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RFQ Summary

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Selected vendor(s) were notified

RFQ ID <b>RFQ329884</b>		Reference #			
RFQ Title Mission Support Services					
RFQ Status Open		Delivery Days From Date of Award to Date of Completion			
RFQ Issue Date 10/15/2008 12:31:53 PM EDT		RFQ Close Date 11/25/2008 11:00:00 AM EST			
Line Items					
Mfr. part No/NSN/Item	Manufacturer	Product/Service Name	Qty	Unit	Ship Address
Description					
Attached Documents: HQ003408R3002 PWS.doc					
Shipping Address					
(1) Mission Support: WHS/A & PO 1700 N. MOORE ST STE 1425 Arlington, VA 22209		Individual Receiving Shipment (b)(6)			

**SPECIAL INFORMATION:**

There will be a Bidders Conference at 1777 North Kent Street, 14<sup>th</sup> Floor, Conference Room #3, on October 28, 2008, from 1:00 to 3:00 p.m. Each offeror is limited to sending two representatives to attend this conference. Offerors who wish to attend must submit information on attendees by 3:00 p.m., October 27, 2008 to (b)(6)

(b)(6) as follows:

Company Name  
 Company Address:  
 Attendee Name:  
 Attendee Title:  
 Attendee Phone Number:  
 Attendee E-mail:

Be advised 1777 North Kent Street is a secure facility. Attendees will need to sign in and provide a Government Issued form of identification to Security in order to obtain access to the building.

**A. SOLICITATION**

This is a solicitation for commercial items prepared in accordance with FAR Subparts 8.4 and 12. This is the only solicitation that will be issued. Revisions and amendments may follow. This solicitation is for proposals which will result both in the establishment of multiple award Blanket Purchase Agreements (BPAs) utilizing the selected contractor's General Services Administration (GSA) Mission Oriented Business Integrated Services (MOBIS) Federal Supply Schedule (FSS) under SINs 874-1 "Consulting Services"; 874-2 "Facilitation Services"; 874-3 "Survey Services", 874-7 "Program Integration and Project Management services", and award of the first task order.

**B. BPA STRUCTURE**

The Washington Headquarters Services, Acquisition and Procurement Office intends to establish multiple award BPA's with three or more vendors.

The following Schedule applies to this agreement:

<u>Period of Performance</u>	<u>Dollar Threshold Capacity of the BPA</u>	<u>Performance Dates</u>
5 Years	\$250,000,000.00	Date of award through month 60 after date of award.

The combined dollar limit of all the BPA's is \$250,000,000.00. The BPA's expire after five (5) years, or at the end of the FSS contract period, whichever is earlier.

The BPA's shall be reviewed annually before the anniversary of their effective dates and revised as necessary. The BPA's may be discontinued by either party upon thirty (30) days written notice.

**1. Scope**

The purpose of the BPA's are to provide a broad range of non-personal, professional, technical, analytical, and executive-level administrative support service to Washington Headquarters Services (WHS), the Office of the Secretary of Defense (OSD), and potentially other Department of Defense offices supported by the WHS Acquisition and Procurement Office.

**2. Obligation of Funds**

Funds will be obligated on individual orders placed against the BPA's. In accordance with FAR 16.702(c), no monetary obligation in the form of a minimum guarantee or otherwise will be made pursuant to the establishment of a BPA.

### **3. BPA Users**

The principal user of the BPA will be the Office of the Undersecretary of Defense (Policy). Other potential users of the BPA, with the consent of the Office of the Undersecretary of Defense (Policy) and approval of the Contracting Officer, are other offices within the Office of the Secretary of Defense, Other Defense Agencies, and the Joint Staff. Calls placed under this Agreement may be made orally, by fax, by E-mail, or by regular mail. Each call will be assigned a call number.

### **4. Authorized BPA Callers**

WHS A&PO OSD Studies Division Contracting Officers.

### **5. BPA Administrator**

The administrator for the BPA will be:

WHS/Acquisition and Procurement Office  
OSD Professional Services Acquisition Division  
1700 North Moore Street, Suite 1425  
Arlington (Rosslyn), VA 22203

### **6. Contractor Information**

CONTRACTOR ADDRESS and POC

Name:

Address:

Phone:

Fax:

Email:

FINANCIAL INFORMATION (All TBD)

Banking Institution:

Routing Transit Number:

Account Number

Type of Account:

Taxpayer ID Number:

### **7. Types of Orders**

The Government contemplates issuing, on an as-needed-basis, primarily firm-fixed-price task orders which may include time and materials CLINs for travel, other less predictable requirements, and surge as necessary. Specific requirements for services will be contained in each task order.

### **8. Required Confidentiality Agreements**

The Contractor may be required to submit to the Contracting Officer prior to the award of a Call Order under this BPA, a signed copy of a Contractor Employee Confidentiality Agreement.

## **C. BPA ADMINISTRATION**

### **1. Contracting Officer's Representative (COR)**

(a) The COR will be identified for each Task Order.

(b) The Contractor is advised that only the Contracting Officer can change or modify the BPA terms or take any other action which obligates the Government on any task order. The authority of the COR for each task order is strictly limited to the specific duties set forth in his/her letter of appointment, a copy of which is furnished to the Contractor. Contractors who rely on direction from other than the Contracting Officer do so at their own risk and expense. Such actions do not bind the Government contractually. Any contractual questions shall be directed to the Contracting Officer.

### **2. Contractor Visits**

The COR will approve and coordinate all Contractor visits to a sponsor's agency and other DoD agencies necessary for performance under each order. All security visit requests shall be submitted to the COR for approval.

### **3. BPA Management**

Notwithstanding the Contractor's responsibility for total management during the performance of this BPA, the administration of the BPA will require maximum coordination between the Government and the Contractor. The following individuals will be the Government points of contact during the performance period of this BPA:

(a) **Contracting Officer.** All BPA administration will be effected by the Contracting Officer. Communications pertaining to contract administration will be addressed to the Contracting Officer. No changes to the performance work statement are authorized without a written modification to the BPA executed by the Contracting Officer.

(b) **Contracting Officer's Representative.** A Contracting Officer's Representative (COR) monitors all technical aspects of the contract and assists in task order administration. The COR is authorized to perform the following functions: assure that the Contractor performs the technical requirements of the task order; perform inspections necessary in connection with performance under each task order, monitor Contractor performance and notify both the Contracting Officer and the Contractor of any deficiencies; coordinate availability of Government Furnished Property (GFP), and provide site entry of Contractor personnel.

(1) The COR is not authorized to change any of the terms and conditions of the contract. Changes in the scope of work shall be authorized only by the Contracting Officer in a properly executed written modification to the contract.

(2) The COR is not authorized to re-delegate his/her authority.

(3) The COR is not authorized to initiate acquisition actions by use of imprest funds or blanket purchase agreements, nor to issue purchase orders, place calls or delivery orders under basic agreements, basic ordering agreements or indefinite-delivery contracts.

(4) The COR will be established for each individual Call Order.

### **4. Travel**

Performance under the BPAs may require travel. In that event, all travel will be at the request of the government via the COR under specific task orders issued.

If travel is required outside the metro area, it will be addressed separately by task order.

Reimbursement for travel in conjunction with the performance of a task order under the BPAs will be in accordance with the Joint Travel Regulations and PWS paragraph 11 herein.

### **5. Invoicing Instructions**

**The Contractor shall invoice per BPA task order.**

In compliance with DFARS 252.232-7003, "Electronic Submission of Payment Request (March 2003)", Washington Headquarters Services, Acquisition & Procurement Office (WHS, A&PO) utilizes WAWF-RA to electronically process vendor request for payment. The contractor is required to utilize this system when submitting invoices and receiving reports for orders issued under this BPA. Unless specifically directed in a task order issued under the BPA, the Contractor shall follow the invoicing instructions below.

The contractor shall (i) ensure an Electronic Business Point of Contract is designated in Central Contractor Registration at <http://www.ccr.gov> and (ii) register to use WAWF-RA at the <https://wawf.eb.mil>, within ten (10) days after award of the BPA or modification incorporating WAWF-RA into the BPA. Step by step procedures to register are available at the <https://wawf.eb.mil>

The WHS WAWF-RA point of contact will be identified for each Task Order. The contractor is directed to use the "2 in 1" format when submitting invoices and receiving reports.

When entering the invoice into WAWF-RA enter in the following fields these DoDAAC or DoDAAC extensions:

"Issue by DoDAAC" field enter HQ0034

"Admin DoDAAC" field enter HQ0034

"Payment DoDAAC" field enter (This will be entered when the BPA is established)

"Ship to Code/ EXT" field enter in HQ0034 and (WHS Team Portfolio to be determined at the task order level) in the extension field

"Inspect By DoDAAC/ EXT" fields (To be determined at the task order level)

"LPO DoDAAC/ EXT" fields - "Leave blank"

In some situations WAWF-RA system will pre-populate the "Issue By DoDAAC", "Admin DoDAAC" and "Payment DoDAAC". Contractors shall verify these DoDAACs automatically entered by the WAWF-RA system match the above information. If these DoDAACs do not match then the contractor shall correct the field(s) and notify the contracting officer of the discrepancy (ies).

Shipment numbers must be formatted as follows:

For Services, enter 'SER' followed by the last four (4) digits of the invoice number.

For Construction, enter 'CON' followed by the last four (4) digits of the invoice number.

For Supplies, enter 'SUP' followed by the last 4 digits of the invoice number.

If the invoice number is less than 4 digits, enter leading zeros.

Before closing out of an invoice session in WAWF-RA but after submitting your document or documents, the contractor will be prompted to send additional email notifications. Contractors shall click on "Send More Email Notification" on the page that appears. Contractors shall insert email addresses identified in the Task Order in the first email address block and add any other additional email addresses desired in the following blocks. This additional notification to the government is important to ensure that the appropriate persons are aware that the invoice documents have been submitted into the WAWF-RA system.

#### **D. CLAUSES INCORPORATED BY REFERENCE**

##### **52.252-2 CLAUSES INCORPORATED BY REFERENCE**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting officer will make their full text available. In addition, the full text of a clause may be accessed electronically at this/these address(es): <http://farsite.hill.af.mil> and [www.amet.gov](http://www.amet.gov).

(End of Clause)

52.204-9	Personal Identify Verification of Contractor Personnel	SEP 2007
52.216-8	Fixed-Fee	MAR 1997
52.216-27	Single or Multiple Awards	OCT 1995
52.217-8	Option to Extend Services	NOV 1999
52.217-9	Option to Extend the Term of the Contract	MAR 2000
52.233-1	Disputes	JUL 2002
52.246-4	Inspection of Services - Fixed Price	AUG 1996
52.246-6	Inspection of Services - Time and Materials and Labor Hour	MAY 2001
252.247-34	F.O.B. Destination	NOV 1991
252.201-7000	Contracting Officer's Representative	DEC 1991
252.204-7000	Disclosure of Information	DEC 1991
252.204-7003	Control of Government Personnel Work Product	APR 1992
252.212-7000	Offeror Representations and Certification - Commercial Items	JUN 2005
252.212-7001	Contract Terms and Conditions Required to Implement Status or Executive Orders Applicable to Defense Acquisitions of Commercial Items	APR 2007
252.232-7003	Electronic Submission and Payment Requests	MAR 2007
252.246-7000	Material Inspection and Receiving Report	MAR 2003

#### 52.217-8 -- Option to Extend Services.

As prescribed in 17.208(f), insert a clause substantially the same as the following:

#### 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 30 calendar days.

(End of Clause)

### **E. OTHER CLAUSES**

#### **1. Organizational Conflict of Interest (OCI)**

##### **a. Purpose:** The primary purpose of this clause is to aid in ensuring that:

- (1) the Contractor's objectivity and judgment are not biased because of its present, or currently planned interests (financial, contractual, organizational, or otherwise) which relate to any work issued pursuant to this agreement;
- (2) the Contractor does not obtain an unfair competitive advantage by virtue of its access to non-public Government information regarding the Government's program plans and actual or anticipated resources; and
- (3) the Contractor does not obtain any unfair competitive advantage by virtue of its access to proprietary information belonging to others.

- b. **Scope:** The restrictions described herein shall apply to performance or participation by the Contractor and any of its affiliates or their successors in interest (hereinafter collectively referred to as "Contractor") in the activities covered by this clause as prime contractor, subcontractor, co-sponsor, joint venture, consultant, or in any similar capacity. The term "proprietary information" for the purposes of this clause is any information considered to be so valuable by its owner that it is held in secret by them and their licensees. Information furnished voluntarily by the owner without limitations on its use, or which is available without restrictions from other sources, is not considered proprietary.

(1) **Access To and Use of Government Information:** If the Contractor, in the performance of this contract, obtains access to information such as plans, policies, reports, studies, financial plans, or data which has not been released or otherwise made available to the public, the Contractor agrees that without prior written approval of the Contracting Officer, it shall not: (a) use such information for any private purpose unless the information has been released or otherwise made available to the public, (b) compete for work based on such information after the completion of this contract, or until such information is released or otherwise made available to the public, which ever occurs first, (c) submit an unsolicited proposal to the Government which is based on such information after such information is released or otherwise made available to the public, or (d) release such information unless such information has previously been released or otherwise made available to the public by the Government.

(2) **Access To and Protection of Propriety Information:** The Contractor agrees that, to the extent it receives or is given access to proprietary data, trade secrets, or other confidential or privileged technical, business, or financial information (hereinafter referred to as "proprietary data") under this contract, it shall treat such information in accordance with any restrictions imposed on such information. The Contractor further agrees to enter into a written agreement for the protection of the proprietary data of others and to exercise diligent effort to protect such proprietary data from unauthorized use or disclosure. In addition, the Contractor shall obtain from each employee who has access to proprietary data under this contract, a written agreement that shall in substance provide that such employee shall not, during his/her employment by the Contractor or thereafter, disclose to others or use for their benefit, proprietary data received in connection with the work under this contract. The Contractor will educate its employees regarding the philosophy of Part 9.503-4 of the Federal Acquisition Regulation so that they will not use or disclose proprietary information or data generated or acquired in the performance of this contract except as provided herein.

- c. **Subcontracts:** The Contractor shall include this or substantially the same clause, including this paragraph, in consulting agreements and subcontracts of all tiers. The terms "Contract," "Contractor," and "Contracting Officer," will be appropriately modified to preserve the Government's rights.
- d. **Disclosures:** If the Contractor discovers an organizational conflict of interest or potential conflict of interest after award, a prompt and full disclosure shall be made in writing to the Contracting Officer. This disclosure shall be made on the OCI Analysis/ Disclosure Form provided as an Attachment to this agreement, and shall include a description of the action the Contractor has taken or proposes to take in order to avoid or mitigate such conflicts.
- e. **Remedies and Waiver:**
- (1) For breach of any of the above restrictions or for non-disclosure or misrepresentation of any relevant facts required to be disclosed concerning this contract, the Government may terminate this contract for default, disqualify the Contractor for subsequent related contractual efforts, and pursue such other remedies as may be permitted by law or the contract. If, however, in compliance with this clause, the Contractor discovers and promptly reports an organizational conflict of interest (or the potential thereof) subsequent to contract award, the Contracting Officer may terminate this contract for the convenience of the Government if such termination is deemed to be in the best interest of the Government.
- f. **Modifications:** Prior to contract modification, when the Task Order PWS is changed to add new work or the period of performance is significantly increased, the Contracting Officer may require the Contractor to submit either an organizational conflict of interest disclosure or an update of the previously submitted disclosure or representation.

## **2. Ordering**

Orders will be placed by the Washington Headquarters Services Acquisition and Procurement Office. The ordering Contracting Officer shall ensure compliance with all rules and regulations. Orders shall be received and accepted via hard and soft copy (CD or e-mail). Prior to soliciting Task Order proposals, Task Order Work Statements will be sent to all BPA holders (as set forth below) with a request to acknowledge receipt within 48 hours for the tasking outlined in the Task Order Work Statement.

When a task order is required, the Contracting Officer will issue a request for proposal to the BPA holders. The BPA holder, unless he "opts out," in accordance with the opt out provision below, shall submit his proposal to the Contracting officer, and the Contracting Officer will either accept the BPA holder's proposal, conduct a source selection, issue a task order, or negotiate with BPA holders, in support of task order award. If negotiations are entered into, the order will be issued to reflect the negotiated and agreed to price for the task order. Each task order shall be binding on the BPA holder when the task order is issued by the Government.

Within 48 hours of issuance of a request for proposals (RFP), BPA holders may choose to not to participate in submitting a proposal in response to an RFP by notifying the Contracting Officer of their desire to "opt out". Such notification shall be made by either facsimile and/or e-mail. The Contracting Officer may suspend BPA holders from future task order competition when BPA holders elect to opt out in response to three successive RFP's, or four times during any option period.

After award of the initial task order, future task order awards may be based on any contracting approach provided for under GSA Ordering Guidelines, including sole source, best value, low price technically acceptable, or price alone. BPA holders will be informed via task order RFP of the source selection method to be used.

## **3. Other Terms and Conditions**

The terms, conditions and clauses of Federal Supply Schedule number ~~48100-01-0000~~ are applicable to this BPA and all call orders issued pursuant to this BPA.

## **4. Small Business Participation/Reporting**

The Government wishes to cultivate small business sources in support of OUSD (Policy) requirements. To that end, the Government intends to actively monitor each BPA holders efforts to include small business participation under awarded Task Orders.

On a quarterly basis, each Contractor shall report on small business participation under awarded Task Orders. This quarterly report must show both total task order dollars and total small business dollars in each socio-economic category for each task order. Using this data, the contractor shall also measure and calculate the afore-mentioned small business participation as a percentage of total Task Order dollars in each socio-economic category for each task order. In the event a Task Order contains little or no small business participation, the Contractor shall include an explanation regarding why small business(es) are not participating in the performance of that order.

Report results will be reviewed against WHS FY2008 Subcontracting Goals set forth below; and the Contractors demonstrated commitment to supporting the Governments goal of cultivating small business sources in support of OUSD (Policy) will also be evaluated. Additionally, option exercise will be linked to the afore-mentioned review results.

### **WHS FY 2009 Subcontracting Goals**

Small business	41%
Small-disadvantaged business	15%



Woman-owned small business      6.5%

HUB Zone                              4.5%

Service-Disabled Veteran-Owned Small Business      3%

The Contractor's results on this BPA will be included in any past performance reporting that may be requested/accomplished on this BPA. The Government reserves the right to make small business participation report results a Go/No Go factor for task order award.

#### **5. Option Exercise**

In addition to the terms and conditions for option exercise set forth by the FAR/DFARS clauses herein, Option Exercise will also be accomplished in accordance with Clause E.4 "Small Business Participation/Reporting" results and Technical Exhibit 1.

#### **6. Key Personnel**

(a) The Contractor shall notify the Contracting Officer prior to making any changes in personnel assigned to key positions. The key positions are defined as:

- (1) *List positions, not individuals by name, that are considered key.*
- (2)
- (3)

***Note: At a minimum, the on-site Program Manager and an alternate should be considered Key Personnel***

(b) During the first 90 calendar days of performance\*, the Contractor shall make no substitutions of key personnel without the approval of the Contracting Officer, unless illness, death, or termination of employment necessitates the substitution. The Contractor shall notify the Contracting Officer as soon as possible after the occurrence of any of these events and provide the information required below. After the initial 90 calendar day period, the Contractor may propose substitutions. The Contractor shall provide a detailed explanation of the circumstances necessitating the proposed substitutions, complete resumes for the proposed substitutes, and any additional information requested by the Contracting Officer. The Contractor shall, prior to making any substitution permanent, demonstrate to the satisfaction of the Contracting Officer, that the qualifications of the proposed substitute personnel are equal to or better than the qualifications of the personnel originally identified for the position. The Contracting officer will notify the Contractor within 15 calendar days after receipt of all required information of the decision on proposed substitutions.

\*Note to Offerors: The number of days for the Key Personnel will be determined by the anticipated duration of each order. Unless the order contains an alternate number of days under this clause, the default number of days will be 90 days.

**PERFORMANCE WORK STATEMENT  
FOR  
MISSION SUPPORT SERVICES**

**1.0 BACKGROUND**

1.1 This Statement of Work (SOW) provides for a broad range of non-personal, professional and executive-level mission support services to the Washington Headquarters Services (WHS), Office of the Secretary of Defense (OSD) and, potentially other Department of Defense offices supported by WHS Acquisition and Procurement Office. The objective of this contract action is to acquire, through award of multiple award Blanket Purchase Agreement (BPA), with firm-fixed price and time and material task orders, for professional and executive-level mission support services, primarily for the Office of Under Secretary of Defense, Policy (USD(P)). The USD(P) provides timely policy advice to the Secretary of Defense, consistent with the nation's overall security objectives. The USD(P) is the principal advisor to the Secretary on all matters concerning national security and defense policy, to include integration and oversight of DoD policy and plans to achieve national security objectives. The Principal Deputy Under Secretary of Defense for Policy provides advice and assistance to the Secretary, Deputy Secretary, and the Under Secretary of Defense for Policy on national security policy, military strategy and plans, defense capability policy, and emerging global issues to include responsibility for the core management functions of the Policy organization.

**2.0 WORK ENVIRONMENT**

Office setting that includes sedentary physical effort. However, may include lifting of weight up to thirty (30) pounds as necessary.

**3.0 OBJECTIVES**

To provide professional, technical, and executive-level administrative support services as defined below to various organizations within the Office of the Under Secretary of Defense (Policy). Work may consist of services for, but not be limited to professional, technical, analytical, security, Freedom of Information and various executive-level office administration and correspondence control support.

**4.0 SCOPE**

The contractor shall provide both on-site and off-site support for routine and unforeseen events and requirements as directed by the contracting authority. The number, type, and essential skills for contractor personnel shall be dictated by the nature of the tasks in each task order. Task requirements will primarily be in support of the missions and functions of the Offices of the Under Secretary of Defense for Policy but may, as needed, also include support for other offices under the Secretary of Defense. The Contractor shall provide personnel during normal operations and during surge or special situations to accomplish the tasks specified in this document. The Contractor shall provide services to perform the work set forth below.

**5.0 GENERAL INFORMATION:**

a. **Quality Control (QC):** The contractor shall develop and maintain an effective Quality control program to ensure services are performed in accordance with the Performance Work Statement (PWS) and Task Order Work Statement (TWS). The contractor shall develop and implement procedures to identify, prevent and ensure non-recurrence of defective services. The contractor's quality control program is the means by which it assures itself that its work complies with the requirement(s) of the BPAs and each individual task order.

b. **Quality Assurance:** The government shall evaluate the contractor's performance under this BPA in accordance with the Performance Requirement Summary (PRS), Technical Exhibit I. A tailored PRS for

each task order will be established using some or all of the performance requirements in Technical Exhibit I, as applicable, and performance will be assessed in accordance with the performance objectives in the PRS.

**c. Hours of Operation:** Contractor personnel are expected to conform to normal operating hours. The normal duty hours are 0830 through 1700 hours, Monday through Friday, except Federal holidays, or when the Government facility is closed due to local or national emergencies, administrative closings, or similar Government directed facility closings. Alternate Work Schedule (AWS) may be made available to the Contractor dependent on the requirements and policies of the respective office supported. The Contractor must at all times maintain an adequate work force for the uninterrupted performance of all tasks defined within this PWS when the government facility is not closed.

**d. Recognized Holidays:** The contractor is not required to provide services on the following days:

New Year's Day	Labor Day
Martin Luther King Jr. Birthday	Columbus Day
President's Day	Veteran's Day
Memorial Day	Thanksgiving Day
Independence Day	Christmas Day

**e. Security Requirements:** Contractor personnel, at a minimum, must possess a TOP SECRET clearance. Contractor personnel working on sensitive compartmented information (SCI) must have a TOP SECRET clearance with access to SCI. Contractors may be issued courier card(s) for the purpose of delivering documents/media to the federally controlled buildings within the National Capital Region (NCR). Specific security requirements will be stated at the Task Order level.

**f. Identification of Contractor Employees:** All contractor personnel performing work under this contract shall conspicuously display on their person a contractor furnished photo identification badge while on duty, as well as a government issued photo identification badge or badges as appropriate. Badges shall display, at a minimum, the employee's full name and the legal name under which the Contractor is doing business. Contractor personnel shall wear their badges while attending meetings and will identify themselves as contractor employees, stating their name and their company's name.

**g. Privacy Act:** Contractor(s) personnel may have access to information subject to the Privacy Act in the performance of this task. All assigned employees shall comply with all the requirements of the Privacy Act. Contractor(s) are responsible for providing all its personnel working on this contract Privacy Act training. Certificates of training shall be sent to the Contracting Officer Representative (COR) upon completion of training.

**h. Organizational Conflict of Interest & Non-disclosure Statements:** All Contractor personnel are required to complete and sign organizational conflict of interest and non-disclosure statements as a part of in processing. Contractor(s) will provide a copy of all signed statements to the COR, who will forward them to the Security Manager at the time the employee enters on to duty. (Also see "Organizational Conflict of Interest (OCI)" herein.)

**i. Key Personnel:** The contractor shall designate a working-level on-site Program Manager and an alternate who, in addition to performing routine, daily duties at the task order level, shall be responsible for the oversight, assignment, attendance and performance of contractor personnel, as well as any other appropriate supervision tasks at both the task order level and the overall Basic Purchasing Agreement. The name of this person and an alternate, who shall act for the contractor when the manager is absent, shall be designated in writing to the Contracting Officer (CO) and the COR in the offeror's proposal. The Program Manager or alternate shall have full authority to act for the contractor on all contract matters relating to daily operation of this contract. The contractor's proposal shall describe the authority vested in this person, as well as the methods whereby the Program Manager intends to manage contractor employees, assignments and quality of work, and how the Program Manager will communicate with his firm, the COR, and/or assigned Government task managers. The Program Manager shall track and record time and attendance for all personnel working under this contract, consistent with his firm's time, attendance and accounting practices.

Progress meetings between the Program Manager and Government officials, such as the COR, Task Managers and the Contracting Officer, shall be held on an as-needed basis and should not exceed two (2) hours in duration.

**j. Post Award Conference/ Periodic Progress Meetings:** Post Award Conference/Monthly Progress Meetings: The contractor shall attend any post award conference convened by the Contracting Officer in accordance with Federal Acquisition Regulation Subpart 42.5. The Contracting Officer or Contracting Officer's Representative (COR), and other Government personnel as appropriate, will meet monthly with the contractor to review progress on any active Task Orders. The agenda for these meetings will include contractor activities for the prior month, scheduled contractor activities for the current and next month, problems encountered or anticipated and actions taken or recommendations for their resolution, and percentage of requirements completed.

## **6.0 REQUIREMENTS**

The contractor shall support the various organizations within the Offices of the Under Secretary of Defense (Policy) and Washington Headquarters Services with the following specific services. Requirements may vary depending on the office. The persons provided should be able to interpret, understand, and abide by published standard operating procedures and various Government rules and regulations in order to perform the work. The contractor should understand the structure of the Department of Defense and the US Federal Government, and must be capable in Microsoft Office suite (Word, Excel, and PowerPoint).

### **6.1 Professional, Technical, and Analytical Support**

6.1.1 Provide professional, technical, and analytical personnel capable of addressing a wide range of policy issues related to the overall mission of the Office of the Under Secretary of Defense (Policy). These issues may include, but not be limited to, subject matter experts in each geographic, demographic, and culture area the world; strategies, policies, and long term security measures; analytical and technical support in such areas as anti-terrorism, domestic force protection, and installation preparedness policy; and defense support for civil authorities, crisis management and defense continuity, and defense and security policies.

6.1.2 Provide assistance in developing the Security Cooperation Guidance and subsidiary guidance; provide expertise on technology policy and assist with policy on non-nation state threats, including counter narcotics and WMD.

6.1.3 Provide support and assistance concerning legislative issues and strategic communication strategies in support of Policy's mission.

6.1.4 Provide technical and analytical support on special operations, strategic capabilities, stability operations and force transformation.

6.1.5 Provide studies and analysis, and on-site technical support for OUSD Policy's global strategy development; assist with providing long-term security strategy planning (e.g. the Quadrennial Defense Review (QDR)).

### **6.2 Freedom of Information-Mandatory Declassification Review Support**

6.2.1 Provide technical and classification reviews of FOIA and Mandatory Declassification and Review (MDR) documents. Work shall be performed by the contractor at the contractor's facility as well as on-site under the direction of the FOIA program manager. The contractor shall pickup and return FOIA/MDR documents from various offices. Task assignments will specify the required work, to include reports, documents, correspondence, and other deliverables with specific timelines delineated by the program manager.

**6.2.2 Review Services.** The Contractor shall provide personnel to process incoming FOIA/MDR requests from the public under the Freedom of Information Act and Mandatory Declassification Review Program. Personnel will have a thorough knowledge of the FOIA and MDR program, as well as relevant classification guides, as information withheld must be defensible under the law.

**6.2.3 Classification review.** The Contractor shall conduct independent reviews, electronically or manually, as defined, to determine if documents may be reclassified/declassified/sanitized based on guidance and regulations. The Contractor shall coordinate among relevant Government offices to determine the status of documents reviews and to resolve issues and problems raised during the review process. Government representatives will make all final determinations.

**6.2.4 Database Management.** The Contractor shall provide required tracking information; update and maintain the FOIA database to ensure that the FOIA 10-working-day suspense requirement is met.

### **6.3 Support to the Policy Security Office**

**6.3.1** Provide Security Specialists who shall advise, guide, counsel, and present security program recommendations for individuals within the Policy offices; provide technical guidance and assistance as required for all matters regarding SCI access.

**6.3.2** Conduct security inspections and technical assistance visits and monitor compliance with security regulations; provide technical guidance, clarification, and interpretation of security guidance; determine strengths and weaknesses of individual offices and help plan and evaluate future security needs.

**6.3.3** Maintain an up-to-date security database, to include special accesses granted and SCI accesses for all personnel assigned.

**6.3.4** Perform SCI briefings and debriefings, and special access briefings; provide security training and ensure that all personnel receive their annual collateral and SCI security refresher briefings, and maintain records of the dates briefed.

**6.3.5** Coordinate on all matters relating to Automated Information Systems (AIS) security and serve as the liaison with OSD Security Services regarding these matters

### **6.4 Management Support**

**6.4.1** Provide program management support, including scheduling and reporting.

**6.4.2** Support policy development resulting from various management initiatives.

### **6.5 General Administrative, Secretarial and Clerical Support**

#### **a. DTS and Travel Support**

**6.5.1** Coordinate with other Policy office staff and leadership, organizations within the Department of Defense, and outside organizations within and outside the Federal Government.

**6.5.2** Coordinate plans and preparation for meetings both in and outside the Washington D.C., including meetings outside the US (travel agenda, country clearance, cables visa/passports, notifications, invitations, protocol interface).

**6.5.3** Provide assistance and administrative support for meetings, document collection, control and retrieval, and general clerical assistance where needed. The contractor must be able to provide assistance in the archiving of federal documents and other administrative matters as appropriate.

6.5.4 Assist in travel arrangements for offices, to include execution under the parameters of the DOD travel regulations.

6.5.5 Provide support to Policy and other organizations for the proper use and implementation of the Defense Travel System including a help desk function.

6.5.6 Assists in obtaining theater and country clearances for DoD personnel traveling overseas under the terms of the Foreign Clearance Guide DoD 4500.54-g.

**b. Clerical and Administrative Support**

6.5.7 Perform secretarial and general clerical assistance including typing, proofreading, filing, scheduling, and working with various software packages such as databases and spreadsheets.

6.5.8 Maintain office calendars and schedule appointments and schedule meetings and ensure background materials have been reviewed and are ready for use. Greet visitors, escort "non-badge" visitors from the main entrances, and assist visitors and Government officials with administrative functions.

6.5.9 Maintain useable working files, personal files, directories, and other materials and prepare file plans in accordance with established procedures.

6.5.10 Deliver taskers, messages, incoming mail, and classified mail to Policy front offices and pick-up any outgoing correspondence. Pick up message diskettes for Policy offices and classified correspondence from Defense Intelligence Agency (DIA) (open, check, sort, and log in a database).

6.5.11 Sort and deliver incoming and outgoing mail to include special messages (cables). Process registered mail and assist with FedEx/UPS deliveries.

6.5.12 Pick up burn bags daily from the front offices and deliver to the Remote Delivery Facility (RDF) in the Pentagon.

6.5.13 Attend to the Customer Service Window and respond to requests from the Policy staff.

**c. Event Support**

6.5.14 Assist in developing special event requirements such as time and place, location, duration, number of attendees, security requirements, and travel arrangements.

6.5.15 Based on draft agenda, locations, and attendees, prepare a draft budget for event to include submission of Official Representational Funds (ORF), if needed.

6.5.16 Arrange for event transportation, security, conference facilities, lodging, meals, and other social functions.

6.5.17 Schedule air and ground transportation.

6.5.18 Arrange for appropriate conference rooms/facilities and prepare meeting places to follow acceptable protocol procedures such as seating arrangements.

6.5.19 Make meal and lodging arrangements to meet the requirements of the attendees.

6.5.20 Assist in scheduling events (i.e. tours), photographers, and other relevant duties.

6.5.21 Arrange for VIP clearance, parking, expediting security requirements/requests.

6.5.22 In consultation with senior Policy officials, manage official gifts for various events such as recording recipients and type of gifts, prepare and request funding through Official Representational Funds, and request for gift appraisal.

**d. Document Management Support**

6.5.23 Accurately distribute incoming and outgoing documents; determine type of action required by Policy office(s) for incoming documents, to include identifying the responsible Policy office for action, coordination, and/or assistance; determine the existence of non-Policy offices having a collateral interest.

6.5.24 Maintain a suspense control system that supports the Policy organization; use a specialized database to properly process documentation by identifying the information in the database, establish official Policy organization record of document transaction, and create computer-generated document control sheets electronically and in hard copy.

6.5.25 Prepare and transmit various management reports that enable senior Policy management to determine the number of suspenses for which they are responsible; identify the responsible action office and the current status of the action.

**e. Document Review Support**

6.5.26 Support and/or perform classification review, information access, records research, conversion, and archiving.

**6.6 Editorial Support Services**

6.6.1 Coordinate all comments from other sources, edit, write, and/or prepare for signature all manner of documentation such as memoranda, letters, reports, studies, instructions, directives, or other documentation.

6.6.2 Make arrangements for meetings to further develop the data and information for a document.

**6.7 Briefings and Presentation Support**

6.7.1 Provide sufficient technical and substantive knowledge and expertise to build briefings of substance from rough ideas or drafts for presentation to the most senior levels of the DoD or Federal Government.

6.7.2 Provide support using the latest computer software and imaging packages, and ensure ability to provide rapid turn-around of briefing and presentation materials; provide experience and capability to operate audiovisual equipment. Graphic support may require either computer packages or original hand drawings. Both must be loadable on web software.

**6.8 Quadrennial Defense Review (QDR) Support**

6.8.1 Professional, Technical and Analytical Personnel Support: Provide studies and analysis, and on-site technical support for OUSD Policy's global strategy development; assist with providing long-term security strategy planning (e.g. the Quadrennial Defense Review (QDR)). Support may include data, content, tradeoff and sensitivity analysis. Additional duties include those outlined in 6.6 Editorial Support Services, 6.7 Briefings and Presentation Support and C.2.3 Classification Review.

6.8.2 Clerical and Admin Support: Provide clerical and administrative support as described in 6.5 (B E). Provide support to organizational requirements that will be initially developed in early Q2 FY09. Additionally, provide surge capability up to 10 personnel as needed.

**6.8.3 Subject Matter Experts:** Provide capability to solicit specific subject matter expert's (SME) opinions on matters of Defense policy, force development and force employment scenarios. SME will need to be available to participate in meetings, presentations, and focus groups to discuss and further develop ideas and concepts.

**6.8.4 Alternative Analysis:** Provide senior peer reviews of products to "red team" concepts, ideas and course of actions.

**6.8.5 Outreach:** Host meetings on behalf of DoD focused on Congress, [the] interagency, industry and key focus groups. The goal is to spread awareness of how the QDR process works and what issues this QDR will address.

**6.8.6 Web Based Support:** Create and maintain an external (open domain) and internal (controlled access) websites that facilitates discussion (blogging), housed documents of reference, and supports analyst and decision makers.

## **7.0 ADMINISTRATIVE CONDITIONS**

**7.1** The Government will provide all business related facilities, supplies, and services necessary to accomplish this task when the contractor is working at Government facilities. The Government will provide access to all available technical manuals and documentation as requested.

**7.2** Normal work hours will be 8:30 a.m. to 5:00 p.m., Monday through Friday, excluding Government Holidays.

**7.3** The contractor's program manager shall notify the Task Monitor when contractor staff is on extended planned absences or away from the area. The contractor should be prepared on short notice to provide a suitable substitute for employees who are going to be out of the office for more than one day.

**7.4** The COR and task Monitor will provide technical assistance and clarification, if required, for the performance of tasks.

## **8.0 DELIVERABLES (See Technical Exhibit 2)**

**8.1** The contractor shall submit to the CO/COR(s) a monthly progress report on each task order. The report should include a narrative review of work accomplished and any anticipated problems or deviations. This report shall also accurately reflect the results of product inspections, summaries of status review meetings, and schedule adherence metrics. In the event the COR decides this requirement is unnecessary for a specific order, the contractor must request the COR make that determination in writing (e-mail is acceptable). Report submittals after receipt to such an e-mail shall reference that e-mail.

**8.1.1** The deliverables shall be submitted to the CO/COR(s) by the fifth business day following the end of each month. The Government reserves the right to modify the delivery schedule below to reflect changes in the Government's requirements.

**8.1.2** Unless otherwise noted, the Government will have five business days to complete the review of deliverables. The task monitor shall have the right to reject or require correction of any deficiencies found in the deliverables that are contrary to the information contained in the contractor's accepted proposal.

**8.2** The contractor shall submit to the CO/COR(s) a Quarterly Performance Requirement Summary (PRS) report in accordance with Technical Exhibit 1.



8.3 The contractor shall submit to the CO/COR(s) a Quarterly Small Business Report in accordance with clause E.4 herein.

Item	Frequency	Due Date
Monthly Progress Report	2 to COR and 1 to CO	5 <sup>th</sup> business day of the month
Quarterly PRS Report	2 to COR and 1 to CO	To be negotiated upon contract award
Quarterly Small Business Report	2 to CO	To be negotiated upon contract award

## 9.0 GOVERNMENT FURNISHED EQUIPMENT AND GOVERNMENT FURNISHED INFORMATION

9.1 The Government will provide all hardware, computer terminals, personal computers, operations manuals, instructions, and documentation.

9.2 The Government will provide access to the NIPRNet and SIPRNet and classified storage as required.

9.3 The Government will provide access to facsimile equipment, copy machines, and telephones to permit conduct of normal operations.

## 10.0 SECURITY

10.1 Identification badges, decals, and passwords will be provided by the Government.

10.2 The contractor shall safeguard all US Government information gathered in the performance of assigned duties in accordance with the Privacy Act of 1974. The Contractor shall be required to sign a non-disclosure statement for retention by the Government to ensure awareness of the Privacy Act, including penalties for willful disclosure.

10.3 The contractor shall be responsible for keys provided to the contractor by the Government. The contractor shall not duplicate keys, nor allow them to be used by unauthorized contractor personnel. The contractor shall develop and implement procedures to ensure that the keys issued to the contractor by the Government are safeguarded. The contractor shall report any occurrence of misplaced keys to the Installation Representative and/or Task Monitor within 24 hours after discovery of occurrence. In the event a key is misplaced or lost, all locks and keys for the Government will be replaced for that system.

## 11.0 PLACE OF PERFORMANCE

Place of performance will be primarily within the Pentagon and other Government facilities in the Washington, D.C. areas as required. OCONUS travel may be required and will be determined at the Task Order level.

Travel may be required in the performance of designated tasks and duties, to include supporting Government reviews. The Contractor will be authorized travel to locations and other agencies as determined necessary by OUSD(P). Travel will be reimbursed in accordance with Joint Travel Regulations.

## 12.0 SECTION 508 COMPLIANCE

Section 508 of the Rehabilitation Act requires Federal agencies to make their electronic and information technology accessible to people with disabilities. This applies to all Federal agencies when they develop, procure, maintain, or use electronic and information technology. All electronic and information technology (EIT) procured through this task order must meet the applicable accessibility standards specified in 36CFR1194.2, unless an agency exception to this requirement exists. Any agency exceptions applicable to this task order are listed below. The standards define Electronic and Information Technology, in part, as "any equipment or interconnected system or subsystem of

equipment that is used in the creation, conversion, or duplication of data or information. The standards define the type of technology covered and set forth provisions that establish a minimum level of accessibility. The application section of the standards (1194.2) outlines the scope and coverage of the standards. The standards cover the full range of electronic and information technologies in the Federal sector, including those used for communication, duplication, computing, storage, presentation, control, transport, and production. This includes computers, software, networks, peripherals, and other types of electronic office equipment.

**ANTICIPATED TASK ORDER I  
PERFORMANCE WORK STATEMENT  
AND OTHER TERMS AND CONDITIONS**

As the Government will likely not award the task until sometime during 2<sup>nd</sup> Quarter FY 2009, vendors are required to have their offer acceptance valid through the end of 2<sup>nd</sup> Quarter FY 2009 (February FY 2009).

ITEM NO	SUPPLIES/SERVICES	QTY	PRICE	UNIT AMOUNT (Per month)
BASE PERIOD				
0001	Program Management FFP	12	\$	\$
OPTION 1				
1002	Analytical Support FFP	12	\$	\$
1003	Outreach Support FFP	12	\$	\$
1004	Administrative Support FFP	12	\$	\$
1005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)
OPTION 2				
2001	Program Management FFP	6	\$	\$
2002	Analytical Support FFP	6	\$	\$
2003	Outreach Support FFP	6	\$	\$
2004	Administrative Support FFP	6	\$	\$
2005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)

## OPTION 3

3001	Program Management FFP	6	\$	\$
3002	Analytical Support FFP	6	\$	\$
3003	Outreach Support FFP	6	\$	\$
3004	Administrative Support FFP	6	\$	\$
3005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)

## OPTION 4

4001	Program Management FFP	3	\$	\$
4002	Analytical Support FFP	3	\$	\$
4003	Outreach Support FFP	3	\$	\$
4004	Administrative Support FFP	3	\$	\$
4005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)

## OPTION 5

5001	Program Management FFP	3	\$	\$
5002	Analytical Support FFP	3	\$	\$
5003	Outreach Support FFP	3	\$	\$
5004	Administrative Support FFP	3	\$	\$
5005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)

## OPTION 6

6001	Program Management FFP	3	\$	\$
6002	Analytical Support FFP	3	\$	\$
6003	Outreach Support FFP	3	\$	\$
6004	Administrative Support FFP	3	\$	\$
6005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)

**OPTION 7**

7001	Program Management FFP	3	\$	\$
7002	Analytical Support FFP	3	\$	\$
7003	Outreach Support FFP	3	\$	\$
7004	Administrative Support FFP	3	\$	\$
7005	Surge T&M (All overtime must be requested and approved in accordance with the basic BPA.)	\$1.00	\$	\$ at 20% (See below)

Surge: Surge will be calculated at 20% of the total proposed cost for all other CLINS during the option period (for example, Option 1 surge is calculated at 20% of the total cost of CLINS 0001, 1002, 1003, 1004)

**TASK ORDER WORK STATEMENT  
FOR  
QUADRENNIAL DEFENSE REVIEW SUPPORT**

**1. GENERAL**

**1.1 Background**

The Quadrennial Defense Review (QDR) is a study by the United States Department of Defense that analyzes strategic objectives and potential military threats. The *Quadrennial Defense Review Report* is the main public document describing the United States's military doctrine. The congressionally mandated Quadrennial Defense Review (QDR) directs DoD to undertake a wide-ranging review of strategy, programs, and resources. Specifically, the QDR is expected to delineate a national defense strategy consistent with the most recent National Security Strategy by defining force structure, modernization plans, and a budget plan allowing the military to successfully execute the full range of missions within that strategy. The report includes an evaluation by the Secretary of Defense and Chairman of the Joint Chiefs of Staff of the military's ability to successfully execute its missions at a low-to-moderate level of risk within the forecast budget plan. The results of the QDR shape future U.S. strategy and force structure.

**1.2 Purpose**

Support shall primarily consist of mission support services.

**2. PERFORMANCE REQUIREMENTS**

**2.1 Description of Work (See PWS Exhibit 1)**

The Under Secretary of Defense (Policy) [OUSD(P)] estimates the initial complement of contractor staff required in support of preliminary QDR efforts to be 17 professional and administrative support staff as follows:

**Professional, Technical and Analytical Personnel Support:** 1 Program Manager/Senior Advisor, 7 policy experts in the areas of force development and joint capabilities

The contractor shall provide studies, analysis, and on-site technical support for the OUSD(P) Quadrennial Defense Review in the following areas:

- force development planning – with an understanding of how joint capabilities can translate strategic variables into a force planning construct as guidance to the services,
- long-term security planning,
- data, content, trade-off, and sensitivity analysis,
- senior peer reviews of products to “red team” concepts, ideas, and courses of action.

Defense Analysts are anticipated to be mid to Senior Level Analyst that will be part of the OUSD(P) QDR Office, supporting all facets of a Policy office which is responsible for producing the Quadrennial Defense Review, coordinating all areas of force development, strategic policy, and preparing senior Policy leaders for OSD decision making bodies. These analysts will conduct analyses, develop reports, briefings, submissions, and attend meetings on QDR10 issues with selected Services and OSD organizations.

Specific responsibilities will include: preparing leadership through research and briefings; coordinating Policy decisions; reviewing DoD programs; providing recommendations during the QDR10 process; and assisting in the development of major DoD strategy level documents.

Specific expertise should include OSD Policy, Joint Policy, Technology Analysis, Service Specific Analysis, IW (SOF) Analysis, and Strategic Policy Analysis. Familiarity with and understanding of the DoD analytical process,

acquisition process, defense planning scenarios, force development, COCOM responsibilities, and Service specific responsibilities is required.

Significant DoD experience is required. OSD experience is also required. Service level experience is highly desirable.

Security clearance required: Secret

**Outreach Support:** 2 analysts with public affairs and outreach experience, 1 web designer, 2 editorial and briefing support staff

The contractor shall support outreach to DoD agencies, Joint Staff, Services, COCOMS, Industry, Congress, key focus groups, and other stakeholders as follows:

- Public affairs activities include:
  - Serving as assistant for supporting communications, public affairs, and outreach, including handling media topics and assisting with crafting language to support the collaborative efforts of the QDR team,
  - Coordinating actions with all appropriate personnel, including DoD agencies, Joint Staff Services, COCOMS, Industry, Congress, key focus groups, and other stakeholders.
  - Developing and improving the impact of OSD(P) contacts, whether with key DoD audiences or external audiences, including the media and other domestic and international research organizations.
  - Coordinating with OSD(P) leaders to ensure that events, policy analyses, and deliberative products that are releasable to the public or internal stakeholders are succinctly summarized and released to the appropriate distribution lists.
  - Coordinating with the OSD Public Affairs office on all media requests that address QDR 10 issues or which involve OSD personnel in interviews, whether they are on or off the record.
- Web support activities including creating and maintaining an external (open domain) and internal (controlled access – Share Point) website that facilitates discussion (blogging), houses documents of reference, and supports analysts and decision makers,
- Editorial and graphics support for briefings, monographs, speeches, and final documents

Security clearance required: Secret

**Technical and Administrative Support:** 1 classification review support specialist, 3 clerical and administrative support staff

Contractor shall perform document management, filing, electronic archiving, and FOIA support in accordance with BPA PWS paragraph 6.5. Contractor shall also perform internal security support to QDR office (in support of actions required by the OSD(P) Security Office as outlined in BPA PWS paragraph 6.3.)

Security clearance required: Secret



**3. SCHEDULE OF DELIVERABLES**

Ref.	Deliverable	Number of Hard Copies	Due Date
	Initial Meeting	N/A	NLT 7 days after award
Technical Exhibit 2	Progress Report	Three (3)	5 <sup>th</sup> business day of each month

**4. PLACE OF PERFORMANCE**

Place of performance will be primarily within the Pentagon and other Government facilities in Washington, D.C. areas as required.

**5. PERIOD OF PERFORMANCE**

The period of performance for this task order will be 12 months plus two (2) 6 month option periods and four (4) 3 month option periods.

Base Period: Applies to Program Management Requirement - One year from date of award

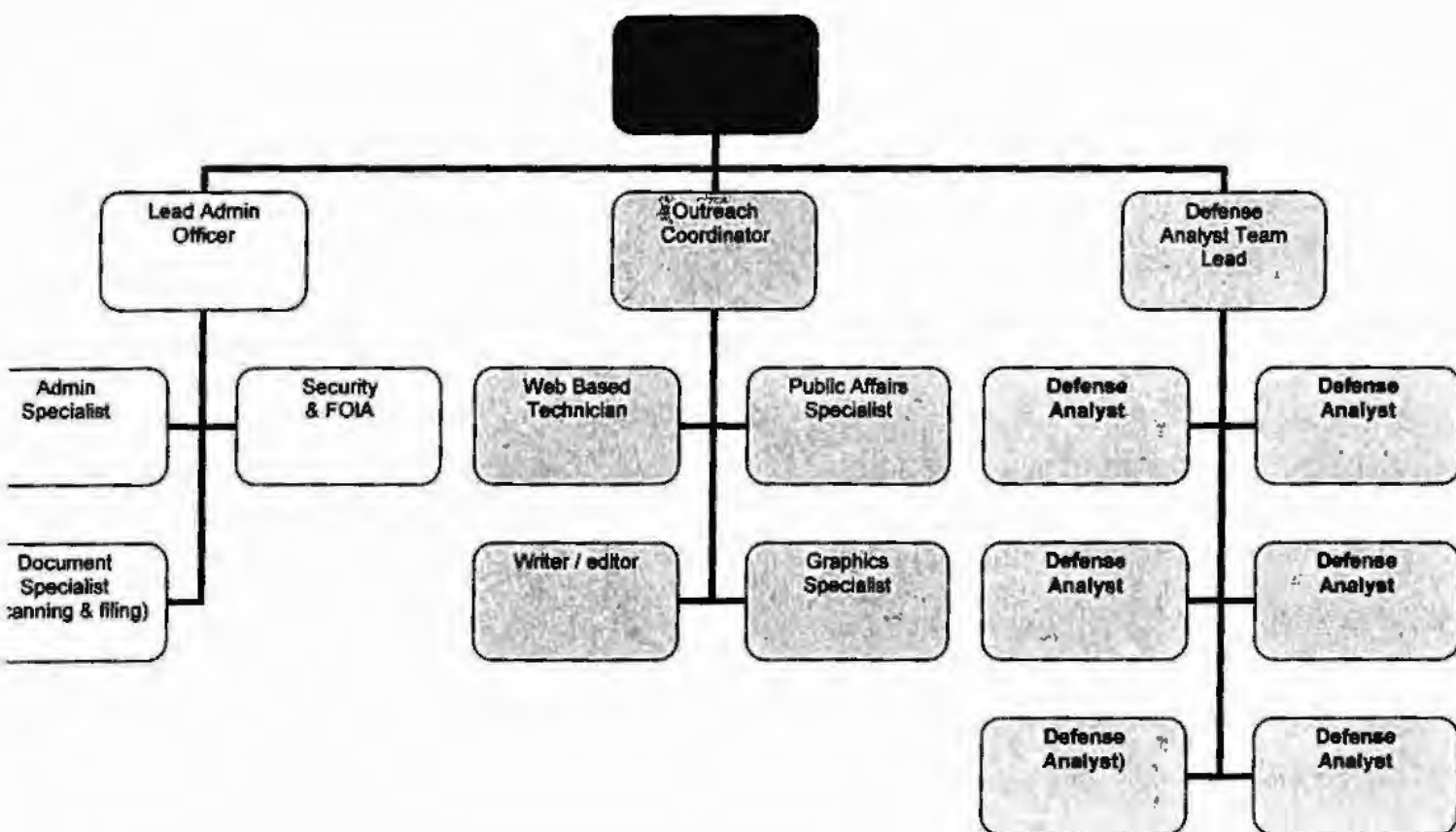
Option Period I: 12 months from date of exercise  
Option Period II: 6 months from date of exercise  
Option Period III: 6 months from date of exercise  
Option Period IV: 3 months from date of exercise  
Option Period V: 3 months from date of exercise  
Option Period VI: 3 months from date of exercise  
Option Period VII: 3 months from date of exercise

**6. DELIVERABLE FORMATS**

All reports and briefings will be prepared in Microsoft Word, PowerPoint, or Excel, compatible with FT&R systems at the time of task order award, and provided on disk and in hard copy.

**Performance Work Statement Exhibit I**

This organizational structure is not a contract requirement, but provided for informational purposes only.



**Special Task Order proposal and pricing instructions:**

**AS THE GOVERNMENT MAY NOT AWARD THIS TASK ORDER UNTIL SECOND QUARTER FY 2009, OFFERORS ARE STRONGLY ENCOURAGED TO VALIDATE TASK ORDER PRICING THROUGH THE END OF SECOND QUARTER FY 2009.**

In accordance with FACTOR 3: STAFFING AND MANAGEMENT APPROACH, Subfactor 3B, Offerors should propose a Technical Approach, Staffing and Management Plan, and Key Personnel for this Task Order.

While not key personnel (except for the Lead Defense Analyst), Defense Analysts will play a key role in task order performance. As a result, under Staffing and Management Plan, Offerors shall demonstrate how the Defense Analyst staff described under Analytical support will achieve their proposed Technical Approach.

At a minimum, Key Personnel for this task order are: Lead Policy Analyst, Outreach Coordinator, and Lead Administrative Officer. OSD experience is required for key personnel.

In accordance with FACTOR 4: PRICE, the Contractor shall provide Task Order pricing as follows (all personnel are full-time):

**PROGRAM MANAGEMENT (CLINS 0001, 2001, 3001, 4001, 5001, 6001, 7001)**

<b>Program Manager - CLIN 0001</b>	<b>Hours</b>	<b>Rate</b>	<b>Dollars</b>
Base Period (12 months) - CLIN 0001			
Option 2 (6 months) - CLIN 2001			
Option 3 (6 months) - CLIN 3001			
Option 4 (3 months) - CLIN 4001			
Option 5 (3 months) - CLIN 5001			
Option 6 (3 months) - CLIN 6001			
Option 7 (3 months) - CLIN 7001			

In support of Task Order pricing, the contractor shall price the labor categories under each CLIN below using the rates in their price matrices or schedule for prospective labor categories under the BPA.

### OPTION 1

#### ANALYTICAL SUPPORT – CLIN 1002 (Option 1 – 12 months)

Option 1	Hours	Rate	Dollars
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

#### OUTREACH COORDINATION SUPPORT – CLIN 1003 (Option 1 – 12 months)

Option 1	Hours	Rate	Dollars
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

#### ADMINISTRATIVE SUPPORT – CLIN 1004 (Option 1 – 12 months)

Option 1	Hours	Rate	Dollars
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	

**OPTION 2****ANALYTICAL SUPPORT – CLIN 2002 (Option 2 – 6 months)**

<b>Option 2</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

**OUTREACH COORDINATION SUPPORT – CLIN 2003 (Option 2 – 6 months)**

<b>Option 2</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

**ADMINISTRATIVE SUPPORT – CLIN 2004 (Option 2 – 6 months)**

<b>Option 2</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	

**OPTION 3****ANALYTICAL SUPPORT – CLIN 3002 (Option 3 – 6 months)**

<b>Option 3</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

**OUTREACH COORDINATION SUPPORT – CLIN 3003 (Option 3 – 6 months)**

<b>Option 3</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

**ADMINISTRATIVE SUPPORT – CLIN 3004 (Option 3 – 6 months)**

<b>Option 3</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	

**OPTION 4****ANALYTICAL SUPPORT - CLIN 4002 (Option 4 - 3 months)**

Option 4 - 3 months	Hours	Rate	Dollars
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

**OUTREACH COORDINATION SUPPORT - CLIN 4003 (Option 4 - 3 months)**

Option 4 - 3 months	Hours	Rate	Dollars
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

**ADMINISTRATIVE SUPPORT - CLIN 4004 (Option 4 - 3 months)**

Option 4 - 3 months	Hours	Rate	Dollars
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	



**OPTION 5****ANALYTICAL SUPPORT - CLIN 5002 (Option 5 - 3 months)**

<b>Option 5</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

**OUTREACH COORDINATION SUPPORT - CLIN 5003 (Option 5 - 3 months)**

<b>Option 5</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

**ADMINISTRATIVE SUPPORT - CLIN 5004 (Option 5 - 3 months)**

<b>Option 5</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	

**OPTION 6****ANALYTICAL SUPPORT - CLIN 6002 (Option 6 - 3 months)**

<b>Option 6</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

**OUTREACH COORDINATION SUPPORT - CLIN 6003 (Option 6 - 3 months)**

<b>Option 6</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

**ADMINISTRATIVE SUPPORT - CLIN 6004 (Option 6 - 3 months)**

<b>Option 6</b>	<b>Hours</b>	<b>Rates</b>	<b>Dollars</b>
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	

**OPTION 7****ANALYTICAL SUPPORT – CLIN 7002 (Option 7 – 3 months)**

Option 7/CLIN 7002	Hours	Rate	Dollars
Lead Defense Analyst*			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
Defense Analyst			
		<b>TOTAL FFP</b>	

**OUTREACH COORDINATION SUPPORT – CLIN 7003 (Option 7 – 3 months)**

Option 7/CLIN 7003	Hours	Rate	Dollars
Outreach Coordinator *			
Web Technician			
Public Affairs			
Writer/Editor			
Graphics Specialist			
		<b>TOTAL FFP</b>	

**ADMINISTRATIVE SUPPORT – CLIN 7004 (Option 7 – 3 months)**

Option 7/CLIN 7004	Hours	Rate	Dollars
Lead Administrative Officer *			
Administrative Specialist			
Security and FOIA Specialist			
Document Specialist			
		<b>TOTAL FFP</b>	

1. The Program Manager requirement will be awarded beginning at Task Order award, and will extend through the end of Option Period 7 (or through the end of the last Option Period exercised, whichever occurs first.) Proposed Program Manager must be available at Task Order award.

2. \* - Key Personnel. All proposed key personnel must be available at Option Exercise per BPA Clause E.6. The Offeror must provide all other staff no later than 30 days after Option Exercise. Substitutions for all other proposed staff should be provided to the Government.

3. As the Government may not need all the above-described support to begin or end at the same time, Options will be exercised as required throughout the Task Order period of performance.

In no event will the total Task Order period of performance extend beyond five (5) years.

4. Total Task Order ceiling will be established as the total price for all support categories (Program Management, Analytical, Outreach, Administrative) for all periods of performance (base and options). Both the Base and Option periods, and total Task Order ceiling, will be evaluated for pricing purposes.

**END OF TASK ORDER I**

**INSTRUCTION TO OFFERORS**

1. The Washington Headquarters Services, Acquisition and Procurement Offices (WHS/A&PO) intends to award multiple award BPA's to three or more vendors with each Task Order to be competed among BPA holders in accordance with the "Ordering" and "Small Business Participation/Reporting" clauses herein. This solicitation will be released electronically only. This electronic version of the RFP is the official version for this acquisition. No hard copy of this solicitation will be issued. Offerors will be sent any and all applicable revisions to this solicitation electronically. Offerors must submit their proposals in both soft and hard copy. Soft copy proposals may be submitted via attachments to e-mail or CD. Text and graphics portions of the electronic copies shall be readable by MS Office 2000, and MS Excel 2000. All price information shall be in files separate from Technical Approach, Management Approach, Personnel Experience, and Past Performance. Soft copy proposals will be used for contract formation purposes. Hard copy proposals may be delivered using the US Postal Service, a commercial delivery service, or by hand delivery. Hard copy proposals will be used for evaluation purposes. Both soft and hard copy proposals are due by the date and time in paragraph 3 below.

Hard copy proposals shall be sent to:

WHS/Acquisition and Procurement Office  
Professional Services and Studies Acquisition Division

ATTN: (b)(6)

(b)(6)

GSA and regulations allow the use of the E-Buy system to solicit both quotes and proposals from GSA Schedules. This solicitation is a "Request for Proposal" and not a "Request for Quote". The Government desires to establish multiple award BPA's and issue an order from an offer received in response to this solicitation. FAR 2.101 provides the following definition of an offer: "Offer means a response to a solicitation that, if accepted, would bind the offeror to perform the resulting contract. Responses to proposals are called "proposals", but are considered offers. Responses to quotations are called "quotations", and are not offers. FAR 13.004 "Legal Effect of Quotations" provides further distinction between an offer and quotation: "A quotation is not an offer and, consequently, cannot be acceptable by the Government to form a binding contract." Again, this solicitation is a Request for Proposal, and offerors are reminded that their offers will be binding should the Government select them for award without discussions. Accordingly, offerors are advised to include their best firm-fixed-pricing on a fully complete and signed SF 1449. Failure to do so may result in the Offeror being determined non-responsible and not considered for award.

Although WHS is issuing this solicitation using GSA's E-Buy system, proposals shall only be submitted as described herein. Proposals submitted by any other means, including through GSA's E-Buy system, will not be evaluated.

2. Questions – Questions are due by 10/29/08. Offerors are requested to email questions to (b)(6) at (b)(6). Responses to all questions will be contained in an amendment to this solicitation and will be sent electronically.

3. Offerors shall submit their proposals before the due date and time for this solicitation. The due date and time for proposals and is 11/25/08 at 11:00 a.m. Proposal due date and time will be adhered to strictly.

## 4. Proposals shall be submitted as follows:

Volume Number and Title	Number of Hard Copies	Page Limit	Due Date
<u>Volume 1 – FACTOR 1</u> Technical Approach Specialized Experience in the past five (5) years	Original plus 4 copies and 1 soft copy	10 Pages	11/25/08
<u>Volume 2 – FACTOR 2</u> Technical Approach Past Performance in the past five (5) years	Original plus 4 copies and 1 soft copy	10 pages – past performance questionnaires, Technical Exhibit 3, will not count against the overall page limit	11/25/08
<u>Volume 3 – FACTOR 3</u> Staffing and Management Approach	Original plus 4 copies and 1 soft copy	None	11/25/08
<u>Volume 4</u> Cost/Price	Original plus 4 copies and 1 soft copy	None	11/25/08

a. Text - Text shall be at least single-spaced, on 8 ½ x 11 inch paper, with a minimum one inch margin all around. Pages shall be numbered consecutively. A page printed on both sides shall be counted as two pages. No foldout pages shall be used. Pages submitted in excess of the page limitations stated throughout this document will be removed and not evaluated.

b. Font Size - Print shall be of a minimum 12 point font size or a maximum 10 characters per inch (10 pitch pica) spacing. Bolding, underlining, and italics may be used to identify topic demarcation or points of emphasis. Graphic presentations, including tables, while not subject to the same font size and spacing requirements, shall utilize spacing and text that is easily readable.

c. Binding and Labeling - Originals shall be unbound. The number of copies shown in the table above should be submitted in economical, three-ring binders. Responses to Technical Approach, Staffing and Management Approach, and Past Performance shall be in one binder, clearly marked as to the RFP identification, date of submittal, acknowledgement of any amendments, the Offerors name, address, Taxpayer ID number, CAGE code, and the Offeror's POC name, phone and e-mail. The cover sheet shall not count against any page limitation.

d. Pricing Data - Any and all pricing information shall only appear in the Price Binder.

## 5. Evaluation Factors and Submission Requirements.

All proposals shall be evaluated in accordance with the factors and methods described in the RFP to ensure that the evaluation will be a structured process employing equitable measures. Evaluators will assess proposals based upon how well the Offerors address the factors and requirements outlined in the RFP, using the instructions in this plan. Evaluators will assess each written proposal and the associated past performance information and then prepare a narrative description of the rationale to support their findings. Whether a system of annotating proposal strengths and weaknesses is adopted or whether a general rationale narrative is applied (for example), will depend on the facilitation of the evaluation process by the Vendor Evaluation Board (VEB) Chairperson. All VEB members shall adhere to a consistent review strategy for each responsive offeror. All final notes and rationale shall be concise and thorough, based on the evaluation factors stated in the RFP and sufficient to support a sound recommendation to the Selection Official.

**EVALUATION RATINGS**

**Outstanding** - The offeror's response substantially exceeds the stated requirements. The Offeror has convincingly demonstrated that the solicitation's requirements have been exceeded and the supplies/services should be of exceptional work quality. Fulfilling the definition of "outstanding" indicates there is a significant probability of success and insignificant risk that the offeror would fail to meet the quantity, quality, and schedule requirements. Furthermore, the offeror has demonstrated their proposed solution exceeds the solicitation requirements in most areas, has no deficiencies, many strengths, and few or no weaknesses and risks.

**Good** - The offeror's response meets or exceeds the stated requirements. The Offeror has credibly demonstrated that the solicitation's requirements have been fully met or in some instances, exceeded, and the supplies/services should be of better than average work quality. Fulfilling the definition of "good" indicates that there is a reasonable probability of success and little risk that this offeror would fail to meet quantity, quality, and schedule requirements. Furthermore, the offeror has no deficiencies, some or few weaknesses or risks, and some strengths that will benefit the agency.

**Marginal** - The offeror's response minimally meets the stated requirements. The offeror has demonstrated that the solicitation's requirements have been minimally met and the supplies/services may result in some risk to achieving work quality. Fulfilling the definition of "marginal" indicates that there is a low probability of success based on present information. Furthermore, the proposal demonstrates a level of risk that the offeror might not be successful because of major weaknesses or risks found.

**Unsatisfactory** - The response to the factor does not meet the stated requirements and/or does not address the specific factor being awarded. Deficiencies were noted. The offeror has demonstrated that the solicitation's requirements may not have been met and the supplies/services would result in significant risk to achieving any work quality. Fulfilling the definition of "unsatisfactory" indicates that what was submitted lacks essential information or is conflicting and unproductive. The proposal contains significant deficiencies such that a major corrective action would be required to enable the offeror to meet the minimum requirements. Furthermore, the degree of risk is so high that there is no reasonable likelihood of success; regardless of price.

## **RELATIVE IMPORTANCE OF THE EVALUATION FACTORS**

Factors 1 and 2 are approximately equal in importance to each other. Factors 1 and 2 are more important than Factor 3. When the proposal is evaluated as a whole, Factors 1, 2, and 3 combined are significantly more important than Factor 4 (Price). The importance of price will increase if offerors are considered essentially equal in terms of technical capability, or if price is so significantly high as to diminish the value of technical superiority to the Government.

### **FACTOR 1: OFFEROR'S SPECIALIZED EXPERIENCE WITHIN THE LAST FIVE (5) YEARS (Specialized experience of the firm and individuals.)**

#### **(a) Basis of Evaluation**

1. The basis of evaluation will be to assess the offerors experience in providing staff who have performed work of similar nature, size, type, and complexity in an environment of a similar nature, size, type, and complexity to that which is expected to be ordered under this contract, as well as the extent of skills and experience of the staff provided. These projects must have been completed or substantially completed (at least 80%) within the last five (5) years of the RFP closing date.

2. Describe the firm's experience in providing adaptable, motivated, and competent staff with the types of skills necessary to perform successfully in a highly stressful, deadline and schedule-driven, multi-tasking environment.

- The complexity of projects can be demonstrated in part by describing skills and abilities to prioritize objectives and work cross functionally, sometimes with minimal, conflicting and changing guidance.

3. Describe the firm's experience in providing staff on short notice with the requisite security clearances.

4. Describe the firm's experience in simultaneously managing multiple projects or task orders at multiple geographic locations.

**Note 1:** The proposal may receive an increased rating for this factor if the offer includes business arrangements where the offeror demonstrates that proposed prime and subcontractor for this BPA have performed together in the past for similar work.

**Note 2:** The proposal may receive an increased rating for specialized experience of either the prime or subcontractor, if the strengths of either firm result in an enhanced proposal.

**Note 3:** A proposal that demonstrates a firm's experience with successful project transition that resulted in minimal disruption to ongoing operations may receive an increased rating.

**Note 4:** All contractor personnel, at a minimum, must possess a TOP SECRET clearance. Contractor personnel working on sensitive compartmentalized information (SCI) must have a TOP SECRET clearance with access to SCI.

**(b) Proposal Submission Requirements**

Offerors shall submit no more than five (5) projects to be evaluated for Factor 1, Specialized Experience. Submissions for Factor 1 shall be limited to a maximum of (10) pages total. **DO NOT INCLUDE PRICE DATA IN THE SPECIALIZED EXPERIENCE FACTOR.** Any additional pages shall be removed from the proposal and discarded prior to evaluation of the proposal. Projects submitted shall be completed or substantially completed within the last five (5) years of the RFP closing date.

**Note 1:** Evaluation of experience will be a subjective assessment based on consideration of all relevant factors and circumstances.

**FACTOR 2: OFFEROR'S PAST PERFORMANCE WITHIN THE PAST FIVE (5) YEARS**

**(a) Basis of Evaluation**

1. The work to be acquired under this solicitation is described in sections 6.0 through 6.7 of this RFP. The basis of evaluation will be limited to the quality of each offeror(s) performance of projects similar in size, scope, and complexity to those that may be ordered under this contract.

2. Evaluation of past performance will often be quite subjective. The evaluation of Past Performance will include the offeror(s) history of reasonable and cooperative behavior, commitment to customer satisfaction, record of conforming to specifications and applicable labor laws, quality of workmanship, record of recommending and/or implementing innovative staffing and/or approaches; record of controlling costs; and adherence to schedules. Projects considered for Past Performance will only be those completed or substantially completed within the past five (5) years of the RFP closing date.

**Note 1:** The Government's sources of information for evaluating Past Performance may include, but are not limited to, any and all information provided by the contractor, inquiries of owner representative(s), any other known sources not provided by the offeror, and retrieval of information from the Past Performance Information Retrieval System (PPIRS), which includes information collected from the U.S. Army Corps of Engineers Contractor Appraisal Support System (CCASS/ACASS) and Contractor Performance Reporting System (CPARS).

**Note 2:** Award may be made from initial offers without discussion. However, offeror(s) may be given an opportunity to clarify certain aspects of their proposal (e.g. the relevance of an offeror's Past Performance information and adverse Past Performance information to which the offeror(s) has not previously had an opportunity to respond) or to resolve minor or clerical errors.



**Note 3:** The proposal may receive an increased rating for this factor among offers that include teaming arrangements if the offeror(s) demonstrates that proposed teaming partners for this contract have successfully teamed with the offeror(s) in the past.

**Note 4:** Successful Past Performance of the offeror(s) in "partnering" and resolving project challenges with the customer may result in an increased rating for this factor.

**(b) Proposal Submission Requirements**

Offerors shall submit no more than five (5) projects to be evaluated for Factor 2, Past Performance. Submission for Factor 2 shall be limited to a maximum of ten (10) pages total. Any additional pages will be removed from the proposal and will not be considered in the evaluation of the proposal. All projects submitted shall be completed or substantially completed within the past five (5) years of the RFP closing date. Offerors should describe the project and provide any other information which is considered pertinent to their past performance in relation to SOW Sections 6.0 through 6.7. Copies of industry awards, certificates, and letters of recommendations may be submitted with your proposal and will not count in the page limitation. For the five projects identified, offerors shall also submit Past Performance Questionnaires.

The form, Past Performance Questionnaire (Technical Exhibit 3), should be used to record past performance. For all projects submitted under Factor 2 that have been completed or substantially completed within the past five (5) years of the RFP closing date, offerors are responsible for having each of their customers complete the attached Past Performance Questionnaire completely and return this questionnaire to (b)(6) for inclusion in the proposal.

**Note 1:** Offerors may include projects with the federal government, agencies or state and local governments, and commercial customers.

**Note 2:** Offerors must provide the correct, current phone number, fax number, and/or e-mail address for each point of contact (POC).

**Note 3:** Submission of Past Performance information involves two distinct processes: (1) Past Performance Questionnaires prepared by clients/customers on behalf of offerors is not subject to the page limitation expressed elsewhere in this solicitation. (2) Descriptions of Past Performance information, prepared and submitted by firms on their own behalf, not necessarily utilizing the Past Performance Questionnaire, are subject to the page limitations for this factor.

**FACTOR 3: STAFFING AND MANAGEMENT APPROACH**

The Government will evaluate both the Offeror's Staffing and Management approach pertaining to the overall BPA, and the Offerors Staffing and Management approach pertaining to the Task Order. Subfactor 3A pertains to the Overall BPA. Subfactor 3B pertains to the Task Order.

**(a) Basis of Evaluation**

**1. Subfactor 3A - Staffing and Management Approach**

Pertaining to the overall BPA, offerors shall be evaluated on the following submittals/plans:

1. **Technical Approach:** Offerors should discuss and demonstrate their general understanding of the background, objectives, and work requirements in the BPA PWS.

2. **Staffing and Management Plan,** addressing staffing and supervision /management of staff. The Staffing and Management Plan should include an organization chart indicating lines of authority, management and/or key personnel responsibilities (as such personnel are defined in the PWS), a description of the types of staff available under proposed labor categories, and the roles and responsibilities of any proposed team members (i.e. major subcontractors, teaming/partnering entities, and joint venture members) should be clearly defined. The Staffing and

Management Plan should also contain the offerors strategy for achieving continuity and minimize disruption from personnel turnover.

3. Key personnel (see "Other Clauses" herein for key personnel terms and conditions) – *at a minimum, the Program Manager and an alternate should be considered key personnel.* Identify by names, job titles, skill sets, and experience.

#### **1. Subfactor 3B - Staffing and Management Approach**

Pertaining to the Task Order, offerors shall be evaluated on the following submittals/plans:

1. Technical Approach: The offerors discussion of the background, objectives, and work requirements of the Task Order PWS; include discussion of proposed methods and techniques for completing each task, as well as any potential difficulties or problem areas and potential recommended solutions.

2. Staffing and Management Plan. The quality of staffing will be measured by the professional credentials, skill mix, and security level each staff member possesses. Identify personnel by job title, skill sets, and experience.

3. Key personnel. The quality of key personnel for the Task Order management will be evaluated. Identify by names, job titles, skill sets, and experience.

2. **Subfactor 2 - Quality Control Plan** The contractor shall develop a Quality Control Plan (QC Plan) for the term of the contract that establishes and maintains well-documented quality control procedures that ensure the production and deliverance of acceptable performance in accordance with this PWS. The QC Plan shall assure adequate quality control throughout all areas of performance, and shall be implemented to validate reliability and effective performance. The Government reserves the right to review the quality controls established, and to evaluate its effective use in the performance of the requirements under the contract. The contractor shall be solely responsible for controlling and assuring quality work, and providing objective evidence that such control does, in fact, exist. The contractor shall also be liable for contractor employee negligence, and any fraud, waste or abuse. It shall be the responsibility of the contractor to enforce all Quality Control Plan requirements for all subcontractor(s).

At a minimum, the contractor's Quality Control Plan shall include:

a. An internal quality control and inspection system for required services. Also, the contractor's approach for conducting the quality inspections and producing the quality data in the Performance Requirements Summary (PRS) herein (See Technical Exhibit 1).

b. A method to identify, and procedures to correct, any deficiencies in services that may occur.

c. A file that documents all inspections, and other quality and internal control actions, including the purpose of the inspection, the results, and any corrective action taken. Upon request, this file shall be made available to the Government during the period of performance.

#### **3. Subfactor 3 - Subcontracting Approach (See Clause E.4 and Technical Exhibit 2)**

Offerors should present a Subcontracting Approach containing the offerors strategy for achieving or exceeding WHS Small Business Goals as set forth below. The proposed approach should contain a list of subcontractors/partners/team members and their socio-economic status. Offerors should also develop and submit a report format for reporting this information in accordance with Clause E.4 and Technical Exhibit 2.

#### **WHS FY 2008 Subcontracting Goals**

Small business	41%
Small-disadvantaged business	15%

Woman-owned small business	6.5%
HUB Zone	4.5%
Service-Disabled Veteran-Owned Small Business	3%

**Note 1:** Proposals expressing a commitment to or exceeding DoD small business goals as demonstrated by their list of subcontractors/partners/team members, as well as demonstrating a history of successful performance with regard to meeting small business goals, may receive an increased rating for this subfactor. Accordingly, offerors should provide information regarding historical successes meeting or exceeding established small business goals.

Small business goal achievement/experience on the BPA will be submitted in quarterly reports in accordance with Technical Exhibit 2. Furthermore, pursuant to clause E.4, past performance reporting and option exercise will be linked to these results.

**3. Relative Importance of Sub-factors.** Sub-factors 3A/3B, 2, and 3 are approximately equal to one another in importance.

**(b) Proposal Submission Requirements**

Offerors shall submit in their proposals information sufficient to address the requirements requested for each subfactor, and separate the information in such a manner that both are readily distinguished from one another. The information requested in Subfactors 3A (Overall BPA) and 3B (Task Order) should be presented in such a fashion that each is readily distinguished from the other. **DO NOT INCLUDE PRICE DATA IN THE STAFFING AND MANAGEMENT APPROACH.**

Offerors shall provide this information in a narrative format covering the overall contract Staffing and Management Approach in the proposal. The Quality Control Plan and Subcontracting Approach will become part of the awarded BPA.

**FACTOR 4: PRICE**

**1. For the BPA, the offeror shall provide either:**

a) A schedule or matrix of all prospective labor categories, showing labor rates for all proposed labor categories for the BPA, and discounts offered for specific categories, for each year of performance. The Offerors shall also show the profit, overhead, or any other direct or indirect costs if they are not included in the labor rate;

or

b) A "blanket" discount that shall apply to their established GSA Schedule rates for each year of performance, again showing the profit, overhead, or any other direct or indirect costs if they are not included in the labor rate.

The Government intends to evaluate offers and award a contract without discussions with offeror(s). In accordance with FAR 8.405-4, the Government requests a price reduction of the offeror(s) GSA Schedule rates.

**2. For the Task Order, the offeror shall provide the information set forth under "Anticipated Task Order I Performance Work Statement and Other Terms and Conditions" herein.**

**(a) Basis of Evaluation**

The price proposal will be evaluated to determine the reasonableness and realism of the offeror(s) proposal. One or more of the following techniques will be used to ensure a fair and reasonable price:

Comparison of proposed prices received in response to the solicitation.  
 Comparison of proposed prices with the Independent Government Estimate.  
 Comparison of proposed prices with available historical information.  
 Comparison of proposed prices with resources proposed.  
 Obtain information/reports from Defense Contract Audit Agency (DCAA) or other outside agencies, as required.

**Note 1:** A price that is found to be either unreasonably high or unrealistically low in relation to the proposed work may result in the overall price being considered unacceptable.

**(b) Proposal Submission Requirements (for the BPA)**

The Offeror shall complete and submit the following with the proposal.

(i) Standard Form (SF) 1449 (Solicitation, Offer, and Award), blocks 12-18.

(ii) A schedule of all prospective labor categories, showing labor rates for all proposed labor categories for the BPA, and discounts offered for specific categories, for each year of performance. The Offerors shall also show the profit, overhead, or any other direct or indirect costs if they are not included in the labor rate;

or

(iii) A "blanket" discount that shall apply to their established GSA Schedule rates for each year or performance, again showing the profit, overhead, or any other direct or indirect costs if they are not included in the labor rate.

and

iv) The Contractor shall also provide a copy of their GSA Schedule (electronic copy is preferred).

**(c) Proposal Submission Requirements (for the Task Order)**

Task Order 0001 Pricing as requested in for the Task Order PWS herein.

(d) As part of the Price proposal for the BPA, the Offeror shall provide the information required to complete the Contractor POC and Financial Information in paragraph B.6 under "BPA Structure" herein

**6. Discussions**

The Government intends to evaluate offers and establish multiple award Blanket Purchase Agreements (BPA's) without discussions. Therefore, the Offerors initial proposal should contain the best terms from a price and technical standpoint. However, the Government reserves the right to conduct discussions if later determined by the Contracting Officer to be necessary. The Government may reject any or all proposals if such action is in the public interest; accept an other than lowest cost/price proposal; and waive informalities and minor irregularities in proposals received. The vendor evaluation will be conducted in accordance with Federal Acquisition Regulation (FAR) Sub-parts 8.4 and 12, with the intention to award BPA's against an existing GSA Federal Supply Schedule.

**7. Type of Award**

The Government will establish multiple award BPA's to three or more vendors, whose proposals conform to this solicitation. Each task order will be competed among BPA holders from this solicitation. Award will be based upon "Best Value" to the Government, price and other factors considered.

## Technical Exhibit 1

**QUALITY PLAN – PERFORMANCE REQUIREMENTS SUMMARY (PRS)**

The Contractor's service requirements are summarized into performance objectives and quality standards that relate directly to mission essential items. The performance threshold briefly describes the minimum acceptable levels of service required for each requirement. Performance in accordance with these thresholds is critical to mission success.

Performance Objective	Standard	Performance Threshold	Method of Surveillance	Incentive/Disincentive
PRS #1 – For each Task Order, the Contractor, in a timely fashion, provides appropriately skilled professional personnel with necessary security clearances to support OUSD (P) in accomplishment of its mission.	Skilled, motivated, and sufficiently cleared support personnel report to work within 17 days of vacancy being identified.	No more than one (1) transgression per 90 day period.	Client Interview	Past Performance Rating; Option Exercise
PRS #2 The Contractor recruits and maintains a stable and talented workforce that effectively supports the OUSD (P) mission requirements.	Minimal turbulence and turnover in the workforce that promotes a stable and productive work environment, with a reduced learning curve and task repetition.	No more than one related episode per 90 day period.	Client Interview	Past Performance Rating; Option Exercise
PRS #3 – The Contractor's workforce consistently generates timely work product of high quality.	All deliverables and written products, including but not limited to Position Papers, White Papers, Briefing Material, meeting summaries, and issue papers, reflect thorough research in and knowledge of the topic at hand; articulate clear conclusions and/or recommendations, as appropriate; all material is written and formatted as directed; reflects Government guidance on draft and final material and is comprehensive, coherent, accurate, timely, and complete.  Professional advice and assistance is rendered pro-actively; is thorough and well thought out; is rational, executable, and supportable.	No more than three transgressions per 90 day period.	Client Interview	Past Performance Rating; Option Exercise

PRS #4 – Contractor results under Clause E.4 “Small Business Participation/Reporting” herein.	WHS FY 2009 Subcontracting Goals	Contractor effort to meet WHS FY 2009 Subcontracting Goals.	Reflected in Quarterly deliverable report.	Past Performance Rating; Option Exercise, Task Order Award
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**End of Technical Exhibit 1**

**Technical Exhibit 2****SCHEDULE OF DELIVERABLES**

<b>Deliverable</b>	<b>Frequency</b>	<b># of Copies</b>	<b>Media/Format</b>	<b>Submit To</b>
Progress Report	Monthly	Two (2) to COR and one (1) to CO	Via e-mail	COR/Contracting Officer
Small Business Report	Quarterly	Two (2) to CO	Via e-mail	Contracting Officer
PRS Report	Quarterly	Two (2) to COR and one (1) to CO	Via e-mail	COR/Contracting Officer

**End of Technical Exhibit 2**

## Technical Exhibit 3

**PERFORMANCE QUESTIONNAIRE**

Your assistance is requested in support of a vendor evaluation for solicitation HQ0034-09-R-3002

Please complete this Questionnaire and email or send by facsimile [FAX (b)(6)] to:

(b)(6)

Desired Response Date:

WHS Acquisition &amp; Procurement Office

Attn: (b)(6)

1700 N. Moore St, Ste 1425

Arlington, VA 22209

When complete, the information on this form is SOURCE SELECTION INFORMATION (FAR 2.101 &amp; 3.104) and shall be protected accordingly.

**TO BE COMPLETED BY OFFEROR**

1. CONTRACTOR NAME &amp; ADDRESS:

2. CONTRACT NO.:

3. CONTRACT INITIATION DATE:

4. COMPLETION DATE:

5. CONTRACT VALUE (with options): \$

1a. NAME OF PRIME CONTRACTOR:

6. TYPE OF CONTRACT:

(FFP, CPFF, T&amp;M, etc.)

7. BRIEF DESCRIPTION OF CONTRACT REQUIREMENTS:

Please add a continuation page if additional space necessary.

**TO BE COMPLETED BY EVALUATING ORGANIZATION REPRESENTATIVE**

8. EVALUATION: a. EVALUATOR'S NAME, POSITION (Project Manager/ COR/ Other) AND ORGANIZATION:

b. EVALUATOR'S PHONE NUMBER:

c. MONTHS PERFORMANCE MONITORED BY  
EVALUATOR:

A. Quality of Products and Services – Please provide a statement regarding the contractor's conformance to contract requirements, specifications, and standards of good workmanship (e.g., technical, professional, environmental, or safety and health standards).

B. Performance – Please provide a statement regarding the contractor's performance for the project.

C. Cost/Schedule – Please provide a statement regarding the contractor's ability to deliver services within cost and time lines specified.

D. Customer Satisfaction – Please provide a statement regarding the contractor's responsiveness to customer needs and their ability to effectively communicate with Government personnel throughout the period of performance.

E. Area for Improvement – If you had to describe one area for improvement, what would it be? Please state the significance.