



# Defense Intelligence Agency

Unclassified

**Solutions for the Information  
Technology Enterprise**

## **SITE Ordering Guide**



May 21, 2010

*Notice: The official version of the SITE Ordering Guide is posted on the SITE web-sites (listed herein). Any printed copy is considered superseded.*  
Please submit proposed changes and comments on NIPRNet to: [SITE@DIA.MIL](mailto:SITE@DIA.MIL)

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# 1. Introduction

This guide provides the customers (end users) with pertinent information for using the Solutions for the Information Technology Enterprise (SITE) contract. It also provides guidance for obtaining decentralized ordering authority and outlines procedures and process flows for identifying SITE requirements through Task Order award. The SITE contract terms are identified and explained to ease the ordering process.

Defense Intelligence Agency, Acquisition Executive (DIA/AE) is the contracting organization that has overall contractual responsibility for the basic SITE contracts as the Procuring Contracting Office (PCO). DIA Chief Information Officer (CIO) is the technical organization responsible for program management and technical oversight of the basic contracts. The SITE Program Manager (PM) and supporting program management office (PMO) serve as the CIO's designated office of responsibility for managing and administering the functional and technical oversight of the program. The Intelligence Support Panel (ISP) is an appointed group of representatives from participating Services and Agencies that provides user representation to the SITE program.

The contract features decentralized ordering and is designed as a flexible and responsive end-user solution with acquisition streamlining advantages. SITE also provides a variety of pricing arrangements of the following major types: Fixed Price (FP), Cost Plus (CP), Labor Hour (LH), Time and Material (T&M). A combination of these ordering types is available under SITE (hybrid orders).

The SITE Ordering Guide and copies of the contracts can be accessed on the following SITE websites:

NIPRnet	<a href="http://www.dia.mil/contracting/site.htm">http://www.dia.mil/contracting/site.htm</a>
JWICS	<a href="http://www.dia.ic.gov/admin/SITE/index.html">http://www.dia.ic.gov/admin/SITE/index.html</a>
SIPRNet	<a href="http://www.dia.smil.mil/admin/SITE/index.html">http://www.dia.smil.mil/admin/SITE/index.html</a>

Please thoroughly review the information provided. If additional assistance is needed, please contact the applicable Points of Contact (POCs) identified in Section 4 below.

***Notice: This guide is not intended to take precedence over any aspects of the contracts. In the event of any conflict between the information in this guide and the terms and conditions of the contract, the contract is the binding document.***

## 2. Scope

### 2.1 Overview

SITE is a multiple award, Indefinite Delivery/Indefinite Quantity (IDIQ) contract with a program ceiling of \$6.6 billion over five years (basic and four annual option periods).

The SITE contract provides worldwide coverage for IT (Information Technology) requirements and technical support services that support the Government through system design, development, fielding, and sustainment of global Intelligence, Surveillance and Reconnaissance (ISR) and the intelligence components of Command and Control (C2) system assets that are vital to the security of the United States.

The government may require support to contingency and exercise operations in an operational area where forces are deployed and deemed hazardous. It also supports business process reengineering/ development, performance measures and metrics, feasibility studies, IT systems architecture development and planning, research, design, engineering and/or development of systems, and fielding and installation of systems with capabilities developed during the design and engineering phase.

SITE replaces DIA's Department of Defense Intelligence Information System (DoDIIS) Integration and Engineering Support (DIESCON3) Blanket Purchase Agreements (BPA) and the Air Force's Intelligence Information, Command and Control, Equipment and Enhancements (ICE2) contract and various other small contracts.

The SITE contract supports both classified and unclassified programs on multiple security domains. The services and capabilities supported by the SITE contract provide responsive, flexible, adaptive, and timely solutions for organizations to satisfy current and future IT requirements.

While the vast majority of the SITE contract work is on top secret networks, individual task orders will specifically identify which networks (and their security level) that are to be included in the scope of work. This will vary from one DOD agency/component to another and from one location to another.

Departments and agencies supported by this contract vehicle include, but are not limited to: Army, Navy, Air Force, Marine Corps, Coast Guard, Defense Intelligence Agency (DIA), Combatant Commands, Joint Reserve Intelligence Program, multi-national partners (e.g., coalition and alliance), Office of the Secretary of Defense (OSD), National Command Authorities, Defense Agencies, and other Federal Departments/Agencies with intelligence missions or using standard C2 or intelligence information systems.

*Note: Most SITE acquisitions are excluded from Major Automated Information Systems (MAIS) requirements because operations and maintenance funds (O&M) of already delivered systems (hardware and software) are not considered an MAIS acquisition.*

*MAIS thresholds are \$32M in any single year or when executed in aggregate (options years, follow on tasks, etc) have total program costs in excess of \$126M or total life-cycle costs in excess of \$378M. In accordance with DODI 5000.2, if a Service/Agency has a requirement for a MAIS acquisition under SITE, the requesting customer and supporting DCO will be responsible for ensuring that the MAIS reporting requirements are addressed.*

## 2.2 Contract Terms

Multiple IDIQ awards were made for SITE with the following terms and provisions:

<b>Contract Terms</b>	<b>SITE</b>
Contract Ceiling	The total amount of all orders placed against all SITE contracts shall not exceed \$6.6B over the life of the contract
Ordering Period	Task Orders may be up to Five (5) Years <ul style="list-style-type: none"> <li>• 12-month base period</li> <li>• Four 12 month options</li> </ul> Task Orders awarded in Option Year 2 may not extend beyond (completed within) 72 months (6 years) of basic IDIQ award date.
Pricing Structure*	Fixed Price: including FPAF, FPIF, FPFF & FPLOE Cost Type: including CPAF, CPFF & CPIF Labor Hour T&M Hybrid
Performance-Based Contracting	Preferred method for acquiring services
Fair Opportunity to be Considered	Subject to FAR 16.505 and DFARS 216.505-70
Ordering Guidance and Process	Guidance provided herein and SITE Contract Clause G-16, Awarding Orders under Multiple Award Contracts

*Note: Acronyms are defined in Appendix P*

## 2.3 SITE Task Areas

The Statement of Objectives (Section C of the SITE IDIQ contracts) contains a description of the task areas that are within the scope of work for a SITE Task Order. Customers should clearly identify the SITE Task Area(s) that are applicable to the work defined in their requirement documents.

A summary of major services and support considered within the scope of the contract consists of the 16 task areas identified on the next page.

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**Task Area 1 Program & Project Management Services**

Services include: Project Management and Planning, Service Level Management, Performance Management, Metrics and Earned Value, Business Process Improvement, Customer Outreach and Relationship Management, and Quality Assurance

**Task Area 2 Technology Assessment and Evaluation Services**

Support involves conducting Research Development Test and Evaluation (RDT&E) activities identifying new and emerging technologies for potential insertion for current and future program requirements.

**Task Area 3 Systems Engineering**

Services include: Application/Tool/Service Development, Application Management, Technical Documentation, Software Engineering and Integration, Development and Release Management, Development Testing, Infrastructure Engineering, Systems Architecture and Next Generation Architecture Planning

**Task Area 4 Operations Support Services**

Services include: Service Desk, Operations and Maintenance of Hardware and Software, Installation and Deployment, Incident Management, Problem Management, Systems Administration, Database Management, Configuration/Change Management, IT Services Continuity, Operations and Maintenance of Conferencing Capabilities, Communications Security Support, Data Center and Equipment Room IT Management

**Task Area 5 Network Operations and Administration**

Services include: Network and System Performance Monitoring and Analysis, Cable Installation, Testing, Troubleshooting and Management, Network Operations and Capacity Management, Voice, Secure Voice, Video and VoIP Operations, Tactical SATCOM Initialization, and Operations and Management

**Task Area 6 Storage Services**

Services include: Enterprise Storage Services, Disaster Recovery Program and Business Continuity, Storage Management, and Storage Support

**Task Area 7 Web Services and Content Management**

Services include: Web Services Management, Web Content Management, and Web System Development

**Task Area 8 Acquisition and Property Management Services**

Services include: Acquisition of Materials, Logistical Support and Inventory Management Services

**Task Area 9 Maintenance and Remote Diagnostic Services**

Services include: Maintenance Services, Remote Diagnostic Tools and Services

**Task Area 10 Administrative and Special Services**

Services include: Administrative IT Support, Outside Technical Support Services, Over and Above (O&A) Services in accordance with DFARs 252.217-7028, Surge Support Services and Deployment Support Services

**Task Area 11 Information Assurance Services**

Support includes the range of activities needed for the enterprise to enforce, comply with, and support the DoD and Intelligence Community (IC) Information Assurance (IA) security directives, policies and procedures.

**Task Area 12 Security Management**

Services for the Special Security Office (SSO) include SCI technical support, security analysis, physical security accreditation, technical security oversight, security policy analysis, and assisting government personnel during Technical Security Countermeasure surveys.

**Task Area 13 SCI Personnel and Information Security Support**

Services for personnel and information security support include SCI indoctrinations/debriefings, providing and tracking foreign travel briefings and debriefings of SCI cleared personnel, coordinating the transfer of SCI clearances to other Special Security Offices, developing and providing security training, and maintaining SCI Visitor Certification logs.

#### **Task Area 14 Risk Management**

Services involve assessing and reporting on risk when encountered throughout the execution of any task order. Risk management will be directed towards assessing, mitigating (to an acceptable level) and monitoring of risks.

#### **Task Area 15 Testing and Verification Services**

Support includes enterprise independent testing activities for system, application and service-oriented IT functions and working with functional users to ensure that user requirements and issues are addressed by the test processes.

#### **Task Area 16 Training Services**

Services include designing, developing, and delivering training to Government or other designated personnel on systems hardware, and/or software.

All work provided for DoD organizations through the SITE contracts must be in accordance with approved Service, Agency, DoD, and Intelligence Community (IC) architectures, standards and guidelines (or other Federal standards as appropriate).

Operations support services available 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. While the vast majority of the SITE contract work is on top secret networks, individual Task Orders will specifically identify which networks (and their security level) that are to be included in the scope of work.

## **2.4 SITE Pricing Structure**

The SITE contract offers the multiple pricing arrangements mentioned below to allow the contracting office to select the pricing arrangement or arrangements most appropriate to the circumstances of the Task Order:

- **Fixed Price:** Includes Fixed Price Award Fee (FPAF), Fixed Price Incentive Fee (FPIF), Fixed Price Fixed Fee (FPFF) and Fixed Price Level of Effort (FPLOE) (FAR 16.2 and 16.4)
- **Cost Reimbursable:** Includes Cost Plus Award Fee (CPAF), Cost Plus Fixed Fee (CPFF), and Cost Plus Incentive Fee (CPIF) (FAR 16.3 and 16.4)
- **Time and Materials (T&M) and Labor Hour** (FAR 16.6)

*Note: Hybrid orders (multiple pricing arrangements) may be placed under SITE.*

### **2.4.1 Performance Based Service Acquisitions**

Although Firm Fixed Price is preferred for performance based service acquisitions (PBSAs), it's not always the best solution (FAR 37.102(a)(2)). Deciding on the contract type involves assessing an agency's requirements and the uncertainties involved in performance when selecting the Task Order type. The contracting office will also follow

their internal procedures and regulatory requirements when developing type and structure that places an appropriate degree of risk, responsibility, and incentives, targets, adjustment formulas, and performance and evaluation criteria on the Contractor for optimum performance. Frequently Asked Questions (FAQ) regarding the use of the SITE contract are provided in Appendix A.

## 2.4.2 SITE Contract Line Item Numbers (CLINs)

Site has established five (5) CLINs for the base period and each of the option years based on the type of pricing required in a Task Order. They are defined as follows:

- CLIN 1 - Fixed Price including FPAF, FPIF, FPLOE
- CLIN 2 - Cost Type including CPAF, CPIF
- CLIN 3 - Labor Hour
- CLIN 4 - Time & Material
- CLIN 5 - Travel & Other Direct Costs (ODCs)

## 2.5 SITE Labor Pricing

SITE's labor pricing tables are part of the basic IDIQ contracts and list both Hourly and Man-Month Labor Rates, Mark-Up Percentages, and Bill Rates for 51 labor categories (descriptions of which are contained in Section H-14 of the contracts). The hourly and man-month labor rates are unloaded labor rates. The mark-up percentages include, but are not limited to, overheads, general and administrative (G&A) costs, profit, benefits, danger pay, hardship pay, and Defense Base Act (DBA) insurance. The bill rates are the sum of the labor rates and mark-up percentages and serve as ceiling rates for pricing Task Orders under the contract. A SITE contractor may propose rates that are lower than those specified in its Pricing Table with the aim to offer the most advantageous Task Order proposal, but it may NOT propose higher rates. The labor rates are priced for the base year and four annual option periods and cover all locations within the continental United States (CONUS) and overseas (OCONUS).

### 2.5.1 US Labor Rates

For US locations, labor rates have been determined based on similar "cost of living" criteria and are categorized into seven price groups. Separate ceiling rates for labor have been negotiated for each group (these rates apply for all work within the defined County). The locations and corresponding labor group are identified in the following table.

*Note: For any US location not specifically identified in the US table, the Group 7 labor rates will be used.*

State	County	Price Group	CONUS Site/City
AK	Anchorage	Gp 3	Fort Richardson
AK	Fairbanks North Star	Gp 3	Fort Wainwright
AK	SE Fairbanks	Gp 3	Fort Greely
AL	Calhoun	Gp 7	Fort McClellan
AL	Jefferson	Gp 3	117th Intelligence Squadron, Birmingham
AL	Madison	Gp 6	Redstone Arsenal, Huntsville
AR	Pulaski	Gp 3	Little Rock AFB, North Little Rock
AZ	Cochise	Gp 7	Fort Huachuca
AZ	Pima	Gp 7	Davis Monthan, Tucson
CA	Alameda	Gp 4	Camp Parks, W ARISC, Dublin
CA	Los Angeles	Gp 1	Los Angeles
CA	San Bernardino	Gp 1	Fort Irwin, National Training Center
CA	San Diego	Gp 3	San Diego, Camp Pendleton, Oceanside
CO	Denver	Gp 2	Denver
CO	El Paso	Gp 7	Colorado Springs
DC	Washington	Gp 3	Washington DC Metro Area
FL	Dade	Gp 4	Miami, SOUTHCOM HQ
FL	Duval	Gp 5	Jacksonville
FL	Hillsborough	Gp 7	MacDill Air Force Base, Tampa
FL	Orange	Gp 6	Orlando
GA	Clayton	Gp 7	Fort Gillem, SE ARISC, Forest Park
GA	Fulton	Gp 5	Fort McPherson
GA	Liberty	Gp 7	Fort Stewart
GA	Richmond	Gp 7	Fort Gordon
HI	Honolulu	Gp 2	Pearl Harbor, Camp Smith, Hickam AB, Ft. Shafter
IL	Edgar	Gp 7	Scott AFB
IL	Lake	Gp 7	FT Sheridan, NC ARISC
IL	Rock Island	Gp 7	Rock Island Arsenal
KS	Geary	Gp 7	Fort Riley
KS	Leavenworth	Gp 7	Fort Leavenworth
KY	Christian	Gp 7	Fort Campbell
MA	Middlesex	Gp 7	Ft. Devens, Natick Soldier Center RIP-18
MD	Anne Arundel	Gp 3	Ft. Meade
MD	Calvert	Gp 3	Washington DC Metro Area
MD	Charles	Gp 3	Washington DC Metro Area
MD	Frederick	Gp 3	Washington DC Metro Area
MD	Harford	Gp 3	US Army Aberdeen Test Center
MD	Montgomery	Gp 3	Washington DC Metro Area
MD	Prince George's	Gp 3	Washington DC Metro Area
MD	St Mary's	Gp 3	Washington DC Metro Area
MI	Wayne	Gp 7	Detroit, Naval Air Reserve Center Selfridge, Mt. Clemens
MN	Montgomery	Gp 7	Minneapolis, RIPO-10
NC	Cumberland	Gp 5	Ft. Bragg
NC	Onslow	Gp 7	Camp LeJeune
NE	Sarpy	Gp 7	Offut AFB
NJ	Monmouth	Gp 1	Fort Monmouth
NY	Jefferson	Gp 7	Fort Drum
NY	Oneida	Gp 7	Rome Labs, ONI/DIA, Rome
OH	Montgomery	Gp 6	Wright Paterson Air Force Base, Dayton

State	County	Price Group	CONUS Site/City
OK	Comanche	Gp 7	Fort Sill
PA	Franklin	Gp 7	Letterkenny Army Depot, Strategic Studies Institute
SC	Charleston	Gp 7	Charleston AFB
SC	Richland	Gp 7	Fort Jackson
TN	Shelby	Gp 7	Memphis, RIPO-Memphis, Millington
TX	Bell	Gp 7	Fort Hood
TX	Bexar	Gp 7	Lackland AFB, San Antonio
TX	El Paso	Gp 7	Fort Bliss
UT	Salt Lake	Gp 7	Draper, Army National Guard, Salt Lake City
VA	Albemarle	Gp 7	Charlottesville
VA	Alexandria	Gp 3	Washington DC Metro Area
VA	Arlington	Gp 3	Washington DC Metro Area
VA	Caroline	Gp 7	Fort A. P. Hill
VA	Fairfax	Gp 3	Washington DC Metro Area, Fort Belvoir
VA	Falls Church	Gp 3	Washington DC Metro Area
VA	Fauquier	Gp 3	Washington DC Metro Area
VA	King George	Gp 3	Washington DC Metro Area
VA	Loudoun	Gp 3	Washington DC Metro Area
VA	Norfolk	Gp 7	Norfolk
VA	Prince William	Gp 7	Quantico
VA	Stafford	Gp 3	Washington DC Metro Area
VA	Suffolk City	Gp 7	Suffolk
VA	Virginia Beach	Gp 7	Virginia Beach, NSWC, Damneck
WA	Island	Gp 3	Whidbey Island, RIPO-1, Oak Harbor
WA	Pierce	Gp 7	Fort Lewis

## 2.5.2 Overseas Labor Rates

Separate labor rates for eighteen overseas locations have been negotiated. The negotiated labor rates are valid for certain Countries or specific overseas city/site locations and are presented in the following table.

Overseas Locations
Afghanistan & Iraq
Bahrain
Mons, Belgium
Colombia
Djibouti
Germany
Naples, Italy
Tokyo, Japan
Yokosuka, Japan
Korea, Camp Humphreys
Korea, Camp Red Cloud
Korea, Seoul
Kosovo, Pristina

Overseas Locations
Okinawa, Camp Courtney
Qatar
Thailand, Bangkok
Turkey, Ankara
United Kingdom

If a labor category or an OCONUS location is not defined in the Pricing Tables, pricing may be requested and negotiations may be entered into to add the labor category or location to the SITE contract as provided for by Section B-6 of the contract.

### 2.5.3 Other Direct Costs

Other direct costs (ODCs) such as those listed below are excluded from the priced rates and are cost reimbursable:

- Facilities (Contractor provided work space)
- Housing
- Tuition
- Materials
- Outside Technical Support Services
- Relocation
- Travel and Per Diem
- Transportation of Equipment
- OEM Payments

When award fee, incentive fee or fixed fee arrangements are used, the fee will be proposed and negotiated at the Task Order level. Ordering authorities should follow their internal procedures and regulatory requirements when developing incentives, targets, adjustment formulas, performance criteria and award fee and surveillance plans. **Remember: If financial incentives are used, funds must be committed to pay them at the time of Task Order award or option exercise.**

## 3. Compliance with SITE Acquisition Plan

### 3.1 Contractor versus Government Performance

OMB Circular A-76 has been considered and SITE is compliant. SITE shall not be used to replace Government employees.

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## 3.2 Inherently Governmental Functions

Consideration was given to the subpart FAR 7.503(c) conditions, and contractors will not be performing inherently governmental duties. Each task order will be examined to ensure that no Inherently Governmental Functions will be performed.

## 3.3 Environmental and Energy Conservation Considerations

SITE customers must consider, during task order acquisition planning, whether hazardous or potentially hazardous materials (HAZMAT) are expected to be used and/or HAZMAT waste generated in performance of requirements. If affirmative, include the following statement in the PWS/SOO: “Contractor is not required to dispose of HAZMAT except to installation/site collection points.”

## 3.4 Other SITE Acquisition Plan Considerations

### 3.4.1 Service Contract Act

The Service Contract Act of 1965 was included in the solicitation. Contractors will identify when responding to a task order which labor categories are subject to the Service Contract Act and subject to an applicable Wage Determination.

### 3.4.2 Contractor’s Authorized to Accompany US Forces Outside the US

The SITE contracts contain DFARS 252.225-7040 as well as the applicable clauses and procedures outlined in DFARS PGI 225-74. Services deemed to be essential during a crisis will be identified in the individual Task Order.

### 3.4.3 Information Assurance Review

Each Task Order issued under this contract must be screened for compliance with applicable information assurance statute, policies, and procedures. The Customer (requiring activity) is responsible for providing the requirements (PWS/SOO) to the DCO that meet information assurance requirements as specified in DFARS Subpart 239.7102; inspection and acceptance methods and criteria; a determination as to whether the IT requires protection against compromising emanations; and a determination as to whether the IT being acquired constitutes a “mission critical” or “mission essential” capability as defined in DoDI 5000.2 (Operation of the Defense Acquisition System).

### 3.4.4 Time and Material (T&M) Task Orders

Prior to issuance of a T&M task order under SITE, determinations and findings (D&F) required by FAR 16.601(c) and DFARS 216.601(d) must be executed by DCOs. Intelligence Support Panel Representatives will assist DCOs, when necessary, with verifying that (1) the work is of a T&M nature and (2) the facts and rationale justify that no other contract-type is suitable.

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When a T&M task order is used, DCOs are reminded that IAW the SITE IDIQ contracts Section G-10 Para 3 (Time and Materials) the “*Vendor must provide a plan, NLT 180 days after contract (task order) award describing what tasks or services may be transitioned from a level of effort (T&M) to a Firm Fixed Price performance-based task based on the performance-based attributes...*”

## 4. SITE Team

### 4.1 Procuring Contracting Officer (PCO)

The Virginia Contracting Office serves as the SITE PCO. The SITE PCO has overall contractual responsibility for the SITE contracts and all resultant DIA Task Orders. The SITE PCO’s responsibilities include:

- Performing all administrative functions associated with the contracts, including issuance of modifications, final decisions, explanations of terms and conditions and contract interpretation
- Managing all protests, claims and contract litigation associated with the original IDIQ SITE contracts (not individual Task Orders)
- Ensuring program and procedural compliance with the Federal Acquisition Regulation (FAR), DoD FAR Supplement (DFARS), and other governing regulations, policies, laws and statutes
- Upon request, providing guidance to the Decentralized Contracting Office (DCO) executing Task Orders under the SITE contracts.

Decentralized ordering authority is granted via a signed Memorandum of Understanding (MOU) to external customers (see Appendix B for sample of letter for requesting the initiation of a SITE MOU). All orders issued are subject to the terms and conditions of the contract. The contract takes precedence in the event of conflict with any order.

### 4.2 SITE Program Manager (PM)

The SITE PM is responsible for program management and technical oversight of the SITE contracts. The PM provides guidance to the Intelligence Support Panel (ISP) Representatives and ordering service/agency program managers in developing the requirements package for the Task Order including Performance Work Statements, Statements of Objectives, Independent Government Estimates, Quality Assurance Surveillance Plans, and Proposal Evaluation Criteria.

The SITE PM responsibilities include:

- Managing the allocation of contract ceiling on behalf of the CIO.

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- Maintaining records of all approved MOUs and associated Task Orders, periodically reviewing MOUs for changes or adjustments of duration of acquisition authority or maximum ceiling authorized.
  - Conducting periodic program reviews and quality assessments.
  - Serving as Chairman of the ISP and convening the ISP, as required, to examine new or pending requirements and potential changes to ceiling allocations.
  - Requesting a determination and approval of scope by the PCO when a review of scope is submitted by an ISP Representative.
  - Managing the SITE Quality Assurance, Surveillance and Oversight Program.

### 4.3 Intelligence Support Panel (ISP)

The ISP is an appointed group of individuals who provide user representation and SITE program support to their respective Service/Agency users. Each Service/Agency that uses the SITE contracts may designate a representative to be on the ISP (see Para 4). Agencies that choose to use the SITE contracts without providing a representative to the ISP may be represented by an “at large” representative appointed by the ISP Chair.

The ISP is chaired by the SITE PM. The roles and responsibilities of ISP Chair and representatives are contained within the ISP Charter which is available on the SITE web-sites.

### 4.4 Intelligence Systems Panel Representative (ISPR)

ISP Representatives are designated in writing by the Chief Information Officer (CIO) or other Senior Executive of that Agency/Service and are authorized to represent that organization in defining SITE program requirements to the SITE PM. The ISP Representative (ISPR) serves as the focal point for coordination with the SITE PM and servicing DCO. The ISP Representative will be responsible, as a minimum, for the following:

- Being the primary point of contact for coordinating with the SITE PM.
- Coordinating and providing oversight of the Memorandum of Understanding (MOU) (see Para 5) to include:
  - Ensuring the authorized ordering ceiling value is not exceeded.
  - Processing MOU addendums for additional ceiling as necessary.
- Providing recommendations of in-scope determinations on potential SITE requirements.
- Reviewing procurement package(s) prior to submittal to the issuing DCO to ensure the package is complete.
- Supporting the DCO as appropriate in reviewing evaluation memos for fairness and impartiality.

- Assisting in contractors' proposal evaluations, as necessary.
- Overseeing the SITE Quality Assurance Surveillance and Oversight Program for the Service/Agency.
- Assisting DCOs when necessary with resolving protests, claims, and disputes related to DCO issued task orders.

#### 4.5 ISP Points of Contact:

<u>Office</u>	<u>Name</u>	<u>Phone</u>	<u>Email</u>
PCO	Esther Woods	703-907-0106	SITE@dia.mil
PM	Jennifer Wilson	703-907-0697	SITE@dia.mil
ISPR/DIA	Doug Cate	703-907-0697	SITE@dia.mil
ISPR/Air Force	Pat Williams	757-225-4207	Pat.Williams@langley.af.mil
ISPR/Army	Ellen Mathews	703-695-2662	Ellen.Mathews@us.army.mil
ISPR/Army	Debra Stryker	703 695-3749	Debra.Stryker@us.army.mil
ISPR/Marines	Roger German	229-639-8413	Roger.German@usmc.mil
ISPR/Navy	Frank Sablan	301 669-5849	fsablan@nmic.navy.mil

*Note: ISP Representatives identified herein should be the first point of contact prior to contacting the SITE PMO or PCO.*

## 5. Decentralized Ordering

### 5.1 Service or Agency Sponsoring Activity

DIA administers the SITE contract centrally, but authorizes decentralized ordering to meet the needs of the DoD Services, including Army, Navy, Air Force, United States Marine Corps, and other Federal Agencies/Departments. SITE is available for use by DoD and Federal Agencies/Departments with Intelligence missions whose Information Technology (IT) requirements are within the scope of the SITE Statement of Objectives (SOO).

To use SITE, the Service/Agency must be authorized through an MOU with DIA. A sample Letter of Intent (LOI), which is used for requesting the establishment of the MOU, is provided in Appendix B. When executed, the MOU will specify the conditions, roles and responsibilities, and approved ceiling allocation for ordering. A draft MOU is available for review on the SITE web-sites listed in paragraph 1. Upon receipt of the MOU requesting letter, DIA will review and normally make a decision for initiating the MOU within 15 calendar days.

When the MOU has been signed by the DIA CIO, Acquisition Executive, and the requesting Service/Agency, Task Orders may be initiated.

In those cases where a sponsoring Service or Agency requests that DIA perform procurements on their behalf, an Interagency Agreement is also required. The instructions and format for establishing an Interagency Agreement for Assisted Acquisition are also available on the SITE web-sites listed in paragraph 1.

## 5.2 Decentralized Contracting Office (DCO)

Upon execution of the MOU, the designated Decentralized Contracting Offices defined in the MOU are empowered to place orders in accordance with the terms and conditions of the SITE contracts, SITE ordering guidelines, the FAR, DFARS, and applicable Service/Agency procedures. Refer to the SITE web-site for a copy of the SITE MOU which must be signed by DIA and the Sponsoring Activity authority **before any order is placed**.

If there are questions concerning a requirement and whether or not it can be supported under SITE, contact the appropriate ISPR or the DIA SITE Program Office. The ISPR is responsible for recommending the “in scope” determination, assisted by their DCO, the SITE PM and SITE PCO as necessary.

The SITE PCO will not make any judgments or determinations regarding orders awarded under the SITE contracts by a Decentralized Ordering Contracting Officer, except in cases where sole source or limited competition task orders are intended (refer to paragraph 7.3). All issues, including protests and disputes must be resolved in accordance with individual agency procedures and/or oversight. Upon request, the SITE PCO is available to provide guidance to Ordering Contracting Officers executing orders under the SITE contracts.

*Note: DCOs should seek guidance from the SITE PCO prior to issuing sole source Task Orders. Such task orders are not authorized without written prior endorsement of the SITE PCO (see Paragraph 7.3).*

# 6. Assisted Acquisition

## 6.1 Requests for DIA to Serve as Contracting Office

DIA may be requested to perform contracting services on behalf of non-DIA components pursuant to the Economy Act (31 U.S.C. 1535) as implemented by subpart 17.5 of the FAR.

An Interagency Agreement is required, pursuant to which DIA will place orders against the SITE contract on the requesting agency’s behalf and perform task order associated administrative activities. The agreement describes the information necessary for the

acquisition as well as roles and responsibilities of the requiring activity and DIA (assisting activity). Prior to the establishment of an Interagency Agreement, the requesting agency/department must provide a LOI (Appendix B) that requests approval for the assisted assistance. A justification for requesting assisted acquisition services must accompany the LOI.

The requirement for an Interagency Agreement applies to DoD components (e.g., Commands/Services/Agencies) and to non-DoD federal agencies.

- **Assisted Acquisitions between DIA and non-DoD Federal Agencies:** An Interagency Agreement for Assisted Acquisition Services under SITE (template) is available for use by non-DoD federal agencies. Contact SITE PMO for a copy of this template.

Non-DoD federal organizations should contact the SITE PCO regarding the procedures for establishing an Interagency Agreement.

- **Assisted Acquisitions between DIA and DoD Components:** The Interagency Agreement between DoD components is established using a DD Form 1144, Support Agreement, for recurring support (refer to DoD Instruction 4000.19). The Interagency Agreement template mentioned above may be used in lieu of DD 1144, if service/agency procedures permit.

Further guidance on assisted acquisitions and interagency agreements can be found on [http://www.acq.osd.mil/dpap/cpic/cp/interagency\\_acquisition.html](http://www.acq.osd.mil/dpap/cpic/cp/interagency_acquisition.html)

## 6.2 Submitting External Purchase Requests (PR)

External requests from DoD organizations must be accompanied with a Military Interdepartmental Purchase Request (MIPR), DD Form 448 and Acceptance of MIPR, DD Form 448-2. ONLY those MIPRs providing for “Reimbursable Funds” will be accepted by DIA for placing SITE Task Orders. A DD 448 template is provided as Appendix O. Non-DoD federal organizations must contact the SITE PCO regarding the correct procedures for submitting PR funding documents.

The related requirement documents (see Para 7.2.3) must be submitted to the SITE PMO for review in advance of receipt of the MIPR so that upon being received it can be processed expeditiously within DIA’s acquisition procedures.

To further accelerate the overall procurement process, when using the SITE IDIQ contracts, all incoming MIPRs should be sent the SITE PM who will perform the necessary coordination with DIA’s Financial Executive (FE) office for formal acceptance or rejection. The address for the SITE PMO is:

Defense Intelligence Agency  
ATTN: CLAR, SITE Program Office  
200 MacDill Blvd  
Washington, DC 20340-5100

Telephone: (703) 907-0697  
FAX: (703) 907-0351

Requirements and all supporting documentation should be sent electronically to:

NIPRnet: [SITE@DIA.mil](mailto:SITE@DIA.mil)  
JWICS: [SITE@DoDIIS.IC.gov](mailto:SITE@DoDIIS.IC.gov)

All incoming MIPRs need to be received and accepted by DIA not later than **30 June** to ensure funds are obligated before they expire. Requests for acceptance of PR funds after 30 June can be requested but approval for this exception is highly restricted and must be accompanied by a compelling need statement which documents the special urgency of the request.

## 7. Initiating a Site Task Order (TO)

A requiring Customer (end-user) should seek assistance from their designated ISPR regarding preparation of the procurement package required to initiate a SITE Task Order. The ISPR will review the requirement for scope and will recommend whether or not the requirement falls within the scope of SITE. The ISPR will also provide help, ranging from refining requirements to reviewing and assisting with preparation of documents and/or evaluation criteria and additional instructions for placing the order through their DCO.

The DCO is responsible for acquisition planning and conducting due diligence. Once the MOU delegating procurement authority is finalized, the ordering DCO will follow their internal processes for planning and funding the requirement, gaining all necessary approvals and documenting the acquisition process for each Task Order. The total estimated value of a Task Order, including options should be considered in developing an acquisition strategy.

Option periods may be offered on Task Orders. Option periods on Task Orders must be in accordance with the basic contract terms and conditions and may not exceed FAR guidance.

### 7.1 Performance Based Work Specification

SITE is a Performance Based Service Acquisition (PBSA) vehicle for the delivery of IT services. Upon identification of a requirement, the customer shall specify the performance specifications for meeting the requirement via a Performance Work Statement (PWS) or Statement of Objectives (SOO). A discussion of the performance based contract methodology, some DO's and DON'Ts and assistance in deciding which type of specification to use (PWS or SOO) are provided in Appendix C.

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## 7.2 The Purchase Request Package

Upon confirmation by the ISPR that the requirement is appropriate and recommended to be within scope for SITE, the requiring activity should use SITE templates provided in this guide along and other individual Service /Agency procedures to prepare and process the procurement package to initiate a SITE Task Order. The SITE Checklist will assist the customer in understanding what is required for the procurement package prior to submission to the contracting activity (Appendix L).

Requiring and contracting activities should perform due diligence in planning for and funding the requirement, gaining all necessary approvals and documenting the acquisition process for each Task Order.

### 7.2.1 Acquisition Plan

An Acquisition Plan is not required by the PCO for SITE Task Orders since it was completed as part of the basic SITE IDIQ acquisition. This plan may be required by servicing DCOs if the Task Order requirements are estimated at \$25M for any one year, or \$50M total program (FAR 16.505(a)(7)). The format and completion of this plan will be defined and accomplished in accordance with Service/Agency DCO guidelines.

### 7.2.2 Market Research

A Market Research report is not required by the PCO but may be required by the servicing DCO. If required, Market Research is done for Task Orders exceeding \$100,000 in value (DFARS 210.001). Market Research should consider the IT marketplace and other existing contracts in addition to SITE. When the use of the SITE contract is determined to be the best solution, a thoroughly documented Market Research Report will afford a basis for determining (1) whether to restrict competition in accordance with FAR 16.505(b)(2), *Exceptions to the Fair Opportunity Process*, (2) whether there are a sufficient number of qualified small business concerns among the SITE contract holders to justify limiting competition exclusively to small business concerns or (3) small business set-aside criteria imposed by FAR 19.502-2(b) cannot be met. The format for this report is defined and accomplished in accordance with Service/Agency guidelines.

### 7.2.3 Procurement Requirement Documentation

The procurement package contains a number of documents prepared by the customer (end-user or COR) that are required by the DCO for developing the Task Order and executing the acquisition. Included among these are the following key documents:

- Performance Work Statement (PWS) or Statement of Objective (SOO) and any supporting data clarifying the requirements to be satisfied by the contractor.
- Quality Assurance Surveillance Plan (QASP)
- Independent Government Estimate (IGE)

- Source Evaluation Criteria (used by DCO in preparing the Source Selection Plan)
- Purchase Request or MIPR

If the Contractor will be working in classified facilities or using classified IT systems in fulfillment of the requirement, the following is required as part of the procurement package.

- DoD Contract Security Classification Specifications (DD 254) and any supplements or attachments as required by a specific Service/Agency.

The PWS or SOO developed by the customer will include the work to be performed, location(s) of work, list of equipment to be supported and/or maintained at each location, list of deliverables, performance standards, documentation standards, acceptance criteria, performance schedule, and any special requirements, (i.e., security clearances, deployment, travel, special knowledge) in sufficient detail to permit accurate estimation of cost, hours, and other resources and completion date (as applicable) by the contractor(s). The customer (working with the ISP Representative) shall also propose the type of Task Order recommended, (e.g., Fixed Price, Cost Reimbursable, Labor Hour, Time and Material) and provide the IGE, the proposed evaluation criteria, and a QASP that specifies (1) all work requiring surveillance; and (2) the method of surveillance, pursuant to FAR 46.401.

The requirement description should be written to encourage the contractor to propose the best approach to accomplishing task order objectives. All required deliverables, such as reports and technical manuals, must have a complete description. One approach to documenting these requirements is to use a contract data requirement listing (CDRL), DD Form 1423. Another approach is to use a table of deliverables within the PWS or SOO (the PWS and SOO templates within this guide provide examples).

Appendix C provides additional insight for understanding when it's best to use a PWS or SOO.

- PWS: The SITE template and instructions for submitting a PWS are provided as Appendix D and Appendix E respectively.
- SOO: The SITE template and instructions for submitting a SOO are provided as Appendix F and Appendix G respectively.
- QASP: Instructions and a template for completing a QASP are provided in Appendix H.
- IGE: Instructions (and references to supporting Excel SITE IGE template) for completing the independent cost estimate are provided in Appendix I.

Depending on the issuing Service/Agency acquisition policies or procedures, other documents that may be required from the customer include:

- Contract Data Requirements List (CDRL): The DD Form 1423 is used to provide specifications on the type, content, frequency, and format of data and documentation being delivered as part of the Task Order.
- SITE Customer Request Form: All SITE requests initiated by DIA must include a completed copy of this request form which provides additional contract information needed by the PCO to develop the Task Order (this may be an optional form outside DIA).

***Assistance from SITE contractors (Prime or Sub-contractors) in developing a procurement package is strictly prohibited.***

### 7.3 Placing Orders

Prior to issuing Task Orders under the SITE contract, it must be determined by the ordering authority whether to:

- compete the Task Order among all of the contract holders
- set-aside\* for only the small business contract holders pursuant to FAR 19.502-2(b)
- restrict competition in accordance with FAR 16.505(b)(2), *Exceptions to the Fair Opportunity Process*. Use of any of the exemptions afforded by FAR 16.505(b), Orders under Multiple Award Contracts, must be documented by the requiring activity and approved as required by DFARS 216.505-70, DFARS PGI 216.5 and FAR 8.405-6. Reminder: DCOs should contact the SITE PCO for guidance and endorsement prior to formalizing acquisition plans for sole source or limited competition Task Orders. Such sole source or limited competition Task Orders are not authorized on SITE without prior written authorization/approval of the SITE PCO.

***NOTE TO DCOs: The SITE contract (IAW FAR 52.219-14) requires that, for total small business set-asides, “at least 50% of the cost of contract performance incurred for personnel shall be expended for employees of the [Offeror]”. The 50% rule applies at the Task Order level.***

SITE is governed by FAR 16.505(b), Orders under Multiple Award Contracts. This means that the Contracting Officer will provide each contractor a fair opportunity to be considered for each Task Order exceeding \$3,000.

Contract holder business size may be a determining factor in the fair opportunity to be considered process. Accordingly, the ordering activity may offer any requirement to the small business contract holders only. Unless an exception to the fair opportunity process is used, or a small business set-aside is selected, all SITE contractors will be provided a fair opportunity to be considered for each order.

All contractors will receive the Request for Order Proposal (RFOP) with the exception of those Task Orders in which competition is limited to Small Business, or those afforded exemption by FAR 16.505(b).

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## 7.4 Order Duration.

Task Orders may be awarded at anytime during the life of the SITE contract (also referred to as the contract ordering period) but must be completed within 72 months (6 years) of the IDIQ award date. The ordering period is for a base period of one year, with four one year options:

### **SITE ORDERING PERIODS:**

- Base Period            Date of award through month 12
- Option Period 1        Month 13 through month 24
- Option Period 2        Month 25 through month 36
- Option Period 3        Month 37 through month 48
- Option Period 4        Month 49 through month 60

Task Order issuance beyond the base period is dependent upon the SITE PCO exercising the associated ordering period option of the SITE contracts.

Task Order duration is not dependent upon exercising the SITE contract option periods—provided that the order term is consistent with the ordering activity's policy, regulatory/statutory restrictions, and appropriation limitations on Task Order duration and funding. Ordering activities may consider the use of options in Task Orders, that when exercised, extend the Task Order's base period of performance. Task Orders are limited to a period of five (5) years.

## 7.5 Request for Order Proposal Procedures

The ordering activity shall provide the Request for Order Proposal (RFOP) to every SITE contract awardee or to small business contract awardees when set-aside procedures are used. The RFOP will suggest the contract type, estimated Task Order start date, period of performance and will include the work specification, evaluation criteria (e.g. experience and past performance), the order of importance of the criteria, instructions for submission of a technical and cost/price proposal, submission of experience and past performance information; any special requirements (i.e. security clearances, travel, special knowledge); any other information deemed appropriate for the respective order; and deadline for receipt of proposals. The RFOP may be provided via regular mail, electronic mail, facsimile, or by other means as determined by the ordering officer. Appendix N contains a recommended memo requesting competitive proposals.

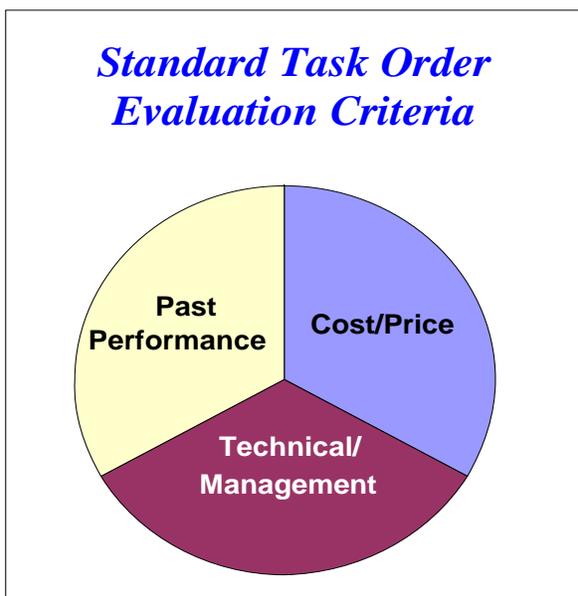
## 7.6 Evaluation

Award of competitive Task Orders will be made to the contractor whose proposal is the most advantageous to the Government based on an integrated assessment of

evaluation criteria. Each solicitation will explain the selection criteria that the proposals will be evaluated against and the order of importance of the criteria. Price or cost and past performance (to include earlier Task Orders under the contract when available), including quality, timeliness and cost control must be among the selection criteria for all orders.

The use and evaluation of past performance for a Task Order requirement should be tailored to fit the needs of that Task Order and clearly articulated in the RFOP. When past performance on SITE orders does not exist or is not current, other relevant and recent past performance will be considered. Past performance should be given sufficient evaluation weight to ensure that it is meaningfully considered throughout the source selection process and will be a valid differentiator among the Task Order proposals received. A sample of evaluation criteria that might be used is provided in Appendix P.

The ordering activity shall evaluate all proposals received using the evaluation criteria stated in the RFOP. The ordering activity is responsible for considering the level of effort and the mix of labor proposed to perform a specific task being ordered, and for determining that the total price is reasonable. Contractors may propose rates that are lower, but no higher, than those in the Rate Tables attached to the basic contract and these lower rates will be incorporated in the Task Orders. The proposed, reduced labor rates should be reviewed for realism to ensure the Government will not be placed at risk of nonperformance. The reduced labor rates will apply only to the respective Task Order and will not change the rates in the SITE contract rate tables or the rates on other Task Orders.

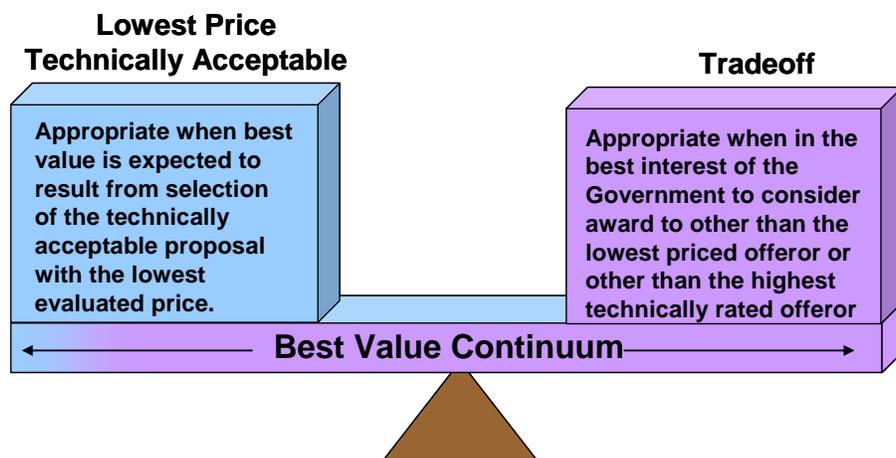


*Note: Requiring activity requirements/  
contracting personnel are responsible for  
providing the appropriate evaluation  
criteria with the competitive procurement  
package.*

Additional evaluation factors relevant to the particular Task Order may be considered in the awards under this contract. The following factors are examples:

- Specific Technical Expertise
- Management Approach
- Optimum Technical Solution
- Delivery Schedule or Turnaround Time
- Manning levels by labor categories (labor mix)
- Security (including clearance level)
- Other factors the customer believes relevant to the award of an order

Best value in negotiated acquisitions may be obtained by using any one or a combination of source selection approaches. In different types of acquisitions, the relative importance of cost or price may vary. For example, in acquisitions where the requirement is clearly definable and the risk of unsuccessful contract performance is minimal, cost or price may play a dominant role in source selection. The less definitive the requirement, the more development work required, or the greater the performance risk, the more technical or past performance considerations may play a dominant role in source selection.



## 7.7 Award

Once evaluations are complete, an authorized selection official will make an award decision and document the rationale for his/her decision. Prior to making a decision, copies of all evaluations will be prepared/provided and a complete award recommendation package assembled to document the selection process and serve as evidence that the fair opportunity to be considered rule was applied, unless an exception was taken under FAR Part 16.505(b)(2). At a minimum, it will include:

- (1) A statement indicating whether announcement of the TO requirement was made to all contractors eligible for receiving an award for the task requirement, or if an exception to the a fair opportunity to be considered rule was cited (cite the exception);

- (2) The selection criteria /methodology used to evaluate the competing contractors;
- (3) The results of the evaluation; and
- (4) The rationale for the recommendation of the TO awardee, including a summary of any negotiations conducted, cost/price analysis and best value analysis.

In accordance with 10 U.S. Code 2304c(d) and FAR 16.505(a)(9), the ordering agency's award decision on each order is generally not subject to protest under FAR Subpart 33.1 except when an order increases the scope, period, or maximum value of the IDIQ contract, or an order valued in excess of \$10M. The Ombudsman will review complaints from the contractors and ensure that all contractors are afforded a fair opportunity to be considered for each order, consistent with the procedures in the contract.

The ordering activity will then place the order with the contractor that represents the best value and will adhere to published ordering procedures (reference FAR 16.505 and terms of the SITE contract). After award, the ordering activity will provide timely notification to unsuccessful Offerors. If an unsuccessful Offeror requests information on an award that was based on factors other than price alone, an explanation of the basis for the award decision shall be provided IAW debriefing requirements in FAR 16.505.

## 7.8 Contents of Task Orders

Each Task Order will contain:

- Date of order
- Contract number and order number
- Contract line item number and description, quantity and price
- Delivery/Performance schedule
- Place of performance
- Identification of contract option periods
- Accounting and appropriation data
- Work Specification (PWS or SOO)
- Quality Assurance Surveillance Plan (QASP)
- Service Deliverable Summaries, as applicable (CDRL)
- DD Form 254 (Contract Security Classification Specifications) as applicable
- Source Selection Criteria as applicable
- Any Government-furnished property, material, equipment, or base support to be made available for performance under the Task Order

Generally, Task Orders will be issued in writing on a DD Form 1155 (Order for Supplies and Services). Decentralized orders will adhere to the numbering sequences specified in DFARS 204.7004(d)(2)(i), exclusive of Task Order numbers 0001 thru 9999 which

are reserved for DIA use. Non-DoD agencies may use any numbering system provided it does not conflict with either of these numbering systems.

**Agency Specific Clauses and Additional FAR Clauses:** Provisions and clauses that supplement the FAR, which are prescribed and included in authorized agency acquisition regulations and issued within an agency to satisfy the specific needs of the agency as a whole, may be added at the Task Order level so long as they are not inconsistent with the terms of the SITE contract.

## 8. Customer Responsibilities

### 8.1 Customer (End-User) Responsibilities

The requiring organization is responsible for the following:

- Identifying the requirement
- Ensuring funds are available by date of award (at the time of RFP release, if funds are not fully available, the RFP must state “subject to availability”)
- Preparing PWS or SOO (guidance available from ISP Representative or DIA SITE PM)
- Developing Proposal Evaluation Criteria
- Developing Independent Government Estimates (ISP Representative will provide guidance)
- Preparing other documentation to ensure the Task Order package is complete
- Reviewing contractor’s proposal for technical approach/technical costs
- Providing written technical evaluation
- Supporting the DCO as needed in negotiations
- Nominating a COR
- Performing technical surveillance
- Monitoring the QASP - documenting positive/negative contractor performance
- Completing performance reports
- Ensuring all deliverables have been submitted and meet Task Order requirements
- Reporting any suspected fraudulent activities by SITE contractors to the DCO/PCO for possible referral to the cognizant Inspector General (IG) office
- Reporting the outcomes of any investigations conducted to the DCP/PCO and the SITE PM.

## 8.2 DCO Responsibilities

The contracting organization is responsible for the following:

- Receiving Task Order package from requesting organization or ISP Representative
- Seeking SITE PCO endorsement/approval if Fair Opportunity exemption is intended (refer to paragraph 7.3)
- Reviewing PWS or SOO and Proposal Evaluation Criteria
- Ensuring Funding Documentation is accurate
- Requesting proposal from contractors (all, some or one as appropriate)
- Receiving/Evaluating proposals
- Conducting discussions (unless awarded without discussions)
- Conducting Best Value determination
- Awarding Task Order (provide copy to DIA PCO)
- Administering Task Order
- Resolving Task Order disputes, claims and protests
- Ensuring past performance is completed in accordance with agency procedures for each Task Order
- Conducting close-out procedures

In addition to the normal processing of Task Orders, the issuing contracting office also has the ultimate responsibility for:

- Ensuring that the SITE PCO is provided copies of all Task Orders issued against SITE contracts and all modifications within 15 days of issuance.
- Appointing COR and specifying their duties/responsibilities under SITE orders
- Providing a copy of the COR appointment letter to the SITE PMO or PCO
- Ensuring that the SITE PCO and PM receive timely information on any issues or problems with the Task Order.
- Providing information copies of reports to the SITE PCO required by FAR, DFARS and statute.
- Reporting fraudulent activities or investigations regarding SITE contractors to the DIA Inspector General (IG) office via the SITE PCO or PMO

## 8.3 COR Responsibilities

Contracting officer's representatives (CORs) will be designated by letter of appointment from the DCO or SITE PCO when DIA provides assisted acquisition services. The COR:

- Obtains Service/Agency required training for CORs

- Serves as focal point for all task activities and acts as primary point of contact for contractors
- Provides technical oversight of the Task Order and ensures adherence to the terms and conditions of the Task Order and SITE contract.
- Is not authorized to make commitments or changes that may affect price, quality, quantity, delivery or other terms and conditions of the contract or Task Order and may be held personally liable for unauthorized acts.
- Conducts final inspection and acceptance of Task Order services and deliverables
- Accepts Task Order services, receives any materials purchased, receives and reviews deliverables, and performs contractor surveillance in accordance with the QASP.

## 8.4 Security Responsibilities

Each Service/Agency is separately responsible for contractor personnel security management to include the processing and maintenance of security clearance approvals for contractors according to their Service/Agency guidelines. In those cases where DIA performs the contracting services for a Service/Agency IAW with the signed MOU or Interagency Agreement, the Task Order's DD Form 254 will determine who provides these services (generally the Customer will be responsible for providing the DD Form 254).

Over the course of the IDIQ Contracts, occasionally contractor personnel will need to move between Task Orders that may be serviced by different Security Organizations (e.g., moving from a completed DIA Task Order to a new Army Task Order). Pursuant to reciprocity procedures, requests for transferring Contractor personnel with SCI billets between Services or Agencies will comply with Intelligence Community Policy Directive (ICPD) 704.2. The COR is responsible for this coordination.

As a courtesy among SITE Sponsoring Activities, and to reduce any potential "downtime" while clearance requests are being processed by the new security office, each losing COR and managing Security Office are encouraged to aid in this transition by maintaining the existing security position for 90 days beyond the Task Order before the Contractor employee is entirely "read-off" by the losing organization (this is fully allowable because the primary IDIQ Contract with the Contractor's personnel is still in force). It is requested that a 90 day perm-cert for this transition period from the losing Security Office to the new Security Office be performed to provide to the Government with the ability to immediately engage the contracted services of the transitioning employees.

*NOTE: All of the above contracting activities and responsibilities will be accomplished based on guidance from the appropriate ISP Representative, the SITE PM and SITE PCO.*

## 9. Post Award/Administration of Task Orders

The Task Order issuing DCO will perform all required administrative functions, including closeout procedures on their respective orders.

**Contractor Performance Assessment Reporting System (CPARS):** As required by their Service/Agency, the requesting organization COR or Program Manager shall be responsible for CPARS reporting for SITE Task Orders that meet the CPARS dollar threshold. Although DIA is exempted from using CPARS, CORs and Program Managers are responsible to provide copies of any CPARS submissions to the SITE PM to be included in the overall quality assurance program of SITE.

## 10. SITE Prime Contractors

PRIME CONTRACTOR	CONTRACT NUMBER
<b>BAE Systems Information Solutions, Inc.</b>	<b>HHM402-10-D- 0013</b>
<b>General Dynamics Information Technology</b>	<b>HHM402-10-D- 0014</b>
<b>Lockheed Martin Information Systems and Global Services</b>	<b>HHM402-10-D- 0015</b>
<b>Northrop Grumman Information Systems</b>	<b>HHM402-10-D- 0016</b>
<b>Science Applications International Corporation</b>	<b>HHM402-10-D- 0017</b>
<b>Systems Research and Applications Corporation</b>	<b>HHM402-10-D- 0018</b>
<b>Blue Canopy (BC FED) Government Services</b>	<b>HHM402-10-D- 0019</b>
<b>CenTauri Solutions, LLC</b>	<b>HHM402-10-D- 0020</b>
<b>Enterprise Information Services, Inc.</b>	<b>HHM402-10-D- 0021</b>
<b>Red Arch Solutions</b>	<b>HHM402-10-D- 0022</b>
<b>Worldwide Information Network Systems, Inc</b>	<b>HHM402-10-D- 0023</b>

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## Appendix A

### Frequently Asked Questions

1. **Question:** What is different about the Purchase Request (PR) process and required attachments for a SITE Task Order?

**Answer:** The PR process is the same already used within a Service/Agency and necessary PR documents/attachments are those dictated by regulatory procedures, but some documents may have slight differences or prescribed formats to accomplish a SITE Task Order. All the common PR attachments used for writing a requirement for a service, maintenance, or repair contract are required by SITE. The specific documents and formats that have been modified for use with SITE Task Orders are (all others follow existing Service/Agency acquisition practices):

**PWS or SOO:** To expedite and standardize the processing of Task Orders, templates have been established for the preparation of the SOO or PWS. These template formats for the SOO and PWS are required for SITE.

**IGE:** An Independent Government Estimate Excel Spreadsheet is provided on the SITE web-site which contains the appropriate labor prices to be used for the base period and option years.

**SITE Checklist:** Format provided in Appendix L of the SITE Ordering Guide.

2. **Question:** How do I get started if I'm not sure exactly where to start or how to prepare my Task Order (via Purchase Request) package?

**Answer:** Contact your SITE Intelligence Support Panel Representative to determine if SITE is an appropriate acquisition vehicle for the anticipated IT requirements. The ISP Representative will also help in guiding you on preparing and refining the requirement. Then define and document the requirements in the form of a PWS or SOO and prepare the other supporting documentation (e.g., independent government estimate, source selection plan) as required by your ISP and DCO.

3. **Question:** Are there any restrictions, (critical, limited, or contingency) on SITE requirements?

**Answer:** Other than obtaining decentralized ordering authority prior to soliciting and issuing orders under the contract, and the regular scope issues, there are no restrictions.

4. **Question:** What is the "lead-time until award of Task Orders under SITE?"

**Answer:** The proposal lead-time is not dictated by the basic SITE contract; but established within each solicitation for a Task Order proposal. Once the customer has completed the required PR documentation and submitted the request to the contracting office for review and processing, the request will be submitted to the Contractors for bid. Customarily, Contractors should be afforded a reasonable amount of time to compile a Task Order proposal, typically 15 to 30 calendar days

depending on the size and complexity of the Task Order to which they must respond. Depending on the size and complexity of the Task Order, the Government may require an evaluation panel be convened to review the proposals and make a recommendation for source selection. Ultimately, the Contracting Office will make a determination of the selected contractor and negotiate as necessary.

*Note: Due to the potential complexity of a given SITE order and/or its extensive evaluation criteria, the actual length of time from initiating the request to completing a signed Task Order can vary significantly (15-30 days for small orders and 3 months or longer on large task orders) .*

5. **Question:** Who evaluates the technical proposals for each prospective Task Order?  
**Answer:** The technical evaluation should be accomplished in accordance with Service/Agency policy (normally by the requiring PM/COR and other requirements personnel within the activity who have responsibility for the requirement). The technical evaluation may be reviewed by the ISP Representative for thoroughness.
6. **Question:** Who issues modifications to Task Orders under SITE?  
**Answer:** The modifications to individual Task Orders will be issued by the cognizant DCO within the requiring activity with responsibility for administration of the Task Order.
7. **Question:** Do we have to accomplish a weighted guidelines calculation on individual Task Orders?  
**Answer:** Generally No—but this may be a requirement of a servicing DCO. SITE already has negotiated contract labor rates which include profit.
8. **Question:** Can contractors receive debriefings on competitive Task Orders?  
**Answer:** If requested by the contractor, debriefings will be provided either orally or in writing. Awardee notification is provided via e-mail, letter or in accordance with DCO procedures.
9. **Question:** Can contractors protest the award of a competitive Task Order?  
**Answer:** Yes, if the Task Order's aggregated amount is in excess of \$10M, or if the order increases the scope, period, or maximum value of the contract under which the Task Order is issued (see FAR 16.505(a)(9)(i)).
10. **Question:** Is an EEO clearance required for each order issued under SITE that exceeds \$10M?  
**Answer:** EEO clearance was obtained for each of the prime awardees. However, if a proposal for a Task Order includes a first tier subcontractor performing over \$10M, EEO clearance must be obtained for that subcontractor.
11. **Question:** Can a vendor 'no bid' a task?  
**Answer:** Yes – but they must acknowledge to the DCO their intent to No-bid.

12. **Question:** Do I have to prepare a determination and findings (D&F) memo to justify the type of order I issue?

**Answer:** If the resultant Task Order will be a FPLOE or T&M, the D&F must be prepared, signed, and coordinated by the cognizant DCO.

13. **Question:** Will the PMO keep a Past Performance database. If so, where and how will everyone access it?

**Answer:** There are plans to provide a Past Performance database by the PMO. Access will be password protected via the SITE web-site. Instructions for getting approved access to this type of data will also be posted.

14. **Question:** Must the Services follow the ordering instructions in the contract with regard to Small Business set-aside?

**Answer:** Yes

15. **Question:** When, if ever, would you have to obtain a Certificate of Current Cost and Pricing Data?

**Answer:** Required on cost type contracts placed on SITE IAW FAR 15.403-4.

16. **Question:** Will DIA sponsor all security clearances?

**Answer:** No—each Service/Agency is responsible to provide security services for Task Orders initiated by their DCO. The Task Order DD 254 will define the servicing security office of responsibility.

17. **Question:** How will requests from a COCOM be handled (i.e., will they need to sign an MOU and have ceiling allocated)?

**Answer:** It varies--if DIA is the responsible contracting office for the COCOM element making the request (e.g., JIOC), no MOU is required. In those cases where the COCOM is planning to use a non-DIA Contracting Office, an MOU with ceiling allocation is required before a Task Order is placed by the servicing DCO.

18. **Question:** Are there any costs incurred by using the SITE contracts (e.g., fixed or percentage usage fees)?

**Answer:** There are no usage or contract fees for SITE. Any other costs will be identified in the MOU or Interagency Agreement when signed. Presently, funding for a yearly coordination visit by the PMO for conducting the Quality Assurance review with the Service/Agency will be negotiated prior to the start of each contract year. Other discretionary cost might include:

- Funding for travel for participants at SITE semi-annual conferences or training sessions
- Costs of any Service/Agency specific requested software modifications to the SITE Task Order Requirements Management System (STORMS)

19. **Question:** Do you have to fully fund a base year before the Task Order is awarded?

**Answer:** No – The SITE contract allows for incrementally funded Task Orders. When task orders are incrementally funded, they will state the amount of funds

allotted to the order and the estimated date of performance through which the funds will sufficiently cover.

20. **Question:** Is the process for issuing CAC Cards (CONUS or OCONUS) defined in the contract?

**Answer:** No – This is the responsibility of the Customer/COR in accordance with their Agency or Service policies. CAC Cards are required for all Contractors deploying/working in any overseas area and are increasingly necessary to gain access to many Military facilities within CONUS. At a minimum, the COR should take the appropriate actions required for issuing CAC Cards to Contractor personnel who are expected to work or frequently visit Military/Federal facilities in support of the Task Order.

21. **Question:** How should “Off-Site” labor rates (i.e. working in Contractor provided space) be accounted for when developing the IGE since the IDIQ contracts use “On-Site” burdened labor rates (i.e., Contractor employees working in Government provide space),

**Answer:** The labor rates used in the SITE IGE tool are based on work performed in Government provided space. In those cases where insufficient Government space is available or the work is best performed at a Contractor facility, you will need to estimate this additional cost in the IGE tool using the ODC Tab (line 35-facilities). Contract the SITE PMO to get guidance regarding what estimate to use. Consider that when off-site work is required, off-site rates will be determined by task order competition. Also, should the contractor have to rent/lease facility space to perform on-site work, this cost will be reimbursable.

22. **Question:** What do we do if we have an Earned Value Management requirement?

**Answer:** The SITE IDIQ contracts do not have requirement for Earned Value Management. If required, this will have to be covered in the Task Order.

23. **Question:** What does the customer have to do exercise an option year?

**Answer:** As long as the options have been solicited, evaluated, and awarded in the Task Order, you simply need to provide the funding for the options (may be incrementally funded), complete the performance evaluation for the past year, and provide notification to the ISPR and DCO of your intent to be exercised the option. You should do this NLT 90 days prior to the start date of the option (in accordance with the SITE IDIQ contracts, notification to the vendors must be performed 30 days prior and awarded NLT 14 days prior to the end of the current period of performance. The option years shall be exercised exactly as awarded in the original Task Order. If changes are required, they must be renegotiated prior to exercise of the option (be sure to plan for additional lead time). If you do have changes, contact your ISPR who will work with the DCO and SITE PMO on how to handle these changes.

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Appendix B

**Sample Letter of Intent to Use SITE**

**Request SITE Memorandum of Understanding (MOU)**

FROM: [Service/Agency Office]

TO: Defense Intelligence Agency  
Attn: DIA CIO (SITE Program)  
Washington D.C., 20340

Subject: Request to Initiate a SITE Memorandum of Understanding

1. Reference: Solutions for the Information Technology Enterprise (SITE) Ordering Guide, Defense Intelligence Agency (DIA)
2. Pursuant to the purpose and scope of the SITE program and the procedures defined in the reference above, request that a Memorandum of Understanding (MOU) be initiated by DIA to authorize this organization to perform acquisition using the SITE Indefinite Delivery/Indefinite Quantity contracts.
3. Propose that the MOU authorize the use of the SITE programs as follows:
  - a. Duration: The period of the agreement will be effective through [date].
  - b. Ordering Limit: The agreement authorizes an ordering amount (ceiling) of: [\$ordering limit].
  - c. [Decentralized / Assisted] acquisition is requested.

*For Decentralized Acquisition Authority:* The contracting activity nominated to be the authorized SITE Decentralized Contracting Office (DCO) is:

Contracting Office

Contact POC (name)

Phone

*For Assisted Acquisition:* The justification for this request is provided as an attachment.

4. The following individual will serve as the point of contact (POC) for coordination of the MOU. In addition, request that the following individual be designated as our representative on the SITE Intelligence Support Panel.

Name:

Phone:

\_\_\_\_\_  
[Signature block of Sponsoring  
Agency/Department]

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## Appendix C

### **Performance Based Service Acquisition (PBSA)**

#### **Performance Work Statement (PWS) and Statement of Objectives (SOO)**

##### **C.1 General**

PBSA is the preferred method of contracting for SITE services and supplies. PBSA means an acquisition structured around the results to be achieved as opposed to the manner by which the work is to be performed. Essential elements of PBSA include:

- (1) Performance requirements, expressed in either a Performance Work Statement (PWS) or Statement of Objective (SOO). Performance requirements should be described in terms of what the required output is and should not specify how the work is to be accomplished
- (2) Performance standards or measurements which are criteria for determining whether the performance requirements are met
- (3) Appropriate performance incentives, either positive or negative
- (4) A surveillance plan that documents the government's approach to monitoring the contractor's performance. These elements are discussed further below.

##### **C.2 Policy**

Federal Acquisition Regulation (FAR) 37.102 has established the policy to use a PBSA approach, to the maximum extent practicable, for all services. Services exempted from this policy are: architect-engineer, construction, utility, and services that are incidental to supply purchases. Use of any other approach has to be justified to the ISPR and DCO.

For Defense agencies, Defense Federal Acquisition Regulations Supplement 237.170-2 requires higher-level approval for any acquisition of services that is not performance-based. Guidance and additional information is incorporated in FAR 37.6 (Performance Based Acquisition). Also, Acquisition Central website provides a comprehensive training tool to understanding PBSA called "Seven Steps to Performance-Based Service Acquisition Guide available", at: <https://www.acquisition.gov/sevensteps/home.html>.

##### **C.3 Contract Type**

Under law and regulation [FAR 37.102(a)(2)], there is an order of preference in contract types used for performance-based contracting, as follows:

- A firm fixed price, performance-based contract or Task Order.
- A performance-based contract or Task Order that is not firm fixed price.
- A contract or Task Order that is not performance-based.

Requiring activities should use the contract type most likely to motivate contractors to perform at optimal levels. Firm fixed price is the preferred contracting type, but it's not always the best solution for PBSA. Work statements should be developed in sufficient detail to permit performance on every requirement. SITE offers a host of pricing arrangements and incentive types for consideration. Hybrid types (those with both fixed-price and cost-type or T&M tasks) are common and should also be considered.

## C.4 Performance Work Statements (PWS)

### What is a PWS?

A PWS identifies the technical, functional and performance characteristics of the government's requirements. The PWS describes the work in terms of purpose of the work to be performed and required results rather than how the work is to be accomplished or the number of hours to be provided. The format for the PWS is similar to the legacy Statement of Work (SOW). However, the difference between an SOW and a PWS is that the tasks are described in terms of the required outcomes or results, not with just the details of "how" the contractor will perform the tasks. A PWS makes the contractor responsible for the outcomes and accountable for achieving or failing to achieve the desired outcomes. A PWS enhances a traditional SOW by including the performance standards and most importantly a Quality Assurance Surveillance Plan (QASP).

### Performance Standards/Metrics

Standards and Metrics reflect the level and kind of service required by the government to meet performance objectives. Standards may be objective (e.g., response time) or subjective (e.g., customer satisfaction).

- Use commercial standards where practicable, e.g., ISO 9000.
- Ensure the standard is needed and not unduly burdensome.
- Must be measurable, easy to apply, and attainable.

If performance standards are not available, the PWS may include a requirement for the contractor to provide a performance matrix, as a deliverable, to assist in the development of performance standards for future Task Orders.

### Performance Incentives

Incentives may be positive or negative, monetary or non-monetary.

*Note: If a financial incentive is promised, ensure that adequate funds are available at time of Task Order award to pay incentives that may be earned.*

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Examples of monetary incentives include:

1. Incentive fees.
2. Share-in-savings.
3. A negative incentive can be included if the desired results are not achieved (deduction should be equal to the value of the service lost).

### **Common Mistakes Using Performance Work Statement**

- Vague task statements can hinder proposal evaluation and source selection by limiting understanding of the Government's critical objectives.
- "How to" requirements can preclude "best value" source selection by denying contractors the ability to propose their most efficient and innovative solutions.
- Overly specific "how to" requirements often cost more and accomplish less.
- Incomplete or unclear task descriptions can be misinterpreted or inconsistently applied by contractors and source selection officials.
- Over specification can be problematic. If the PWS is too specific, an agency is limiting itself to specific solutions that may not be the best solution.

To support expediting the award of Task Orders using SITE, a template has been established and is required for submitting the PWS requirements.

The PWS instructions and template for completing a SITE Task Order are provided in Appendix D and E respectively.

## **C.5 Statement of Objectives (SOO)**

### **What is a SOO?**

A SOO is an alternative to the PWS. It is a briefer document (commonly two to 10 pages, depending upon complexity, although there is no maximum or minimum length). It summarizes the key goals and outcomes to which contractors respond with solutions. It is different from a PWS in that, when a SOO is used, offerors are asked to develop and propose a PWS as part of their solution. Typically, offerors would also propose a technical approach, performance standards, incentives/disincentives, a QASP (typically based upon commercial practices) and pricing.

Upon award, the winning offeror's solution to the SOO, incentives/disincentives (if any) and pricing should be incorporated in the resulting Task Order. The SOO itself is not a part of the Task Order; rather, the winning PWS submitted by the Vendor in response to the SOO is used to generate the Task Order.

### **Common Mistakes Using Statement of Objectives**

- Customers try to tell contractors how to do the work required
- All too often, the requirement is for staff augmentation support rather than for accomplishment of a specific task

- SOOs may contain phrases that have multiple meanings
- Developing SOOs that are too long (typically 20+ pages) are most often really a PWS in disguise

To support expediting the award of Task Orders using SITE, a template has been established and is required for submitting the SOO requirements.

The SOO and template for completing a SITE Task Order are provided in Appendix F and G respectively.

## C.6 QASP

Whether using a PWS or SOO format, a QASP is required. The QASP is a plan for assessing contractor performance to ensure compliance with the government's performance objectives. It describes the surveillance schedule, methods, performance measures, and incentives.

- The level of surveillance should be commensurate with the dollar amount, risk, and complexity of the requirement.
- Don't inspect the process, just the outputs.
- QASP is included as part of the PWS.

More information on QASP (to include sample format) is provided in Appendix H.

## C.7 Deciding Which Type to Use (PWS or SOO)

As defined by [FAR 37.601](#), agencies may opt to use either a Performance Work Statement (PWS) or a Statement of Objectives (SOO) in the Solicitation.

**PWS:** Best used when the Government's need is well defined/understood and the required work has been substantially determined. The Government examines its requirements, specifies the outcomes, defines the tasks to be accomplished, and develops standards. Based on these efforts, the Government writes the PWS and Quality Assurance Surveillance Plan (QASP), including both in the Solicitation to which the Contractor must respond.

**SOO:** Best used when the Government has identified a baseline of its requirements but wants the Contractor to propose the best approach for the solution and specific type of work necessary to meet those requirements. The Government creates the SOO, which is a brief, high-level document stating the Government's objectives. A SOO is used in Solicitations when the intent is to provide the maximum flexibility to each Offeror to propose an innovative development approach. The SOO is incorporated into the Solicitation and the Offerors must respond with their own unique, self-created PWS and, if requested, a draft QASP. The SOO does not become part of the task order.

*Note: When using a SOO, the Offeror, not the Government, will write the PWS. The Government's Acquisition Team must then evaluate all proposed Performance Work*

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*Statements to determine acceptability. Development of a SOO typically requires less effort in the planning phase than development of a PWS. However it is important to remember when using a SOO the Acquisition team will have to carefully evaluate each Offeror's PWS prior to award. When using a SOO, remember to build sufficient time into the schedule to allow for a thorough evaluation of each proposed PWS.*

## Appendix D

### SITE PWS TEMPLATE

#### PERFORMANCE WORK STATEMENT (PWS)

**Project Title:** Provide a short, descriptive title of the work to be performed.

**Organization:** Provide complete Customer/Agency name and address.

#### 1.0 BACKGROUND

[Insert brief overview.]

#### 2.0 SCOPE

[Provide clear program objectives of the proposed task order.]

#### 3.0 REQUIREMENTS/TASKS/SERVICES

[Describe the specific performance requirements for all tasks covered by the PWS]

#### 4.0 APPLICABLE DOCUMENTS

[List standards and policy documents relevant to work]

#### 5.0 INCENTIVES

Incentives will be used? No \_\_\_ Yes\_\_\_

[If "YES" complete the following – otherwise delete this section of text]

The following incentives are provided:

5.1

5.2

#### 6.0 DELIVERABLES

The following deliverables are required (express these deliverables using CDRLs or in a table like the one shown below):

PWS Para Nr.	Description of Deliverable	Distribution	Format	When and how often

**7.0 CERTIFICATIONS, LICENSE, PHYSICAL REQUIREMENTS OR OTHER EXPERTISE REQUIRED**

Required? \_\_\_ No \_\_\_ Yes

[If “YES” complete the following – otherwise delete this section of text]

The contractor shall meet the following requirements (provide references defining certification):

- 7.1
- 7.2

**8.0 QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)**

The QASP is provided as Attachment 1.

**9.0 PERIOD OF PERFORMANCE**

[Complete using one of the samples provided or use your own wording as applicable]

The period of performance is \_\_\_\_\_ through \_\_\_\_\_.

<OR>

The period of performance is 12 months from date of task order award.

<OR>

The base period of performance is July 12, XXXX through July 11, XXXX with options to renew for four 12-month periods beginning July 12<sup>th</sup> and ending July 11<sup>th</sup>, annually.

**10.0 PLACE OF PERFORMANCE**

[Complete using one of the samples provided or use your own wording as applicable]

The place of performance is \_\_\_\_\_.

<OR>

All work shall be performed at the contractor facility.

**11.0 OPERATIONAL HOURS**

[Complete using one of the samples provided or use your own wording as applicable]

Work will be performed \_\_\_ hours per week during normal business hours, Monday-Friday, excluding Federal holidays.

<OR>

Work will be performed \_\_\_ hours per week during normal business hours, Monday-Friday, excluding Federal holidays.

Shift Work: \_\_\_ No \_\_\_ Yes \_\_\_ M \_\_\_ Tu \_\_\_ W \_\_\_ Th \_\_\_ F \_\_\_ Sa \_\_\_ Su

On-Call: \_\_\_ No \_\_\_ Yes



**12.0 OVERTIME**

Overtime is:  Not Authorized  Authorized (complete Justification)  
 Justification: The Overtime hours are required to \_\_\_\_\_ .

**13.0 GOVERNMENT-FURNISHED EQUIPMENT, BADGE, KEYS AND/OR FACILITIES PROVIDED**

GFE Provided?  No  Yes

If Yes, the Government will provide the following GFE:

**14.0 SAFETY ISSUES**

Safety Issues?  No  Yes

If yes, the following safety issues that may affect performance: \_\_\_\_\_

Reimbursable Safety Equipment Required?  No  Yes

If yes, the anticipated amount is: Cost: \$\_\_\_\_\_

**15.0 SECURITY CLEARANCE**

Work under this Task Order requires the following minimum clearance (select one):

UNCLASSIFIED  SECRET  TOP SECRET  TOP SECRET (SCI)

**16.0 REIMBURSABLE EXPENSES (TRAVEL, CONFERENCE, TRAINING, EQUIPMENT OR MATERIALS, ETC.)**

Travel or reimbursable expenses are required?  No  Yes

[If "Yes", complete for travel, conferences and training (to the degree possible) indicate the expected locations, frequency, and duration.]

The contractor will be required to travel to other locations in support of the tasks described in this Performance Work Statement (if conferences or training is required, list here and include a justification). Prior to incurring any travel expenses, contractor personnel must obtain written authorization from the COR that approves approximate travel, dates, expected duration, origin and destination, purpose, estimated costs and the number and names of personnel traveling. Contractor expense reports shall be prepared and processed in accordance with the Joint Travel Regulation (JTR) and FAR 31.205-46. Materials and subcontracts will be reimbursed at actual cost, including allocable material handling costs, as applicable, in accordance with FAR 52.232-7 - PAYMENTS UNDER TIME-AND-MATERIALS AND LABOR-HOUR CONTRACTS. [ADD OTHER CLAUSES HERE AS APPROPRIATE].

## 17.0 NON-PERSONAL SERVICE STATEMENT

Contractor employees performing services under this order will be controlled, directed and supervised at all times by management personnel of the contractor. The contractor's management shall ensure that employees properly comply with the performance standards outlined in the Quality Assurance Surveillance Plan (QASP). Contractor employees will perform independent of and without the supervision of any Government official. Actions of contractor employees may not be interpreted or implemented in any manner that results in any contractor employee creating or modifying Federal policy, obligating the appropriated funds of the U.S. Government, overseeing the work of Federal employees, providing direct personal services to any Federal employee or otherwise violating the prohibitions set forth in Parts 7.5 and 37.1 of the Federal Acquisition Regulation (FAR). The Government will control access to the facility and will perform the inspection and acceptance of the completed work.

## 18.0 GOVERNMENT CONTRACTING OFFICERS REPRESENTATIVE (COR)

The government COR will provide general instructions on limitations and deadlines, and is responsible for the administration of the Task Order in compliance with the contract to include inspection and acceptance of deliverables.

## 19.0 INTERNATIONAL SERVICES

International Services Required? \_\_\_NO \_\_\_YES

If YES, Complete the information below for the type of support required-- otherwise delete all the text from here down:

\_\_\_\_\_ Permanent      \_\_\_\_\_ TDY      \_\_\_\_\_ Deployed

Country(s):

\_\_\_\_\_ Indicate if country has: SOFA  MOU  TRADE ACT  or Other  
 \_\_\_\_\_ Indicate if country has: SOFA  MOU  TRADE ACT  or Other

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## Appendix E

### Instructions for Preparing a SITE PWS

**Project Title:** Provide a short, descriptive title of the work to be performed.

**Organization:** Provide the complete Customer/Agency name and address.

#### 1.0 BACKGROUND

Describe the need for the services, the current environment, and the office's mission as it relates to this requirement. Provide a brief description/summary of the services sought.

Provide details of its relationship to other programs, requirements and/or systems. Ensure that there is adequate information for the competing offerors to prepare proposals without having to submit an overwhelming and unnecessary amount of data.

Discuss any known technical, management, or other issues or constraints that may impact the program. Provide reason(s) why this effort is required. Explain how this effort fits into larger program initiatives or goals.

#### 2.0 SCOPE

Indicate which SITE contract task area(s) apply to the work to be performed. Include a high-level view of the procurement, its objectives, size, and projected outcomes. State whether it is an on-going or one-time requirement. Do not include anything that won't contribute to the expected result. Do include impacts/implications.

Provide a short functional description of the overall system. This document describes the services and deliverables required as they relate to the organization's mission.

#### 3.0 REQUIREMENTS/TASKS/SERVICES

Provide a narrative of the specific performance requirements and standards or tasks that make up the PWS. Describe the work in terms of the required output, i.e., what is expected from the contractor, rather than how the work is to be accomplished or the number of hours to be provided. Number the tasks sequentially, e.g., Task 1-Title of Task and description, Task 2-Title of Task and description, etc. The requirement must be defined sufficiently for the contractor to submit a realistic proposal and for the government to negotiate a meaningful price or estimated cost.

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State the performance levels required by the Government in terms of quality, quantity, and timeliness. Example are:

**Quality standards:** condition, error rates, accuracy, form/function, reliability, maintainability.

**Quantity standards:** capacity, output, volume, amount.

**Timeliness standards:** response times, delivery, completion times, milestones.

Describe the specific tasks and services required, including the results that will be provided to the Government. Be specific and include all results required under this request for services. The following are some examples of information which may be included in this section (two different approaches are provided):

- a. **Approach 1 - Describe Work** - Describe the work to be performed in a clear, concise manner. It is essential to make sure it is understood what has to be done, who is responsible for doing it, when it must be done, and if applicable, by what means it must be done. Individual tasks or phases may be needed to properly define the work to be performed as follows:

**Describe any individual tasks** - In describing the work, a description of individual tasks to be performed may be necessary. Some work is best broken down into distinguishable tasks that may need to be performed concurrently, sequentially, or in a specified combination of performance.

**Define Phases if work is complex / lengthy** - If the work is complex or lengthy, rather than individual tasks, phases may be a more appropriate means of describing the effort. If completion of the entire work requires a longer period of time than the period for which funds are currently available, it may be feasible to break the work into increments, fund the base period, and align contract option periods with the successor increments. If one action must be completed and approved by the Government before work on the next phase commences, this should be stated.

- b. **Approach 2 - Use a WBS** - Another method is to use a Work Breakdown Structure (WBS). The WBS arranges program activities in a logical framework of elements necessary to accomplish the program objectives. The WBS is layered to form a hierarchy with a high level task statement such as construct a house which is then flowed down to lower task levels of complexity such as plumbing, carpentry, electrical work, etc. The layering allows management to assess program progress toward quantifiable and measurable goals along a time line established in the acquisition baseline. The primary purpose of the WBS is to clearly define the program's structure, to include all the elements for performance that are the responsibility of the contractor, and to detail any necessary interface with Government personnel or other contractor personnel.
- c. **Project Management Guidance – tools or process if required** – If relevant, provide information on how the contractor is expected to manage the project to

meet cost, schedule and performance goals. If a particular process or management tool is expected, it must be specified. Otherwise, if no specifics are provided, the contractor will be free to manage the project in the way it feels is most effective.

#### 4.0 APPLICABLE DOCUMENTS

List any standards, regulatory, or policy documents that are relevant to work. Include necessary information such as title, document number, date, etc., and state where documents can be obtained. If only portions of documents apply, so state.

#### 5.0 INCENTIVES

Some efforts are more conducive to use of incentives than others. Incentives should be used when they will encourage better quality performance. They may be either positive, negative, or a combination of both. Incentives may be monetary or non-monetary. Incentives do not need to be present in every performance-based contract as an additional fee structure. In a fixed price contract, the incentives would be embodied in the pricing and the contractor could either maximize profit through effective performance or have payments reduced because of failure to meet the performance standard.

**Positive incentives.** Actions to take if the work exceeds the standards. Standards should be challenging, yet reasonably attainable.

**Negative Incentives.** Actions to take if work does not meet standards.

If applicable, tie incentives to those work/tasks which are most critical and for which risk of failure is high.

#### 6.0 DELIVERABLES AND DELIVERY SCHEDULE

All items to be delivered or milestones to be achieved must be specified along with quantities and required and/or desired delivery dates. This includes all varieties of deliverables whether a sophisticated information technology system, a piece of scientific instrumentation, a completed software program, required briefings, or written interim, progress, or final reports. Each listed deliverable must trace back to a tasking statement in Section 4 asking for that deliverable. Include media type, quantity and method of delivery. Examples are:

- Monthly Progress Report; due by 10<sup>th</sup> workday following the end of the month.
- Final Report; due 10 working days after project completion.
- List any technical, project, plan, budgetary, reports or other work products resulting from performance of the tasks described above and dates they will be due, i.e. 10<sup>th</sup> work day of each month.

**Example Format:**

PWS Para Nr.	Description of Deliverable	Distribution	Format	When and how often
3.1	Project Plan	1 softcopy to COR	Microsoft Project	10 Days after Start w/ongoing updates as required by COR
3.2	Monthly Status Reports	1 Hardcopy 1 softcopy	MS Word	10 <sup>th</sup> of each month
3.3	Final Report	1 softcopy	Microsoft Word	10 days after project completion

**7.0 CERTIFICATIONS, LICENSE, PHYSICAL REQUIREMENTS OR OTHER EXPERTISE REQUIRED**

Include only those items that are required to successfully complete the task. Examples are:

- Certification in a particular program or field of study (e.g., medical license)
- Knowledge of a particular software program, type of equipment, etc.
- Education in a specific field of study
- Specific experience, as related to the above items

**8.0 QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)**

The purpose of the QASP is to determine and measure contract compliance. A written QASP enables the Government to document the Government's evaluation of the contractor's work and draw conclusions about the contractor's overall performance. Refer to the Appendix H for further guidance of the QASP template.

No wording change is required since the completed QASP is to be included as Attachment 1.

**9.0 PERIOD OF PERFORMANCE**

Describes the time frame during which the work is to be performed or products delivered. Indicate when the task should begin and end. Include any option periods, if

required, and the anticipated dates. For SITE, any given period of performance shall not exceed a period of 12 months for severable services.

The period of performance is \_\_\_\_\_ through \_\_\_\_\_.

<OR>

The period of performance is 12 months from date of task order award.

Example when option years are being used:

The base period of performance is July 12, XXXX through July 11, XXXX with options to renew for four 12-month periods beginning July 12<sup>th</sup> and ending July 11<sup>th</sup> annually..

## 10.0 PLACE OF PERFORMANCE

Specify whether the work will be performed at the contractor's site or at a government site with exact address if possible. Describe any local or long distance travel the contractor will be required to perform. Indicate the actual location of the work site; include the city and state.

Examples:

The place of performance is \_\_\_\_\_.

<OR>

All work shall be performed at the contractor facility.

## 11.0 OPERATIONAL HOURS

Indicate the number of hours to be worked each week and any restrictions, if applicable, and whether performance will be required outside of normal business hours, i.e. evenings, week-ends, and shift work.

Examples:

Work will be performed \_\_\_ hours per week during normal business hours, Monday-Friday, excluding Federal holidays.

<OR>

Work will be performed \_\_\_ hours per week during normal business hours, Monday-Friday, excluding Federal holidays.

Shift Work: \_\_\_No \_\_\_Yes \_\_\_M \_\_\_Tu \_\_\_W \_\_\_Th \_\_\_F \_\_\_Sa \_\_\_Su

On-Call: \_\_\_No \_\_\_Yes

## 12.0 OVERTIME

If overtime is authorized, indicate the number of overtime hours estimated and provide a short justification why it is needed.

**\*Provide justification:**

Overtime hours are required to \_\_\_\_\_ (i.e. respond to emergencies, contingencies or unusually heavy workload - provide a description or example).

**13.0 GOVERNMENT-FURNISHED EQUIPMENT, INFORMATION, BADGE, KEYS AND/OR FACILITIES PROVIDED**

Indicate whether the Government will be providing any tools, equipment, documents or facilities to the contractor. An example is:

The Government will provide contractor personnel with an office environment typically provided to Government personnel that includes workstations, facsimile, telephones and computers with access to the Internet and local area network (LAN).

**14.0 SAFETY ISSUES**

Provide any safety issues that may affect performance such as expected lifting of materials or objects up to specified weights; exposure to hazardous conditions such as gases or fumes, solvents or grease; or possible performance in adverse or uncomfortable environmental conditions such as excessively hot or cold weather.

Examples are:

- The work described herein is primarily sedentary, performed in an office setting. Some walking will be required throughout the workplace facilities and at work sites. The work environment involves everyday risks or discomforts that require normal safety precautions typical of such places as conference rooms or office spaces. There are no unusual physical demands.
- Work will be performed in a maintenance shop setting, both indoor and outdoors. The contractor will be subject to a moderate amount of noise and vibration from shop equipment and to a variety of weather conditions. The contractor may be subject to cuts, bruises, falls and burns. Physical exertion may result from prolonged standing, climbing up and down ladders and scaffolding. Work will sometimes be accomplished in cramped and awkward positions while installing items and reaching, lifting and bending while using hand tools and power tools. The contractor may occasionally be required to lift weights exceeding 75 pounds. The contractor will occasionally work in confined spaces in close proximity to grease, oil, fuel, lubricants and solvents.

If Reimbursable Safety Equipment required specify type and anticipated amount):

Safety Equipment: \_\_\_\_\_ Cost: \$\_\_\_\_\_

---

If Contractor's are being sent to a high risk area (e.g., designated hazardous duty area), contact the DCO for the most current required wording (some wording has already been included in the basic IDIQ contract).

## **15.0 SECURITY**

SITE Contract Section H.8 requires that the level of classified access be incorporated into individual Task Orders as necessary.

Indicate the required level of security classification and any other pertinent security requirements. If the work to be performed requires access to or generation of classified information by a contractor, a DD Form 254, Contract Security Classification Specification must be included with your statement of work.

## **16.0 REIMBURSABLE EXPENSES (TRAVEL, CONFERENCE, TRAINING, EQUIPMENT OR MATERIALS, ETC.).**

Mark if reimbursable expenses are required. If "Yes", leave the text provided. Add any other reimbursable items that might be required.

## **17.0 NON-PERSONAL SERVICE STATEMENT.**

No modifications necessary – use wording already provided in template.

## **18.0 GOVERNMENT CONTRACTING OFFICERS REPRESENTATIVE (COR).**

No modifications necessary – use wording already provided in template.

## **19.0 INTERNATIONAL SERVICES.**

Mark the appropriate box (NO or YES) and complete the information required.

---

## Appendix F

### SITE SOO TEMPLATE

#### STATEMENT OF OBJECTIVES (SOO)

**Project Title:** Provide a short, descriptive title of the work to be performed.

**Organization:** Provide complete Customer/Agency name and address.

#### 1.0 BACKGROUND

[Insert brief overview.]

#### 2.0 SCOPE

[Provide clear and program objective of the proposed task order.]

#### 3.0 OBJECTIVES

[Describe the specific objectives for the SOO]

#### 4.0 APPLICABLE DOCUMENTS

[List standards and policy documents relevant to work]

#### 5.0 QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)

The QASP is provided as Attachment 1.

#### 6.0 PERIOD OF PERFORMANCE

[Complete using one of the samples provided or use your own wording as applicable]

The period of performance is \_\_\_\_\_ through \_\_\_\_\_.

<OR>

The period of performance is 12 months from date of task order award.

<OR>

The base period of performance is July 12, XXXX through July 11, XXXX with options to renew for four 12-month periods beginning July 12<sup>th</sup> and ending July 11<sup>th</sup> annually..

#### 7.0 PLACE OF PERFORMANCE

[Complete using one of the samples provided or use your own wording as applicable]

The place of performance is \_\_\_\_\_.

<OR>

All work shall be performed at the contractor facility.

#### 8.0 GOVERNMENT-FURNISHED EQUIPMENT, BADGE, KEYS AND/OR FACILITIES PROVIDED

GFE Provided?  No  Yes

If Yes, the Government will provide the following GFE:

## 9.0 SAFETY ISSUES

Safety Issues?  No  Yes

If yes, the following safety issues that may affect performance: \_\_\_\_\_

Reimbursable Safety Equipment Required?  No  Yes

If yes, the anticipated amount is: Cost: \$\_\_\_\_\_

## 10.0 SECURITY CLEARANCE

Work under this Task Order is requires the following minimum clearance (select one):

UNCLASSIFIED  SECRET  TOP SECRET  TOP SECRET (SCI)

## 11.0 REIMBURSABLE EXPENSES (TRAVEL, CONFERENCE, TRAINING, EQUIPMENT OR MATERIALS, ETC.)

Travel or reimbursable expenses are required?  No  Yes

[If “Yes”, complete for travel, conferences and training (to the degree possible) indicate the expected locations, frequency, and duration]

The contractor will be required to travel to other locations in support of the tasks described in this statement of work (if conferences or training is required, list here and include a justification). Prior to incurring any travel expenses, contractor personnel must obtain written authorization from the Project Officer that approves approximate travel, dates, expected duration, origin and destination, purpose, estimated costs and the number and names of personnel traveling. Contractor expense reports shall be prepared and processed in accordance with the Joint Travel Regulation (JTR) and FAR 31.205-46. Materials and subcontracts will be reimbursed at actual cost, including allocable material handling costs, as applicable, in accordance with FAR 52.232-7 - PAYMENTS UNDER TIME-AND-MATERIALS AND LABOR-HOUR CONTRACTS. [ADD OTHER CLAUSES HERE AS APPROPRIATE].

## 12.0 NON-PERSONAL SERVICE STATEMENT

Contractor employees performing services under this order will be controlled, directed and supervised at all times by management personnel of the contractor. The contractor’s management shall ensure that employees properly comply with the performance standards outlined in the Quality Assurance Surveillance Plan (QASP). Contractor employees will perform independent of and without the supervision of any

Government official. Actions of contractor employees may not be interpreted or implemented in any manner that results in any contractor employee creating or modifying Federal policy, obligating the appropriated funds of the U.S. Government, overseeing the work of Federal employees, providing direct personal services to any Federal employee or otherwise violating the prohibitions set forth in Parts 7.5 and 37.1 of the Federal Acquisition Regulation (FAR). The Government will control access to the facility and will perform the inspection and acceptance of the completed work.

### 13.0 GOVERNMENT CONTRACTING OFFICERS REPRESENTATIVE (COR)

The government COR will provide general instructions on limitations and deadlines, and is responsible for the administration of the Task Order in compliance with the contract to include inspection and acceptance of deliverables.

### 14.0 INTERNATIONAL SERVICES

International Services Required? \_\_\_NO \_\_\_YES

If YES, Complete the information below for the type of support required-- otherwise delete all the text from here down:

\_\_\_\_\_ Permanent      \_\_\_\_\_ TDY      \_\_\_\_\_ Deployed

Country(s):

\_\_\_\_\_ Indicate if country has: SOFA  MOU  TRADE ACT  or Other  
 \_\_\_\_\_ Indicate if country has: SOFA  MOU  TRADE ACT  or Other

---

## Appendix G

### Instructions for Preparing a SITE SOO

**Project Title:** Provide a short, descriptive title of the work to be performed.

**Organization:** Provide the complete Customer/Agency name and address.

#### 1.0 BACKGROUND

Describe the need for the services, the current environment, and the office's mission as it relates to this requirement. Provide a brief description/summary of the services sought.

Provide details of its relationship to other programs, requirements and/or systems. Ensure that there is adequate information for the competing offerors to prepare proposals without having to submit an overwhelming and unnecessary amount of data.

Discuss any known technical, management, or other issues or constraints that may impact the program. Provide reason(s) why this effort is required. Explain how this effort fits into larger program initiatives or goals.

#### 2.0 SCOPE

Indicate which SITE contract task area(s) apply to the work to be performed. Include a high-level view of the procurement, its objectives, size, and projected outcomes. State whether it is an on-going or one-time requirement. Do not include anything that won't contribute to the expected result. Do include impacts/implications.

Provide a short functional description of the overall system and program objective. This document describes the services and deliverables required as they relate to the organization's mission.

#### 3.0 OBJECTIVES

Provide the clear and specific objectives of the proposed contract (different from the overall program objective listed in the SCOPE). Describe the capabilities or services to be provided to the Government. Be specific and include all results you require under this request for services. Describe how differing objectives impact performance. Describe the inter-relationship of the work and how the various participants, both Government and contractor, will interact (e.g., on-site project manager, progress meetings, status reports, etc.).

---

Provide the description of Business and Technical objectives of the project or services to be performed. Include specific project objectives as they relate to the organization's mission as they relate to the organization's mission constraints.

Suggested formats for describing objectives include:

**BUSINESS OBJECTIVES:**

- Overall Objectives - The overall Objectives section should contain objectives that identify the primary purpose of the SOO
- Program management Objectives - Describe the management objectives for the overall program or for each of the contract phases as appropriate

**TECHNICAL OBJECTIVES**

- Engineering Objectives
- Contract Objectives - May need to include instructions for how you wish offers to address these objectives within their proposals
- Logistics Objectives - Develop an Integrated Logistics Support program

This section should provide answers to the questions. "Why are we doing this effort, and how will we know if we are successful?" If at all possible, the objectives should be based on the plans and objectives found in agency strategic performance plans, program authorization documents and budget and investment documents. Drafters should look at the narratives utilized to acquire funding during the budget process as they may make excellent objectives.

Details such as whether the program is to be conducted in one or multiple phases should also be provided here. The offeror's proposal containing the PWS generated from the Government SOO should contain the critical performance standards, a written plan for how the contractor's performance will be assessed and Quality Assurance Surveillance Plan (QASP). The offeror's PWS should also include data requirements/deliverables in the form of a Contract Data Requirements List (CDRL) or table of deliverables within the PWS. All data requirements should be traceable to tasks defined in the PWS.

#### **4.0 APPLICABLE DOCUMENTS**

List any standards, regulatory, or policy documents that are relevant to work. Include necessary information such as title, document number, date, etc., and state where documents can be obtained. If only portions of documents apply, so state.

#### **5.0 QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)**

The purpose of the QASP is to measure and determine contract compliance of the quality of services obtained from the contractor. A written QASP enables the Government to document the Government's evaluation of the contractor's work and draw conclusions about the contractor's overall performance. Refer to the Appendix H for further guidance of the QASP template.

---

No wording change is required since the completed QASP is to be included as Attachment 1. The QASP when using a SOO will be developed after contract award by the Government or developed by the contractor as part of its proposal.

## 6.0 PLACE OF PERFORMANCE

Specify whether the work will be performed at the contractor's site or at a government site with exact address if possible. Describe any local or long distance travel the contractor will be required to perform. Indicate the actual location of the work site; include the city and state.

Examples:

The place of performance is \_\_\_\_\_.

<OR>

All work shall be performed at the contractor facility.

## 7.0 PERIOD OF PERFORMANCE

Describes the time frame during which the work is to be performed or products delivered. Indicate when the task should begin and end. Include any option periods, if required, and the anticipated dates. For SITE, any given period of performance shall not exceed a period of 12 months for severable services.

The period of performance is \_\_\_\_\_ through \_\_\_\_\_.

<OR>

The period of performance is 12 months from date of task order award.

Example when option years are being used:

The base period of performance is July 12, XXXX through July 11, XXXX with options to renew for four 12-month periods beginning July 12<sup>th</sup> and ending July 11<sup>th</sup> annually.

## 8.0 GOVERNMENT-FURNISHED EQUIPMENT, INFORMATION, BADGE, KEYS AND/OR FACILITIES PROVIDED

Indicate whether the Government will be providing any tools, equipment, documents or facilities to the contractor. Two examples are:

The Government will provide contractor personnel with an office environment typically provided to Government personnel that includes workstations, facsimile, telephones and computers with access to the Internet and local area network (LAN).

---

The Government will provide the necessary hand and power tools, spare and repair parts and the facilities necessary to carry out routine maintenance of vehicles and heavy equipment.

## 9.0 SAFETY ISSUES

Provide any safety issues that may affect performance such as expected lifting of materials or objects up to specified weights; exposure to hazardous conditions such as gases or fumes, solvents or grease; or possible performance in adverse or uncomfortable environmental conditions such as excessively hot or cold weather.

If reimbursable Safety Equipment is required, specify type and anticipated amount):  
Safety Equipment: \_\_\_\_\_ Cost: \$ \_\_\_\_\_

If Contractor's are being sent to a high risk area (e.g., designated hazardous duty area), contract the DCO for the most current required wording (some wording has already been included in the basic IDIQ contract).

## 10.0 SECURITY

SITE Contract Section H.8 requires that the level of classified access be incorporated into individual Task Orders as necessary.

Indicate the required level of security classification and any other pertinent security requirements. If the work to be performed requires access to or generation of classified information by a contractor, a DD Form 254, Contract Security Classification Specification must be included with your statement of work.

## 11.0 REIMBURSABLE EXPENSES (TRAVEL, CONFERENCE, TRAINING, EQUIPMENT OR MATERIALS, ETC.).

[Mark if reimbursable expenses are required. If "Yes", leave the text provided. Add any other reimbursable items that might be required.

## 12.0 NON-PERSONAL SERVICE STATEMENT.

No modifications necessary – use wording already provided in template.

## 13.0 GOVERNMENT CONTRACTING OFFICERS REPRESENTATIVE (COR).

No modifications necessary – use wording already provided in template.

## 14.0 INTERNATIONAL SERVICES.

Mark the appropriate box (NO or YES) and complete the information required.

---

## Appendix H

### Quality Assurance Surveillance Plan (QASP) Instructions

#### H.1 Instructions for Completing a QASP

This information is required by the contract and serves as a very useful tool for you. *(NOTE: When using a PWS, the QASP is prepared by the Government and accompanies the PWS. When using a SOO, the Government may require the contractor to propose the QASP rather than having the Government develop it.)* When you sign receiving reports, you are verifying that tasks have been performed or deliverables have been received (at the **Green** level) and meet the Government standards for quality, timeliness and quantity such that payment is authorized. In cases where services or deliverables are rated **Yellow** or **Red**, you must report that immediately to the DCO. This is a two-step process. First, you must develop a QASP, which consists of four parts:

- Tasks or deliverables to be completed (what will be monitored?)
- Performance standard (what is expected?)
- Acceptable quality level/compliance level (what constitutes acceptance?)
- Surveillance method/frequency (how will you perform your check?, i.e., random sampling, customer complaint, etc.)

Second, perform surveillance as performance progresses and document the results. Surveillance will be performed in accordance with the surveillance methods you select. You will document your surveillance on the QASP worksheet if a deliverable is **Yellow** or **Red**. You must not sign a receiving report where any deliverable is **Yellow** or **Red** without immediately reporting the quality concern to the CO. Periodically, the CO will ask for a copy of your worksheet to document the official Task Order file.

#### H.2 Acceptable Surveillance Methods

**Random Sampling:** This method is designed to evaluate performance by randomly selecting and inspecting a statistically significant sample. This is highly recommended for large quantity, repetitive activities with objective and measurable quality attributes. Computer programs may be available to help establish sampling procedures.

**One Hundred Percent Inspection:** This method is too expensive for most cases. 100% inspection is used for stringent performance requirements when safety and health is on the line.

**Periodic Inspection:** This method, sometimes called “planned sampling,” consists of the evaluation of tasks selected on other than a 100% or random basis.

**Direct Observation:** Direct observation of services and products is used to survey the requirements. Observations can be performed periodically or through 100% surveillance. The observations are documented in a surveillance log.

**User Survey:** This method combines elements of validated user complaints and random sampling. A random survey is conducted to solicit user satisfaction. This is appropriate for high quantity activities that have historically been satisfactory.

**Compliance Level and Date:** This column is used to determine whether the services or deliverables required meet the Acceptable Quality Level on the QASP. It will be used to provide documentation for deficiencies requiring payment adjustment (when afforded by contract provision) or other action from the contractor. The compliance block is filled out using a color code (**Green, Yellow** or **Red**):

**Green** = Deliverable required has been met in a satisfactory manner.

**Yellow** = Deliverable required is not being consistently met satisfactorily; attention is needed in certain areas.

**Red** = Deliverable is not being met; requires Contracting Officer/Contractor attention.

If you rate a deliverable **Yellow** or **Red**, you will need to provide detailed documentation why. This will be used to help the CO determine what course of action to take, in accordance with the terms of the contract, to resolve quality issues.

### QASP Sample

Task/Deliverable	PWS/SOO Para.	Performance Standard	Acceptable Quality Level	Method Used/Frequency	Compliance Level and Date
Documents produced in final form using standard software packages	3.1	Format in accordance with regulation 12.4, deadlines met, error-free on final document	Most drafts in full accordance with regulation; on time and error free on final document	Random Sampling/ Weekly	Green 7/1/06
Predictive/preventative maintenance	3.2	Remedial maintenance services performed and problem resolution completed within specific timeframe	System availability must be 95% during the hours 0800-1600. Response times within 4 hours of request.	Direct Observation/ Each occurrence	Red 7/1/06
Database developed and deployed	3.3	Validated against Oracle Database 10g R2	Data calculations are error-free	Periodic Inspection/ Quarterly	Green 7/1/06
Responses to user inquiries	3.3	Response made within one hour of receipt	No more than 3 valid customer complaints per month	User Survey at Completion	Yellow 7/31/06

## Quality Assurance Surveillance Plan (QASP)

**PWS TITLE:** \_\_\_\_\_

**Task Order Number:** \_\_\_\_\_

*(See Instructions for assistance in completing this worksheet)*

Task/Deliverable	PWS/SOO Paragraph	Performance Standard	Acceptable Quality Level	Method Used/Frequency	Compliance Level and Date
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					

**Agency COR Signature/Date:** \_\_\_\_\_

**Contracting Official Signature/Date:** \_\_\_\_\_

**Page** \_\_\_\_ **of** \_\_\_\_ **Pages**

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## Appendix I

### Preparing Independent Government Estimates (IGE)

#### I.1 Overview

The Independent Government Estimate (IGE) is the Government's estimate of the resources and projected cost of the resources a contractor will incur in the performance of a contract. These include costs items such as labor, supplies, equipment, travel, transportation and some indirect costs such as material overhead. The data provided in the IGE Guide is not intended to cover every possible SITE Task Order, but rather explains elements of cost within the general context of their use. The IGE should include only those applicable to and developed from the PWS or SOO in describing the products and services to be acquired.

The IGE is developed by the customer (requiring activity) and used to establish a realistic price/cost for budget purposes. In addition, the Contracting Officer uses the IGE for technical and management information. The IGE is the baseline for evaluation of a realistic task order price/cost. Format and contents of the IGE will vary in accordance with the complexity and value of the requirement.

*NOTE: The IGE is a procurement sensitive document and should be handled accordingly. Access to the IGE shall be on a need to know basis.*

#### I.2 SITE IGE Process

The first consideration in developing the IGE is establishing a mind set as if the developers would be working in a commercial environment. Standards, practices, and procedures that are normally used by industry should be used as the basis for developing the IGE.

*Note: The IGE process has been simplified for SITE Task Orders since key aspects of the labor rates are already known and percentages for material handling fee markups are available.*

All requirements submitted to your supporting contracting office require an IGE.

For SITE, the IGE is determined using an Excel Workbook available from the SITE website. The workbook contains all the major elements required to calculate a SITE IGE. It includes a labor spreadsheet which has the appropriate labor rates by labor category and location of each contract year for estimation purposes, a set of ODC spreadsheets for capturing the most common types of ODCs such as travel, equipment, etc. (it can also be extended for other special ODC or cost requirements), and finally a top-level spreadsheet which summarizes all the costs associated with the proposed Task Order.

### I.3 Determining a SITE Labor Estimate

The projected labor costs for SITE Task Orders can be directly estimated since these costs have been negotiated as “fully loaded” rates (already includes the Contractor’s overhead, G&A, and fee costs). The negotiate labor rates are “not to be exceeded” for each year of the contract so the actual bid rates for any Task Order will not exceed these rates. For IGE purposes, although the specific negotiated rates for each SITE vendor differs, a consolidated estimate of costs of each labor category by location has been determined for each of the initial five negotiated contract years.

An Excel spreadsheet (available from the SITE web-site) provides Customers with the ability to enter their projected labor requirements by labor category and location. Labor estimates are entered in either man-hours or man-months as desired (when calculating labor years, multiply by 12 and enter as man-months). Currently, Task Order estimates for the first five years of labor for the basic IDIQ contracts be calculated using the spreadsheet.

### I.4 Determining SITE Other Direct Costs (Price Estimates)

The Other Direct Costs category provides an estimate of the types and quantity of material, equipment, and travel necessary for the contractor to perform the work you expect to accomplish. For work in non-US locations, consider relocation, housing and dependent tuition costs. These costs can be charged directly against the specific requirement. Item descriptions, quantities and related price estimates can be obtained using catalogs, price quotes, market surveys, historical data, etc. The emphasis in estimating other direct costs should be on accuracy of type and quantity.

The price estimate for ODCs must be "independently" developed based on a comparison and analysis of factors such as published catalogs prices, historical prices paid, market survey information, vendor price quotes, etc. The price estimate is not broken down into the various cost elements and depends more upon bottom line prices paid or available in the market place.

Typically, the Contracting Officer or specialist can help you research for "pricing" information. When developing the price estimate, focus should be placed on:

For equipment and materials pricing:

- Prices and quotes found in published or current catalog prices
- Previous prices and quantity purchased
- Quantity of items to be purchased
- Market Surveys and other miscellaneous source of pricing data

For calculating travel, use the published Government travel rates for the projected locations of travel for the first year—the spreadsheet will add an inflation factor for the options years (if used).

For calculating non-US relocations, ceiling costs (per one-way move) have been negotiated for each SITE vendor.

## I.5 Determining SITE Indirect Costs

### Indirect (Overhead) Costs

Overhead costs are already included in the labor estimates and projected within the percentage markup estimates used in the SITE IGE spreadsheet for ODCs.

### General & Administrative (G&A) Costs

G& A costs are already included in the labor estimates and projected within the percentage markup estimates using in the IGE spreadsheet for ODCs.

### Profit/Fee

Profit or fee is already included in the contract labor rates of the IGE workbook. Profit/fee is excluded from ODC since ODCs are cost reimbursable and profit is not allowable.

When using incentive/award fee arrangements, fee is a negotiable cost element. For the purposes of incentive/award fee arrangements, estimators may utilize the IGE worksheets as a basis for task order estimates; but, giving proper consideration to profit adjustment formulas, targets, incentives, performance criteria and award fees pursuant regulatory requirements and internal procedures.

## I.6 Escalation Considerations for the IGE

The impact of inflation should be considered when developing your IGE. For labor costs, this is already included in the “loaded” prices of the awarded base year and 4 option years.

To forecast other option year(s) costs, appropriate escalation factors are applied to the previous cost elements to bring it them up to a realistic value. If the task order performance involves more than one year, different escalation factors may be applied dependent on the labor/material mix as appropriate.

## I.7 Summary

An IGE is required for every new SITE acquisition that exceeds the simplified acquisition threshold. A subject matter expert should independently prepare it. Do not base the IGE on a contractors cost/price estimate.

When including commercial items as ODCs, the estimator should research past price history and make adjustments for any changes in specifications, quantities or inflation factors. For items that do not have a detailed pricing history it may be necessary to do a detailed analysis of individual cost elements.

With a little diligence, you can provide an accurate estimate of these costs. By reviewing the work specification you can determine the labor categories and effort required plus equipment, materials, and other direct costs plus overhead to perform the operation.

A brief narrative of how the costs were developed and what reference material was used should be provided with the completed IGE along with name, title, and signature of the estimator and an approving official.

---

## Attachment I.1

### Assumptions When Preparing Your IGE (Provide with the IGE)

Preparation Instructions:

**Assumptions Used:** Identify any and all assumptions and methodologies used in cost computations.

**Basis for Cost Estimates:** Specify the item, the basis for the factor used and the source of the data used in preparing the IGE.

Item	Basis	Sources
1.		
<hr/>		
2.		
<hr/>		

**Other Project Information:** Identify any other information which may be necessary or helpful in the proper evaluation of the cost estimates; i.e., Statements of Objectives (SOO), etc.

## Appendix J

## SITE Customer Request Form

Page 1 of 2

1. Your Agency Control Number *(if needed)*:

Date:

2. Contract Number:

3. Task Order Number:

4. Requesting Agency/Office:

Organization:

Address:

5. Agency Project Officer (PO):

Name:

Phone Number:

Fax Number:

Email Address:

Alternate PO Name:

Phone Number:

E-Mail Address:

Contracting Officers Representative (COR):

Address 1:

Phone Number:

Address 2:

Fax Number:

City, State, Zip Code+4:

E-Mail Address:

6. Project Name or Brief Unclassified Description:

7. Security Clearance Required?

Yes  No Agency-Specific Background Investigation? Yes  No *(Include a completed DD Form 254 for security clearances SECRET and above)*

Security POC:

Phone Number:

E-Mail Address:

8a. Labor Union Agreements. Are there any Collective Bargaining Agreements (CBA) in place at the location work will be performed that may affect the prevailing wage rates? Yes  No

8b. Prior Procurement History: Contractor Name & Address: \_\_\_\_\_

Total Price:\$ \_\_\_\_\_

Suggested Task Order Type (Multiple types/hybrid order may be checked):

Firm Fixed Price: \_\_\_\_\_

Fixed Price Level of Effort: \_\_\_\_\_

Labor Hour: \_\_\_\_\_

Cost Reimbursement: \_\_\_\_\_ (Provide justification in remarks block below\*)

Time and Materials: \_\_\_\_\_ (Provide justification in remarks block below\*)

\*T&M and CR contract types require justification in accordance with Federal Acquisition Regulations.

Remarks:

List of Attachments (Refer to SITE Checklist, Appendix L, for suggested attachments):

9. Agency Certification (By signing this document, you are certifying that the funds are legally available for the purpose of the acquisition requested; all unique funding and procurement requirements, including statutory or regulatory requirements applicable to the funding being provided have been properly disclosed; and all internal reviews and approvals required by your agency prior to placing an order have been completed.) Both signatures are required unless one person is both the Project Officer and Approving Official. Then one signature is required in the Approving Official block.

Signature of Project Officer: \_\_\_\_\_

Signature of Approving Official: \_\_\_\_\_

Name:	Name:
Title:	Title:
Date:	Date:

In accordance with FAR Subpart 32.702(a) and the Anti-Deficiency Act, 31 U.S.C. 1341, signing of this document shall constitute written assurance from the responsible fiscal authority of the customer agency that adequate funds are available, or shall be made available, subject to availability of funds as described in Subpart 32.703-2, to fund the resulting contract or order should an acceptable and reasonable proposal be negotiated.



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## Instructions for Completing SITE Customer Request Form

- Block 1 Your Agency's internal control number, if applicable.
- Block 2 To be assigned by Contracting Office
- Block 3 To be assigned by Contracting Office
- Block 4 Insert your agency's information.
- Block 5 Insert Project Officer, Alternate Project Officer and COR information.
- Block 6 Provide a project title and a short 3 or 4 sentence summary of the work.
- Block 7 Coordinate with your security office to ensure the appropriate level of investigation or clearance is obtained. Determine if the contractor can begin the tasks prior to completion of the investigation or clearance.
- Block 8 Sometimes, existing labor union agreements specify wage rates that exceed the prevailing SCA wage rate determination for certain geographical locations. If you are aware that a CBA is in place that may affect the rate to be paid (and required funding), please identify accordingly.
- Block 9 You must sign the form before the DCO can issue an order to a contractor.

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## Appendix K

### Memorandum for Record

The following documentation and coordination was accomplished on the basic SITE contract, and is not required for subsequent Task Orders:

- Contractor Responsibility Documentation
- Equal Employment Opportunity (EEO) Compliance – EEO clearance was obtained for prime contractors. However, EEO clearance is necessary for any first tier subcontractors when their portion of a proposed Task Order exceeds \$10M
- Facility Security Clearances (prime contractors)
- Synopsis (pre/post)
- Announcement of Contract Award (1279 Report) per DFARS 205.303

Although overall responsibility has been determined for each SITE contractor, in accordance with FAR 9.405-1 and the Office of Federal Procurement Policy Memorandum, “Contractor Responsibility Determinations and Indefinite-Delivery Contracts,” dated 16 Apr 2002, ordering contracting officers should complete and document an Excluded Parties List review on contractors they intend to award Task Orders prior to making each Task Order award. This policy is also consistent with DFARS 209.405-1.

## Appendix L

### SITE Checklist (To be completed by Contracting Officer)

*Note: The checklist covers most of the important information needed for the contract file. These are not just for SITE; they are necessary for all contracting personnel to adhere to meet regulatory requirements and to help set up the task order and solicitation. Additional requirements may be imposed by the issuing DCO.*

Customer / COR Provided Documentation	Yes	N/A
Acquisition Plan (only if required by DCO)	<input type="checkbox"/>	<input type="checkbox"/>
Market Research Report (only if required by DCO)	<input type="checkbox"/>	<input type="checkbox"/>
Performance Work Statement (PWS) or Statement of Objectives (SOO)	<input type="checkbox"/>	<input type="checkbox"/>
Selection Evaluation Criteria	<input type="checkbox"/>	<input type="checkbox"/>
Quality Assurance Performance Plan (QASP)	<input type="checkbox"/>	<input type="checkbox"/>
Independent Government Estimate (IGE)	<input type="checkbox"/>	<input type="checkbox"/>
Funding Documents (PR, MIPR, Interagency Agreement, etc)	<input type="checkbox"/>	<input type="checkbox"/>
Classified Contract Requirements (DD 254)	<input type="checkbox"/>	<input type="checkbox"/>
Contract Data Requirements List (CDRL), (DD Form 1423) (N/A when SOO requires contractor development)	<input type="checkbox"/>	<input type="checkbox"/>
Determination & Findings (D&F) (for MIPRs)	<input type="checkbox"/>	<input type="checkbox"/>
Justification and Authorization (J&A) (for non-competitive procurements)	<input type="checkbox"/>	<input type="checkbox"/>
Safety Requirements		
Green Procurement Program (GPP) (applies when using appropriated funds) (PWS Statement or Attachment)	<input type="checkbox"/>	<input type="checkbox"/>
Packaging Instructions	<input type="checkbox"/>	<input type="checkbox"/>
Transportation (DD 1653)	<input type="checkbox"/>	<input type="checkbox"/>
Environmental Management System (EMS) (PWS Statement) (Applicable if work performed on government installations)	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>
Contracting Office Provided Documentation		
Contracting Officer's Representative (COR) Appointment Letter	<input type="checkbox"/>	<input type="checkbox"/>
DD 2579 (Small Business Coordination)	<input type="checkbox"/>	<input type="checkbox"/>
Theater Business Clearance (Applicable to Iraq/Afghanistan)	<input type="checkbox"/>	<input type="checkbox"/>
Source Selection Plan (SSP)	<input type="checkbox"/>	<input type="checkbox"/>
Request for Order Proposal (RFOP)	<input type="checkbox"/>	<input type="checkbox"/>
Other:	<input type="checkbox"/>	<input type="checkbox"/>

Are all documents annotated with the appropriate distribution statement/export control notification?  Yes  No  Not Applicable

Proprietary data should not be included as part of the data package. Have you ensured that no proprietary data is included?  Yes  No  Not Applicable

## Place of Performance:

 Contractor's Facility Government Location(s):

**If performance is on a Government location, identify working space, materials, equipment, services and other support that will be provided in the PWS.**

## Class I Ozone Depleting Substances:

 I have reviewed the requirements, including available technical documentation, and believe that it does not require the contractor to use Class I Ozone Depleting Substances (ODS), nor is it written so that it can only be met by the use of a Class I ODS. I have attached the approved ODS waiver.Will HAZMAT be used or generated during performance of the task order?  Yes  NoWill Government Furnished Property (GFP) be provided?  Yes  No - If yes, identify GFP and GFP delivery schedule. Also indicate which of the following is applicable: FOB Origin  FOB Destination  MILSTRIP

**Note: If the GFP was previously authorized under another contract, please provide the contract number and the name and phone number of the cognizant DCO. This information is required before a Task Order can be awarded.**

Do you have a technical support contractor involved in working this program?  Yes  No  
If yes, please provide name and company.

Will you have Non-Government Advisors participating in the technical proposal evaluation?

 Yes  No (If yes, please provide the names and company below. This information must be included in the RFOP and accepted by Offerors before proposals are submitted.)

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## Appendix M

### Source Selection Criteria

#### M.1 Overview

This appendix is designed to provide the Customer/COR with instructions on how to properly prepare source selection criteria and associated documentation. It will be given to the DCO and then used by the Government to award a competitive Task Order to the Contractor whose proposal is the most advantageous to the Government based on an integrated assessment of evaluation criteria.

The technical evaluation processes are normally performed by the Customer/COR and include: (1) Evaluating skill mix, manning levels, labor hours and/or delivery schedules, (2) Reviewing technical solutions, capacity and/or technical/management approach. (3) Evaluating past performance on earlier orders under the contract and previous contracts, including quality, timeliness and cost control.

#### M.2 Determining Best Value

All source selections should ensure that the Government selects the offeror proposing the best value to the Government. BEST VALUE can be determined by using one of two distinct processes: (1) “tradeoff” or (2) “lowest price, technically acceptable” (LPTA).

- Tradeoff means, “in the best interest of the Government to consider award to other than lowest priced offeror or other than the highest technically rated offeror.” In essence this means that the Government will evaluate both technical and price/cost factors as well as past performance and will award to the offeror whose proposal offers the best value to the government, considering trade-offs between price/cost and other factors.
- Lowest Price, Technically Acceptable (LPTA) means that the award will be made to the offeror whose price is lowest among all proposals that were deemed to be technically acceptable:
  - Determining best value using the LPTA method may be appropriate where the requirement is not complex and the technical and performance risks are minimal, such as acquisitions where service, supply, or equipment requirements are well defined.
  - The evaluation factors and significant sub-factors that establish the requirements of acceptability shall be set forth in the solicitation. The solicitation shall specify that award will be made on the basis of the lowest evaluated price of proposals meeting or exceeding the acceptability standards for non-cost factors (See FAR 15.101-2(b)(1)) This method does not allow for trade-offs between price/cost and technical factors.

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Whether based on the “tradeoff” or “lowest price, technically acceptable” method, successful proposal evaluation depends on the following elements:

1. Appropriate, well-defined evaluation criteria,
2. Evaluation rating standards that are understood and applied consistently among evaluators and among all proposals being evaluated,

### M.3 Process for Developing Evaluation Criteria

Follow the process beginning on the next page as a guide to developing the evaluation criteria. Contained within this process are examples of instructions to the Offerors and the standards for each of the factors to be evaluated. You may use one or more of these examples as stated, tailor them or develop new criteria to meet your program needs. This information will then be used by the DCO when preparing the Request for Order Proposal (RFOP).

**Blue (or Bold)** fonts in the steps below represent where modifications and additional working is required.

## Assistance in Preparing Source Selection Criteria

### Step 1. Identity Evaluation Factors and Priorities

The table below lists the most common evaluation factors used during source selections. The relative importance of these factors must be stated in the RFOP.

Note: For Technical and Management you can either prioritize and evaluate them separately or combine them into a single factor. If you prioritize them as separate priorities, do not also prioritize the combined factor and vice versa.

Not all factors are required for the evaluation process – if not relevant leave the Priority blank (Cost/Price and past performance must always be considered).

In the Priority column, mark which factors are to be used (1 being the highest and 5 the lowest). Factors can have the same priority (for example if all factors are considered of equal importance to the selection process they can all be marked as “1” or just an “X”).

Selection Factor	Priority
Technical	
Management	
Technical/Management	
Past Performance	
Past Performance Risk	
Proposal Risk	
Security	
Cost/Price	
Other:	

### Step 2. Priority of Cost/Price

The RFOP shall also state, at a minimum, whether all evaluation factors (other than Cost/Price), **when combined**, are (mark one):

- Significantly more important than Cost/Price;
- Approximately equal to cost or price; or
- Significantly less important than cost or price. (FAR 15.304(e))

### Step 3. Determine Best Value Approach

Consult with the DCO or Contract Specialist when making this determination and check the appropriate box.

- Tradeoff (best value other than lowest cost)
- LPTA (lowest price that is technically acceptable)

**Step 4. Develop Technical Evaluation Factors:**

Insert the number of pages for this factor. For simple requirements 5 – 15 pages is common, for moderate requirements 15 to 40 is common, and for complex a range of 50 – 100 may be needed to provide sufficient space to address all the requirements and provide enough room for information to be provided that can be used by the evaluation team to distinguish between the qualities of the Bidder responses.

The table below provides some sample technical evaluation factors and Instruction(s) to Offeror. Others may need to be defined in addition to the ones listed below based on the type of requirements to be addressed in the Bidder proposals. The goal is to provide the type of discriminators which allow the Government to make a best selection decision. “Discriminators” are the significant aspects of a task order requirement that are expected to distinguish one proposal from another, thus having an impact on the ultimate selection decision, and allowing the source selection team to accomplish an evaluation that distinguishes among competing proposals in areas the Government believes are most important. Mark on the left which to “Use”.

Use	Description	Instruction to Offeror	Example Evaluation Standard
<input type="checkbox"/>	Technical Solution/ Approach	Provide a description of Offeror’s technical solution/approach to meet the requirements of the <b>SOO or/ PWS dated xxx 201_</b> .	The standard is met when the proposal provides a sound technical solution/approach, including the implementation of sound technical processes/procedures which meet requirements of the <b>SOO or/ PWS dated xxx 201_</b> and ensures system and software operability and maintainability, and the ability to recognize and address program interoperability, safety and security issues, including but not limited to personnel, data, data analysis tools, and assets.
<input type="checkbox"/>	Mix/ Availability of Skills	Provide a description of the mix of skills proposed in the numbers needed in the time required that meets the requirement of the <b>SOO or/ PWS dated xxx 201_</b> . If personnel are subcontracted, the approach illustrates the method of administration and technical control of the subcontractor(s).	The standard is met when the Offeror provides a sound, compliant approach, which meets the requirement of the <b>SOO/ PWS dated xxx 201_</b> and illustrates a thorough knowledge and understanding of those requirements, adequate and appropriate personnel skills, any associated risks, and actions the offeror will take to mitigate the risks, if any. If personnel are subcontracted, the approach illustrates a sound method of administration and technical control of the subcontractor(s).
<input type="checkbox"/>	<b>[Others]</b>		



**Step 5. Develop Management Evaluation Factors:**

Insert number of pages for this factor (for simple requirements typically 3-5 pages, for moderate requirements 5-10 pages and for complex requirements 15-25 pages).

The table below provides sample management evaluation factors and Instruction(s) to Offeror. Others may need to be defined in addition to the ones listed below based on the type of requirements to be addressed in the bidder proposals. The selections should be limited to those which provide the type of discriminators which allow the Government to make a best value decision.

Use	Description	Instruction to Offeror	Example Evaluation Standard
<input type="checkbox"/>	Management Approach	Provide a description of Offeror's management approach to meet the requirements of the <b>SOO or PWS dated xxx 201_</b> . The proposal should provide all task related materials and services (not otherwise being provided as GFE) required to efficiently and effectively manage accomplishments of tasks covered by requirements. You may want to add - The contractor should provide a program plan tailored to accomplishing administrative, management, technical, and financial requirements, as a minimum a milestone chart, projected spending rate and estimated man-hours should be included.	The standard is met when the proposal provides a sound, compliant approach, which meets requirements of the <b>SOO or PWS dated xxx 201_</b> and illustrates a thorough knowledge and understanding of those requirements, their associated risks, if any, and actions the offeror will take to mitigate the identified risks. This includes all materials and services required to efficiently and effectively manage accomplishments of tasks covered by requirements (add the following if adding additional sentence as highlighted above) and a program plan tailored to accomplishing administrative, management, technical, and financial requirements, as a minimum a milestone chart, projected spending rate and estimated man-hours.
<input type="checkbox"/>	Delivery Schedule or Turnaround Time	Provide a description of Offeror's delivery schedule or turnaround time which meets or exceeds the requirement specified in the PWS. If subcontracted, the approach should illustrate the method of administration and technical control of the subcontractor(s).	The standard is met when 1) the proposal provides a sound and compliant approach to the delivery schedule or turnaround time which meets or exceeds the requirement specified in the PWS, and illustrates a thorough knowledge and understanding those requirements and demonstrates the offeror's ability to accomplish the logistics efforts associated with providing parts and personnel to residential and on-call locations within CONUS and OCONUS locations, including deployed locations. 2) If subcontracted, the approach, which illustrates the method of administration and technical control of the subcontractor(s), is acceptable.



<input type="checkbox"/>	Capacity	Provide a description of the Offeror's capacity to meet the required delivery schedule (or proposed delivery, if earlier). If subcontracted, the approach illustrates the capacity of the subcontractor and the method of administration and technical control of the subcontractor(s).	The standard is met when the Offeror demonstrates the ability to produce the necessary resources to meet or exceed the required delivery schedule (or proposed delivery, if earlier), including but not limited to training, support personnel, diagnostics, and OEM support agreements. If subcontracted, the approach illustrates the capacity of the subcontractor and the method of administration and technical control of the subcontractor(s).
<input type="checkbox"/>	[others]		

**Step 6. Development of Technical / Management Evaluation Rating Scale**

Choose the appropriate rating scale from below or provide your own:

**Best Value:** A sample rating scale for evaluating best value is provided below.

Color	Interpretation	Definition
Blue	Exceptional	Exceeds specified minimum performance or capability requirements in a way beneficial to the Government
Green	Acceptable	Meets specified minimum performance or capability requirements necessary for acceptable contract performance
Yellow	Marginal	Does not clearly meet some specified minimum performance or capability requirements necessary for acceptable contract performance but any proposal inadequacies are correctable
Red	Unacceptable	Fails to meet specified minimum performance or capability requirements. Proposals with an unacceptable rating are not awardable

**LPTA** - For the lowest price, technically acceptable, the approach is based on PASS/FAIL:

Interpretation	Definition
Acceptable	PASS: Meets specified minimum performance or capability requirements necessary for acceptable contract performance
Unacceptable	FAIL: Fails to meet specified minimum performance or capability requirements necessary for acceptable contract performance



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## Step 7. Develop Past Performance Factors

The extent of the past performance evaluation is determined by the complexity of the requirement. The requiring activity must provide the Technical Experience/Knowledge evaluation criteria and relevancy definitions. Past Performance Fact sheets are helpful when gathering past performance information.

Insert number of past performances submissions required from the Bidders (Usually 3 to 4 per source selection)

Insert if Past Performance is Simple, Moderate or Complex

The evaluation of past performance will assess the confidence in the offeror's ability to successfully accomplish the proposed effort based on the offeror's demonstrated present and past work record. More recent and more relevant past performance usually has a greater impact in the confidence assessment than less recent and less relevant performance.

Targeted Past Performance is required for all competitive orders. The requiring activity must develop the performance evaluation criteria, relevancy ratings, and evaluation standards. The extent of the past performance evaluation is dependent on the value and complexity of the requirement.

For simple requirements, past performance evaluations may be performed by the Contracting Officer with input by the requiring activity's technical office.

If an evaluation team is used, it will determine quality, relevancy, and confidence ratings as follows:

- Quality ratings: Exceptional, Satisfactory, Unsatisfactory
- Relevancy ratings: Very Relevant, Relevant, Not Relevant.

**Sample Quality Definitions:** (Please note these are **sample** definitions only. Quality definitions may need to be tailored to the specific requirement and should be focused on those aspects of performance that will serve as discriminators). A quality rating will be assigned to each contract identified by the Offeror in its Technical Knowledge/ Experience submission): Select one of the two example sets of quality definitions defined below:

**For LPTA or Best Value (Simple Requirements)**

**PASS:** A review of the Offeror's past performance demonstrates that the Offeror has performed successfully, without any unresolved quality issues. Performance has been timely and fully acceptable to the Government. In the event of performance problems, all issues have been resolved to the satisfaction of the Government. (*Provide examples from information obtained from the POCs identified by the Offeror, CPARS, Past Performance Information Retrieval System (PPRIS), etc., on the evaluation form.*)

**FAIL:** A review of the Offeror's past performance demonstrates that the Offeror has not performed successfully. (Provide examples from information obtained from the POCs identified by the Offeror, CPARS, PPIRS, etc., on the evaluation form.)

**For Best Value (Moderate to Complex Requirements)**

**EXCEPTIONAL:** A review of Offeror's past performance demonstrates that the Offeror has performed successfully, on schedule, and without any unresolved quality issues. Performance has been timely and fully acceptable to the Government. In the event of performance problems, all issues have been resolved to the satisfaction of the Government. (Provide examples from information obtained through past performance evaluation, CPARS, PPIRS, etc.)

**SATISFACTORY:** A review of Offeror's past performance demonstrates that the Offeror has performed successfully and without any unresolved quality issues. In the event of performance issues, all issues have been resolved to the satisfaction of the Government. (The evaluation team will obtain information from the POCs identified by the Offeror, Contractor Performance Assessment Reporting CPARS, Past Performance Information Retrieval System (PPRIS), etc)

**UNSATISFACTORY:** A review of the Offeror's past performance demonstrates that the Offeror has not performed successfully. (The evaluation team will obtain information from the POCs identified by the Offeror, Contractor Performance Assessment Reporting System CPARS, Past Performance Information Retrieval System (PPRIS), etc)

**Sample Relevancy Definitions:** (Please note these are **sample** relevancy definitions only. Relevancy definitions must be tailored to the specific requirement and should be focused on those aspects of performance that will serve as discriminators). Two example sets of relevancy definitions are provided below:

**Simple/Moderate Requirements**

**RELEVANT:** Present/past performance efforts involved ***much*** of the magnitude of effort and complexities this solicitation requires. Must include programs that demonstrate capability in **(*identify program/requirement*) by containing XX (#) of the XX (#) critical tasks identified in the PWS.**

**NOT RELEVANT:** Present/past performance efforts involved ***little or none*** of the magnitude of effort and complexities this solicitation requires.

**Complex Requirements**

**VERY RELEVANT:** Present/past performance efforts involved ***essentially the same*** magnitude of effort and complexities this solicitation requires. Must include programs that demonstrate capability in ***(identify program/requirement) by containing XX (#) of the XX (#) critical tasks identified in the PWS.***

**RELEVANT:** Present/past performance efforts involved ***much*** of the magnitude of effort and complexities this solicitation requires. Must include programs that demonstrate capability in ***(identify program/requirement) by containing XX (#) of the XX (#) critical tasks identified in the PWS.***

**NOT RELEVANT:** Present/past performance efforts involved ***little or none*** of the magnitude of effort and complexities this solicitation requires.

**Step 8. Development of Risk Assessment for Past Performance (if required)**

Mark this box if a Performance Risk Assessment will be performed. This type of analysis provides insight into an offeror's probability of successfully completing the solicitation requirements based on the offeror's performance record on similar contract efforts. Assess risk through evaluation of the offeror's past performance.

Rating	Definition
Substantial Confidence	Based on the Offeror's performance record, the government has a high expectation that the Offeror will successfully perform the required effort.
Satisfactory Confidence	Based on the Offeror's performance record, the government has an expectation that the Offeror will successfully perform the required effort.
Limited Confidence	Based on the Offeror's performance record, the government has a low expectation that the Offeror will successfully perform the required effort.
No Confidence	Based on the Offeror's performance record, the government has no expectation that the Offeror will be able to successfully perform the required effort.
Unknown Confidence	No performance record is identifiable or the Offeror's performance record is so sparse that no confidence assessment rating can be reasonably assigned.

**Step 9. Development of Overall Risk Assessment of Proposal (if required)**

Mark this box if a Proposal Risk Assessment will be performed. This type of evaluation documents the risks associated with an offeror's proposed approach.

The following table provides an approach to evaluating Risk Assessment.

Rating	Definition
High	Likely to cause significant disruption of schedule, increased cost, or degradation of performance. Risk may be unacceptable even with special contractor emphasis and close Government monitoring.
Moderate	Can potentially cause some disruption of schedule, increased cost, or degradation of performance. Special contractor emphasis and close Government monitoring will probably be able to overcome difficulties.
Low	Has little potential to cause disruption of schedule, increased cost, or degradation of performance. Normal contractor effort and normal Government monitoring will probably be able to overcome difficulties.

### Step 10. Development of Security Factors (if required)

In the SITE umbrella contract, the prime contractors have all demonstrated that: they possess a TS Facility clearance and have the ability to store secret level documentation and that they are able to provide TS cleared personnel under DoD contracts and contractor personnel that are eligible for SCI access. The Contractors all provided the CAGE codes for all Facility clearances and the CAGE code (s) for storage location (s). The nominated Program Manager was eligible for SCI access.

If additional security requirements are required to be demonstrated by the offeror at the task order level, criteria will have to be established. Examples might include their ability to provide:

- A sufficient number of cleared personnel to meet the schedule.
- Sufficient SCIF storage space to house XX square feet of equipment by XX date.

The Security Factor is often evaluated as Pass or Fail, but it is not required. If Pass/Fail evaluation is acceptable check the block below. If the offeror does not receive a Pass in the Security portion of its proposal, the proposal will not be evaluated further.

STANDARD: The Offeror has demonstrated that all security requirements are met. This is a Pass/Fail factor.

If Security is not pass/fail and will be an independent evaluation factor, then provide the security criteria to be used, including the ranking factors. Examples include: Did the vendor clearly demonstrate the ability to provide cleared personnel. What time frame is proposed? Are key personnel identified in the proposal that are eligible for SCI access in the time required? How thorough is their strategy for (or have they demonstrated experience in) placing people in a hazardous area of operations?

STANDARD: Provide security criteria to be used.

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## Appendix N

### Request for Order Proposal (RFOP) Cover Letter for Competitive Orders

MEMORANDUM FOR (See Distribution List Below)

[Current Date]

FROM:

SUBJECT: Request for Order Proposal (RFOP) HHM402-XX-R-\_\_\_\_\_

1. A proposal is requested for the (*supplies and services, etc.*) described in the attached (*Statement of Objectives, Performance Work Specification, etc.*). It is determined that the most appropriate type order for this effort is (*firm fixed price, time and materials, cost plus fixed fee, etc.*). Your proposal or “no-bid reply” shall be submitted on or before the date and time specified further below. Any “no-bid reply” must include a brief statement as to why you are unable to perform. **NOTE: ADD THE FOLLOWING WHEN APPROPRIATE:** It is the Government’s intent to provide the SITE services described herein among the entire DIA (replace DIA with applicable service/agency) enterprise. During the course of the resultant task order or its option periods, when additions to or deletions from the listing of performance locations become necessary, and/or increases to or decreases from site(s) requirements may be required to accommodate relocations and/or installation of additional equipment in CONUS and OCONUS locations, such changes will be made by task order modification.

2. Each page containing proprietary information should be so marked. Proposal submissions are requested electronically. Page size shall be 8.5 x 11 inches, not including foldouts. Pages may be single spaced, font size no less than 12 point Times New Roman. Use at least 1-inch margins on the top and bottom and ¾ inch side margins. Pages shall be numbered sequentially by attachment. Tables, charts, graphs and figures shall be legible and shall not exceed 8.5 x 14 inches (legal). The text shall be no smaller than 10 point Times New Roman. To ensure receipt of a complete proposal submission, you are requested to provide a table of contents as a cover sheet (or in the cover email) clearly indicating the title of the email attachments and the number of pages per attachment. The order proposal should include the following sections: Section I - completed RFOP schedule & clauses, Section II – Technical Submission, Section III – Cost / Price Submission, and Section IV – Past Performance Submission (*if applicable*).

a) Section I – Completed RFOP Schedule & Clause: Submission shall be the completed RFOP schedule & clauses. ***An estimated amount for the Other Direct Cost (ODC) Contract line item numbers (CLIN) must be provided.***

b) Section II -- Technical Submission: Submission shall include a brief technical proposal (limited to 10 pages total) (***Number of pages is based on the number of evaluation factors – normally 3 pages per factor but can be more depending on the requirement***) identifying the Offeror’s proposed approach to the specific requirement. Section II will be evaluated in

accordance with the factors listed below. Each evaluation factor should be addressed separately in your proposal.

### ***INSERT EVALUATION FACTORS***

***Insert [if using a Statement of Objectives]: The offeror shall submit a PWS and QASP (if required) using the attached PWS template.***

c) Section III - Cost / Price Submission: Submission shall identify which rates, if any, are lower than those in the SITE rate tables. Contractors may offer rates that are no higher than those set forth in the contract rate tables. Contractors may propose rates that are lower than those in the rate tables and those lower rates will be incorporated in the Task Orders. The Government will perform a cost realism analysis for Time and Materials Task Orders on labor hours only. The Government will perform a cost realism analysis on cost reimbursement Task Orders on labor hours. Cost realism will also be performed on the CR and LH rates when the labor rates proposed on the Task Order are lower than those in the rate tables attached to the contract. When proposal includes effort that crosses contract ordering periods, contractors shall utilize the rates in effect at the time the task order is issued for the entire performance period, not to exceed 12 months. Contractors' proposals shall identify the labor categories, the number of hours or man-months proposed.

If a T&M Task Order is contemplated, contractor's proposal will cite a proposed ceiling price for labor and an estimate of material, travel, and other direct costs to be reimbursed. Proposals shall identify the labor categories, the number of hours, and the proposed labor rates for each category. Proposals shall include all labor rates, mark-up fees, bill rates and material handling fees.

If a LH Task Order is contemplated, contractor's proposal will cite a proposed ceiling price for labor. Proposals shall identify the labor categories, the number of hours, and the proposed labor rates for each category. Proposals shall include all labor rates, mark-up fees, bill rates and material handling fees.

If a FFP Task Order is contemplated, contractors will prepare a FFP proposal and shall include other costs (e.g. material, travel, etc.). Proposals shall identify the labor categories, the number of man-months, and the proposed man-month rates for each category as well as estimates of material, travel, and other direct costs to be reimbursed. Proposals shall include all labor rates, mark-up fees, bill rates and material handling fees. When multiple pricing arrangements are used and include hourly rate items, number of hours and proposed hourly rates will also be included. **NOTE: NEED TO ADDRESS INCENTIVES IF THEY ARE TO BE USED.**

If a CR Task Order is contemplated, contractor's proposal will cite a proposed ceiling price for labor and an estimate of material, travel, and other direct costs. Proposals shall identify the labor categories, the number of hours, indirect cost rates, and the proposed labor rates for each category. DCAA audit results of indirect rates shall be provided if available. **NOTE: NEED TO ADDRESS THE TYPE FEE ARRANGEMENT TO BE USED**

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**(I.E. AWARD FEE, INCENTIVE FEE, OR FIXED FEE), AND THE FEE WILL BE PROPOSED AND NEGOTIATED FOR THE TASK ORDER.**

Additionally, contractors shall identify which labor categories are subject to the Service Contract Act and subject to an applicable Wage Determination.

If minimal information is required, such as in the case of a fixed price proposal, that information can be included in Section I or your cover letter. The cover letter shall also include a statement as to whether you have used the rates in the Rate Tables incorporated in the basic SITE contract or you have proposed lower rates.

d) Section IV -- Past Performance Submission (*if applicable*)  
*[... insert text from one of the next two paragraphs]*

- **For Simple and Moderately Complex Requirements, Past Performance Paragraph:**

Submission shall include a summary of your past performance information, which will be evaluated in accordance with the technical experience/knowledge evaluation criteria (applicable for simple and moderate complexity requirements) and relevancy definitions and quality ratings set forth below. The Section IV submission shall identify at least XX (normally 3) contracts the Offeror believes are relevant to this requirement and shall include at least three points of contact (i.e., program manager, Contracting Officer Representative (COR), contracting officer, etc.), including telephone number and e-mail address, for every contract/order provided as a past performance reference. These contracts should have performance within the last three years of the issuance date of this RFOP.

***Simple requirements:***

- *Technical Experience/Knowledge evaluation criteria and standard*
- *Relevant/Not Relevant*
- *Quality: Pass/Fail*

***Moderate requirements:***

- *Technical Experience/Knowledge evaluation criteria and standard*
- *Very Relevant/Relevant/Not Relevant*
- *Quality: Exceptional/Satisfactory/Unsatisfactory*

- **For Complex Requirements, Past Performance Paragraph:**

Submission shall include Present and Past Performance information for the Offeror itself and each of its proposed subcontractors in accordance with the format contained in the “FACTS Sheet” (see Attachment 2) to this letter and the following paragraphs.

- i) The present and past performance submission shall include a summary page describing the role of the Offeror and each subcontractor/vendor (both nature of work, criticality of work, and percentage of overall work).

- ii) The offeror shall provide “FACTS” Sheet documenting past performance on up to **[three (3)]** contracts or subcontracts as a prime or of its proposed subcontractor, performed within the last three years, having tasks performed similar to the functional areas identified in Section II of the RFOP. The past performance information may be for the prime offeror or its proposed subcontractors (with preferably at least one year of performance history). Contracts listed may include those with the federal government, state and local governments or their agencies, and commercial customers. FACTS Sheet responses should be focused so that they clearly correlate present and past performance with the requirements of this RFOP and must clearly describe the relevance of the effort to the work proposed by that entity. The completed FACTS Sheet for each order may cover no more than both sides of two 8 ½ x 11 pages.
- iii) Offeror shall include for itself and each subcontractor two additional pages (8 ½ x 11 with 0.5” margins), in spreadsheet format, listing all contracts the entity is performing or has performed in the past three (3) years. If the list of said contracts exceeds two pages per entity, only the most recent contracts ongoing/completed shall be listed. These spreadsheets do not count toward the FACTS Sheet page limitations. The Government may obtain and use performance information on any or none of these programs. The spreadsheet(s) shall include, as a minimum, current information as follows:
- Contract Number
  - Period of Performance (maximum years)
  - Maximum total estimated dollars
  - Stage of the program and brief status
  - Contracting agency or customer
  - Phone number and e-mail address for at least two POCs
  - Brief program description, including relevancy
- iv) FACTS Sheets must include the following legend at the top and bottom of the page:

SOURCE SELECTION INFORMATION – See FAR 2.101 and 3.104  
FOR OFFICIAL USE ONLY

3. In accordance with Clause XXXXX, award of this competitive Task Order will be made to the Contractor whose proposal is the most advantageous to the Government based on an integrated assessment of evaluation criteria which address technical/management, past performance, and cost/price. The Government intends to award without discussions.

4. The technical proposal evaluation factors will be evaluated as follows: each Offeror’s technical proposal shall be evaluated to determine if it meets, does not meet, or exceeds the standards set forth. A color and risk rating will be assigned (see Attachment 1 for definitions). Proposal risk

assesses the risk associated with the Offerors' proposed approach as it relates to accomplishing the requirements as specified.

The government will perform a risk assessment of each Offeror's proposal. Proposal risk assessment focuses on the risks and weaknesses associated with the Offeror's experience and will consider each Offeror's likelihood of success in performing the requirements stated in the RFP. The risks which will be assessed, are those associated with technical aspects of the program. Risks may occur as a result of a particular technical methodology, operational process, or economic impacts associated with these approaches. It will also include potential for disruption of schedule, degradation of performance and the need for increased Government oversight as well as the likelihood of unsuccessful contract performance. For any risk identified, the evaluation will address the Offeror's proposal for mitigating those risks and why that approach is or is not manageable. All risk assessments will be included as part of the adjectival/Color Rating in the Technical/Management and Past Performance Factors.

5. The successful Offeror's technical proposal may be incorporated in whole or in part (or by reference) in any resulting order. Nothing contained in the successful Offeror's technical proposal shall constitute waiver to any other requirement of the contract/order. If after award of an order, it is discovered that changes made during discussions (if held) were not incorporated into the PWS and/or technical proposal, such changes to the contractor's documentation shall be considered administrative and shall be made by unilateral modification to the order, at no change in cost or price or other terms and conditions.

6. *[For paragraph 6 use one of the following:]*

**Simple and moderate complexity requirements:**

6. The past performance submission will be evaluated as follows: each Offeror's past performance submission shall be evaluated to determine a technical experience/knowledge rating, relevancy rating and quality rating for the past performance contracts/orders provided as references. For technical experience/knowledge, each Offeror's past performance submission shall be evaluated to determine if it meets, does not meet, or exceeds the standards set forth and a color and risk rating will be assigned (see Attachment 1 for definitions). Proposal risk assesses the risk associated with the Offerors' proposed approach as it relates to accomplishing the requirements as specified. Each contract/order submitted as a past performance reference will be assigned a relevancy rating and quality rating in accordance with paragraph 2(d) above based on evaluation of the information submitted by the Offeror, telephone interviews conducted by the evaluation team with the points of contact provided by the Offeror, and review of CPARS and other information available to the evaluation team.

**For complex requirements:**

6. The past performance submission will be evaluated as follows: The assessment will assess the confidence in the Offeror's ability (which includes, if applicable, the extent of subcontractor involvement) to successfully accomplish the proposed effort based on the

Offeror's demonstrated present and past work record. The Government will evaluate the Offeror's demonstrated record of contract compliance in supplying products and services that meet users' needs, including cost and schedule. The recency and relevancy of the information, the source of the information, context of the data, and general trends in the contractor's performance will be considered. The Government will perform an independent determination of relevancy of the data provided or obtained and a relevancy determination of the Offeror's present/past performance (which includes, if applicable, the extent of its subcontractors' involvement). The Government is not bound by the Offeror's opinion of relevancy. The following relevancy criteria apply:

VERY RELEVANT: *(Insert relevancy definition)*

RELEVANT: *(Insert relevancy definition)*

NOT RELEVANT: *(Insert relevancy definition)*

7. Information utilized may be obtained from the references listed in the proposal, as well as other sources known to the Government. Interviews, if held, will be performed utilizing a list of questions that will be used for all interviews. Data from previous source selections may be used if the data is recent and relevant. Evaluation of present and past performance will include consideration of overall customer satisfaction and conclusions of informed judgment. Offerors shall be given an opportunity to address adverse past performance information if the Offeror has not had a previous opportunity to respond to the information. The assessment will consider issues including, but not limited to, the number and severity of the problems, the appropriateness and/or effectiveness of any corrective actions taken (not just planned or promised), and the Offeror's overall work record. Prompt corrective action in isolated instances may not outweigh overall negative trends. Past performance information will also be considered regarding any key personnel of an Offeror or subcontractor if that specific entity is a newly formed entity who either has no prior contracts or does not possess relevant corporate past performance. If an Offeror, or the proposed key employees of an Offeror, do not have a past performance history deemed relevant to this RFOP, the Offeror will receive an unknown confidence rating.

8. The Government will consider an Offeror's contracts in the aggregate in determining relevancy. An Offeror's demonstrated performance on two contracts may, by definition, represent only a rating less than very relevant when each contract is considered as a stand-alone effort. However, when these contracts are performed concurrently (in part or in whole) and are assessed in the aggregate, the work may more accurately reflect a higher relevancy rating. The Government will consider a subcontractor's submitted contracts in the aggregate in this same manner. The following performance confidence assessment ratings apply:

<u>Rating</u>	<u>Definition</u>
Substantial Confidence	Based on the Offeror's performance record, the government has a high expectation that the Offeror will successfully perform the required effort.

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Satisfactory Confidence	Based on the Offeror's performance record, the government has an expectation that the Offeror will successfully perform the required effort.
Limited Confidence	Based on the Offeror's performance record, the government has a low expectation that the Offeror will successfully perform the required effort.
No Confidence	Based on the Offeror's performance record, the government has no expectation that the Offeror will be able to successfully perform the required effort.
Unknown Confidence	No performance record is identifiable or the Offeror's performance record is so sparse that no confidence assessment rating can be reasonably assigned.

9. Proposal submission is due no later than 4:30 pm Eastern Time on **(Date)**. Address your proposal and any questions to the undersigned at (XXX) XXX-XXXX, e-mail XXXXXX@XXX.XXX, facsimile (XXX)-XXX-XXXX.

NAME  
Contract Specialist

Attachments: ***[Add or delete as necessary]***

Addressee Distribution List

1. Evaluation Ratings and Definitions
2. FACTS Sheet
3. SOO/PWS
4. DD1423
5. DD254

## Attachment 1 – RFOP Definitions

### Evaluation Ratings and Definitions

Color	Interpretation	Definition
Blue	Exceptional	Exceeds specified minimum performance or capability requirements in a way beneficial to the Government
Green	Acceptable	Meets specified minimum performance or capability requirements necessary for acceptable contract performance
Yellow	Marginal	Does not clearly meet some specified minimum performance or capability requirements necessary for acceptable contract performance but any proposal inadequacies are correctable
Red	Unacceptable	Fails to meet specified minimum performance or capability requirements. Proposals with an unacceptable rating are not awardable

### Risk Definitions

HIGH	Likely to cause significant disruption of schedule, increased cost, or degradation of performance. Risk may be unacceptable even with special contractor emphasis and close Government monitoring.
MODERATE	Can potentially cause some disruption of schedule, increased cost, or degradation of performance. Special contractor emphasis and close Government monitoring will probably be able to overcome difficulties.
LOW	Has little potential to cause disruption of schedule, increased cost, or degradation of performance. Normal contractor effort and normal Government monitoring will probably be able to overcome difficulties.

## Attachment 2 - FACTS Sheet

### Present/Past Performance "FACTS Sheet" (TO BE COMPLETED BY OFFEROR)

Provide the information requested in this form for each contract/program being described. Provide frank, concise comments regarding your performance on the contracts you identify. Provide a separate completed form for each contract/program submitted.

#### A. OFFEROR:

1. Name (Company/Division) \_\_\_\_\_
2. Address: \_\_\_\_\_
3. CAGE Code: \_\_\_\_\_
4. Duns Number: \_\_\_\_\_

(NOTE: If the company or division performing this effort is different than the offeror or the relevance of this effort to the instant acquisition is impacted by any company/corporate organizational change, note those changes. Refer to the "Organizational Structure Change History" you provided as part of the Present/Past Performance Volume.)

#### B. PROGRAM TITLE:

#### C. CONTRACT SPECIFICS:

1. Contracting Agency or Customer \_\_\_\_\_
2. Contract Number \_\_\_\_\_
3. Contract Type(s) - Please list all that apply (FFP, T&M, etc.) \_\_\_\_\_
4. Period of Performance \_\_\_\_\_
5. Original Contract \$ Value \_\_\_\_\_
6. Current Contract \$ Value \_\_\_\_\_
7. If Amounts for 5 and 6 above are different, provide a brief description of the reason.

#### D. BRIEF DESCRIPTION OF EFFORT AS \_\_\_ PRIME OR \_\_\_ SUBCONTRACTOR

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

1. As a part of this narrative description, highlight portions considered most relevant to the current acquisition; addressing how and to what extent the proposed effort relates to the program identified in B. above.

2. This paragraph shall also include details to support the offeror's record for on time support, technical quality, and cost control for this effort identified in paragraph B. above.

#### E. COMPLETION DATE:

1. Original date: \_\_\_\_\_
2. Current Schedule: \_\_\_\_\_
3. Estimate at Completion: \_\_\_\_\_
4. How Many Times Changed: \_\_\_\_\_

5. Primary Causes of Change:

\_\_\_\_\_

\_\_\_\_\_

**F. PRIMARY CUSTOMER POINTS OF CONTACT:** (For Government contracts, provide current information on all four individuals. For commercial contracts, provide points of contact fulfilling these same roles. The offeror is responsible for exerting its **best efforts** to ensure that current information is provided for all individuals.

1. Program Manager      Name: \_\_\_\_\_  
                                  Office: \_\_\_\_\_  
                                  Address: \_\_\_\_\_  
                                  Telephone: \_\_\_\_\_  
                                  E-Mail: \_\_\_\_\_

2. Contracting Officer Name: \_\_\_\_\_  
                                  Office: \_\_\_\_\_  
                                  Address: \_\_\_\_\_  
                                  Telephone: \_\_\_\_\_  
                                  E-Mail: \_\_\_\_\_

3. Administrative Name: \_\_\_\_\_  
     Contracting Officer Office: \_\_\_\_\_  
                                  Address: \_\_\_\_\_  
                                  Telephone: \_\_\_\_\_  
                                  E-Mail: \_\_\_\_\_

4. COR or Other Name: \_\_\_\_\_  
     (Please Specify)      Office: \_\_\_\_\_  
                                  Address: \_\_\_\_\_  
                                  Telephone: \_\_\_\_\_  
                                  E-Mail: \_\_\_\_\_

G. Specify, by name, key individual(s) who will participate in the proposed effort under this acquisition that also participated in the program identified in B. above, and indicate their contract role. Describe how participation of these key personnel contributed to the success of the previous effort and how this indicates probability of success on the proposed effort.

H. Use this space to address any aspect about this program considered unique. Describe quality awards or certifications that indicate the offeror possesses a high-quality process for developing and producing the product/service required.



## Appendix O

### DD Form 448 Template for DIA SITE

<b>MILITARY INTERDEPARTMENTAL PURCHASE REQUEST</b>					1. PAGE 1 OF ___ PAGES		
2. FSC		3. CONTROL SYMBOL NO.		4. DATE PREPARED		5. MIPR NUMBER	6. AMEND NO.
7. TO: Defense Intelligence Agency ATTN FE-DSS2 WASHINGTON, DC 20340-5100 Phone: 202-231-5275/402-294-3884 Fax/email: 202-231-8893, DS-FEMIPRS@dia.mil				8. FROM: (Agency, name, telephone number of originator)			
9. ITEMS [ ] ARE [ ] ARE NOT INCLUDED IN THE INTERSERVICE SUPPLY SUPPORT PROGRAM AND REQUIRED INTERSERVICE SCREENING [ ] HAS [ ] HAS NOT BEEN ACCOMPLISHED.							
ITEM NO. a	DESCRIPTION (Federal stock number, nomenclature, specification and/or drawing No., etc.) b			QTY c	UNIT d	ESTIMATED UNIT PRICE e	ESTIMATED TOTAL PRICE f
<p>FUNDS ARE HEREBY CERTIFIED AVAILABLE IN THE AMOUNT OF \$ for project/contract/period of performance</p> <p>DIA DD4 Tech Rep (phone, fax, email)</p> <p>DIA FE Satellite Financial Rep: FEDSS2, DS-FEMIPRS@dia.mil 202-231-8893</p> <p>Requesting Agency Tech Rep (phone, fax, email)</p> <p>Requesting Agency Financial Rep (phone, fax, email)</p> <p>THESE FUNDS ARE BEING USED IAW THE PURPOSE FOR WHICH THEY WERE APPROPRIATED AND ARE AUTHORIZED TO FUND.</p> <p>FUNDS EXPIRE FOR OBLIGATION.....</p> <p>SEND ACCEPTANCE AND OBLIGATION TO.....</p>							
10. SEE ATTACHED PAGES FOR DELIVERY SCHEDULES, PRESERVATION AND PACKAGING INSTRUCTIONS, SHIPPING INSTRUCTIONS AND INSTRUCTIONS FOR DISTRIBUTION OF CONTRACTS AND RELATED DOCUMENTS.						11. GRAND TOTAL	
12. TRANSPORTATION ALLOTMENT (Used if FOB Contractor's plant)				13. MAIL INVOICES TO (Payment will be made by)			
PAY OFFICE DODAAD							
14. FUNDS FOR PROCUREMENT ARE PROPERLY CHARGEABLE TO THE ALLOTMENTS SET FORTH BELOW, THE AVAILABLE BALANCES OF WHICH ARE SUFFICIENT TO COVER THE ESTIMATED TOTAL PRICE.							
ACRN	APPROPRIATION	LIMIT/ SUBHEAD	SUPPLEMENTAL ACCOUNTING CLASSIFICATION		ACCTG STA DODAAD	AMOUNT	
15. AUTHORIZING OFFICER (TYPE NAME AND TITLE)				16. SIGNATURE		17. DATE	

DD FORM 448, JUN 72

PREVIOUS EDITION IS OBSOLETE



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## Appendix P

### ACRONYMS

<b>ACAT</b>	<b>Acquisition Category</b>
<b>AE</b>	<b>Acquisition Executive</b>
<b>BPN</b>	<b>Business Partner Network</b>
<b>C2</b>	<b>Command and Control</b>
<b>CBA</b>	<b>Cost Benefit Analysis</b>
<b>CDRL</b>	<b>Contract Data Requirement Listing</b>
<b>CFC</b>	<b>Combined Federal Campaign</b>
<b>CLIN</b>	<b>Contract Line Item Number</b>
<b>COCOM</b>	<b>Combatant Command</b>
<b>CONUS</b>	<b>Continental United States</b>
<b>COR</b>	<b>Contracting Officer's Representative</b>
<b>CP</b>	<b>Cost Plus</b>
<b>CPAF</b>	<b>Cost Plus, Award Fee</b>
<b>CPARS</b>	<b>Contractor Performance Assessment Reporting System</b>
<b>CPFF</b>	<b>Cost Plus, Fixed Fee</b>
<b>CPIF</b>	<b>Cost Plus, Incentive Fee</b>
<b>D&amp;F</b>	<b>Determination and Findings</b>
<b>DBA</b>	<b>Defense Base Act</b>
<b>DCAA</b>	<b>Defense Contract Audit Agency</b>
<b>DCO</b>	<b>Decentralized Contracting Office</b>
<b>DD Form</b>	<b>Department of Defense Form</b>
<b>DD Form 1155</b>	<b>Orders for Supplies and Services</b>
<b>DD Form 254</b>	<b>Contract Security Classification Specifications</b>
<b>DFARS</b>	<b>Defense FAR Supplement</b>
<b>DIA</b>	<b>Defense Intelligence Agency</b>
<b>DoDIIS</b>	<b>Department of Defense Information System</b>
<b>DUNS</b>	<b>Data Universal Numbering System (id issued by Dun and Bradstreet)</b>
<b>EEO</b>	<b>Equal Employment Opportunity</b>
<b>FAR</b>	<b>Federal Acquisition Regulation</b>
<b>FFP</b>	<b>Firm Fixed Price</b>
<b>FIPS</b>	<b>Federal Information Processing Standard</b>
<b>FOB</b>	<b>Fright On Board</b>
<b>FOE</b>	<b>Fair Opportunity Exception</b>
<b>FP</b>	<b>Fixed Price</b>
<b>FPAF</b>	<b>Fixed Price, Award Fee</b>
<b>FPFF</b>	<b>Fixed Price, Fixed Fee</b>
<b>FPIF</b>	<b>Fixed Price, Incentive Fee</b>
<b>FPLOE</b>	<b>Fixed Price, Level of Effort</b>
<b>G&amp;A</b>	<b>General and Administrative Costs</b>
<b>GFE</b>	<b>Government Finished Equipment</b>
<b>GFI</b>	<b>Government Finished Information</b>
<b>GFP</b>	<b>Government Furnished Property</b>
<b>GOV</b>	<b>Government Owned Vehicle</b>
<b>GPP</b>	<b>Green Procurement Program</b>
<b>IA</b>	<b>Interagency Agreement</b>
<b>IAW</b>	<b>In Accordance With</b>
<b>IC</b>	<b>Intelligence Community</b>
<b>ICE2</b>	<b>Intelligence Information, Command and Control, Equipment &amp; Enhancements</b>

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<b>ICPD</b>	<b>Intelligence Community Policy Directive</b>
<b>ID</b>	<b>Identification</b>
<b>IDIQ</b>	<b>Indefinite Delivery/Indefinite Quality</b>
<b>IGE</b>	<b>Independent Government Estimate</b>
<b>ISO</b>	<b>International Standards Organization</b>
<b>ISP</b>	<b>Intelligence Systems Panel</b>
<b>ISR</b>	<b>Intelligence, Surveillance and Reconnaissance</b>
<b>IT</b>	<b>Information Technology</b>
<b>LAN</b>	<b>Local Area Network</b>
<b>LH</b>	<b>Labor Hour</b>
<b>MAIS</b>	<b>Major Automated Information System</b>
<b>MILSTRIP</b>	<b>Military Standard Requisitioning &amp; Issue Procedures</b>
<b>MIPR</b>	<b>Military Interdepartmental Purchase Request</b>
<b>MOU</b>	<b>Memorandum of Understanding</b>
<b>NACI</b>	<b>National Agency Checks and Inquires</b>
<b>OCONUS</b>	<b>Outside CONUS</b>
<b>ODC</b>	<b>Other Direct Cost</b>
<b>ODS</b>	<b>Ozone Depleting Substances</b>
<b>OEM</b>	<b>Other Equipment Manufacture</b>
<b>OSD</b>	<b>Office of the Secretary of Defense</b>
<b>PBA</b>	<b>Performance Based Assessment</b>
<b>PBSA</b>	<b>Performance Based Service Acquisition</b>
<b>PCO</b>	<b>Procuring Contracting Office</b>
<b>PM</b>	<b>Program Manager</b>
<b>PNM</b>	<b>Price Negotiation Memorandum</b>
<b>POC</b>	<b>Point of Contact</b>
<b>PPIRS</b>	<b>Past Performance Information Retrieval System</b>
<b>PR</b>	<b>Procurement Request</b>
<b>PWS</b>	<b>Performance Work Statement</b>
<b>QASP</b>	<b>Quality Assurance Surveillance Plan</b>
<b>RFOP</b>	<b>Request for Order Proposal</b>
<b>SATCOM</b>	<b>Satellite Communications</b>
<b>SITE</b>	<b>Solutions for the Information Technology Enterprise</b>
<b>SOO</b>	<b>Statement of Objectives</b>
<b>T&amp;M</b>	<b>Time and Material</b>
<b>U.S.C.</b>	<b>United States Code</b>
<b>VoIP</b>	<b>Voice over IP</b>
<b>WBS</b>	<b>Work Breakdown Structure</b>