAR 52.246-6, Inspection – Time and Material and Labor Hour/ IAW FAR 52.246-4, Inspection of Services – Firm Fixed Price [NEED TO ENSURE PROPER FAR CLAUSE IS INSERTED HERE].

Acceptance criteria are as follows:

- DESCRIBE ACCEPTANCE CRITERIA AS APPLICABLE TO THE TASK.
Only the client representative (CR), their designated alternate, the Project Manager (PM) or Contracting Officer (CO) has the authority to inspect, accept, or reject all deliverables. Final acceptance of all deliverables will be provided in writing, or in electronic format, to the PM or CO within 30 days from the end of the task order.

Performance by the Contractor to correct defects found by the Government as a result of quality assurance surveillance and by the Contractor as a result of quality control, shall be \textit{IAW FAR 52.246-6, Inspection – Time and Material and Labor Hour}/ \textit{IAW FAR 52.246-4, Inspection of Services – Firm Fixed Price} [NEED TO ENSURE PROPER Far clause is inserted here]. The client representative will monitor compliance and report to the PM.

\section*{5.2 Quality Control}

The contractor shall establish and maintain a complete Quality Control Plan to ensure the services are performed in accordance with PWS and commonly accepted commercial practices. The contractor shall develop and implement procedures to identify, prevent and ensure non-recurrence of defective services. The government reserves the right to perform inspections on services provided to the extent deemed necessary to protect the government’s interests. The contractor must control the quality of the services and deliverables provided in support of this task and maintain substantiating evidence that services conform to contract quality requirements and furnish such information to the government if requested.

The QCP shall include a quality control matrix (QCM), such as the sample QCM shown in Table 2. The QCM shall reflect the quality approach (using the headings shown in Table 2) of the vendor as it applies to the key areas of the offeror’s proposed TA.

\begin{table}[h]
\centering
\caption{Sample Quality Control Matrix}
\end{table}
<table>
<thead>
<tr>
<th>Requirement</th>
<th>Criteria for Acceptance</th>
<th>Acceptable Quality Level</th>
<th>Method of Surveillance</th>
<th>“Incentives” Positive or Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reports and Deliverables</td>
<td>100% compliance</td>
<td>100% compliance</td>
<td>Random Sampling</td>
<td>Past performance report</td>
</tr>
<tr>
<td>Application Design &amp; Development</td>
<td>Met all external and internal suspense’s</td>
<td>100% compliance</td>
<td>100% Inspection</td>
<td>Past performance report</td>
</tr>
<tr>
<td>Software Development</td>
<td>• Met all external and internal requirements</td>
<td>100% compliance</td>
<td>Random Sampling</td>
<td>Past performance report</td>
</tr>
<tr>
<td></td>
<td>• 100% functionality</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Testing &amp; QA</td>
<td>Track, address, and closeout all external and internal inquiries</td>
<td>100% compliance</td>
<td>Random Sampling</td>
<td>Past performance report</td>
</tr>
<tr>
<td>Software Documentation</td>
<td>Track, address, and closeout all external and internal inquiries</td>
<td>100% compliance</td>
<td>Random Sampling</td>
<td>Past performance report</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>O&amp;M Support</td>
<td>Resolve 80% of help desk issues within 24 hrs</td>
<td>100% compliance</td>
<td>Random Sampling</td>
<td>Past performance report</td>
</tr>
<tr>
<td>Training &amp; Deployment</td>
<td>• Provide training and deployment IAW WBS schedule</td>
<td>100% compliance</td>
<td>Random Sampling</td>
<td>Past performance report</td>
</tr>
<tr>
<td></td>
<td>• Customer Satisfaction</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
NOTE: This QC matrix is a sample format for the vendor only. The vendor will include a Quality Control Matrix (using the headings shown in the sample) in the quote that reflects the key areas of support identified in the TA and the QC plan proposed by the vendor IAW the PWS. Including the above sample table in the quote may result in the quote being determined unacceptable under the TA evaluation factor.

This is a task order for commercial services. The contractor shall develop and maintain a quality process to ensure services are performed in accordance with commonly accepted commercial practices and existing quality control systems. The contractor shall develop and implement procedures to identify, prevent and ensure non-recurrence of defective services. However, the government reserves the right to perform inspections on services provided to the extent deemed necessary to protect the government’s interests. The contractor must control the quality of the services and deliverables provided in support of this task; the contractor must maintain substantiating evidence that services conform to contract quality requirements and furnish such information to the government if requested.

5.3 Desired Skills and Knowledge

DESCRIBE THE DESIRED SKILLS YOU ARE LOOKING FOR TO PERFORM THIS TASK. IDENTIFY THE SKILLS/TECHNOLOGY THE VENDOR WILL NEED TO UNDERSTAND IN ORDER TO COMPLETE THIS TASK. THESE SKILLS MAY BE BASED ON THE CURRENT OPERATING ENVIRONMENT. FOR EXAMPLE:

- Programming skills: C++, HTML, XML
- Databases: Oracle, SQL
- Hardware: Sun
- Operating Systems: Microsoft XP, Linux, UNIX
- Systems: SAP, PeopleSoft, Distance Learning
- Project Management: Earned Value Management, Microsoft Project

5.4 Man Hours/Labor Categories

- THE LABOR CATEGORIES IN THIS SECTION SHOULD ALWAYS INCLUDE A RANDOM SAMPLING OF CATEGORIES FROM ACROSS SCHEDULE HOLDERS. DO NOT USE LABOR CATEGORIES IDENTICAL TO THE INCUMBENTS

The CLIENT anticipates the vendor will require a total minimum level of effort (LOE) as identified in Table 2 to complete this task.
Table 3 Minimum Level of Effort (Total LOE)

<table>
<thead>
<tr>
<th>Labor Category</th>
<th>Estimated Hours by Labor Category</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Base</td>
</tr>
<tr>
<td>Senior Program Manager</td>
<td></td>
</tr>
<tr>
<td>Application Specialist</td>
<td></td>
</tr>
<tr>
<td>Programmer / Analyst</td>
<td></td>
</tr>
<tr>
<td><strong>Total Estimated Direct Labor Hours</strong></td>
<td></td>
</tr>
</tbody>
</table>

NOTE: If the offeror desires/chooses to propose alternative solutions the offeror must provide the rationale explaining why they chose to deviate from the proposed mix (labor category and hours) so that it is clear that they understand the requirement. Any deviation without supporting rationale may render your quote unacceptable as the government may be unable to determine if the offeror sufficiently understands the task order requirements. The Government considers 1920 hours (excludes holidays) to be a full year’s labor for one individual. The government may accept a quote containing a justified alternative level of effort solution as part of a best value determination.

5.5 Travel

Contractor employees will be required to travel for the purpose [INSERT RATIONALE/DESCRIPTION OF REQUIRED TRAVEL]. The total estimated travel costs are estimated at the levels described in Table 3.

Table 4 Total Estimated Travel Costs

<table>
<thead>
<tr>
<th>Period of Performance</th>
<th>Estimated Travel Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base</td>
<td>$</td>
</tr>
<tr>
<td>Option 1</td>
<td>$</td>
</tr>
<tr>
<td>Option 2</td>
<td>$</td>
</tr>
<tr>
<td>Option 3</td>
<td>$</td>
</tr>
<tr>
<td>Option 4</td>
<td>$</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>$</td>
</tr>
</tbody>
</table>
5.6 Material/Hardware

The Contractor will be required to provide materials/hardware for the purpose [INSERT DESCRIPTION OF MATERIAL/HARDWARE COSTS]. The total estimated material/hardware costs are estimated at the levels described in Table 4.

Table 5 Total Estimated Material/Hardware Costs

<table>
<thead>
<tr>
<th>Period of Performance</th>
<th>Estimated Material/Hardware Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base</td>
<td>$</td>
</tr>
<tr>
<td>Option 1</td>
<td>$</td>
</tr>
<tr>
<td>Option 2</td>
<td>$</td>
</tr>
<tr>
<td>Option 3</td>
<td>$</td>
</tr>
<tr>
<td>Option 4</td>
<td>$</td>
</tr>
<tr>
<td>Total</td>
<td>$</td>
</tr>
</tbody>
</table>

5.7 Additional Considerations

IDENTIFY ANY OTHER ISSUES/REQUIREMENTS THAT ARE RELEVANT TO THE REQUIREMENT.
6.0 OTHER REQUIREMENTS

6.1 Type of Task

This task is a T&M incrementally funded/FFP FULLY FUNDED award using [CONTRACT VEHICLE (SCHEDULE NAME/FUNCTIONAL AREA)].

6.2 Period of Performance (POP) and FAR Clauses in Full Text or by Reference

The POP for this task is a [#-MONTH BASE + #/DURATION OF OPTIONS]. The following FAR references are incorporated herein by reference:

1. **FAR Clause 52.217-5 Evaluation of Options (Jul 1990):** Except when it is determined in accordance with FAR 17.206(b) not to be in the Government’s best interests, the Government will evaluate offers for award purposes by adding the total price for all options to the total price for the basic requirement. Evaluation of options will not obligate the Government to exercise the option(s).

2. **FAR 52.217-8 Option to Extend Services (NOV 1999):** The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within sixty (60) calendar days prior to the expiration of the contract.

3. **FAR Clause 52.217-9 Option to Extend the Term of the Contract (Mar 2000):**
   - The Government may extend the term of this contract by written notice to the Contractor at least 1 day prior to the expiration of the current period of performance provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 60 days before the contract expires. The preliminary notice does not commit the Government to an extension.
   - If the Government exercises this option, the extended contract shall be considered to include this option clause.
   - The total duration of this contract, including the exercise of any options under this clause, shall not exceed 5 years. *(Per requirement)*
4. **GSAR 552.217-71 Notice Regarding Option(s) (NOV 1992)**

The [Agency] has included an option to extend the term of this contract in order to demonstrate the value it places on quality performance by providing a mechanism for continuing a contractual relationship with a successful Offeror that performs at a level which meets or exceeds [Agency’s] quality performance expectations as communicated to the Contractor, in writing, by the Contracting Officer or designated representative. When deciding whether to exercise the option, the Contracting Officer will consider the quality of the Contractor’s past performance under this contract in accordance with 48 CFR 517.207.

### 6.2.1 FAR Clauses Incorporated by Reference

In addition to the applicable clauses contained in the [SCHEDULE NAME] task order, the following FAR clauses are included in this task for added emphasis of their applicability:

**SAMPLE FAR CLAUSES INCLUDE:**

<table>
<thead>
<tr>
<th>FAR Clause</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.212-4</td>
<td>Contract Terms and Conditions (FEB 2012)</td>
</tr>
<tr>
<td>52.227-21</td>
<td>Technical Data Declaration, Revision and Withholding of Payment - Major Systems (DEC 2007)</td>
</tr>
<tr>
<td>52.245-1</td>
<td>Government Property (AUG 2010)</td>
</tr>
<tr>
<td>52.246-6 or 52.246-4</td>
<td>Inspection Time &amp; Material Labor Hour (MAY 2001) or Inspection of Services – Firm Fixed Price (AUG 1996) Alt 1-will need to tailor to requirement if using ODC’s</td>
</tr>
</tbody>
</table>

### 6.2.252.227-15 Representation of Limited Rights Data and Restricted Computer Software. (DEC 2007) (Only use when requirement has limited rights data or restricted computer software)

As prescribed in 27.409(c), insert the following provision:

(a) This solicitation sets forth the Government’s known delivery requirements for data (as defined in the clause at 52.227-14, Rights in Data—General). Any resulting contract may also provide the Government the option to order additional data under the Additional Data Requirements clause at 52.227-16, if included in the contract. Any data delivered under the resulting contract will be subject to the Rights in Data—General clause at 52.227-14 included in this
contract. Under the latter clause, a Contractor may withhold from delivery data that qualify as limited rights data or restricted computer software, and deliver form, fit, and function data instead. The latter clause also may be used with its Alternates II and/or III to obtain delivery of limited rights data or restricted computer software, marked with limited rights or restricted rights notices, as appropriate. In addition, use of Alternate V with this latter clause provides the Government the right to inspect such data at the Contractor’s facility.

(b) By completing the remainder of this paragraph, the offeror represents that it has reviewed the requirements for the delivery of technical data or computer software and states [offeror check appropriate block]—

[ ] (1) None of the data proposed for fulfilling the data delivery requirements qualifies as limited rights data or restricted computer software; or

[ ] (2) Data proposed for fulfilling the data delivery requirements qualify as limited rights data or restricted computer software and are identified as follows:

(c) Any identification of limited rights data or restricted computer software in the offeror’s response is not determinative of the status of the data should a contract be awarded to the offeror.

6.2.2 FAR Clause 52.204-9 Personal Identity Verification of Contractor Personnel (Jan 2011)


(b) The Contractor shall account for all forms of Government-provided identification issued to the Contractor employees in connection with performance under this contract. The Contractor shall return such identification to the issuing agency at the earliest of any of the following, unless otherwise determined by the Government;

(1) When no longer needed for contract performance.

(2) Upon completion of the Contractor employee’s employment.

(3) Upon contract completion or termination.

(c) The Contracting Officer may delay final payment under a contract if the Contractor fails to comply with these requirements.
(d) The Contractor shall insert the substance of clause, including this paragraph (d), in all subcontracts when the subcontractor’s employees are required to have routine physical access to a Federally-controlled facility and/or routine access to a Federally-controlled information system. It shall be the responsibility of the prime Contractor to return such identification to the issuing agency in accordance with the terms set forth in paragraph (b) of this section, unless otherwise approved in writing by the Contracting Officer.

(End of Clause)

6.2.3 52.204.10, Reporting Executive Compensation and First-Tier Subcontract Awards (JULY 2010)

(a) Definitions. As used in this clause:

“Executive” means officers, managing partners, or any other employees in management positions.

“First-tier subcontract” means a subcontract awarded directly by a Contractor to furnish supplies or services (including construction) for performance of a prime contract, but excludes supplier agreements with vendors, such as long-term arrangements for materials or supplies that would normally be applied to a Contractor’s general and administrative expenses or indirect cost.

“Total compensation” means the cash and noncash dollar value earned by the executive during the Contractor’s preceding fiscal year and includes the following (for more information see 17 CFR 229.402(c)(2)):

(1) Salary and bonus.

(2) Awards of stock, stock options, and stock appreciation rights. Use the dollar amount recognized for financial statement reporting purposes with respect to the fiscal year in accordance with the Statement of Financial Accounting Standards No. 123 (Revised 2004) (FAS 123R), Shared Based Payments.

(3) Earnings for services under non-equity incentive plans. This does not include group life, health, hospitalization or medical reimbursement plans that do not discriminate in favor of executives, and are available generally to all salaried employees.

(4) Change in pension value. This is the change in present value of defined benefit and actuarial pension plans.

(5) Above-market earnings on deferred compensation which is not tax-qualified.

(6) Other compensation, if the aggregate value of all such other compensation (e.g., severance, termination payments, value of life insurance paid on behalf of the employee, perquisites or property) for the executive exceeds $10,000.
(b) Section 2(d)(2) of the Federal Funding Accountability and Transparency Act of 2006 (Pub. L. 109-282), as amended by section 6202 of the Government Funding Transparency Act of 2008 (Pub. L. 110-252), requires the Contractor to report information on subcontract awards. The law requires all reported information be made public, therefore, the Contractor is responsible for notifying its subcontractors that the required information will be made public.

(c)(1) Unless otherwise directed by the contracting officer, by the end of the month following the month of award of a first-tier subcontract with a value of $25,000 or more, (and any modifications to these subcontracts that change previously reported data), the Contractor shall report the following information at http://www.fsrs.gov for each first-tier subcontract. (The Contractor shall follow the instructions at http://www.fsrs.gov to report the data.)

(i) Unique identifier (DUNS Number) for the subcontractor receiving the award and for the subcontractor’s parent company, if the subcontractor has a parent company.

(ii) Name of the subcontractor.

(iii) Amount of the subcontract award.

(iv) Date of the subcontract award.

(v) A description of the products or services (including construction) being provided under the subcontract, including the overall purpose and expected outcomes or results of the subcontract.

(vi) Subcontract number (the subcontract number assigned by the Contractor).

(vii) Subcontractor’s physical address including street address, city, state, and country. Also include the nine-digit zip code and congressional district.

(viii) Subcontractor’s primary performance location including street address, city, state, and country. Also include the nine-digit zip code and congressional district.

(ix) The prime contract number, and order number if applicable.

(x) Awarding agency name and code.

(xi) Funding agency name and code.

(xii) Government contracting office code.

(xiii) Treasury account symbol (TAS) as reported in FPDS.

(xiv) The applicable North American Industry Classification System code (NAICS).
(2) By the end of the month following the month of a contract award, and annually thereafter, the Contractor shall report the names and total compensation of each of the five most highly compensated executives for the Contractor’s preceding completed fiscal year at http://www.ccr.gov, if—

(i) In the Contractor’s preceding fiscal year, the Contractor received—

(A) 80 percent or more of its annual gross revenues from Federal contracts (and subcontracts), loans, grants (and subgrants) and cooperative agreements; and

(B) $25,000,000 or more in annual gross revenues from Federal contracts (and subcontracts), loans, grants (and subgrants) and cooperative agreements; and

(ii) The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at http://www.sec.gov/answers/execomp.htm.)

(3) Unless otherwise directed by the contracting officer, by the end of the month following the month of a first-tier subcontract with a value of $25,000 or more, and annually thereafter, the Contractor shall report the names and total compensation of each of the five most highly compensated executives for each first-tier subcontractor for the subcontractor’s preceding completed fiscal year at http://www.fsrs.gov, if—

(i) In the subcontractor’s preceding fiscal year, the subcontractor received—

(A) 80 percent or more of its annual gross revenues from Federal contracts (and subcontracts), loans, grants (and subgrants) and cooperative agreements; and

(B) $25,000,000 or more in annual gross revenues from Federal contracts (and subcontracts), loans, grants (and subgrants) and cooperative agreements; and

(ii) The public does not have access to information about the compensation of the executives through periodic reports filed under section 13(a) or 15(d) of the Securities Exchange Act of 1934 (15 U.S.C. 78m(a), 78o(d)) or section 6104 of the Internal Revenue Code of 1986. (To determine if the public has access to the compensation information, see the U.S. Security and Exchange Commission total compensation filings at http://www.sec.gov/answers/execomp.htm.)

(d)(1) If the Contractor in the previous tax year had gross income, from all sources, under $300,000, the Contractor is exempt from the requirement to report subcontractor awards.

(2) If a subcontractor in the previous tax year had gross income from all sources under $300,000, the Contractor does not need to report awards to that subcontractor.
(e) Phase-in of reporting of subcontracts of $25,000 or more.

(1) Until September 30, 2010, any newly awarded subcontract must be reported if the prime contract award amount was $20,000,000 or more.

(2) From October 1, 2010, until February 28, 2011, any newly awarded subcontract must be reported if the prime contract award amount was $550,000 or more.

(3) Starting March 1, 2011, any newly awarded subcontract must be reported if the prime contract award amount was $25,000 or more.

(End of clause)

6.3 Homeland Security Presidential Directive-12 (HSPD-12)

Homeland Security Presidential Directive 12 (HSPD-12) was issued to implement the policy of the United States to enhance security, increase Government efficiency, reduce identity fraud, and protect personal privacy by establishing a mandatory, Government-wide standard for secure and reliable forms of identification issued by the Federal Government to its employees and contractors (including contractor employees). Under this directive, the heads of executive departments and agencies are required to implement programs to ensure that identification issued by their departments and agencies to Federal employees and contractors meets the Standard. This policy can be found at the following website:


In performance of services under this task, contractor shall insure all its personnel who require physical access to federally controlled facilities and access to federally controlled information systems by 27 October 2007, have been issued identification in compliance with HSPD-12 policy. In their quotes, offeror’s shall confirm they will comply with the government client’s identification procedure that is implementing HSPD-12 policy. The Security/Identification point of contact for the client agency that is responsible for implementing their HSPD-12 compliant policy is:

<table>
<thead>
<tr>
<th>POC Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Symbol</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>City, State, Zip</td>
<td></td>
</tr>
<tr>
<td>email address</td>
<td></td>
</tr>
</tbody>
</table>
All costs associated with obtaining necessary clearances shall be borne by the contractor.

6.4 Security

**Federal Information Security Management Act (FISMA) of 2002 Compliance:**

FISMA compliance is access through annual accreditation and certification as required by Department of Defense Information Assurance Certification and Accreditation Process (DIACAP) governed by Department of Defense Instruction 8510.01, dated November 28, 2007.

Note: This requirement must be met on any procurement, IT, PS, etc., where the contractor will have access to government electronic information.

In order to satisfy this requirement, [AGENCY] requires the FISMA point of contact for the client agency that is responsible for maintaining their annual FISMA accreditation and certification:

Provide your agency official for FISMA compliance below:

<table>
<thead>
<tr>
<th>POC - Name</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Office Symbol</td>
<td></td>
</tr>
<tr>
<td>Address</td>
<td></td>
</tr>
<tr>
<td>City, State, Zip</td>
<td></td>
</tr>
<tr>
<td>Telephone #</td>
<td></td>
</tr>
<tr>
<td>Fax #</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td></td>
</tr>
</tbody>
</table>

6.5 Place and Hours of Performance

**DESCRIBE WHERE THE WORK WILL BE PERFORMED. CAN BE CONTRACTOR FACILITY, CLIENT LOCATION, ALTERNATE SITES, OR COMBINATION OF ALL OF THE ABOVE.**
DESCRIBE THE HOURS OF PERFORMANCE WHEN WORKING AT GOVERNMENT FACILITIES. TAKE INTO CONSIDERATION ALT WORK SCHEDULES, OVERTIME, WORKING IN DIFFERENT TIME ZONES, ETC. When working at Government facilities, work will be accomplished during normal duty hours (8AM-5PM) unless approved by site personnel.

Contractor personnel will not report to Government facilities to work nor remain at the work locations any time the Government is unexpectedly required to close their offices. The contractor will not be compensated for these Government closures. The contractor is responsible for all notification of their contractor staff during times of closure.

6.5.1 Contractor Employee Guidelines

The contractor shall not employ persons on this task order if such employees are identified to the contractor by the client representative as a potential threat to the health, safety, security, general well being, or operational mission of the installation and its population.

6.6 Special Terms and Conditions

6.6.1 508 Compliance.

The Industry Partner shall support the Government in its compliance with Section 508 throughout the development and implementation of the work to be performed. Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d) requires that when Federal agencies develop, procure, maintain, or use electronic information technology, Federal employees with disabilities have access to and use of information and data that is comparable to the access and use by Federal employees who do not have disabilities, unless an undue burden would be imposed on the agency. Section 508 also requires that individuals with disabilities, who are members of the public seeking information or services from a Federal agency, have access to and use of information and data that is comparable to that provided to the public who are not individuals with disabilities, unless an undue burden would be imposed on the agency. Applicable standards are 1194.21-1194-26

The Industry Partner should review the following websites for additional 508 information:

http://www.section508.gov/index.cfm?FuseAction=Content&ID=12

http://www.access-board.gov/508.htm

http://www.w3.org/WAI/Resources

The contractor must indicate in its quote where full details of compliance to the identified standards can be found, such as vendor’s website, etc.

Project Number: TASK ORDER ID

Client Name: CLIENT NAME

SCHEDULE
6.6.2 Post Award Orientation Conference

The contractor shall participate in a post-award conference for the purposes of making introductions, coordinating security requirements, discussing schedules, prioritizing PWS requirements, and providing details regarding the transition of work requirements from the incumbent contractor. Please Note: This applies to re-competed requirements with a new awardee.

The contractor shall commence work on the first day of the period of performance. The Post Award Orientation Conference shall occur at _________________, xx days after award.

6.6.3 Transition Plan (Phase In and Out of Task Order)

The contractor shall provide a transition plan that outlines the designated time period and strategy to transition into the duties as the contractor and to transition out of the task order at the end of the period of performance.

Note: The transition period shall not exceed 30 days.

[The transition language should be tailored to the specific needs of the client requirements.]

6.6.4 Personal Service

The client has determined that use of the GSA contract to satisfy this requirement is in the best interest of the government, economic and other factors considered, and this task order is not being used to procure personal services prohibited by the Federal Acquisition Regulation (FAR) Part 37.104 titled “Personal services contract”.

To counter the circumstances that infer personal services and to preserve the non-personal nature of the contract, the contractor shall adhere to the following guidelines in the performance of the task:

- Contractor provides for direct supervision of all contract employees assigned to the task.
- Refrain from discussing the issues such as skill levels and hours, salaries, cost and funding data, or administrative and personnel matters affecting contractor employees with the client.
• Ensure close communication/coordination with the PM, reporting problems to the PM as they occur (not waiting for a monthly meeting).

• Do not permit government officials to interview potential contractor employees, discuss individual performance, approve leave or work scheduling of contractor employees, terminate contractor employees, assist contractor employees in doing their jobs or obtain assistance from the contractor in doing Government job.

• Do not assign contractor personnel to work under direct government supervision.

• Maintain a professional distance from government employees.

• Provide contractor employees with badges, if appropriate, identifying them as contractors.

• Ensure proper communications with the government (technical discussion and government surveillance is okay, but the Government cannot tell the contractor how to do the job).

• Assign a task leader to the task order. The task leader or alternate should be the only one who accepts tasking from the assigned Government point of contact or alternative.

• The government has the right to reject the finished product or result and this does not constitute personal services.

• When travel is required for the performance on a task, the contractor personnel are only to travel as directed by their contract management.

6.6.5 Privacy Act

Work on this project may require that personnel have access to Privacy Information. Personnel shall adhere to the Privacy Act, Title 5 of the U.S. Code, Section 552a and applicable agency rules and regulations.

6.6.6 Limitation of Funds

The Contractor shall not perform work resulting in charges to the government that exceed obligated funds. The contractor shall notify the Contracting Officer in writing, whenever it has reason to believe that in the next 60 days, the charges to the government will exceed 75% of the obligated funds. The notice shall state the estimated amount of additional funds required to complete performance of this task. The government is not obligated to reimburse the Contractor for charges in excess of the obligated funds and the Contractor is not obligated to continue performance or otherwise incur costs that would result in charges to the government in excess of the amount obligated under this order.
6.6.7 Unilateral Modifications for Funds Management

The standard FAR 52.212-4 Contract Terms and Conditions – Commercial Items Clause is tailored to allow unilateral modifications to be issued after award of this task to obligate funding. The acceptance of the task award by the vendor constitutes written agreement of both parties that all future modifications issued for the obligation of funding will be issued by the CO unilaterally. The vendor has responsibility for funds monitoring and tracking so by acceptance of this change, the vendor is agreeing to obtain in a timely manner the unilateral modifications from ITSS for the purpose of ensuring that funding totals are not exceeded and to ensure the vendor’s responsibility for tracking and reporting deficits in funding can be accomplished per the terms of the SOW/PWS.

6.6.8 Records/Data

All software (databases/code) produced at the request of the client becomes the sole property of the United States Government and shall enter the public domain and is non-proprietary. Subsequent use of this software for commercial purposes by the Contractor or any other entity may occur only after a properly filed Freedom of Information Act (FOIA) request has been approved by the Government. Any such subsequent use shall attribute the origin of the software to the client.

All deliverables become the sole property of the United States Government. The Government, for itself and such others as it deems appropriate, will have unlimited rights under this contract to all information and materials developed under this contract and furnished to the Government and documentation thereof, reports and listings, and all other items pertaining to the work and services pursuant to this agreement including any copyright. Unlimited rights under this contract are rights to use, duplicate, or disclose data, and information, in whole or in part in any manner and for any purpose whatsoever without compensation to or approval from the Contractor. The Government will at all reasonable times have the right to inspect the work and will have access to and the right to make copies of the above-mentioned items. All digital files and data, and other products generated under this contract, shall become the property of the Government.

Copyright: Any software and computer data/information developed, as a component of this contract shall have the following statement attached to documentation:

“This computer program is a work effort for the United States Government and is not protected by copyright (17 U.S. Code 105). Any person who fraudulently places a copyright notice on, or does any other act contrary to the provisions of 17 U.S. Code 506(c) shall be subject to the penalties provided therein. This notice shall not be altered or removed from this software or digital media, and is to be on all reproductions.”
6.6.9 Government Furnished Items

DESCRIBE ALL GFE. INCLUDE WHAT IS BEING PROVIDED AND WHEN IT WILL BE PROVIDED.
7.0 INVOICING/ PROCEDURES FOR PAYMENT

The Period of Performance (POP) for each invoice shall be for one calendar month. The contractor shall submit only one invoice per month per order/contract. The appropriate [AGENCY] office will receive the invoice by the twenty-fifth calendar day of the month after either:

- The end of the invoiced month (for services) or
- The end of the month in which the products (commodities) or deliverables (fixed-priced services) were delivered and accepted by the Government.

For Labor Hours and Time and Material orders/contracts each invoice shall show the skill level category, the hours worked per skill level, the rate per skill level and the extended amount for that invoice period. It shall also show the total cumulative hours worked (inclusive of the current invoice period) per skill level, the hourly rate per skill level, the total cost per skill level, the total travel costs incurred and invoiced, and the total of any other costs incurred and invoiced, as well as the grand total of all costs incurred and invoiced.

For Labor Hour and Time and Material orders/contracts each invoice shall clearly indicate both the current invoice’s monthly “burn rate” and the total average monthly “burn rate”.

The contractor shall submit all required documentation (unless exempted by the contract or order) as follows:

- For Travel: Submit the traveler’s name, dates of travel, location of travel, and dollar amount of travel.
- For ODCs: Submit a description of the ODC, quantity, unit price and total price of each ODC.

**NOTE: The Government reserves the right to audit, thus; the contractor shall keep on file all backup support documentation for travel and ODCs.**

7.1 Posting Acceptance Documents:

Invoices shall initially be submitted monthly [enter method for invoice submission to Agency], to allow the [Agency] to certify the services have been received and the COTR to electronically accept the invoice. Included with the invoice will be all back-up documentation required such as, but not limited to, travel authorizations and training authorizations (including invoices for such).

7.2 Receiving Agency’s Acceptance

The receiving agency has the following options in accepting and certifying services;

- [ENTER METHOD FOR ACCEPTING/CERTIFYING SERVICES]
NOTE: The acceptance of the authorized agency customer representative is REQUIRED prior to the approval of payment for any invoiced submitted.

NOTE: If the required documentation including, (A) the customer’s signed written acceptance OR (B) the customer’s electronic acceptance, is not received within 15 calendar days from the date the invoice was submitted to [Agency] Finance, the invoice may be rejected in whole or in part as determined by the Government.

7.3 Posting Invoice Documents
Contractors shall submit invoices to ________________ for payment.

7.4 Content of Invoice
The contractor’s invoice will be submitted monthly for work performed the prior month. The contractor may invoice only for the hours, travel and unique services ordered by [AGENCY] and actually used in direct support of the client representative’s project. The invoice shall be submitted on official letterhead and shall include the following information at a minimum.

• [AGENCY] Task Order Number
• Task Order ACT Number
• Prompt Payment Discount
• Remittance Address
• Period of Performance for Billing Period
• Point of Contact and Phone Number
• Invoice Amount
• Skill Level Name and Associated Skill Level Number (for T&M or Labor Hour)
• Actual Hours Worked During the Billing Period (for T&M or Labor Hour)
• Travel Itemized by Individual and Trip (if applicable)
• Training Itemized by Individual and Purpose (if applicable)
• Support Items Itemized by Specific Item and Amount (if applicable)
7.5 Final Invoice

Invoices for final payment must be so identified and submitted within 60 days from task completion and no further charges are to be billed. A copy of the written acceptance of task completion must be attached to final invoices. The contractor shall request from [AGENCY] an extension for final invoices that may exceed the 60-day time frame.

The Government reserves the right to require certification by a COTR before payment is processed, if necessary.

7.6 Close-out Procedures

The contractor shall submit a final invoice within sixty (60) calendar days after the end of the Performance Period. After the final invoice has been paid the contractor shall furnish a completed and signed Release of Claims (GSA Form 1142) to the Contracting Officer. This release of claims is due within fifteen (15) calendar days of final payment.
APPENDIX A

Points of Contact

1.0 POINTS OF CONTACT.

1.1 Client Representative
The following person has been designated the CR by the Contracting Officer:

NAME
TITLE
ORGANIZATION
CONTACT INFO

Appendix F details tasks delegated to the Client Representative.

1.2 Contracting Officer
NAME
TITLE
ORGANIZATION
CONTACT INFO

1.3 Project Manager
NAME
TITLE
Project Number: TASK ORDER ID
Client Name: CLIENT NAME
SCHEDULE
1.4 Invoice Reviewer

NAME

TITLE

ORGANIZATION

CONTACT INFO
APPENDIX B

Evaluation Criteria

THE EVALUATION CRITERIA SHOULD BE TAILORED TO MEET YOUR SPECIFIC REQUIREMENT. IT MUST BE CONSISTENT WITH THE EVALUATION CRITERIA IN THE ACQUISITION PLAN AND THE EVALUATION PLAN!!!

a. Implementation of Past Performance:

(a) FAPIIS- This system is intended to significantly enhance the scope of information available to Contracting Officers as they evaluate the integrity and performance of prospective awardees. The FAPIIS information is available to Contracting Officers for viewing by accessing the Past Performance Information Retrieval System or PPIRS. Contracting officials can input applicable information into the FAPIIS module of the Contractor Performance Assessment Review System or CPARS.

(b) The Government reserves the right to use past performance information obtained from sources other than those identified by the offeror. This past performance information will be used for the evaluation of past performance.

(c) The Government does not assume the duty to search for data to cure the problems it finds in the information provided by the Offeror. The burden of providing thorough and complete past performance information remains with the Offeror.

• If past performance is not an evaluation factor for this procurement, the CO will still review the Federal Awardee Performance and Integrity Information System (FAPIIS) and the Excluded Parties Lists System (EPLS) information on the awardee in order to make a responsibility determination in accordance with FAR 9.104-6 FAPIIS and FAR 9.105-1 Obtaining Information.

[AGENCY] will evaluate all quotes to determine the best value to the government. [AGENCY] will make that determination based on each vendor’s quote using the following evaluation criteria, listed in their descending order of importance:

• Past Performance (PP) demonstrates relevant experience or performance on how well contractors manage and comply with contractual requirements in the past. (Per needs of client’s requirements and/or Open Market, or Sole Source Procurement) PP evaluation will take into account (a) the currency and relevance of an offeror’s PP; (b) the source of the information; (c) the context of the data; and (d) the quality of an offeror’s PP.
• Past Experience (PE) and its relevancy to the scope, size, and duration of requirements identified in the PWS within the last 3 years (tailor to your requirement and make sure this matches your Evaluation Plan).

• Technical Approach (TA) and its feasibility, practicability and appropriateness in accomplishing PWS requirements.

• Price: Evaluated to determine that the price is fair and reasonable.

PP/PE/TA is more/significantly more important than PP/PE/TA. PP/PE/TA is more/significantly more important than PP/PE/TA. Non-price factors, when combined, are less/more/significantly more/less important than/ equal to Price. As the difference in non-price factors becomes closer, Price may become more important. Non-price factors will be evaluated first, then price. (Tailor to your requirement)

The following definitions will be used with respect to the above criteria:

• PE
  • Past Experience: Work the vendor has performed that shows they have the capability to successfully complete the tasks identified in this solicitation at minimum risk to the Government.
  • Scope: The range of work/skills being referenced is similar in nature to the requirements identified in the PWS.

• TA:
  • Technical Approach: Description of the vendor’s knowledge and understanding of the requirements as outlined in the PWS. Includes the methodologies, processes, and techniques used to successfully complete the PWS requirements.
  • Feasible: Can successfully accomplish the tasks with the identified resources.
  • Practical: Logical approach that does not introduce a high level of risk in order to successfully complete the task requirements.
  • Appropriate: A suitable approach that is within the scope of the task and satisfies all the task requirements (right tool for the job).

Non-price factors (PP/PE/TA) when combined are significantly more important than price. As differences in non-price factor become less significant, price will become increasingly more important. Non-price factors will be evaluated first, then price.

This requirement will be conducted in accordance with FAR 8.4 as the task order will be placed against a Federal Supply Schedule contract. As such, debriefing as described in FAR 15.506 is NOT applicable in this instance. Vendor(s) are put on notice that only a
brief explanation of the basis for the award decision shall be provided as prescribed by FAR 8.405-2(d), and only if requested in writing.

If any of the evaluation factors (PE/TA/PP) receives a rating of less than acceptable, the Quote will not be reviewed any further and will not be considered for award.

Past Experience (PE)

This factor considers the extent of the offeror’s past experience in carrying out similar work. The government must have confidence in the offeror’s ability to complete a project with similar scope, size, and duration with minimal risk.

- **SIMILAR IN SCOPE IS DEFINED AS A MEASURABLE RANGE OF OPERATIONS SUCH AS THE MAJOR REQUIREMENT AREAS OF A PWS. LIST THE CRITICAL AREAS FROM REQUIREMENT THAT THEY MUST HAVE.**

- **SIMILAR IN SIZE IS DEFINED AS DOLLAR VALUE, NUMBER OF PERSONNEL IN SIMILAR SKILL SETS, AND/OR NUMBER OF USERS/HARDWARE SUPPORTED.**

- **SIMILAR IN DURATION IS IDENTIFIED BY THE CLIENT AS THE LENGTH OF TIME REQUIRED TO SHOW THE VENDOR CAN SUPPORT A REQUIREMENT OF SIMILAR LENGTH.**
REQUIRED PAST EXPERIENCE INFORMATION

- Using the Past Experience Information Sheet (PWS/Appendix D) provide the PE information for three past or current contracts/task orders executed within the past 3 years with comparable (same or similar scope, size, duration) requirements to the solicited task. In rating this factor, the Government will evaluate the firm’s similar experience.

- PE may be submitted for both the prime or teaming partner if required.

- Note: In rating this factor, the Government will evaluate the firm’s similar experience. The government’s consideration of experience will include the offeror’s organizational experience but will not include specific consideration of the offeror’s proposed, current, or former contractor personnel experience as part of the offeror’s organizational experience.

CONTRACTOR TEAMING ARRANGEMENTS (CTA): IF A CTA IS QUOTED, THE VENDOR MUST PROVIDE A BREAKOUT OF WHAT WORK WILL BE PERFORMED BY THE PRIME AND EACH TEAMING PARTNER. PAST EXPERIENCE WILL BE EVALUATED ON THE TOTAL SOLUTION OFFERED. (CTA TEAMING ARRANGEMENT – ONLY WHEN USING SCHEDULES.)
TECHNICAL APPROACH (TA)

Required TA Information
This factor considers the extent which the offeror understands the requirements of the SOW/PWS, and the offeror’s technical approach to meeting those requirements.

Each offeror will be evaluated on their demonstrated understanding of the task order requirements, the adequacy of the solution approach, the quality and completeness of their technical solutions to these objectives, and the overall qualifications and skill mix of the contractor workforce proposed to address these task order objectives.

In support of the evaluation of the TA each offeror must submit the following: (tailored to PWS)

- Description/Narrative of the vendor’s knowledge and understanding of the requirements as outlined in the PWS.
- The methodologies and techniques used to fulfill the PWS requirements including the management of the task.
- Identification of specific skill categories with a description of specific duties each will perform. The vendor shall include a “crosswalk” between the labor categories identified in this PWS and their proposed labor categories based on their GSA Schedule.
NOTE: AN OFFEROR MUST NOT SIMPLY STATE THAT IT IS WILLING TO PERFORM THE PWS REQUIREMENTS. VENDORS MUST SHOW THEY ARE CAPABLE OF PERFORMING THE WORK DESCRIBED IN THE PWS.

- Transition plan (Reference in Section 6.5.5 Transition Plan)
- A table cross-referencing the labor categories identified in this quote to the vendor’s proposed labor categories (based on the vendor’s [SCHEDULE NAME]) with a description of specific duties each will perform.

Past Performance:

The CO will evaluate the offeror’s PP as a measure of the Government’s confidence in the offeror’s ability to perform successfully, this project based on demonstrated performance. The Government will conduct a performance risk assessment based upon the quality of the offeror’s PP and any proposed subcontractor, as it relates to the probability of successful accomplishment of the required effort. When assessing performance risk, the Government will focus its inquiry on the PP of the offeror and its proposed subcontractors as it relates to all solicitation requirements. The evaluation may include a review of your compliance with subcontracting plan goals, monetary targets for small disadvantaged business (SDB) participation and notifications submitted under 19.1202-4(b). In the case of an offeror without a record of relevant past performance or for whom information on past performance is not available, the offeror will not be evaluated favorably or unfavorably but will receive a rating of “neutral”.

Required PP Information

PP will be evaluated based on the offeror’s relevant performance compared to the requirements specified in the solicitation/PWS. In conducting the performance risk evaluation, the Government may use data provided by the offeror, data obtained from the contractor’s PE references, and data obtained from other sources (FAPIIS/PPIRS/CPARS) that it considers current, accurate and relevant.

Contractor Teaming Arrangements (CTA): If a CTA or prime-subcontractor arrangement is proposed, the vendor must provide a breakout of the percentage of work performed by the prime and each subcontractor. The PP of each Team member (or critical subcontractor) will be evaluated individually and then factored together for an overall Team factor rating (taking into consideration the appropriate weight to give each Team member (or subcontractor) based on their planned performance as identified in the quote. For example, if the offeror’s quote generally indicates to the Government that Team member “A” will perform a significant amount of work, then commensurate weight (significant weight in this example) is given to Team member A’s experience rating in assigning the overall Team experience rating.

Project Number: TASK ORDER ID

Client Name: CLIENT NAME

SCHEDULE
Note: In rating this factor, the Government will evaluate the firm’s PP. The government’s consideration of PP will include the offeror’s organizational PP but will not include specific consideration of the offeror’s proposed, current, or former contractor personnel performance as part of the offeror’s organizational PP.

PP Evaluation Standard

In evaluating PP, the Government will review how well the offeror has performed on other relevant comparable projects with respect to scope. In making this determination, the Government will review the following elements:

- Management Controls: Responsiveness, staffing, project management
- Quality of Services: Compliance with contract requirements, technical excellence, accuracy of reports
- Customer Satisfaction: Reasonable and cooperative behavior and commitment to customer service
- Schedule Compliance: Timeliness compared to the schedule of activities, milestones, and/or deliverables
- Cost Control: Management of the contract/task budget and cost control

The Government may obtain data on PP through the FAPIIS/PPIRS/CPARS systems; any other database; by contacting references on listed PE projects and/or by any other means.

Required PP Information

One of two options can be utilized:

- Past Performance Questionnaire Form (Questionnaire mirrors the CPARS Form)
- CO directly calling the PP references

Price

Price will be evaluated to determine the fairness and reasonableness of proposed pricing. Price will be evaluated separate from all non-price elements of the quote. A rating will not be assigned to the evaluation of price.

This requirement is incrementally funded T&M/fully funded FFP with pricing based on GSA’s IT Schedule 70. In the pricing section of their response to this PWS, contractors shall include specific skill category(s) with rates the contractor expects to invoice and the number of positions with estimated total hours for each position.
In an effort to receive the highest quality solution at the lowest possible price, the government requests all available discounts on all services offered by the contractor for this requirement. The contractor is encouraged to offer discounts below contract rates. When offering discounts, quotes must clearly identify both the contract and the discount price for each discounted labor rate. The vendor will provide prompt payment terms in their quote.

1.3 Other Direct Costs (ODCs)

An offeror’s quote should clearly reflect any items NOT covered by the vendor’s GSA schedule contract or a teaming arrangement with another schedule contractor. [AGENCY] must purchase any item exceeding $3000 not covered by a contractor’s schedule or their team member’s schedule.

The price quote shall include pricing for any ODCs other than travel if any are known. The contractor shall state in their quote if there are no known ODCs. If G&A is included, the contractor must provide documentation that it was authorized in their GSA IT Schedule 70 contract award.

Any quote that contains indirect costs such as General and Administrative (G&A) and Material and Handling (M&H) must comply with the following:

General and Administrative (G&A) and Material and Handling (M&H) costs will not be allowed unless it’s an approved rate on the offeror’s GSA schedule contract. If requested, the offeror must provide verification in the form of an approved GSA pricelist, showing the approved G&A or M&H rate.

The offeror’s quotation will not be considered for award if G&A and/or M&H rates are quoted and the rates are not approved on the offeror’s GSA schedule contract.

1.3.1 ODC Teaming

To provide for possible ODC purchases under this task order, the Government is asking for CTA(s) with other Schedule contractor(s).

At this time, all items possibly required under this task order are unknown. For items identified during the period of performance for this task where the teaming arrangements already established cannot provide the items, it is the responsibility of the ‘prime’ contractor of this task order to form the necessary teaming arrangements to obtain those items.

The prime contractor of this task order shall submit all teaming arrangements established prior to quote submission for review by the government. Provide any teaming arrangements established during the performance of the task order to the Contracting Officer.
for their files within 15 days after the establishment of the agreement. The contracting officer will modify the task order to include the teaming arrangement(s).

Any Contractor Teaming Arrangements established under this task order shall designate all team members, their corresponding GSA Schedule contract numbers and describe the tasks performed by each team member, along with associated proposed prices (e.g., unit prices, labor categories and rates).

The team lead responsibilities for any established teaming arrangements remain with the ‘prime’ contractor/awardee under this task order. The team lead is ultimately responsible for insuring performance of this task. However, each team member is accountable under the terms and conditions of its contract for any problems identified.

When employing a CTA with another GSA Schedule holder, the ‘prime’ contractor or lead teaming partner must submit a ‘request for purchase’ preferably by email, to the Contracting Officer to get approval on each purchase made for Other Direct Costs (ODC’s) such as equipment, software, etc. (does not include travel) utilizing teaming arrangements.

As a part of that email request, the contractor will submit the proposed purchase price for each item along with the teaming partner’s name and Schedule contract number. Then also provide two other Schedule contract price comparisons for all of the purchased items.

If there are no other Schedule contractors that provide the items off their Schedule contracts, then the ‘prime’ contractor should provide other vendor pricing such as from other contracts or open market pricing. The contractor shall identify where the pricing is from. The Contracting Officer will use this information in determining that the Government is getting a fair and reasonable price.

1.3.2 Open Market ODCs

For any open market items (items not on contractor’s or a Teaming Partner’s GSA schedule) over $3000 that are required during the performance of the task order, the CO/PM must be notified immediately so the purchase can be made by [AGENCY].
1.3.3 Travel

Travel [is/is not] anticipated for this task. [The vendor will include travel costs IAW terms identified in the PWS (Paragraph 5.5).]

Travel costs estimates are for evaluation purposes only.

During performance, only actual costs for travel are reimbursed in accordance with the Joint Travel Regulations (JTR), Federal Acquisition Regulations (FAR) and other applicable regulations, subject to approval by the client representative (CR). The CR must give prior approval for any travel. The vendor will make every effort to make requests a minimum of 2-weeks prior to travel and will provide estimated travel costs as part of the request.
APPENDIX C

Quote Format

1.0 Quote Format

The contractor’s quote must include the following information and must not exceed the following page limitations:

- **Cover Letter/Executive Summary** (including the contractor’s DUNS, Tax ID, and Prompt Payment Discount) – X pages
- **Technical Portion (Non Price):**
  - Past Performance (PP) X Pages Past Experience (PE): X pages (Max X references/Max X pages per reference)
  - Technical and Management Approach (TA): X pages
  - Pricing: X pages total.
1.1 QUOTE DEVELOPMENT INSTRUCTIONS

The contractor must submit quotes by the date and time established in the request for quote (RFQ) notice posted in ______________________________ System. If you are unable to attach your quote in ______________________________ System due to some type of technical difficulty, you must report the problem to the CO, [NAME], [TELEPHONE #], [E-MAIL], in sufficient time prior to closing to allow for the submission of the quote via an alternative method.

NOTE: Failure to register properly in ______________________________ System is not an acceptable excuse for the inability to submit a quote.

If a contractor decides to submit a “No Bid” in response to an RFQ, [AGENCY] requests they provide reasons why they chose not to participate.

The contractor will submit all industry questions concerning this PWS to the PM via email to [E-MAIL] by close of business 5 working days after the RFQ issue date identified in the ______________________________ System. The CO will compile all questions and responses and post them in ITSS for all solicited vendors to view.

The only method by which any term of the PWS may be modified is by a formal amendment to the PWS generated by the issuing office. No other communication made whether oral or in writing (e.g., at any Pre-Quote conference, Industry Questions & Answers prior to response closing date and time, clarifications, etc.), will modify or supersede the terms of the PWS.

The Government reserves the right to make a selection based upon initial quotes; therefore the offeror should submit its best terms in its initial quote.

The Government also reserves the discretion to confer with offeror’s and request revised quotes if needed, and may also determine to make no award.

Offeror’s shall thoroughly examine all solicitation documents and instructions. Failure to do so will be at the Offeror’s own risk. Failure to comply with all of the terms and conditions of the PWS may result in the Government’s elimination of the Offeror’s quote from further consideration for award.
APPENDIX D

Past Experience Information Sheet

Provide the information requested in this form for each contract/program being described. Provide concise comments regarding your performance on the contracts you identify. Provide a separate completed form for each contract/program submitted. Limit the number of past efforts submitted and the length of each submission to the limitations set forth in the task order, Section 8.3.1, Past Experience, of this solicitation.

A. Offeror Name (Company/Division): ______________________________
   CAGE Code: ________________________________________________
   DUNS Number: ______________________________________________

(NOTE: If the company or division performing this effort is different than the offeror or the relevance of this effort to the instant acquisition is impacted by any company/corporate organizational change, note those changes.)

B. Program Title: ________________________________________________

C. Contract Specifics:

   1. Contracting Agency or Customer ________________________________
   2. Contract Number ____________________________________________
   3. Contract Type ______________________________________________
   4. Period of Performance _________________________________________

   Project Number: TASK ORDER ID
   Client Name: CLIENT NAME
   SCHEDULE
5. Total Contract $ Value ____________________ (Total cost to include all options)

6. Current Contract $ Value ____________________ (Do not include unexercised options)

D. Brief Description of Effort as __Prime or __Subcontractor

(Please indicate whether it was development and/or production, or other acquisition phase and highlight portions considered most relevant to current acquisition)

E. Milestones:

1. Start Date: ______________________________

2. Completion Date: ____________________________
F. Primary Customer Points of Contact: (For Government contracts provide current information on both individuals. For commercial contracts, provide points of contact fulfilling these same roles.)

<table>
<thead>
<tr>
<th>Name</th>
<th>Office</th>
<th>Address</th>
<th>Telephone</th>
<th>FAX Number</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name</th>
<th>Office</th>
<th>Address</th>
<th>Telephone</th>
<th>FAX Number</th>
<th>E-Mail</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

G. Describe **in as much detail as possible** why this experience is relevant with respect to the scope of the overall task and to the requirements as described in Sections 4 and 5 of this SOW/PWS. Scope is defined as the range of work/skills being referenced is similar in nature to the requirements identified in the SOW/PWS. Please reference back to Appendix B, Section 1.2 Past Experience (PE) “similar” language, pg. B3.
H. Describe **in as much detail as possible** why this experience is relevant with respect to the size of the overall task and to the requirements as described in Sections 4 and 5 of this SOW/PWS. **Size is defined as dollar value, number of personnel in similar skill sets, and/or number of users/hardware supported** is similar in nature to the requirements identified in the SOW/PWS. Please reference back to Appendix B, Section 1.2 Past Experience (PE) “similar” language, pg. B3.
APPENDIX E

QUALITY ASSURANCE PLAN

[MAY BE INCLUDED AS A SEPARATE FILE]