

TASK ORDER TEMPLATE

Multifunction Device and Network Printer Fleet Assessment

TEMPLATE 1: Device Discovery, Cost and Energy Baselines, Optimization Recommendations

Template 1 is designed for the purpose of conducting an initial information gathering assessment in a print output environment. Template 1 is for a task that will be conducted at least 2-12 months prior to procuring devices under Functional Area II or managing devices under Functional Area III, depending on the scope and complexity of the assessment.

(Enter Ordering Activity Agency Name)

(The following is an example of a Performance Work Statement)

DATE: (Enter date)

Background: Describe background information about your agency's requirements. The definition of an "imaging fleet" is the sum of all devices that print, copy, scan, or fax a hard copy document within a defined environment. Describe your agency's "imaging fleet".

Include the size of the organization, current knowledge about the state of the MFD and NP environment, and operational responsibility for the MFD and NP fleet.

1.0 Scope of Work: Describe the elements of work that is being requested as outlined in this document. The initial fleet assessment and needs analysis process is comprised of three phases that include, but are not necessarily limited to, discovery of all hardware in the ordering activity's existing fleet; discovery and analysis of existing output volumes; discovery and analysis of monthly or annual spend; workflow analysis; and optimization recommendations. Fleet assessments should yield deliverables in the form of organizational reports and analyses designed to assist an agency in reducing the TCO of a fleet and improving operational efficiencies.

Phase I: Device Discovery: Identify the locations of the imaging fleet to be inventoried.

Task A: Device Discovery using Automated Data Collection Agent: The contractor may deploy data collection tools designed to automatically discover all of the print output devices residing on an identified network. These tools may include software packages that will reside on the agency's network, or workstation discovery tools that will require access to the network via workstations, but will not physically reside on the network. Contractors may also provide a combination of both.

The data collection tools are designed to identify the devices currently residing on the network and provide detailed usage information for those devices. Basic usage information should include:

- Device make and model
- Serial number or other unique identifier
- Page count

More detailed information may be available, and as part of the ordering process, the ordering activity should identify the additional data elements that are to be collected. Additional usage information includes, but is not limited to:

- B&W page count
- Color page count
- Duplex/Simplex page count
- Page count by size
- Installation location
- Installation date
- Device status
- Supply levels

Task B: Device Discovery using Manual Processes: For those scenarios that may prohibit the use of DCAs, the contractors are prepared to or perform data collection services (such as device discovery and meter reads) through a manual process. As part of the ordering process, the ordering activity should identify the scope of the requirement that will require manual data collection.

The manual collection process will require basic device information and meter reads to be collected directly from the device, by physically extrapolating the information through the device's control panel.

Because of the increase in labor that will be required to perform the manual collection process, ordering activities are strongly encouraged to promote the use of DCAs.

Tasks A and B Deliverables: The contractor shall provide a comprehensive list of the results of its discovery process with the data elements requested outlined in Task A. If the ordering activity requires a specific format in which the collected is to be displayed, the format should be identified as part of the ordering process.

Phase II: Spend Analysis: The Contractor will work with the ordering activity to collect all available spend data related to the existing fleet. "Spend data" is defined as any electronic or hard copy data that can be produced by the ordering activity that shows the dollar amount expended for a particular product or service within the identified fleet. The spend data should cover a period of time that is identified by the ordering activity at the task order level.

Task C: Comprehensive Description of Current and/or Past Spend Elements: Below are examples of cost components that should be considered in the contractor's estimate of spend. Additional concrete cost factors may also be identified.

- Consumables cost (e.g., purchase price, click price, and supply delivery cost for toner and parts)
- Maintenance and repair costs
- Device prices (e.g., lease, rental, and purchase prices)
- Usage costs (e.g., allowance, overage rate, cost per click, flat rate)
- Energy costs
- Lease termination costs
- Depreciation costs

In addition to comprehensively assessing cost given the needs of an agency, the Contractor shall differentiate between past and current costs and identify a period of time associated with past costs.

Task D: Assumptive Analysis: For cases where an ordering activity may be unable to provide the Contractor with spend data for the existing fleet, the Contractor should be asked to provide a plan to generate an estimated spend using a combination of assumptive analyses and estimated values of the existing goods and services within the fleet. The assumptive analysis process will be designed to model past agency spend where the data is unavailable and should be based on established pricing rates within existing Government supply markets.

The primary purpose of the data should be to enable the agency to understand its current print environment and to prove savings achieved by better managing print decisions.

Task E: Baseline Metrics Establishment: Once the data collection process is completed, the Contractor shall use the data to establish the current and past total cost of ownership (TCO) of the imaging fleet. The TCO data should provide insight into past costs at the device level when possible and should be expressed as dollar figure. The

cost elements that should go into the TCO calculation should include the cost of the device, the cost of maintaining the device, the cost for supplies needed to print.

In addition to calculating the total cost of ownership of the fleet, the contractor shall establish a cost per impression (CPI) using information on print volume derived from legacy device meter reads. The CPI should communicate to the agency how much they are spending on black and white and in color output.

The contractor may also assess the energy usage of a fleet or display or assess the fleet from an environmental perspective using other environmental variables.

The Contractor shall further enhance the TCO calculations by identifying CPI for an identified fleet. A CPI is calculated by identifying the TCO for an entire fleet over a set period of time, and then dividing the TCO by the number of hard copy images produced by that fleet over the same period of time. A CPI should be established for both black and white (B&W) and color output.

The ordering activity shall identify to which degree it would like the CPI to be identified. For example, a CPI might be required for each device within the fleet, or for each device type (e.g., copiers and printers) within a fleet.

Task F: Benchmark for Cost Reduction: The TCO and CPI benchmarks should be the data components to which all progress toward cost reduction can be compared. The Contractor shall propose a plan to assist in measuring progress towards lowering costs. The Contractor is encouraged to offer the ordering activity tools that can be used to assist the ordering activity's progression. Any electronic tools such as software packages or management databases shall be identified in the contractor's offer.

Phase III: Future State Recommendations: As part of the assessment process, the Contractor shall provide an estimated cost savings that can be achieved if the ordering activity were to follow an optimization and right-sizing plan designed to achieve the maximum potential from available resources. Such recommendations may include, but not necessarily be limited to, the relocation, removal, or disposal of legacy devices; the addition of new devices; implementation of print behavioral changes etc.

Task G Optimization: Contractor will be required to provide the ordering activity with recommendations for optimizing the existing fleet so as to use all existing devices to their maximum potential. The optimization process will include device placement within environments where an appropriate number of users are mapped to a particular device enabling higher utilization rates. The Contractor shall outline its approach to identifying deficiencies within the existing fleet as well as potential areas for improvement. The goal of the optimization process is to achieve maximum value from each of the existing devices within the current fleet.

Right-Sizing Plan: In addition to optimizing the existing resources within a fleet, the Contractor should be required to provide recommendations for right-sizing a fleet.

Right-sizing will involve relocation, removal, and and/or disposal of certain devices, as well as the potential addition of new devices.

All recommendations for device removal at the order level shall be accompanied with a recommended disposal plan to assist the ordering activity in making decisions that will mitigate negative environmental impacts.

All recommendations for new devices should be manufacturer-neutral. The recommendations for new devices shall be identified based on machine functionality as opposed to brand name make and model. If the ordering activity requests that a brand name make and model be identified, the Contractor also shall identify all equivalent makes and models available.

Contract Type: State the type of order i.e. Firm Fixed Price, Time and Materials etc. that is applicable for this contract action. For information on contract types refer to FAR Part 16.

Geographical Location/Place of Performance: Indicate all locations in which the contractor is being asked to perform or state that it will be at the contractor's facilities. If necessary, identify the main location, and approximately how far away any secondary locations are. Identify normal working hours and how you wish to address overtime or extra hours.

Period of Performance: Indicate the length of this project by using one of the following methods:

Method 1: Work to be performed in a specific time period with a period of performance of five years or less. The base period for this order is from (insert the date and year) through (insert the date and year) or one year from date of delivery and/or installation, with four available twelve month option periods to be exercised at the discretion of the government. Total of base period and option periods shall not exceed 5 years. The exercising of the options should begin 60 to 90 days prior to expiration date.

Method 2: Multi-year period of performance - Used when the need for supplies or services is non-severable and continuing over a period greater than one year. The period of performance shall not exceed 5 years.

Site Visit: If applicable – provide site visit information. If a site visit is not required please mark this section N/A or Reserved.

Performance Requirement	Method of Surveillance	Standards	Assessment
Devices are delivered 30	COR confirms delivery	Delivery is complete by 5	Failure on two

days ARO		pm on agreed upon delivery date or a substitute device has been offered	occasions will result in an assessment of task failure
Device Discovery task completion collects all basic data elements requested (manufacturer, model number, serial number, cumulative meter read)	CO , COR, and Project Manager review final reports with Contractor 4 weeks after award	There is no indication devices exist in the organization that have not been inventoried. Data provided to the office is complete for 98% of the Fleet, barring no mitigating circumstance	Failure of the standard results in failure of the task

RFQ Considerations:

Carefully consider whether the Task Order will be procured using a Performance Based Services approach. If the Contracting Officer intends to use Performance Based Contracting methods the Contracting Officer must consider how to implement and use a Quality Assurance Surveillance Plan. The Ordering Activity may utilize a system of incentives and disincentives rather than a pass/fail approach given their preferences.

The Ordering Activity Contracting Officer is responsible for developing the methodology for evaluating order quotations. Some options to consider are:

- Acceptable/Unacceptable Technical Offers that are the lowest price and meet or exceed salient performance characteristics
- Other technical factors are more highly valued by the government than price