
Manpower Personnel Training and Analyses Support

Performance-Based Statement of Work

Defense Manpower Data Center

Client Order ID (COI): 9Q9SDBIS013

October 15, 2009

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1.0 Title of Order

Manpower Personnel Training and Analyses Support (MPTA)

2.0 Points of Contact

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3.0 Introduction

Defense Manpower Data Center (DMDC) is part of a Department of Defense (DoD) Field Activity called the Defense Human Resources Activity (DHRA) which supports major programs and initiatives within the DoD. DMDC maintains the central and authoritative store of personnel, manpower, training, and security data for the DoD. The personnel data holdings, in particular, are broad in scope and date back to the early 1970's, covering all Uniformed Services, all components of the Total Force (Active, Guard, Reserve, and Civilian), and all phases of the personnel life cycle (accessions through separation/retirement). The categories of data archived at DMDC represent significant data holdings and, in most cases, provide the only single source of common data on the Uniformed Services. These data support decision-making by the Office of the Under Secretary of Defense (Personnel and Readiness), other OSD organizations, and a wide variety of customers both within and outside the Department.

DMDC operates major programs that affect individual members of the DoD, as well as other Federal Departments and Agencies. The programs support active duty, Reserve, and retired military members and their families, and civilian employees of the DoD. These programs include verifying military entitlements and benefits; managing the DoD ID card issuance program; providing identity management for the DoD; helping identify fraud and waste in DoD systems; conducting personnel surveys; developing military selection and classification and language proficiency tests, and assisting military members and their spouses with relocations, quality of life issues and transition to civilian life.

DMDC takes pride in delivering timely, quality support to the DoD and its members. DMDC adds value by ensuring that data received from many different sources are consistent, accurate, and appropriate when used to respond to inquiries. In fulfilling its mission, DMDC successfully has explored and fielded new programs, such as the Defense Language Proficiency Tests (DLPT), by leveraging existing systems and infrastructure. DMDC quickly responds to initiatives and information needs of DoD senior leadership. DMDC exploits its centralized collection of manpower and personnel data to support Department-wide tracking, analyses, research, studies, and a wide variety of reporting requirements and operational programs. DMDC not only supports the execution, modification and maintenance of Departmental and Congressionally mandated programs for personnel and medical benefits, readiness, and force protection, but also implements new initiatives, relatively inexpensively, which are highly useful extensions of existing systems. DMDC programs improve the effectiveness, efficiency, and productivity of personnel operations throughout DoD.

DMDC is a geographically separated organization with personnel and facilities located in Arlington, Virginia; Seaside, California; Seoul, Korea and Mannheim, Germany. The DMDC Director and Division Chiefs for the Business Operations and Management (BOM), Access Card Office (ACO), Data Analysis and Programming (DAP), Identity and Authentication Operations (IAO), Survey and Program Evaluation, and the Reserve Affairs Liaison are located at DMDC Headquarters in Arlington, Virginia. The DMDC Deputy Director and Division Chiefs for the Defense Enrollment Eligibility Reporting System (DEERS); Card Technology and Identity Solutions (CTIS); Data, Analysis and Program (DAP); Systems and Technical Support; Programs & Analysis; Beneficiary Support and Services, Operations Support; and Personnel Testing Divisions (PTD) at DMDC's Seaside, California location. In addition, several uniformed service members are attached to DMDC Seaside as Liaisons of the active and reserve components.

3.1 Personnel Testing Background

The PTD is responsible for the research, development and evaluation of the Armed Services Vocational Aptitude Battery (ASVAB) and the test delivery of all DoD language tests. The ASVAB is the single aptitude battery given to all applicants for the U.S. Armed Forces and is used by the Services to determine qualification for enlistment and entry into military specialties. DMDC is charged with research and development, in support of two Department of Defense (DoD) testing programs, and for the development and fielding of the ASVAB. The two DoD programs are the Enlisted Testing Program (ETP) and the Career Exploration Program (CEP). The ASVAB is administered in two modes. In the ETP, an adaptive version called the Computerized Adaptive Testing (CAT) version of the ASVAB (CAT-ASVAB) is used in some locations, while the Paper-and-Pencil ASVAB (P&P-ASVAB) is utilized in other locations. In the CEP, only the P&P-ASVAB is currently administered.

The CAT-ASVAB is currently being administered to applicants that process through the Military Entrance Processing Stations (MEPS). About 60% of all applicants take the CAT-ASVAB in the MEPS. The P&P ASVAB is administered in most Military Entrance Testing (MET) Sites, most of which are remote locations. The DMDC is exploring the feasibility of using CAT-ASVAB in MET sites, and has recently implemented an internet version of CAT-ASVAB, called iCAT, at a few MET sites.

It is anticipated that this contract will provide support in the form of manpower and equipment in PTD's CAT Laboratory (called the CAT Lab). Support for the CAT Lab is a vital function of this contract since it provides needed resources and manpower for developing operational requirements and programs and trouble shooting systems issues with the CAT-ASVAB system in the operational environment.

Supporting the ASVAB program requires a substantial amount of research and development in the area of selection and classification. This is necessary in order to maintain the most efficient selection and classification procedures. This contract will provide support for all ASVAB research and development efforts.

In addition to ASVAB, the PTD is responsible for delivery computer-based versions of DoD's language tests. These tests currently consist of the Defense Language Proficiency Tests (DLPT) and the Defense Language Aptitude Battery (DLAB). This contract will provide support for all DoD language testing programs.

4.0 Objective

Scientific, technical, and analytic support services are required that lead to the development and execution of studies supporting the ETP and STP as well as new DoD personnel programs, research and studies of force readiness and personnel policies to support Deputy Assistant Secretary for Readiness and Director of Accession Policy.

5.0 Contract Specific

5.1 Contract Type

Task orders (TOs) written against this IDIQ order will be Firm Fixed Price (FFP) or Time and Materials (T&M) and require a detailed, contractor cost proposal that supports each TO and facilitates agency review. Travel and Other Direct Costs (ODCs) will be authorized and reimbursed on a Cost Reimbursable (CR) basis.

5.2 Contract Expectation

The Government expects there may be travel and equipment that may be needed to support some TOs. These costs will be CR and should be proposed as travel and other direct cost (ODCs), respectively, with no indirect burden or fee.

The Government expects that all other ancillary cost proposed by the awardee for any TO such as subcontractor labor or ODCs (printing, shipping, xeroxing) will be clearly identified and a copy of the awardee's CAS statement provided. The Government will not accept fee on fee for subcontractor labor effort or second tier subcontracting. Subcontractor proposals to the awardee (prime) contractor are subject to review for facility, fee, indirect, and other cost / assumptions on all TOs.

5.3 Place of Performance / Hours of Operation

Some Information Technology (IT) work, identified in tasks 6.6 and 6.8, and some Item Writing and Item Editing work, identified in task 6.2, shall be performed at the Government

site, Defense Manpower Data Center, 400 Gigling Road, Seaside, CA 93955-6771. Most other tasking will be performed at the contractor's facility or at field locations.

Core hours of operation shall be 8 a.m. to 5 p.m., Monday through Friday (excluding Federal holidays). The Government does not expect the contractor to conform to DMDC duty hours.

5.4 Period of Performance

The base period of performance for this Order shall be a one-year 'Base' period from the date of award with four (4) one-year 'Option' periods that may be exercised at the discretion of the Government.

5.5 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.

Protection of Personally Identifiable Information (PII)

(a) To the extent that the work under this task order / agreement requires the contractor to have access to personally identifiable information about an individual (hereinafter referred to as "PII"), the contractor shall after receipt thereof, treat such PII as confidential and safeguard such information from unauthorized use and disclosure. The contractor agrees not to appropriate such PII for its own use or to disclose such information to third parties unless specifically authorized by the Government, in writing.

(b) The contractor agrees to allow access only to those employees who need the PII to perform services under this task order / agreement and agrees that PII will be used solely for the purpose of performing services under this Agreement. The contractor shall ensure that its employees will not discuss, divulge or disclose any such PII to any person or entity except those persons within the contractor's organization directly concerned with the performance of the task order / agreement.

(c) Contractor shall administer a monitoring process to ensure compliance with the provisions of this clause. Any discrepancies or issues should be discussed immediately with the Contracting Officer Technical Representative (COTR) and corrective actions will be implemented immediately.

(d) The contractor shall report immediately to the DMDC CIO / Privacy Office and secondly to the COTR discovery of any Privacy breach. Protected PII is an individual's first name or first initial and last name in combination with any one or more of the following data elements including, but not limited to: social security number; biometrics; date and place of birth; mother's maiden name; criminal, medical and financial records; educational transcripts, etc.

(e) The Government may terminate this task order / agreement for default if contractor or an employee of the contractor fails to comply with the provisions of this clause. The Government may also exercise any other rights and remedies provided by law or this task order / agreement, including criminal and civil penalties.

(f) In accordance with the Privacy Act of 1974 Section (m) (1) contractors support a agency shall be considered to be an employee of an agency. As such all contractors will be required to take Privacy training, provided by the agency, upon hiring and annually. Additional specialized training may also be required.

(g) The Contractor shall include this clause in all appropriate subcontracts.

5.6 Security

DoD 5200.2-R, DoD Personnel Security Program, assigns DoD contractor personnel who perform work on IT systems to one of three ADP position categories (ADP-I, ADP-II, ADP-III) that equate to Critical Sensitive, Non-Critical Sensitive, and Non-Critical, respectively. DoDI 8500.2, Information Assurance Implementation renamed the ADP position categories as IT Level I (IT-I) (Privileged), IT-II (Limited Privileged), and IT-III (Non-Privileged), respectively. The term IT is synonymous with the older term ADP.

Any contractor employees who work in support of this order that have access to the DoD sensitive data must comply with the National Agency Check with Inquiries (NACI) investigative process for IT-II access in accordance with procedures identified by the DMDC Information Systems Security Group (DISSG) responsible for oversight of all security at DMDC. Individuals proposed for positions on this order must be capable of being "vetted" to the IT level, as determined / specified by DMDC, in accordance with DoD Regulation 5200.1-R. Personnel who are charged with security as a duty should be professionally certified to the IT level-1 category as specified in 8570.01-M.

The contractor must implement non-disclosure statements to be signed by all of its employees with access to DMDC applications, Administrator passwords (such as for, but not limited to RAPIDS, DBIDS, DNVC, DCCIS, NTS, ETAS, etc.) to ensure that portion of the DoD PKI remains safeguarded. The contractor should refer to DoD Regulation 5200.2-R, Personnel Security Program for details.

The Government retains the right to direct removal and exclusion from DMDC facilities any contractor personnel, regardless of prior clearance or adjudication status, whose actions, while assigned to these tasks, conflict with the interests of the Government. Such removal or exclusion will not entitle the contractor to additional compensation or additional time to complete the tasks described in this task order.

5.6.1 National Agency Check & Inquiries (NACI)

All tasking (not related to classified systems/applications) described in this PWS or resultant Task orders are Unclassified and the level of clearance, National Agency Check & Inquiries (NACI), or IT level of access required is specified in DoD Regulation 5200.1-R. All personnel working on this task will be required to successfully complete / pass a NACI. Individuals proposed for positions must be capable of being qualified at the proposed the IT level in accordance with DoD Regulation 5200.1-R.

U.S. citizenship is required for all personnel who have not submitted trustworthiness determination and/or security clearance by October 26, 2006. All documentation and cost for clearance processing shall be the responsibility of the contractor. No contractor

employee shall commence work under this task order until the appropriate paperwork for trustworthiness determination and/ or security clearance has been granted.

5.6.2 Trustworthiness Determination and Security Clearances

Work on this project may require that personnel have access to sensitive unclassified information. In the event the contractor is given access by the Government to sensitive Government data, the contractor hereby agrees to protect such data from unauthorized use or disclosure as long as such data remains sensitive. In order to protect this sensitive information the contractor shall comply with DoD Regulation 5200.1-R, Information Security Program and DoD Regulation 5200.2-R, Personnel Security Program.

The contractor shall take reasonable care to deny access to unauthorized persons, maintain an established information security policy, and uphold procedures for safeguarding and controlling the protected information, so that it is exposed only to those who have a need to know the information and a duty to protect it. The duty to protect shall be established by a confidentiality agreement with the employee.

Additionally, as required personnel will have access to system administrator accounts and passwords. The contractor shall safeguard this information and shall not share this information, without the express permission of the Government Technical Point of Contact (TPOC). The contractor personnel issued CACs will be required to sign a DD Form 2841, "Department of Defense (DoD) Public Key Infrastructure (PKI) Certificate of Acceptance and Acknowledgement of Responsibilities" and shall adhere to these responsibilities.

Contractors are required to attend annual Security Awareness training and other security related training provided by the DMDC to ensure users understand all DMDC and DoD protocols.

5.6.3 IT Security Compliance

The Contractor shall abide by DMDC security policies and models for system architecture and technology. The contractor shall meet DMDC security requirements in three areas of: Authentication, Authorization, and Auditing. Security information technology will adhere to and be guided by program inception, elaboration, construction and maintenance Service Oriented Architecture (SOA) life cycle methodology (see DOD Architecture Framework, DoDAF v1.5; see www.defenselink.mil).

5.7 Key Personnel

Bidders shall identify 'key' positions in their technical proposals and provide a Key Qualification Matrix (KQM) for each 'key' person proposed to fill that position in accordance with the template provided in Appendix B. The contractor shall certify that the information on each 'key' person submitted is true and complete, and that the individual(s) named are available for assignment the date the order is effective. A KQM should lay out the 'key' positions' technical qualification areas required and the proposed individual's associated experience and education against each area. Once accepted, the KQM for a 'key' position becomes the baseline standard. The contractor may propose to replace 'key' personnel, but they must possess skills, work experience, and education equal to or greater than the existing / departing 'key' person's baseline qualifications.

The overall IDIQ order requires a Project Manager be available throughout the order to assume responsibility for overall order / contract performance, individual task order performance, deliverables, communication between the awardee and the Government as well as all subcontractors that are part of the awardee's team supporting the Government.

During TO performance, a KQM for new or replacement 'key' personnel should be submitted to the DMDC COR and GSA CO. The awardee shall provide a KQM for any proposed replacement of 'key' personnel at least 21 business days prior to the time the personnel change is expected to occur to allow for Government review and approval.

5.8 Government Furnished Property

The Government will furnish office space which will include desk, telephone, and computers along with access to office applications necessary to conduct business.

The Government shall provide access to Government owned software, CAT-ASVAB, DLPT and DLAB, that DMDC has developed, enhanced, and maintained and all technical data package / documentation necessary to perform scientific and technical tasks in the performance-based statement of work.

The Government will provide the successful bidder with copies of existing ASVAB programs: the ETP materials and the CEP; to include student guides, workbooks, counselor manuals, and CD / DVD media with update programs/guides.

All hardware procured will become Government Furnished Equipment (GFE). The contractor shall safeguard all Government Furnished Property (GFP), equipment, software, and information.

6.0 Performance Requirements

In order to maximize the advantage of rapidly changing technologies and leverage new technological breakthroughs, DMDC needs research studies and technical support of its primary mission in the following areas:

- Development of the ASVAB, in both its modes of administration.
- Development of the CEP.
- Computer delivery of language aptitude and language proficiency tests and psychometric technical support for test development.
- Research and development of ETP and CEP Improvements.
- Development and maintenance of software and systems for Computer-based Testing (CBT) selection and classification instruments, to include Computerized Adaptive Testing (CAT) systems.
- Evaluation of armed forces readiness and representation of today's youth in the armed forces.

- Development and evaluation of recruiting-related initiatives related to selection and classification of military applicants.

6.1 Task 1 – Conduct Research and Psychometric Analyses of Selection, Classification, and Proficiency Tests and Career Exploration Instruments (T&M)

Design and conduct research studies to evaluate selection and classification issues. Perform analyses of cognitive and non-cognitive measures; conduct statistical modeling using Item Response Theory (IRT) methods, or other mathematical modeling techniques. Perform analyses of test and item scores and compute item level statistics. These analyses could include factor analyses of test scores, structural equation modeling, advanced applications of IRT, and other multivariate techniques.

6.2 Task 2 – Develop Test Items for the ASVAB (FFP)

Subject Matter Experts and Item Writers/Editors will write and edit test items that cover all ASVAB content areas and content areas under consideration for inclusion in the ASVAB. Provide item development reference material and equipment as needed.

6.3 Task 3 -- Develop Test Forms and Survey Instruments for use in Selection and Classification Tests and Surveys (FFP)

Develop interest inventories, surveys, and other types of selection and classification instruments, as needed to evaluate testing program issues. As necessary, scan paper answer sheets and build analysis databases. Provide test development reference material and equipment as needed. Conduct content and sensitivity reviews of test items in accordance with professional testing standards. Develop and revise test specifications and test development procedures.

6.4 Task 4 – Administer Selection and Classification Tests and Non-cognitive Instruments, such as Interest Inventories and Evaluation Surveys (FFP)

Set up test sites, either computer-based or paper-and-pencil, train test administrators, administer tests or surveys, and build the necessary analysis files. This includes obtaining Office of Management and Budget (OMB) and Human Subject Protection Program (HSPP) approvals, as necessary, scanning of paper answer sheets, processing of computer-based item level data, developing user guides, test administration instructions, and other training documents, and developing on-line training systems.

6.5 Task 5 – Evaluate Characteristics of the Armed Forces (T&M)

Gather data, conduct analyses, and document results of evaluations of characteristics of the Armed Forces. This includes developing population representation reports, evaluating capabilities of the all-volunteer force, and evaluating other aspects of military force readiness.

6.6 Task 6 – Evaluate New Types of Selection and Classification Instruments and Methodologies (T&M)

Develop new types of selection and classification instruments. Design and conduct studies to evaluate the new instruments and methodologies. Research will include both cognitive and non-cognitive measures. Methodologies will include unidimensional and multidimensional IRT and both adaptive and conventional testing.

6.7 Task 7 – Provide IT Support for Research Efforts (FFP)

Provide programming and technical support for research projects that involve collecting computer-based testing data. This includes developing computer programs using C++, Java, and other such computer languages. Programming will include documentation of both computer-based conventional testing systems and computerized adaptive testing systems. Work also involves conducting analysis of software system performance and performing troubleshooting of software and hardware systems, providing general troubleshooting for issues that arise as part of the development and data collection efforts, conducting Quality Assurance (QA) software testing on the computer-based testing systems, and providing procedural documentation, including user's guides, software installation procedures, and other such documents.

6.8 Task 8 – Conduct Analysis and Studies of Geographic and Demographic Data Files (FFP)

Conduct analyses and studies of the DMDC data files containing geographic and demographic data. The files include the Recruit Market Network and Relocations systems files and other data fields of military units and installations as well as if the civilian work force and other geopolitical entities.

6.9 Task 9 – Support Personnel Testing Division's (PTD) CAT Lab (FFP)

Provide programming and technical support for the CAT Lab operational activities. This involves developing and maintaining computer programs using C++, Java, and other such computer languages. Primary programming efforts will support the CAT-ASVAB and language testing delivery systems, both Windows versions and web-based versions. Programming must be performed in accordance with Government guidelines and security requirements. Programming will include documentation of both computer-based conventional testing systems and computerized adaptive testing systems. Programming includes development of web applications for the purpose of dissemination of official selection and classification information.

Other computer technical support includes providing system support to field testing locations, HQ USMEPCOM, and DLIFLC, in addition to the CAT Lab. This involves supporting maintenance of the certification and accreditation process, resolving equipment problems within the CAT Lab, procuring equipment to resolve CAT Lab problems, conducting analysis of software system performance and performing troubleshooting of software systems and equipment hardware, providing general troubleshooting for issues that arise for the ASVAB and language testing systems, including network troubleshooting. Technical support also includes providing Configuration Management (CM) procedures and conducting Quality Assurance (QA) software testing on computer-based testing systems, providing computer programs and utilities to support the operations of the CAT Lab and the field-testing locations, providing procedural documentation, including user's guides, software installation

procedures, and other such documents, and providing technical support for development of learning management systems focused on training test administrators.

6.10 Task 10 – Develop and Evaluate Recruiting-related Initiatives (T&M)

Provide research and development on a wide variety of recruiting-related initiatives in the area of selection and classification of military applicants and personnel. Such efforts will include initiatives such as developing English skills in military applicants who appear to be otherwise qualified for military service, researching the use of calculators during ASVAB, researching retest score gains, researching using ASVAB as an alternative to DLAB for entrance into language training.

6.11 Task 11 – Research other Selection and Classification and Accession Policy Issues (T&M)

Conduct research, development, and evaluation of contemporary manpower and personnel issues facing the United States and the NATO Alliance. Evaluate and document the latest developments in strategic military Human Resources (HR) and the HR research community.

7.0 Performance Standards

Performance Standards are to be determined in each Task Order.

8.0 Quality Assurance Surveillance Plan

The contractor shall submit a Quality Assurance Surveillance Plan (QASP) to the Government for approval within 45 calendar days after award of the TO and be in direct relationship to the contractor submitted QCP. The QASP is a living document, changes and implementation will occur by mutual agreement between Government and contractor. The QASP will be used by the Government to enforce the inspection and acceptance of the TO.

Unsatisfactory work - 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 at the contractors' expense and without additional reimbursement by the Government.

9.0 Incentives

The Government expects the contractor to control cost, report cost, provide timely / quality deliverable the first time, and make progress in each task established and funded. Contractor 'success' would be measured by the following: report monthly reporting of cost, cost against funding, cost year-to-date compared to ceiling for task / line item; positive or successful subtask progress; timely delivery of substantive deliverables. Positive outcome would provide the Government incentive to continue funding or exercise of options years. Contract 'failure' would be failure in one or more of the following: no or incomplete monthly cost reporting; no or stagnant progress of subtasks; late or poor quality deliverables. A combination of these could cause funding to be curtailed, the Government not to exercise option periods, the Government to request remediation plan to get back on track, removal of key personnel, or the Government to report unsatisfactory performance report to the GSA Schedule Office.

10.0 Section 508 Compliance

The contractor shall support the Government in its compliance with Section 508 through-out 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.

Section 508 also requires that individuals with disabilities who are members of the public seeking information or services from the 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.

The Offer should review the following websites for additional 508 compliance information.

- <http://www.section508.gov/index.cfm?FuseAction=Content&id=12>
- <http://www.access-board.gov/508.htm>
- <http://www.w3.org/WAI/Resources>

11.0 Other Requirements

11.1 Travel

Local or long-distance travel may be required to various locations, as directed by the Government. All non-local travel must be pre-approved by the DMDC COR or the GSA CO and must be in accordance with the applicable Government Travel Regulations. Note: Specific travel destinations cannot be determined at this time. Travel will be performed at the direction of the Government on a not to exceed basis. Any unused travel amount for the current period of performance will **NOT** be carried over to the next period of performance. If travel costs are expected to exceed this amount, the contractor shall notify the COR and obtain written authorization from the GSA CO prior to travel.

11.2 Deliverables and Reports

The contractor shall provide the following deliverables and reports:

| Deliverable | TO | Frequency | Format |
|-------------------|-----|--|--------|
| Technical Reports | TBD | Per Task Order or Government schedule provided | Word |

| Deliverable | TO | Frequency | Format |
|--|-----|--|---------------|
| Informal Technical Information | TBD | Per Task Order or Government schedule provided | Word |
| Software programming, source code, and documentation | TBD | Quarterly | CD or FTP |
| Technical Recommendation involving management actions, policies, or procedures | TBD | Per Task Order or Government schedule provided | Word |
| Data collection instruments or methodology | TBD | Per Task Order or Government schedule provided | Word |
| Detailed research, evaluation or data collection design documents | TBD | Per Task Order or Government schedule provided | Word |
| Briefing and briefing materials | TBD | Per Task Order or Government schedule provided | Disk |
| Adjunct lessons learned technical write-ups, reports, or other forms of documentation | TBD | Per Task Order or Government schedule provided | |
| Diagrams; chart exhibits; vu-graphs; transparencies; slides, film, or photographs; or combination of these forms. | TBD | Per Task Order or Government schedule provided | Word |
| User maintenance manuals for implementation of any models, systems, or other software designed to meet specific requirements of a TO or the contract | TBD | Per Task Order or Government schedule provided | Word |
| Empirical databases including file formats, layouts, and other documentation | TBD | Per Task Order or Government schedule provided | Word |
| All executable and source code developed under this contract | TBD | Per Task Order or Government schedule provided | CD or FTP |
| Documentation necessary for interpreting and maintaining computer programs developed under this contract | TBD | Per Task Order or Government schedule provided | MS Word on CD |
| Monthly Status Reports | TBD | Per Task Order or Government schedule provided | Monthly |
| QASP | 8.0 | 30 calendar days after TOA | Word |

| Deliverable | TO | Frequency | Format |
|------------------------------|--------|---|--------|
| Quality Control Plan 'Final' | 11.2.1 | 45 calendar days after TOA | Word |
| Written Problem Report | 11.2.2 | Per Government request | Word |
| Senior Management Review | 11.2.3 | 15 th calendar day of each month | Word |
| Funding Notification | 11.2.4 | As necessary | E-mail |

11.2.1 Quality Control Plan

The Quality Control Plan (QCP) is the contractor’s internal plan to insure delivery of quality products and services under the terms of this TO. The QCP should detail the contractor’s internal controls for services under this TO and should have a direct relationship to the proposed terms of the QASP. The outline for the QCP shall be submitted with the offeror’s proposal. The completed QCP shall be delivered 45 days after award.

11.2.2 Problem Reports

The contractor shall bring problems or potential problems affecting performance to the attention of the COR and CO as soon as possible. Verbal reports shall be followed up with written reports when directed by the COR or CO.

11.2.3 Senior Management Review (SMR) Reports

An SMR report shall be submitted at the end of each month. The monthly SMR report shall summarize for each contract line item: Financial Review/Expenses, accomplishments during the period, problems met or anticipated, activities anticipated during the next reporting period, and utilization of personnel. See Appendix C for an acceptable sample format. These reports shall be submitted to the Contracting Officer’s Representative (COR) by e-mail.

Each monthly SMR report shall be submitted by the 15th business day of the month following the period reported upon.

11.2.4 Funding Notification

The contractor shall notify the CO, by written memorandum, concerning any funding shortfalls, risk situations, or adjustments stemming from Government direction or prioritization of work that is outside of the basic order or awarded TO(s).

11.3 Delivery, Inspection, and Acceptance Instructions

The contractor shall deliver all end items specified in this PWS / Deliverable table electronically (with contractor’s letterhead - cover letter) to the COR, TPOC, and GSA CO unless otherwise specified. The Government will review any ‘draft’ documents and notify the contractor of approval or recommended changes to be made in the ‘final’ version within 30 days. ‘Final’ deliverables are then due within 10 working days after receipt of any Government comments on the draft unless otherwise specified by the Government.

11.4 Payment Procedures

Billing and payment shall be accomplished in accordance with the TO and submitted to GSA and DMDC. The contractor's invoice will be for one month, for services performed in the previous month. The contractor may invoice only for the hours, travel and unique services ordered by GSA and actually used in direct support of the awarded TO. All invoicing will be done electronically through GSA's payment system.

Billing and payment shall be accomplished in accordance with this clause. The contractor shall have the invoice certified by the client representative. The contractor's invoice will be for no less than one month. The contractor may invoice only for the hours, travel, and/or unique services ordered by GSA and actually used in direct support of the client representative's project. A copy of the Government's document (receiving report) accepting the covered services must accompany invoices submitted for payment.

A copy of the invoice will be submitted to the COR and GSA CO along with the monthly status report, at the same time that it is submitted for payment. Failure to comply with the procedures outlined above may result in your payment being delayed.

12.0 Special Terms and Conditions

12.1 Continuity of Services

The Contractor recognizes that the services under this task order (TO) are considered vital to the Government and must be continued without interruption and that, upon TO expiration, a successor, either the Government or another contractor, may continue them. The contractor agrees to (1) furnish phase-in training and (2) exercise cooperation to affect an orderly and efficient transition-out to a successor.

12.2 Project Staffing Plan

Each offeror shall provide a Project Staffing Table (PST) in accordance with the template provided in Appendix A, to provide labor hours for each proposed labor category, at the task / subtask level. The PST should include:

- Schedule Labor Category Name;
- Key or non-Key position;
- Site (contractor or government);
- Person's Name;
- Primary technical function supported;
- Brief experience, skills, education they bring;
- Planned hours, by subtask

For individuals not identified at the time of proposal preparation, offerors shall provide a representative sample (at least one or two individuals) for each proposed position, but not yet identified.

12.3 Personnel Approval Requirements

a. All personnel assigned to work under Time and Materials Task orders issued hereunder must meet the qualifications in 12.4 Personnel Qualifications Requirements below and be approved as set forth in the Section.

b. Key Personnel Requirements

- (1) Certain skilled experienced professional and/or technical personnel are essential for successful accomplishment of the work to be performed under this contract. These are defined as "Key Personnel" and are those persons that the contractor proposes to furnish for all labor categories designated as "Key Personnel" in paragraph H-15 Personnel Qualifications and are indicated by a double asterisk placed at the end of the labor category. (Note: This provision applies equally to those personnel proposed against these key labor categories after contract award.)

The contractor agrees that such personnel shall not be removed from the contract work or replaced without compliance with paragraphs (2) and (3) hereof.

- (2) If one or more of the key personnel for whatever reason becomes, or is expected to become unavailable for work under this contract for a continuous period exceeding 30 work days, or is expected to devote substantially less effort to the work than indicated in the proposal or initially anticipated, the contractor shall immediately notify the Contracting Officer and shall, subject to the concurrence of the Contracting Officer or his authorized representative, promptly replace such personnel with personnel of at least substantially equal ability and qualifications.
- (3) All requests for approval of substitutions or new hires hereunder must be submitted in writing at least 15 days (30 days if security clearance is to be obtained) in advance and provide detailed explanation of the circumstances necessitating the proposed substitutions or new hires. The request must contain a complete resume for the proposed person(s) and any other information requested by the Contracting Officer or needed by him to approve or disapprove the proposed substitution. The Contracting Officer or his authorized representative will evaluate such requests and promptly notify the contractor of his approval or disapproval thereof in writing.
- (4) If the Contracting Officer determines that suitable and timely placement/replacement of key personnel who have been assigned, reassigned, terminated or have otherwise become unavailable for the contract work is not reasonably forthcoming or that the resultant reduction of productive effort would be so substantial as to impair the successful completion of the contract or the Task order thereunder the contract may be terminated by the Contracting Officer for default or for the convenience of the Government, as appropriate, or, at the discretion of the Contracting Officer if he finds the contractor at fault for the condition, the contract price may be equitably adjusted downward to compensate the Government for any resultant delay, loss or damage.

c. Substitution of Personnel - In addition to requirements for Key Personnel as set forth in paragraph b. above, the following provisions shall apply to all personnel in labor categories as listed in Section B.

- (1) The contractor agrees to assign to any ordered task those persons whose

resumes were submitted with the proposal and who are necessary to fill the requirements of the Task order. No substitutions shall be made except in accordance with this clause.

- (2) The contractor agrees that during the first 90 days of the contract performance period no personnel substitutions will be permitted unless such substitutions are necessitated by an individual's sudden illness, death, or termination of employment. In any of these events, the contractor shall promptly notify the Contracting Officer. After the initial 90 day period, all proposed substitutions or new hires must be submitted, in writing, at least 15 days (30 days if security clearance is to be obtained), in advance of the proposed substitutions to the Contracting Officer. All proposed substitutes must meet qualifications as delineated in paragraph H-15 Personnel Qualifications.

12.4 Personnel Qualification Requirements

- Expert Contributor (Behavioral) – uniquely skilled and nationally known experts in a behavioral science field. **
- Task Leader / Senior Contributor (Behavioral)* – possessing a minimum of a bachelors degree in a behavioral science field, plus 15 years of related work experience, or a Ph.D. in a behavioral science field, plus 10 years of related work experience. **
- Mid-range Technical Contributor (Behavioral)* – possessing a minimum of a bachelors degree in a behavioral science field, plus seven years of related work experience, or a masters in a behavioral science field, plus three years of related work experience. **
- Junior Technical Contributor (Behavioral)* – possessing a minimum of a bachelors degree in a behavioral science field, plus two years of related work experience, or a masters in a behavioral science field.
- Expert Contributor (Analytic) – uniquely skilled and nationally known experts in an operations research, mathematics, statistics, economics, engineering or computer science field. **
- Task Leader/Senior Contributor (Analytic)* – possessing 15 years work experience in an operations research, mathematics, statistics, economics, engineering or computer science field, or a Ph.D. in an operations research, mathematics, statistics, economics, engineering or computer science field, plus 10 years of related work experience, or a Masters degree in one of these fields plus 12 years of experience. **
- Mid-range Technical Contributor (Analytic)* – possessing a minimum of a bachelors degree in an operations research, mathematics, statistics, economics, engineering or computer science field, plus seven years of related work experience, or a masters in an operations research, mathematics, statistics, economics, engineering or computer science field, plus three years of related work experience. **
- Junior Technical Contributor (Analytic)* – possessing a minimum of a bachelors degree in an operations research, mathematics, statistics, economics, engineering or

a computer science field plus two years of related work experience, or a masters in an operations research, mathematics, statistics, economics, engineering or computer science field.

- Programming/Analysis Support Staff* – possessing a minimum of five years of experience in the area of computer programming, database management, and other analysis and computer support functions.**
- Data Collection Technician – possessing one year of experience in test administration or data collection techniques.
- Senior Technical Editor/Writer – possessing at least 10 years of experience in scientific report editing or test item writing/editing and thorough knowledge of the Publication Manual of the American Psychological Association, capable of rewriting and final editing based on general guidance/principals/examples, capable of generating editing rules from general guidance/principals/examples.**
- Mid-level Technical Editor/Writer – possessing at least 5 years of experience in scientific report editing or test item writing/editing and thorough knowledge of the Publication Manual of the American Psychological Association, capable of editing based on general guidance, principals, and examples.
- Junior Technical Editor/Writer – possessing at least 1 year of experience in scientific report editing or test item writing/editing and knowledge of the Publication Manual of the American Psychological Association, capable of editing based on general grammatical rules and specific guidance, principals, and examples.
- Production Staff – includes clerical, graphics, general office support staff.

* There are three (3) levels in this category. The levels differ by factors such as seniority in the position and can be equated to the within-grade steps of the Federal General Schedule with Level 1 equivalent to steps 1-4, Level 2 equivalent to steps 5-7, and Level 3 equivalent to steps 8-10.

** Key Personnel

12.5 Program Administration / Management

The contractor shall appoint a Program Manager who shall be responsible for the overall management and coordination of this contract with the Government. The Program Manager's name, telephone number, and internet e-mail address shall be furnished to the CO and COR.

12.6 Records/Data

The Government will be sole owner of all technical data, software developed, and infrastructure designed under this project.

13.0 List of Appendices:

The Government has provided appendices to assist Offeror's in responding to this solicitation.

- Appendix A: Sample - Project Staffing Plan
- Appendix B: Sample - Key Qualification Matrix
- Appendix C: Sample - Senior Management Review (SMR) Report

APPENDIX A

(This will be removed at award)
 Project Staffing Plan Template

| Name | Proposed Labor Category | Labor Category Number | Key Personnel (Yes or No) | Qualifications | Estimated Hours Proposed for Each Task | | | | | |
|--------------------------|-------------------------|-----------------------|---------------------------|----------------|--|--------|--------|--------|--------|--------|
| | | | | | Task 1 | Task 2 | Task 3 | Task 4 | Task 5 | Task 6 |
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| Total Hours by Task Area | | | | | | | | | | |

APPENDIX B

(This will be removed at award)

Key Personnel Qualifications Matrix Template

Proposed Personnel Name: John Smith

Company Name / Employer: Beltway Contractors, Inc.

Functional Role / Position: Database Manager

Proposed Labor Category: Database Analyst / Programmer Senior

| Requirements (Example Only) | Place of work and client if appropriate | Dates for cited experience (month / year) beginning and end | Years of experience for <u>each</u> cited position held | Official title for each cited position held | Description of qualifications and experience for <u>each</u> cited position held |
|---|---|---|---|---|--|
| Demonstrated experience enhancing and maintaining databases similar to the complexity of those in the TO. | | | | | |
| Demonstrated experience reporting to high-level personnel. | | | | | |
| Demonstrated experience working with Oracle database software. | | | | | |
| Demonstrated experience working with Access database software. | | | | | |
| Demonstrated experience working with Windows NT software. | | | | | |
| Demonstrated knowledge of ANSI SQL. | | | | | |
| Demonstrated knowledge of Relational and Object-Relational Database Standards. | | | | | |
| Demonstrated knowledge of Secure Sockets. | | | | | |

APPENDIX C
 Senior Management Review (SMR)
 Reporting Month
 Date Submitted

Contractor Name
 Manpower, Personnel and Training Analysis Support
 Contract Number # (tbd)

Financial Review / Expenses (for each CLIN)

Contract \$ Awarded

(this Contract Year (CY))

Amount \$, by CLIN

CLIN # 0001

Time elapsed this CY:

Percentage % (# months / 12)

Current \$ expended against CY:

Percentage % (expended / awarded)

Amount funded this CY:

Dollar \$

Less expense incurred and billed

Dollar \$ (through what date)

Less expenses, incurred, but not billed

Dollar \$ (covers what period of time)

Remaining CLIN funded amount available

Dollar \$

CLIN # 0002

Same format as above

CLIN # 0003

And so forth

CLIN(s) not funded

Amount \$

Activities During this Month

The following new individuals were engaged to provide services on the contract:

| <u>Govt. Lab Cat</u> | <u>Contractor Lab Cat</u> | <u>Name</u> | <u>CLIN</u> |
|----------------------|---------------------------|-------------------------------|-------------|
| | | Senior Management, Supervisor | |
| | | Project Manager | |
| | | Assistant Project Manager | |
| | | Project Assistant | |
| | | Web Designer / Manager | |
| | | Database Analyst / Programmer | |
| | | Graphics Designer, Senior | |
| | | Graphic Designer | |

Risks/Issues & Concerns:

Project Status Dashboard:

Financial Status: (red, yellow or green)

Personnel: (red, yellow or green)

Project Performance: (red, yellow or green)

Utilization of Personnel

Days of technical service agreed to, worked, and remaining for labor categories listed below.

| | | | | | | | |
|-----------------|--|--|--|--|--|--|--|
| Contract #, O&M | | | | | | | |
|-----------------|--|--|--|--|--|--|--|

| Option Year Four | | Start Date | End Date | Date of Latest Inv | Rate Per Day | # of Days Requested | # of Days Worked | # of Days Remaining |
|------------------|------|------------|----------|--------------------|--------------|---------------------|------------------|---------------------|
| Name | CLIN | | | | | | | |
| | | | | | | | | |
| Totals | | | | | | | | |

Hours worked to date by Labor Category; organized / report by CLIN.

| <i>Hours</i> | <i>Month 1</i> | <i>Month 2</i> | <i>Month 3</i> | <i>>>>></i> | <i>Month 11</i> | <i>Month 12</i> | <i>Total</i> |
|-------------------------------|----------------|----------------|----------------|-------------------------|-----------------|-----------------|---------------------|
| CLIN 0001 | | | | | | | |
| Name | | | | | | | |
| LABOR CATGORIES | | | | | | | |
| Senior Management, Supervisor | | | | | | | |
| Employee name | | | | | | | |
| Project Manager | | | | | | | |
| Employee name | | | | | | | |
| Assistance Project Manager | | | | | | | |
| Project Assistant | | | | | | | |
| Wed Designer / Manager | | | | | | | |
| Database Analysr / Programmer | | | | | | | |
| Graphics Designer, Senior | | | | | | | |
| Graphic Designer | | | | | | | |
| Total Hours CLIN 0001 | | | | | | | |

CLIN 0002

Name

 Repeat

 Total Hours CLIN 0002

Semi-Annual Highlights (every six months from TOA)

Based on discussion at the monthly SMR meetings, provide highlights of accomplishments and problems that occurred during previous six-month reporting period. Provide highlights of activities and problems anticipated during the next reporting period