



# **DODIIS Conference COR Administration & Oversight (SITE)**



## **DODIIS Worldwide Conference April 2012**

This briefing is classified

**Unclassified**





# What is a Contracting Officer's Representative (COR)?

- **Office of the Acquisition Executive (AE) COR Deskbook – “Eyes and Ears”**
  - **Required Courses**
  - **COR Nomination/Designation Letter**
  - **Alternate CORs**
  - **Annual Performance Objectives**





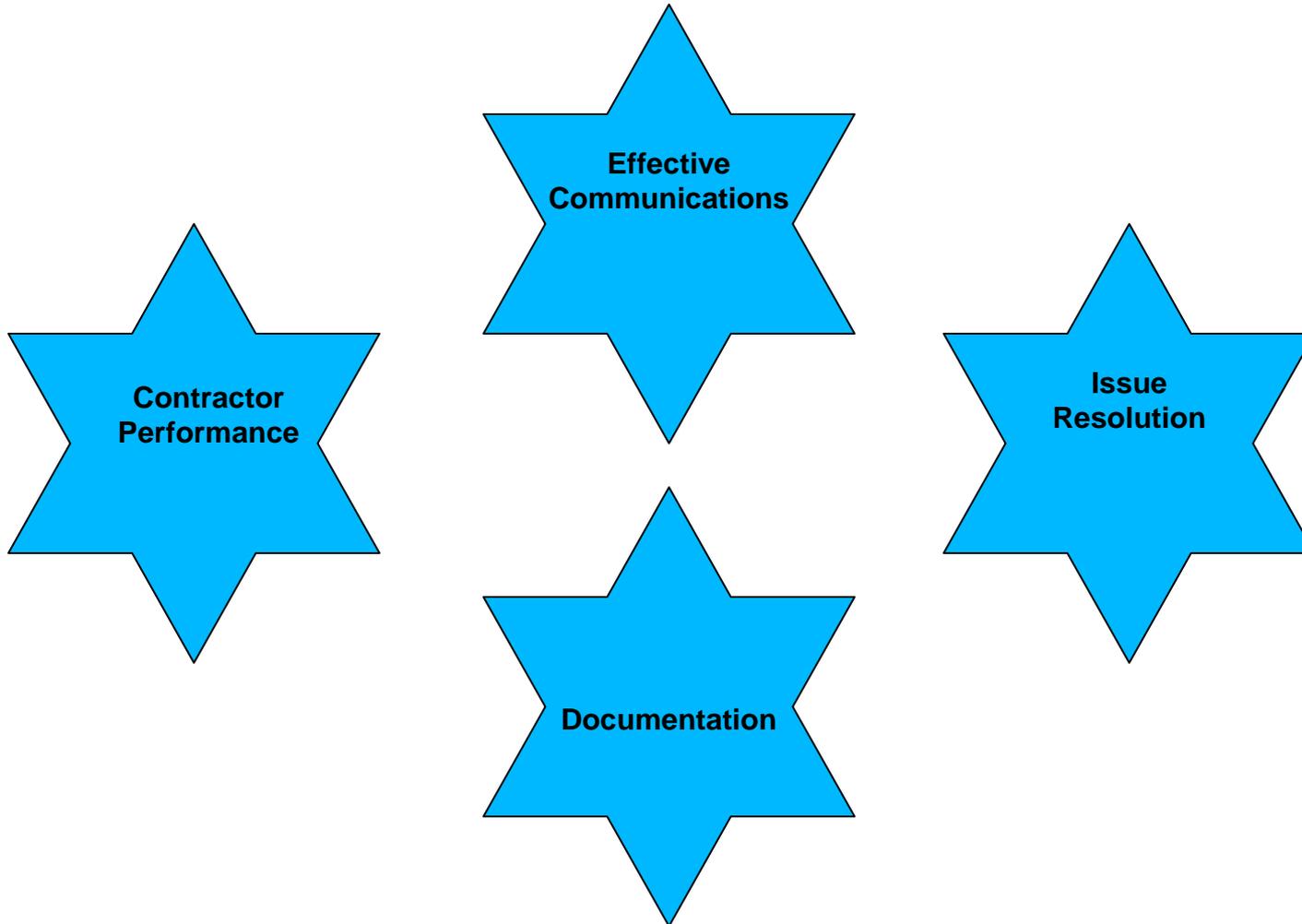
## Alternate CORs

- **Alternate Contracting Officer Representatives (ACOR)s are qualified individuals appointed by the Contracting officer (KO) to **assist the COR** in the technical monitoring.**
- **ACORs are appointed or designated through the same process as that for the COR: (1) nomination by the requiring or supported unit, (2) appointment or designation by the contracting officer, and (3) signature by the contracting officer and ACOR, with a copy to the contractor.**
- **ACOR has the authority and responsibility to act as COR only in the absence of the primary COR. Absence of the primary COR may be due to annual leave, sick leave, training, etc.**





# What Makes an Excellent COR?





# Standard Operating Procedure

- **COR Oversight SOP**
  - Purpose
  - Policy
  - Responsibilities
  - Procedures
  - COR Performance Evaluation Form



# Contracting Overseas

- **US has Status of Forces Agreements (SOFAs) with over 100 nations**
- **26 are represented under the NATO-SOFA**
- **SOFAs have no standard points of reference**
  
- **Some are classified**
- **Of particular interest to us have been agreements with Germany, Italy, Korea, Qatar, Afghanistan, and Iraq**
  - **For Germany: [mark.ferrigno@eucom.mil](mailto:mark.ferrigno@eucom.mil)**
  - **For KAF: [mary.hennigan@afghan.swa.army.mil](mailto:mary.hennigan@afghan.swa.army.mil)**
  - **For Others: [david.ziner@dodiis.mil](mailto:david.ziner@dodiis.mil)**





# COR Tools

- **SITE PMO COR Tools**
  - Oversight SOP
  - SITE COR Training
  - CAR Report
  - COR Acceptance Log
  - Personnel Qualifications Log
  - Oversight Questionnaire
  - COR Performance Evaluation Form
  - COR File Inventory Spreadsheet
- **FACTS/EDW/CMS**
- **Annual Performance Assessment**





## Guidelines for Completing the CONTRACT ACTIVITY REPORT (CAR)

**Document Header within Word Document:** Enter the company name [VENDOR NAME].

### **MONTHLY REPORT Section:**

- Enter Task Order Name; Contract Number; and Reporting Period.

### **DESCRIPTION OF WORK BEING PERFORMED Section:**

- Provide brief general description of work being performed.

### **TASK ORDER POINTS OF CONTACT Section:**

- Enter Point of Contact; Address; Telephone; and Email for each of the following:
  1. Contracting Officer (CO)
  2. Contracting Officer Representative (COR) and all Alternate CORs (ACOR) assigned to the contract (*insert additional rows as needed*)
  3. Government Project Manager (if different from COR, otherwise enter "Same as COR"); and
  4. Contractor Project Manager





## Sample COR Acceptance Log

COR Acceptance Log tracks all defined contractor deliverables specified in the contract and task order awards. With a small amount of upfront planning by COR to tailor the log to fit Task Order requirements will save much time later on when compliance and acceptance documentation is required.

MS Excel tool was developed to provide a central location for COR documentation of acceptance and approval of vendor scheduled deliverables. This template is easily tailored to address contract/task order deliverables as defined in the Task Order Performance Work Statement (PWS) and Quality Assurance Surveillance Plan (QASP).

- Use IDIQ contract and task order award documents to populate the template with deliverables to be measured.
- Each SITE task order should include a Performance Requirements Summary (PRS) within the PWS, as well as a government QASP defining the methods for measuring performance.

1	A	B	C	D	E	F	G	H	I	J	K	L
Item	Task/ Deliverable	SOV para.	Perf. Standard	Acceptable Quality Level	Method	Frequency	Compliance Level and Date		Other Comments			
2	1	PWS and QASP	3.0	Draft: To be submitted with the final proposal	100%	Direct Observation	As Required	Fully compliant. Draft included within Proposal.	7/28/11 (award)			
3	1	PWS and QASP	3.0	Final NLT 15 days after task order award	100%	Direct Observation	As Required	Fully compliant.	8/19/11			
4	2	CAR Report Base Period	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
5	2	Aug-11	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly	Fully compliant. Uploaded to SharePoint.	9/13/11			
6	2	Sep-11	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly	Fully compliant. Uploaded to SharePoint.	10/11/11			
7	2	Oct-11	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly	Submitted late. Uploaded to SharePoint.	11/15/11			
8	2	Nov-11	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
9	2	Dec-11	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
10	2	Jan-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
11	2	Feb-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
12	2	Mar-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
13	2	Apr-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
14	2	May-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
15	2	Jun-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
16	2	Jul-12	6.3	NLT 10th working day of the next month	95%	Direct Observation	Monthly					
		CAR Report		NLT 10th working day of the		Direct						





## Personnel Qualifications Acceptance Log

Task/Deliverable	SOW para.	Performance Standard	Acceptable Quality Level (from QASP)	Method (from QASP)	Frequency (from QASP)	Compliance Level and Date	Other Comments (e.g. selection / rejection basis)
<b>Contract Personnel</b>	3.4.1; and H-16	3.4.1 Key Personnel/Replacement of Contract Personnel; and Clause H-16 (SITE Contract)	100%	Direct observation	As required	Status of proposed personnel, and date of assessment	
Program Manager	Yes	29. Program Manager - Performs day-to-day management of overall contract operations, supporting multiple projects and groups of contractor personnel at multiple locations. Directs and coordinates the planning and execution of all contract support activities. Must possess excellent written and oral communication skills. Responsible for ensuring all contractor tasks and deliverables are being performed in accordance with the contract, task order, and quality assurance standards. Establishes and alters (as necessary) corporate management structure to direct effective contract support activities. Must have at least 15 years experience in this field with some experience in the Department of Defense and/or Intelligence support. Advanced degrees desired. Must have a four year degree.		Resume review		Acceptable qualifications 1/13/12	Tom Baker - has 20 yrs. exp., BS, PMP, and ITIL certifications
Systems Administrator	No	6. Network Administrator - Perform administration duties for networking hardware including routers, switches, hubs, gateways, access points, network interface cards, networking cables, network bridges, modems, ISDN adapters, firewalls and other related network hardware. Must have firm grasp and knowledge of fiber and copper-based Ethernet technologies, capabilities and cabling and their connectivity to local and wide area networks. A minimum of three years of relevant technical experience in the administration of network equipment. A Bachelor's Degree from an accredited institute in an area applicable to this position (e.g. information systems, computer science, math, or engineering). An additional four years of relevant technical experience may be substituted for the Bachelor's Degree.		Resume review		Rejected 2/1/12	Rejected Sam Baker based on lack of degree and experience.
Junior Process Improvement Analyst	Yes	51. Junior Process Improvement Analyst - Assists and consults in supporting process improvement teams. At least 4 years of IT experience in development, testing, or operations and trained in process improvement, six-sigma, CMMI, or related process improvement methods. Assists with benchmarking and surveys. Assists in the facilitation of process improvement efforts. Must have at least 2 years on IT related process improvement experience. Must have a four year Business or Computer Science related degree. An additional 4 years of experience can be substituted for this degree.		Resume review		Questionable experience with process improvement 3/15/12	Accepted Tanya Baker based on degree and CMMI certification, but appears to lack required years process improvement experience.

*Note: Personnel Qualifications Acceptance Tool includes listing of all SITE Labor Categories...*

Personnel Qualifications Acceptance Log Tool located at: [NIPRNET/SHAREPOINT/GUIDES & TEMPLATES/SITE COR TOOLKIT](#)



Last Updated: 21 March 2012

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SITE PMO

## SITE COR Oversight Questionnaire

1. Did you complete the minimum training (COR, and SITE PMO COR) within the last three years?
2. Were you properly appointed, by a contracting officer, receiving a designation letter?
3. Are your COR responsibilities included in your annual performance objectives?
4. Do you have an Assistant COR (ACOR) to assist you with your COR duties? If so, who, and what responsibilities are assigned to the ACOR?
5. If you have an ACOR(s) assigned do you have their Letter of Delegation in your COR Folder?
6. Does your TO have a PWS and Performance Requirements Summary (PRS) detailing TO performance standards and metrics?
7. Does your TO have an oversight plan (QASP) detailing contract monitoring procedures to perform the oversight? If no, are you or your contractor in the process of developing a QASP or do you need assistance?
8. Does your contractor have a Quality Control Plan (normally submitted as part of their proposal) for meeting all contract performance objectives? If so, have you reviewed it?
9. Do you maintain some type of acceptance log to document compliance, such as the QASP Sample provided in your SITE COR Training?





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SITE PMO

COR Performance Evaluation

Evaluator: Click here to enter text.

Date: Click here to enter text.

Contract or Task Order No./Contract or Task Order Name Click here to enter text./ Click here to enter text.

Rating Descriptions: 1 = Poor 2 = Fair 3 = Adequate 4 = Very Good 5 = Superior NAA=Not Able to Assess
Please check the appropriate answer:

1. Performance of Delegated Contract Management Duties

1(a) Compliance with limits of appointment [ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ] NAA

Comments: Click here to enter text.

1(b) Invoice certification and review of contract burn rate(s) [ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ] NAA

Comments: Click here to enter text.

1(c) Monitoring and inspection of work products [ ] 1 [ ] 2 [ ] 3 [ ] 4 [ ] 5 [ ] NAA

Comments: Click here to enter text.





### COR File Inventory Checklist

FOLDER	SUBFOLDER or File	SUB-SUBFOLDER	Required Files
<b>Pre-Award Library (Gov't Special Access)</b>			
	Requirements Documents (editable)		Contract Acquisition timeline for Task Order Requirements Completion and Award; SOW; SOO; PWS; QASP; Attachments for supporting information; IGE; Source Selection Criteria; Draft DD Form 254, Draft DD Form 250; and pending Modifications to SOO, PWS, or SOW; Market research; meeting minutes and action items, and other documented correspondence.
	Solicitations		Solicitation documents released to bidders, to include: RFIs, RFI Questions, & Answers, RFI Responses; Technical Exchange; Capability Statements; and RFP and RFP Amendments; and RFP Questions & Answers
<b>AWARD (Gov't and Vendor)</b>			
	IDIQ Base Contracts		Link to SITE IDIQ Base Contract
	Awarded Proposal		Awarded Technical Proposal, Awarded Past Performance Proposal, Transition Plan, and Staffing Plan/Matrix
	Task Order Award and Mods (incl. DD254)		Task Order Award; Notice To Proceed; Standard Form 30; DD250; DD254
<b>COR DOCS (Gov't and Vendor)</b>			
	0. COR_ACOR Designation		Signed COR and ACOR Nomination and Designation Letter(s)





## STORMS Overview

- **STORMS is an online management system and data repository for the administration of IDIQ contracts**
- STORMS provides users the capabilities to manage all aspects of SITE Task Orders
  - **Ceiling Allocations and Task Order Planning**
  - **Info on IDIQ Contracts (e.g., NTE labor rates)**
  - **Info on Contractors (Prime and Subs)**
  - **Info on Task Orders & Modifications (e.g., funding status)**
  - **Imports Vendor data which includes hours delivered by Employee Name, Location of Work, and Labor Category charged for each Task Order**





# STORMS System Components

## SITE Program Website ([www.siteidiq.gov](http://www.siteidiq.gov))

**DEFENSE INTELLIGENCE AGENCY**  
COMMITTED TO EXCELLENCE IN DEFENSE OF THE NATION

HOME HOW TO USE SITE TASK ORDERS AWARDEES SERVICE AREAS LABOR CATEGORIES REFERENCE LIBRARY CONTACTS

ACCESS SITE SHAREPOINT  
ACCESS STORAGE (GOVT ONLY)  
STORMS  
Request Access  
Reset Password

### SOLUTIONS FOR THE INFORMATION TECHNOLOGY ENTERPRISE

Solutions for the Information Technology Enterprise (SITE) contract establishes an acquisition framework for delivering Information Technology services & capabilities that will support the global Intelligence Command and Control (C2) assets vital to the security of the United States. SITE, a multiple indefinite Delivery/Indefinite Quantity (IDIQ) contract vehicle, provides receptive, adaptive, and timely solutions for organizations to satisfy current and future Information technology requirements. Support requirements range from per call and "on-call" to full-time attendant support at sites around the world, including locations considered high risk, crisis/danger areas.

SITE is a multiple award contract vehicle that allows for competition between SITE Task Orders for work at the Task Order level. Each Task Order will specify the IT solutions & services as outlined by a Statement of Objectives (SOO), Statement of Work (SOW) or Performance-Based Work Statement (PBWS). The SITE contract framework provides for centralized oversight & monitoring with decentralized execution through an Interagency Agreement (IA) with Services and agencies.

OUR MISSION

Manage the acquisition framework for delivering the full scope of Information technology services and capabilities to the Defense Intelligence Agency, the Military Services, the U.S. Coast Guard, the Combatant Commands, the Joint Reserve Intelligence Program, and other Defense and non-Department of Defense departments or Agencies with Intelligence missions, or that use Intelligence Information systems.

## SITE SharePoint

HOME SITE HOME TASK ORDERS STORMS SETTINGS HELP LOGOUT

Welcome to the SITE SharePoint

ANNOUNCEMENTS  
Look up useful SharePoint Instructions in the Library on the left  
by Candice LaHart 6/2/2011 12:36 PM

The SITE SharePoint is now available  
by Candice LaHart 9/7/2011 11:26 AM

Access the "Task Orders" List and the Document Libraries in the Quick Launch

Org	Status	Task Order Title (Click)	Base IDIQ Contract	To #	Mod	Prime	Set-aside?	Avd Date
Count: 25								
DIA	Awarded	CEPSS	HHM402-10-D-0013	0001	11	BAE	No	2/2/2011
DIA	Awarded	EOS	HHM402-10-D-0013	0002	11	BAE	No	2/2/2011
DIA	Awarded	ESIS	HHM402-10-D-0013	0003		BAE	No	12/30/2011
DIA	Awarded	ESD	HHM402-10-D-0014	0001	7	GO IT	No	1/1/2011
DIA	Awarded	ECS	HHM402-10-D-0014	0002	14	GO IT	No	3/31/2011
DIA	Awarded	Cyber Defense	HHM402-10-D-0014	0003	3	GO IT	No	9/16/2011
DIA	Awarded	Maury Hall	HHM402-10-D-0015	0001	6	LM	No	9/7/2011
DIA	Awarded	HBIT	HHM402-10-D-0016	0001	13	NG	No	9/22/2010
DIA	Awarded	Data Consolidation Fusion (ORION)	HHM402-10-D-0017	0001	7	SAIC	No	7/28/2011
DIA	Awarded	Cress Domain	HHM402-10-D-0018	0001	1	SRA	No	9/29/2011
DIA	Awarded	IDSP	HHM402-10-D-0019	0001	5	BC Fed	Yes	8/1/2010

## STORMS Database

WELCOME TO THE SITE TASK ORDER REQUIREMENTS MANA

YOUR CONTRACTS AND TASK ORDERS

**HHM402-10-D-0013** Prime: **BAE Systems**  
Title: SITE IDIQ Contract: BAE Systems/IT  
Description: SITE IDIQ Contract: BAE Systems/IT

- 0001 Customer Engagement & Field Support Services
- 0002 Enterprise Operations Services

**HHM402-10-D-0014** Prime: **General Dynamics**  
Title: SITE IDIQ Contract: General Dynamics  
Description: SITE IDIQ Contract: General Dynamics

- 0001 Enterprise Service Desk (ESD)
- 0002 Enterprise Communications Services (ECS)
- 0003 Cyber Defense

**HHM402-10-D-0015** Prime: **Lockheed Martin**  
Title: SITE IDIQ Contract: Lockheed Martin  
Description: SITE IDIQ Contract: Lockheed Martin

- 0001 Maury Hall

**HHM402-10-D-0016** Prime: **NGC**  
Title: SITE IDIQ Contract: Northrop Grumman  
Description: SITE IDIQ Contract: Northrop Grumman

## STORMS Report Repository (Crystal Reports)

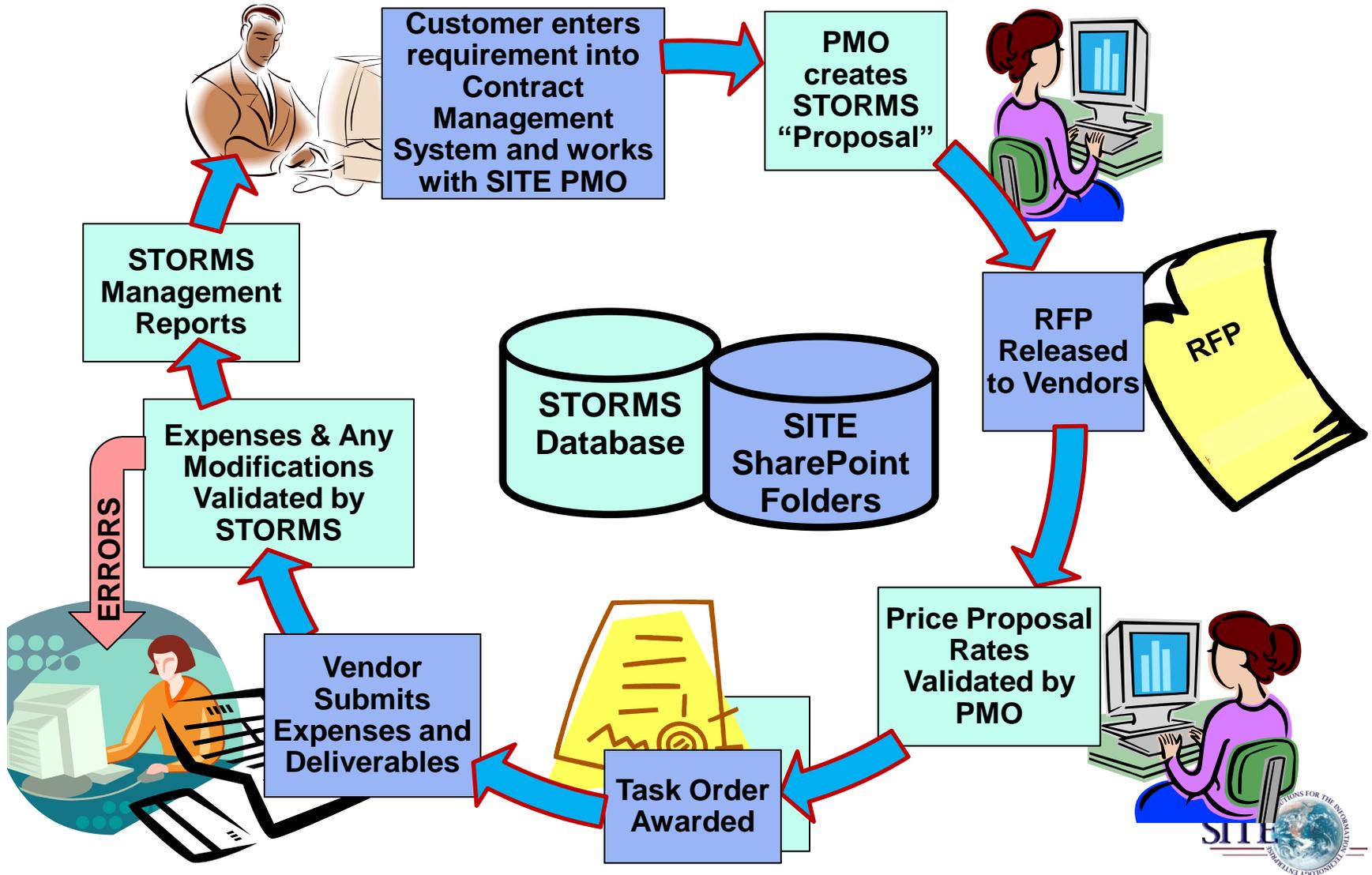
DEFENSE INTELLIGENCE AGENCY  
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Home | Document List | Open | Send To | Help | Prefere

Title	Last Run	Type	Owner
DB Downloads		Folder	bthompson.admin
CLIN Summary - by IDIQ & Task Order		Crystal Report	Administrator
CLIN Summary - by Task Order NAME		Crystal Report	Administrator
Sponsor Summary Report		Crystal Report	bthompson.admin
Vendors - Complete Listing		Crystal Report	kgordon
Alpha listing of ALL Vendors		Crystal Report	kgordon
Vendors - Primes and Subs (not working)	Jan 24, 2012 12:45 PM	Crystal Report	kgordon
Listing by Primes with Subs		Crystal Report	kgordon



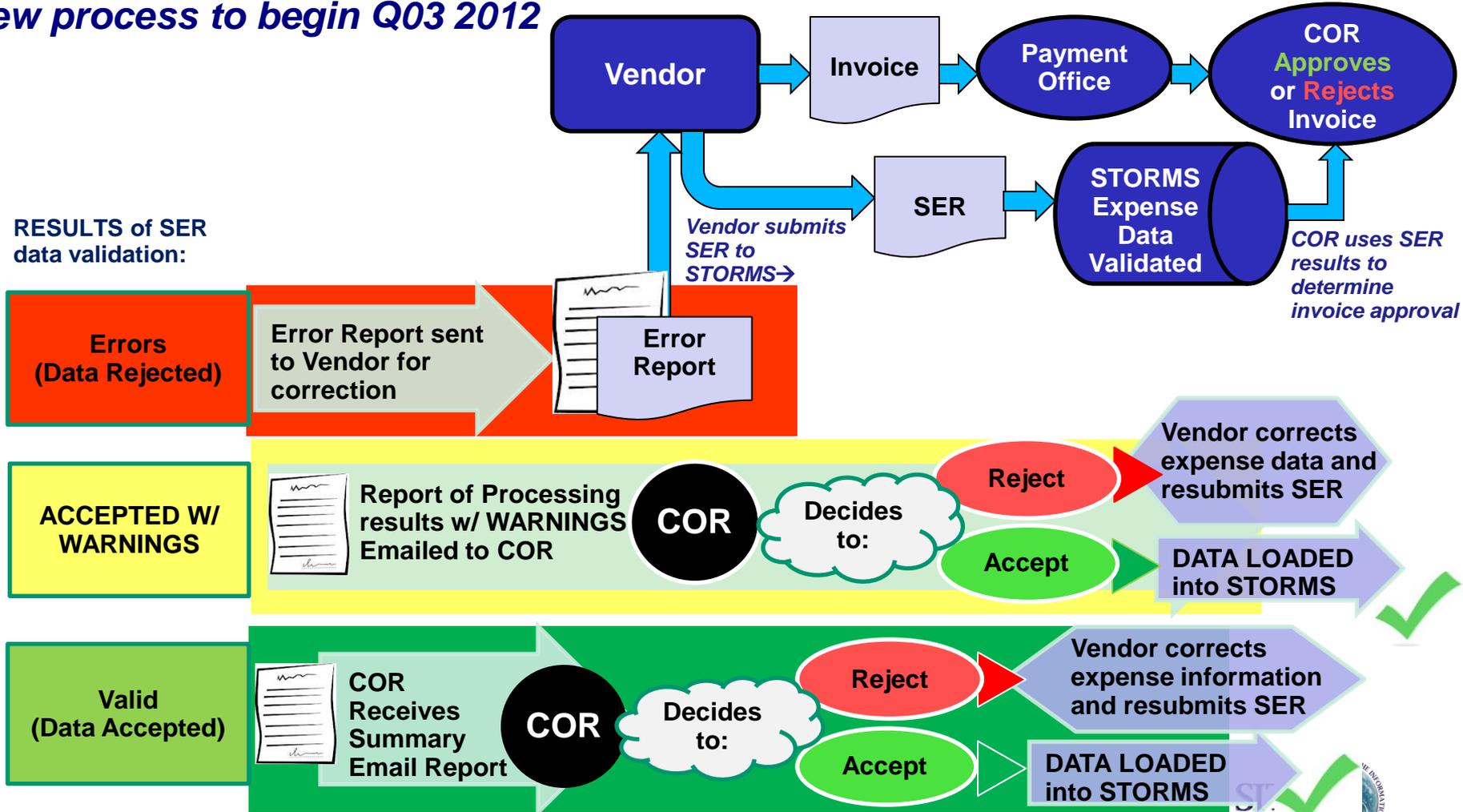
# Business Process: STORMS Lifecycle





# Invoice Approval w/ STORMS Expense Report (SER)

New process to begin Q03 2012





# Sample SER Email Summary Report

**ACTION REQUIRED:** [XXX] WARNING errors were identified by STORMS (see attached error file for details). These errors need to be reviewed by the COR before approving this invoice for payment. This error information was also provided to the Vendor.

Contract: HHM402-10-D-XXXX      Task Order: XXXX  
Title:      CEOS Services  
Prime:      XYZ Company  
PCOR:      Iam Good

**The following invoice was processed for the above contract/task order:**

File Name:      HHM402-10-D-0XXX\_XXXX\_12\_SER.xls  
Date Submitted: 12/14/2011  
Invoice Number: XXXXXX-XX\_XXXXX  
Invoice Date:    12/12/2011

Total Labor:    \$340,000.00  
Total ODCs      \$10,000.00

-----  
**Total Invoice: \$350,000.00**

**Invoice CLIN Summary:**

CLIN	Type	CLIN Title	Amount Charged
0001	FFP-LOE	Base Labor	\$230,000.00
0002	T&M	Base Labor	\$110,000.00
0005	ODC	Base ODCs	\$10,000.00

Select your COR action:

<b>ACCEPT</b>	This will load the SER data represented above into the STORMS database.
<b>REJECT</b>	This will notify Vendor that SER data has been rejected. Please work with your vendor for resubmission of their SER and Invoice.





# COR/Vendor Responsibilities

- COR
  - Maintains COR file in SharePoint
  - Manages Permissions for Task Order record
  - Approves SITE deliverables
  - Prior to invoice approval, COR verifies invoice accuracy against STORMS Expense Report (SER) submitted by vendor (via COR Email Summary)
- Vendor
  - Submits SITE-required deliverables (CAR, PMR, SER)
  - Submits PPR to SharePoint to validate rates prior to award
  - Submits negotiated, awarded PPR to SharePoint after award





# SharePoint COR Folders:

## COR FILE

Pre-Award Library  
(Gov't Special Access)

Award

COR Docs

COR Docs (No Vendors)

Vendor Deliverables

SER: STORMS Exp Rpt  
(Special Access)

## TASK ORDER TEAM

Tasks

Calendar

Team Discussion

<---- NOTE: Document libraries with limited access are annotated (in parenthesis)

## Sample Task Order Name

A description about this task order (based on SOW).

### Announcements

<input type="checkbox"/>		Title	Modified
--------------------------	--	-------	----------

There are no items to show in this view of the "Announcements" list. To add a new item, click "New".

[+ Add new announcement](#)

### Calendar

March, 2012





# SITE SharePoint FAQs

Frequently asked questions:

- How do I get access to SharePoint?
- How do I get access to a particular Task Order?
- What are the two Contractor roles within a Task Order?
- How do I view contract documentation (CAR, PPR, SER, etc...)

The screenshot shows the SITE SharePoint home page. The main content area displays a table titled "TASK ORDERS" with a summary of 24 items and a total value of \$1,080,968,771. The table columns include Org, Name (Click), Base IDIQ Contract TO #, Mod, Prime, SBSA?, Awd Date, Total Value, and PCOR. The table lists various task orders such as DIA CE, DIA EO, DIA ESD, DIA ECS, DIA Cyber, DIA Maury Hall, DIA HBIT, DIA ORION, DIA Cross Dom, DIA IDSP/DIOCC, DIA DoD SES, DIA ROME, and DIA International.

Org	Name (Click)	Base IDIQ Contract TO #	Mod	Prime	SBSA?	Awd Date	Total Value	PCOR
							Count= 24	Sum= \$1,080,968,771
DIA	CE	HHM402-10-D-0013	0001	15	BAE	No	2/2/2011	\$209,005,269 Tammy Morgan
DIA	EO	HHM402-10-D-0013	0002	15	BAE	No	2/2/2011	\$151,179,143 David Garbe
DIA	ESD	HHM402-10-D-0014	0001	10	GD IT	No	1/1/2011	\$42,265,243 Enrique Osuna
DIA	ECS	HHM402-10-D-0014	0002	15	GD IT	No	3/31/2011	\$198,990,057 Fredia Banks
DIA	Cyber	HHM402-10-D-0014	0003	7	GD IT	No	9/16/2011	\$86,323,807 Alice bolander
DIA	Maury Hall	HHM402-10-D-0015	0001	8	LM	No	9/7/2011	\$3,000,000 Teresa Peterson
DIA	HBIT	HHM402-10-D-0016	0001	13	NG	No	9/22/2010	\$34,191,744 Bruce Ramos
DIA	ORION	HHM402-10-D-0017	0001	8	SAIC	No	7/28/2011	\$32,698,422 John Dominics
DIA	Cross Dom	HHM402-10-D-0018	0001	2	SRA	No	9/29/2011	\$3,520,714 Timothy Siclari
DIA	IDSP/DIOCC	HHM402-10-D-0019	0001	8	BC Fed	Yes	8/1/2010	\$27,362,832 Jeff Halvorson
DIA	DoD SES	HHM402-10-D-0019	0002	12	BC Fed	Yes	9/24/2010	\$32,533,069 Christopher Winters
DIA	ROME	HHM402-10-D-0020	0001	3	CSC	Yes	8/30/2010	\$4,787,799 Jeff Halvorson
DIA	International	HHM402-10-D-0020	0002	11	CSC	Yes	9/29/2010	\$31,904,841 Amy Bartoszewicz

