

**BLANKET PURCHASE AGREEMENT, FEDERAL SUPPLY SCHEDULE  
BETWEEN THE GSA/ DHS AND THE TEAMING ARRANGEMENT OF KADIX SYSTEMS**

In the spirit of the Federal Acquisition Streamlining Act the General Services Administration (GSA) and the teaming arrangement of Kadix Systems (team lead) with team members: Management Concepts, Inc.; RGII Technologies, Inc.; and Robbins-Gioia, LLC enter into a cooperative blanket purchase agreement, **GS-10F-06-LP-A-0008**, to further reduce the administrative costs of acquiring commercial items from the following General Services Administration (GSA) Federal Supply Schedule MOBIS Contracts:

<b>Team Lead</b>	<b>MOBIS Contract</b>
Kadix Systems	GS-10F-0278R
<b>Team Member</b>	
Management Concepts, Inc.	GS-10F-0074R
RGII Technologies, Inc.	GS-10F-0194K
Robbins-Gioia, LLC	GS-23F-7102H

Federal Supply Schedule contract BPA's eliminate contracting and open market costs such as: the search for sources; the development of technical documents and solicitations; and the evaluation of bids and offers. Contractor Team Arrangements are permitted with the Federal Supply Schedule contractors in accordance with Federal Acquisition Regulation (FAR) Subpart 9.6.

This BPA will further decrease costs, reduce paperwork and save time by eliminating the need for repetitive, individual purchases from the Schedule contract. The end result is to create a purchasing mechanism for the Government that works better and costs less.

Signatures:

 \_\_\_\_\_  
Date: June 2, 2006

AGENCY \_\_\_\_\_  
(GSA)  
Name: Victor Angkico  
Title: Contracting Officer

\_\_\_\_\_ Date  
CONTRACTOR/ TEAM LEAD  
(Kadix Systems)  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_

GENERAL SERVICES ADMINISTRATION  
BLANKET PURCHASE AGREEMENT

Pursuant to the GSA Federal Supply Schedule (FSS) MOBIS contracts listed on Page 1 of this document and Federal Acquisition Regulation (FAR) 8.405-3, Blanket Purchase Agreements (BPAs), the Contractor agrees to the following terms of a BPA, established and administered by the GSA, and hereby made available for use by all DHS Components, agencies and organizations:

1. The following contract services/products can be ordered under this BPA. All orders placed against this BPA are subject to the terms and conditions of the basic GSA Multiple Award Schedule (MAS) contract in addition to the terms and conditions listed in this BPA.

ITEM (Special Item Number (SIN)/ Type of Service)

SPECIAL BPA DISCOUNT/PRICE

- 874-1, Consulting Services
- 874-2, Facilitation Services
- 874-3, Survey Services
- 874-4, Training Services
- 874-5, Support Products (If on MAS Contract)
- 874-6, Competitive Sourcing Support
- 874-7, Program Integration and Project Management

The awarded team discount of 11% shall apply to each of the FSS MOBIS Contracts listed on Page 1.

Specific Functional Areas within each SIN is listed in the Statement of Work (SOW), included as Attachment 1.

2. Delivery:

Place of Performance

Place of Performance to be determined at the time of individual task order(s).

Delivery Schedule/Dates

Delivery Schedule/ Dates to be determined at the time of individual task order(s).

3. This BPA does not obligate any funds.
4. The base period of performance under this BPA will be June 2, 2006 through June 1, 2007, with 4 option periods of 12 months each.
5. The requirements for invoicing and payment will be specified at the task order level.
6. The following is a list of changes to the Request for Quote (RFQ) (RFQ of 4/19/06 included as Attachment 2):
  - a. Orders will be placed against this BPA in accordance with *GSA Schedule BPA Ordering Procedures for Strategic Sourcing*, which is included in this award document as Attachment 3.
  - b. The *Strategic Sourcing Procurement Spend Data DID* referenced in the RFQ is replaced by *Procurement Price Reduction & Usage Tracking System (PPRUTS) Report*, which is included as Attachment 4 of this document.
  - c. The Statement of Work (Attachment 1) is revised with the following language:

“Offerors shall be made aware that although each Task Order will specify any travel and ODC requirements, the Government will not allow for the inclusion of any profit whatsoever on travel and ODCs, and will not allow any G&A or material handling charges based upon a percentage of cost, unless such a manner of allocating G&A is already permitted per the terms and conditions of the contractor’s underlying basic GSA MOBIS Schedule.”

During Oral Presentations, the Contractor stated that their MOBIS Contracts do not allow for percentage based G&A applications, therefore they will comply with the language of the original RFQ (i.e. not provide for any G&A or material handling charges based upon a percentage of cost).

7. Extent of Obligation: The Government is obligated only to the extent of authorized purchases actually placed against the Blanket Purchase Agreement (BPA).

8. Individuals Authorized to Place Orders:

The COMPONENT CONTRACTING OFFICER (CCO) is hereby authorized to place orders under this BPA. The CCO (defined as any appropriately warranted Contracting Officer within DHS or GSA) will function as an Ordering Officer in accordance with Attachment 4, *GSA Schedule BPA Ordering Procedures for Strategic Sourcing*, and Attachment 5, *Roles and Responsibilities*.

9. The BPA level CO/ACO for this procurement is Victor Angkico (see Attachment 5, *Roles and Responsibilities*):

Point of Contact

Victor Angkico, CO/ACO  
U.S. General Services Administration  
Management Services Center  
400 15<sup>th</sup> St SW  
Auburn, WA 98001  
Email Address: [victor.angkico@gsa.gov](mailto:victor.angkico@gsa.gov)  
Phone #: 253.931.7858  
Fax #: 253.931.7111

Alternate Point of Contact

Andrew Starling, Contract Specialist  
U.S. General Services Administration  
Management Services Center  
400 15<sup>th</sup> St SW  
Auburn, WA 98001  
Email Address: [andrew.starling@gsa.gov](mailto:andrew.starling@gsa.gov)  
Phone #: 253.931.7900  
Fax #: 253.931.7111

10. The BPA level Contracting Officer's Technical Representative (COTR) is Jane Hawn (see Attachment 5, *Roles and Responsibilities*):

Point of Contact

Jane M.K. Hawn  
Email Address: [Jane.Hawn@dhs.gov](mailto:Jane.Hawn@dhs.gov)  
Phone #: 202.205.5045

11. The contractor's Team Price Proposal and Team Technical Proposal, dated April 21, 2006, is incorporated by reference.

12. The following documents are incorporated in full text:

**Attachment 1: Statement of Work** (as set forth in Attachment 1 of the RFQ)

**Attachment 2: Request for Quote** (revision 4, dated April 19, 2006)

**Attachment 3: Procurement Price Reduction & Usage Tracking System (PPRUTS) Report** (replaces Attachment 3 of the RFQ)

**Attachment 4: GSA Schedule BPA Ordering Procedures for Strategic Sourcing**

**Attachment 5: Roles and Responsibilities**

**Attachment 6: Quality Assurance Surveillance Plan** (as set forth in Attachment 5 of the RFQ)

**Attachment 1****STATEMENT OF WORK****STATEMENT OF WORK FOR THE DEPARTMENT OF HOMELAND SECURITY STRATEGIC SOURCING PROGRAM MANAGEMENT INITIATIVE****A. GENERAL DESCRIPTION****DHS Strategic Sourcing Initiative**

In January 2006, the General Services Administration (GSA) formed a partnership with the Department of Homeland Security (DHS), Strategic Sourcing Acquisition Systems (SSAS) program office to support DHS/SSAS strategic sourcing initiatives. Currently, GSA and DHS are engaged in sourcing initiatives involving commodities such as office supplies, professional services such as Financial Management and Program Management (PM), and using e-procurement tools to improve source management and business communications.

In 2006, GSA and DHS performed a spend analysis for Program Management (PM) services acquired in Fiscal Year (FY) 2005. The analysis indicated DHS spent approximately \$275 million for PM services in FY '05. DHS acquired some of those PM services from contracts other than the GSA Multiple Award Schedule (MAS) 874 *Mission Oriented Business Integrated Services* (MOBIS). The Government estimates that the MOBIS related DHS PM services approximated \$100 M during FY05. This information is being provided for informational purposes only and does not limit the value of this BPA.

Among other program areas, GSA is providing direct project and acquisition support to DHS/SSAS. GSA is administering this sourcing initiative's acquisition process and will award and manage the subsequent Blanket Purchase Agreement (BPA) resulting from this sourcing initiative acquisition. During the life of this BPA, GSA retains Direct Purchase Authority and may, at a future date, provide additional project management and acquisition support to DHS.

DHS will have Direct Purchase Authority to use any and all BPAs resulting from this acquisition, issue Request for Quotes (RFQs) and award and manage Task Orders (TOs) under the BPA. The Component and agency program offices will work with DHS Contracting Officers (COs) to oversee TOs, appoint Contracting Officer's Representatives (CORs) and obligate program funds. This BPA is available to all DHS Components, agencies and organizations.

**Contractor Professional and Program Management Support Services**

The contractor (defined as the combined team lead plus team partners) shall provide Professional and PM support services and perform the effort required under the BPA on a Firm Fixed Price (FFP) and Labor Hour (LH) basis, depending upon the specific requirements of subsequent TOs to be issued under the BPA. The contractor shall perform the work in accordance with this RFQ and the basic contract, MAS 874, MOBIS Schedule under which the resulting BPA is placed.

For the purpose of this requirement, "program management" is delivering a project or projects from concept through completion using a team of experts whose focus is helping DHS meet its business oriented mission goals. Program management combines the ability and resources to define, plan, implement, and integrate every aspect of the comprehensive program.

Professional services includes PM services and program related services, detailed in this SOW, which may require specialized skills to perform and are also within the scope of the GSA MOBIS Schedule.

The DHS will be able to issue TOs against this BPA for Professional and PM support services from time of award for a base period of 12 months, with four option periods of 12 months each.

**Background**

In January 2003, the DHS became the Nation's 15th and newest Cabinet department, consolidating 22 agencies under one unified organization. The United States Department of Homeland Security (DHS) mission is to prevent terrorist attacks within the United States; reduce America's vulnerability to terrorism; and minimize damage from potential attacks and natural disasters

To meet these challenges, DHS requires Professional and PM support services, Department-wide, to perform the various PM-related tasks identified in Section D. These services include, but are not limited to, Enterprise and program planning, program integration and project management in many areas such as organizational planning, business process reengineering, knowledge and information management, communications, human resource management, acquisition and source management, logistics, among other PM areas and functions. Contractors may be tasked to gather information, assess program organizations, provide advice and written documents, and support every aspect of program planning, integration and management. DHS also requires PM services for strategic and tactical purposes that may arise from future National, organizational and business changes.

## **B. OBJECTIVE**

The overall objective of these requirements and subsequent TOs is to provide DHS with expert and experienced business oriented Professional and PM support services. The BPA serves as an umbrella contractual Agreement to provide PM support to the Department and its Components, Offices, directorates and agencies for reoccurring PM requirements. The individual TOs placed under the BPA will allow DHS to plan, assess, design, develop, implement, and manage DHS programs, projects and related change processes within DHS, at the Enterprise and local levels, as they relate to PM and oversight support.

The Department's objective for these requirements is to improve the performance, quality, timeliness and efficiency of DHS programs and the services provided by DHS. DHS anticipates the contractor shall help facilitate the Department's response to dynamic, evolutionary influences and mandates at the National and State levels, and enable DHS to continuously improve mission performance.

## **C. SCOPE**

The scope of this BPA encompasses a broad range of business oriented PM concepts, activities and deliverables. Scope is bound by the MOBIS Schedule which is for mission oriented, professional business support services; rather than for staff augmentation and technical operational support or Information Technology (IT) services (other than Project Management support).

Scope includes directly consulting with program offices, managing programs and managing the various projects and business functions within programs areas. Scope does not exclude other domains such as engineering or logistics but must involve consulting or managing the program, project, or functional business process.

At a minimum, scope includes the following items:

- Special Item Numbers (SINs) 874-1 through 874-4 and SINs 874-6 and 874-7 under the MOBIS Schedule
  - 874-1: Consulting Services
  - 874-2: Facilitation Services
  - 874-3: Survey Services
  - 874-4: Training Services
  - 874-6: Privatization Support Services and Documentation
  - 874-7: Program Integration and Project Management
- General knowledge areas of Program/Project management, such as scope and time management, cost management, quality and risk management, human resource management, communications management and acquisition management, among other possible management areas.
- Functional areas such as program / project management and administration, acquisition, business and enterprise planning, human resources, space management, security, training, and to a lesser degree, operation and maintenance of program tools or tracking systems.
- Project management life cycle phases, including Concept, Requirements Determination, Planning, Design, Development, Delivery and Closeout phases.

## **Section 508 Compliance Requirements**

Even though this requirement is for Professional services versus IT services, all electronic and information technology (EIT) provided by the contractor which Government employees will use as part of this BPA or a Task Order must meet the applicable accessibility standards at 36 CFR 1194, unless an agency exception to this requirement exists. 36 CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended, and is viewable at <http://www.section508.gov>.

Full details addressing or demonstrating compliance with Section 508 requirements shall be included as an attachment to any award made hereunder.

### **Homeland Security Presidential Directive (HSPD) 12**

Contractors shall comply with HSPD 12 “Policy for a Common Identification Standard for Federal Employees and Contractors”. The primary objectives of HSPD-12 are to establish a process to enhance security, increase Government efficiency, reduce identity fraud, and protect personal privacy by establishing a mandatory, Government-wide standard for secure and reliable forms of identification issued by the Federal Government to its employees and contractors. HSPD-12 requires contractors who have access to federally controlled facilities and Federal Information systems to comply with the Government’s personal identity verification process.

### **D. GENERAL REQUIREMENTS**

Section D.1 describes high-level management tasks the contractor shall perform throughout the life of this BPA. As a result of this BPA, the Government will solicit quotes and provide specific requirements in written Task Order Request for Quotes. For each TO, DHS will address specific background information, scope, tasks, requirements, deliverables, schedules, places and periods of performance, and funding ceilings. Task orders will also address security, travel, technical or environmental requirements as applicable.

The contractor shall apply a *customer-driven* approach to managing the BPA and TOs (i.e., through appropriate business and contractual methods, the customer’s satisfaction becomes the focus of all efforts). The contractor’s *customer-driven* management approach shall incorporate quality management defined by the customer’s total satisfaction; and strive to create and maintain an environment of open communications, teamwork and commitment.

The contractor shall provide all necessary personnel, administrative, financial, and managerial resources necessary to manage the TOs under this BPA. The contractor shall use proven methodologies that assure all activities and deliverables are identified, documented, and tracked so that the contractor’s performance can be continuously evaluated and monitored for timeliness and quality service.

The contractor shall provide effective, efficient, and responsive PM support. The contractor shall institute and maintain a management process that shall be responsible for managing the BPA, individual TOs, and overseeing all contractor personnel and financial resources utilized in performing the BPA and TOs. The contractor’s Program Manager and Project Managers must be proactive and responsive to managing contractor resources and meeting DHS requirements.

The contractor shall post and maintain BPA contract information on its company Web site. The contractor shall update the Web site information periodically, when applicable, to enable DHS users to access pertinent contract and ordering information.

Current GSA-DHS communications and implementation planning includes GSA hosting BPA and sourcing initiative information (e.g., labor categories, awarded minimum discount, labor rates, and ordering procedures) on the *GSA Advantage* Web site with a future *DHS Advantage* link. Therefore, the contractor shall support the e-procurement tools data requirements which are built into the Schedules Input Program (SIP) and standard electronic data interchange (EDI) transaction fields. Other GSA-DHS sourcing initiatives will use those data requirements to post BPA information. Using SIP and EDI are the only two ways of submitting data into *GSA Advantage*.

As a general guide, the contractor shall ensure that all support is compliant with applicable Federal regulations and guidelines. At the TO level, DHS will provide specific compliance requirements regarding DHS regulations, policies, procedures, and security requirements.

The contractor shall be required to perform the following activities under the basic BPA:

- Attend a post-award kickoff meeting

The contractor shall participate in a post-award kickoff and introduction meeting with DHS representatives within 2 weeks after BPA award in the Washington DC area. Each contractor team will be required to provide a 30 minute presentation

introducing its team members to DHS and to give a brief synopsis of the teams' capabilities. The exact time and location will be determined at time of BPA award. This meeting will be at no charge to the Government.

- Monthly Status Reporting (MSR) (For All Open Task Orders)

Monthly Status reports will be required to be submitted to the CO/COR by the contractor that briefly summarizes each open task order placed against the BPA, which shall include the following minimum information:

- a. Team Lead Contractor Name and BPA Number
- b. Listing of each Open Task Order
- c. Price and Period of Performance of each Task Order
- d. General Description and Scope of the Task Order
- e. Progress on complying with Small Business Utilization BPA goals
- f. Name and Contact Information of the DHS Customer
- g. Any major issues and problems
- h. Strategic Sourcing Procurement Spend Data information required by the attached DID

At any time, should the contractor encounter any technical, financial, personnel, or general managerial problems throughout the BPA period of performance, the contractor shall immediately contact the COR and CO.

Any costs associated for generating the BPA level MSRs are considered to be included in the loaded labor rates utilized at the Task Order level. No separate Task Orders or additional funding will be provided for generation and delivery of the required MSRs.

In the event the contractor does not have any open Task Orders, the MSRs are not required to be submitted.

Although TOs will specify specific requirements, the contractor in addition to post-award meetings and status reporting at the task order level, may be required to also:

- Develop and maintain a Project Management Plan (PMP)

The contractor may be tasked to prepare PMPs for accomplishing the tasks required by TOs. The PMPs shall be commensurate with project size and scope.

The contractor shall use Microsoft Project, or an agreed upon tool, and apply sound management principles [e.g., Program Management Institute's guidelines and the Project Management Body of Knowledge Guide (PMBOK®)].

The contractor may be tasked to submit an initial draft PMP within a specified amount of days after receiving a TO award from the CO. The Government will and the contractor may recommend project milestones and propose times for formal Government review and acceptance of deliverables. All such recommendations shall be subject to approval by the Government (i.e., CO or designated COR).

The contractor may be tasked to develop and execute PMPs that must be integrated or coordinated with other agencies' project plans; and integrate change control and coordinate changes throughout the life cycle of the project.

- Participate in In-Progress Reviews (IPRs)

The contractor's Program and Project Managers may be tasked to participate in In-Progress Reviews and periodically report, as required by the specific TO, on the progress and financial status of their respective TOs. The IPR process includes contractor participation in Task Order Close Out briefings.

- Use Value Engineering

The contractor shall employ value engineering methods [e.g., earned value management (EVM)] while managing TOs. While the Government reserves the right of final approval, a joint determination will be made by the Government and contractor as to when EVM will be applicable or beneficial to the Government.

**D.1 PROFESSIONAL SERVICES AND PROGRAM MANAGEMENT SUPPORT**

Contractor support shall include, but not be limited to, consulting, facilitating, establishing and operating a DHS program/project management function, assisting DHS in implementing various programs and projects, supporting management oversight of these initiatives and establishing processes and procedures for effectively planning, initiating and managing major initiatives at the Department, Component or agency levels and providing program related Professional services as described in this section. Support for management oversight also includes using automated databases or other systems that allow management to track the status of program initiatives.

Providing PM services and advice requires the contractor to be capable of actually performing the function, providing guidance, and assisting DHS program office personnel in performing the function. The contractor could be tasked to perform the functions listed below on a variety of business oriented programs; and may include a small amount of effort crossing into other domain areas, limited to PM Support, if DHS requires project management personnel (e.g., engineering and logistics PM support). The Government anticipates other domain-specific programs/project in engineering and logistics, for examples, will have PM support as an integral part of the project and have the domain specific technical work carried out via other DHS Strategic Sourcing contracts outside of this BPA.

Below is a list of key functions which the contractor must have technical capability to consult, facilitate, perform and assist with, within this PM requirement. The list is not intended to be all-inclusive but provides some scope of technical expertise required.

- Strategic & Tactical Planning/Alignment
- Program Assessments
- Program Tracking & Guidance
- Internal & External Oversight & Reporting
- Program Planning
- Communication Planning
- Quality Management Support
- Risk Management Support
- Program Review, Oversight & Reporting
- Acquisition PM Support
- Logistics Support
- Enterprise Architecture
- Transitional/Change Management
- Inventory Management
- Human Resource Management
- Contingency Planning
- Workflow Management
- Technology Research & Technical Feasibility
- Management Controls & Sustainment
- Business Assurance Services
- Privatization (“A-76”) Support Services
- Studies & Analyses
- Productivity
- Resolution of Program Issues
- Record Management and Maintenance
- Resource Requirements
- Real Property Management/Space Planning
- Security, COOP, and Safety Planning
- Government Cost Estimates
- Change Control Plans
- Project Team Facilitation & Participation
- Collaboration/Coordination



The following sections provide additional information regarding these functions:

**D.1.1 Strategic & Tactical Planning/Alignment shall involve, but not be limited to:**

- Aligning strategic and tactical plans to achieve optimum interagency efficiency, performance and communications between DHS's stakeholders, customers, employees, and all contractor personnel associated with a program.
- Aligning strategic and tactical plans with Presidential directives, Congressional legislation and other Federal mandates.
- Developing metrics and performance management plans to implement alignment and strategic plans.
- Developing scorecards and dashboards to provide "at-a-glance" information about business performance across the enterprise, showing visually intuitive snapshots of strategic financial and operational data.
- Developing PM processes, policies, procedures and governance/approval structures.
- Developing and executing PMPs that must be integrated or coordinated with other agencies' project plans; and integrating change control and coordinating changes throughout the life cycle of the project.

**D.1.2 Program Assessments**

The contractor shall provide program assessments, guidance or assistance to program office personnel in performing the function. The types of assessment activities anticipated are, but are not limited to:

- Understanding, assisting with and using the Program Assessment Rating Tool (PART)
- Technical studies and analysis
- Applicability/impact of laws, regulations and policies.
- Processing action items, position papers, studies and reports

**D.1.3 Program Tracking & Guidance**

The contractor shall provide program tracking, guidance or assistance to program office personnel in performing the function. The types of tracking activities anticipated are, but not limited to, the following:

- Program metrics
- Timeline and milestones
- Action item indexing and tracking

**D.1.4 Supporting Internal and External Reporting and Oversight Requirements shall involve, but not be limited to:**

- Reviewing inquiries, providing input, and preparing responses as requested to support all DHS, Congressional, OMB and other outside organization reporting requirements and inquiries.
- Understanding and assisting DHS compliance with the Government Performance Results Act (GPRA) for improved internal management, service quality and performance measurement.
- Understanding and assisting DHS compliance with the Information Technical Management Reform Act and the Clinger-Cohen Act which mandates performance-based management principles using an Enterprise Architecture methodology.
- Preparing presentations, briefings, point papers, Letter of Findings, alternative recommendations, and spreadsheet analysis of program or financial data for briefings to DHS management or outside organizations.

**D.1.5 Program Planning Support**

When planning program/project activities, the contractor must be able to support recommendations and plans with sound data and information, enabling the agency to make sound business decisions regarding program planning. Program planning support involves, but is not limited to, the following:

- Meet with or facilitate DHS program planning teams to identify requirements
- Prepare Implementation Plans and project schedules
- Work through scope definition, planning and scope verification
- Work through project initiation and identify project activities and deliverables
- Identify interactivity dependencies, and estimate activity durations
- Developing Cost/Benefit models and analysis, Return on Investment calculation
- Monitor or control changes to project scope and schedules, including using value engineering methods and management systems

**D.1.6 Communications Management Support shall involve, but not be limited to:**

- Determining the information and communication needs of the stakeholders; and ensuring timely and appropriate generation, collection, dissemination, storage and disposition of project information.
- To ensure the flow of accurate and integrated communications to other DHS organizations, senior managers, stakeholders, and industry suppliers the contractor may be tasked to perform the following:
  - Prepare Communication Plans
  - Communicate performance measurements and reporting activities
  - Provide administrative closure support that includes generating, gathering and disseminating information to formalize phase or project completion

**D.1.7 Quality Management Support**

At the outset of each TO, the contractor shall define quality issues with DHS program/project managers and stakeholders. The primary purpose of quality management (QM) is to confirm that the contractor identifies customer requirements and expectations, presents accurate information in a methodical way that ensures successfully completing each TO, and ensures proper tracking of all documents and records. Quality assurance and control processes are critical to maintaining accuracy and accountability of contractor-provided services and initializing, performing and closing TOs. Quality Management support shall involve, but is not limited to the following:

- Providing QM Plans
- QM support and oversight
- Using a well structured methodology for developing program-related documents

- Plan, measure and provide quality assurance and control information to the agency or program office, including quality assurance surveillance plans

**D.1.8 Risk Management Support shall involve, but not be limited to:**

- The contractor shall have an established and practiced risk management process that represents the firm's approach to risk management. The contractor's Program Manager and Task Order Project Managers shall be responsible for initiating or leading the risk management process. The contractor shall ensure the CO, COR, Technical Point of Contacts (TPOCs) and key stakeholders, including the contractor's key personnel, are aware of identified risks, when risks may occur during the life cycle of the project, their likely affects, and the response strategy to mitigate risk.
- Threat and Vulnerability assessments
- The contractor may be tasked to provide the following risk management support:
  - Provide Risk Management Plans
  - Apply tools and techniques to identify program risks
  - Prepare and implement risk response strategies
  - Identify and analyze risks, prioritize risk events, and present risk information in narrative, qualitative or quantitative formats
  - Perform risk monitoring and controls; and evaluating their effectiveness throughout the project life cycle

**D.1.9 Program Review, Oversight, and Reporting Support shall involve, but not be limited to:**

The contractor shall work with and assist Government personnel to help ensure that projects are completed within approved budgets. The Government acknowledges that changes to projects' schedules and scope can significantly impact cost; however, the Government expects the contractor to provide the following PM support:

- Resource planning, cost estimating, program budgeting and cost control
- Determine resource and quantity requirements
- Develop estimates of the costs of the resources needed to complete project activities
- Provide advice on ways to control changes to the project budget

**D.1.10 Acquisition Program Management Support**

The contractor shall provide a full range of acquisition program management support services to DHS staff and Program Managers. The contractor shall support DHS in achieving acquisition program cost, schedule, and performance goals and compliance with acquisition requirements such as those identified in DHS Management Directive (MD) #1400. Acquisition PM support includes, but is not limited to, the following:

- Preparing and implementing templates, models, guides and training
- Developing and maintaining databases and executive reporting systems
- Developing and implementing program documents, plans, and performance measures
- Assisting in program / project financial management processes
- Providing training and facilitation
- Turnover and transition to a follow-on contractor, if required

**1. Prepare and Implement Templates, Models, Guides and Training**

The contractor shall assist DHS in developing and delivering templates, preparation guides, and employee refresher workshop guides and materials for the MD #1400 program documents and acquisition processes listed below.

- Mission Needs Statement
- Acquisition Plan
- Configuration Management Plan
- Operational Requirements Document

- Acquisition Program Baseline
- Life Cycle Cost Estimate
- Cost-Benefit Analysis
- Program Management Plan
- Alternative Analysis
- Logistics Support Plan
- Test and Evaluation Plan
- Risk Management Plan
- Earned Value Management
- Government Cost Estimate (including pricing models)
- Source Selection Procedures
- Other related processes as need dictates

The contractor may conduct training programs for designated DHS personnel for certification in the necessary skills associated with program, acquisitions, and program financial management. The contractor may be required to conduct training in Leadership, Contract/Task Order Management, Performance Based Acquisition, Preparing Government Estimates, Source Selection and Evaluation Procedures, Earned Value Management, and other areas of the acquisition process as required.

The contractor may be required to be a facilitator and event coordinator for instructor-led training, training-related activities, and management seminars that include, but are not limited to, executive conferences and other work-related functions.

## **2. Develop and Maintain Program Databases, Tracking and Reporting Systems**

The contractor shall develop, implement, and maintain databases or reporting systems required by individual program offices that may be necessary for program or project management and tracking. The Government anticipates the contractor shall use MS Access or a commercial off-the-shelf (COTS) package; and the Government does not intend for the nature of this effort to be *Information Technology Service*.

The contractor shall propose, develop, implement, and maintain automated deliverables to assist DHS with managing deliverables and proposal responses received from industry vendors/bidders. The tracking systems shall provide a detailed listing of requests and proposals, dependencies, milestone dates, dues dates and other details as required.

The contractor shall develop and or maintain a process for tracking expenditures by contractors and provide monthly updates to program spending plans.

## **3. Develop, Implement, and Maintain Program Documents, Plans, and Performance Measures**

The contractor shall develop or assist DHS personnel with the activities described in items **a** through **d** below. The contractor shall research and identify Federal regulations, guidelines and standards, and designated industry standards; and propose the means for their implementation when such research is deemed necessary and requested in individual TOs.

a. Develop or assist DHS acquisition program managers with developing the following program documents:

- Mission Needs Statement
- Acquisition Plan
- Small Business Goals
- Acquisition Program Baseline
- Life Cycle Cost Estimate
- Cost-Benefit Analysis
- Program Management Plan
- Test and Evaluation Plan
- Pre-Negotiation Briefing Memorandums (PBMs)
- Logistics Support Plan
- Configuration Management Plan
- Operational Requirements Document
- Risk Management Plan
- Government Cost Estimates
- Other Documents as needed
- Alternative Analysis
- Quality Assurance Surveillance Plans

- b. Development, implementation and maintenance of standard operating procedures, business plans and performance measures.
- c. Assist with developing documents that define agency-specific program goals and objectives. These documents include, but are not limited to:
  - Updating Program/Project Management Plans, including Work Breakdown Structures (WBS), with specific tasks required, the entity responsible for each task, and task completion dates.
  - Assisting with or providing PM oversight and reporting to determine whether or not the program/project is on schedule, within budget, proceeding in conformance with approved plans and specifications, and is being implemented efficiently and effectively.
  - Coordinating with agency and DHS Federal Enterprise Architecture teams to develop and provide appropriate inputs to the agency or other appropriate organization on reporting standards.
  - Assisting with developing test plans that will define the types of testing (e.g. functional, performance, usability) and the test levels (e.g. unit, integration, field testing) to be performed during each program phase.
  - Support in responding to e-government initiatives.
- d. Assist program office staffs in the development, implementation and maintenance of required documents such as: requirements traceability matrix, integrated program schedule, program charter, system security plan, disaster recovery plan, award fee and performance incentive fee plans.

#### **4. Assist with Financial Processes Within the Program Office**

The contractor shall provide financial management PM support to directly assist the DHS program manager in budget preparation and management. This task includes, but is not limited to:

- a. Developing detailed financial plans including estimates, justification of assumptions, research, and analysis.
- b. Providing assistance for budget formulation, oversight to budget execution, and assisting with preparing related reports.
- c. Assist with OMB Exhibit 300 requirements.
- d. Portfolio management for budget goals and objectives.
- e. Assist with resolving funding execution discrepancies.
- f. Monitor the availability and use of program funds.
- g. Review financial documents and plans for impact on program objectives and requirements.
- h. Assist with preparing responses to internal and external communications regarding financial matters.
- i. Assist with financial and budget briefing preparations including spreadsheet and graphic presentations.
- j. Provide statistical analysis support as needed.

**D.1.11 Enterprise Architecture support includes, but is not limited to:**

- Describing business structures and processes that connect other business structures, and how those processes are executed.
- Describing and documenting the current and desired relationships among business and management processes and Information Technology.
- Ensuring compliance with DHS enterprise architecture processes and procedures, including analysis & compliance with the Technical Review Model (TRM) and preparing submissions to the DHS Investment Review Board (IRB) and Joint Requirements Council (JRC).

**D.1.12 Transition and Change Management support includes, but is not limited to:**

- Managing program assets and information during a period of restructuring
- Assisting with transitioning contractor support from one contractor to another
- Organizational Change Management

**D.1.13 Managing an Inventory Management-related project includes, but is not limited to:**

- Understanding the systems and processes that identify inventory requirements.
- Being able to set inventory targets and recommend replenishment techniques.
- Understanding and being able to report actual and projected inventory status.
- Providing consulting and project management assistance with the rollout of DHS information technology systems to track and maintain inventories.
- Providing consulting and PM assistance with using Radio Frequency Identifications to enhance DHS Inventory Management processes.

**D.1.14 Human Resource Management support includes, but is not limited to:**

- Being able to identify and recommend efficient and effective ways of using contractor and Government human resources within a program office for the purpose of supporting mission planning and execution.
- Understanding the staffing functions of an organization, including human resource planning, recruitment, selection, orientation, training, performance appraisal, compensation and safety.
- Understanding the management of the employment relationship, including contracts, collective bargaining and reward system.
- Providing consulting assistance regarding the implantation of DHS human capital policies and procedures as they evolve in the Department (e.g., MaxHR, pay banding).

**D.1.15 Contingency Planning includes, but is not limited to:**

- Developing a management plan that recommends or uses alternative strategies to ensure project success if specific risk events occur; this includes logistics and deployment options.
- Planning for the recovery of an IT system or business process.
- Understanding of DHS COOP plans and locations, and the ability to support DHS at times when such plans are enacted.

**D.1.16 Workflow Management support includes, but is not limited to:**

- Understanding the operational aspect of a work procedure; i.e., how tasks are structured, who performs them, their relative order and how they are synchronized.
- Understanding automated and non-automated systems that manage and coordinate the flow of work among program offices or DHS Components.
- Being able to track and prioritize information and work tasks as they are passed from one person, program office or Component to another.
- Ability to suggest improvements in workflow management to reduce the cycle times for DHS processes as the numerous DHS Components are integrated into unified systems.

**D.1.17 Technology Research and Feasibility of Technical Approach includes but is not limited to:**

- Performing various types of market research regarding technical concepts, tools or methodologies to enhance the effectiveness of program activities
- Advising Source Selection Evaluation Boards on the feasibility of a vendor's proposed technical approach

**D.1.18 Management Controls and Sustainment includes but is not limited to:**

- Assisting DHS Program Managers with determining efficient and effective methods of tracking various change requests
- Assisting acquisition program office personnel with managing and tracking change requests regarding solicitations, task order modifications, invoice discrepancies, etc.
- Recording and assessing change requests

**D.1.19 Business Assurance Services**

The contractor may be tasked to provide DHS with an independent evaluation, analysis, and assurance of business and program management requirements; the contractor shall provide, but are not limited to:

- Validating that stakeholder objectives are reflected in program and project requirements.
- Assessing program and project alignment with the Business Architecture(s).
- Defining and implementing a Governance process.
- Evaluating project and program portfolios to ensure cost, risk, and benefit mix is appropriate.
- Independently assessing Change Management plans and processes.
- Baseline current Business Architecture including business processes, applications, infrastructure, definitions, methodologies, and available systems.
- Evaluate/ prioritize dynamic Mission and Business transformation issues, conduct fit/ gap assessments and support definition of roles, responsibilities to support transformational requirements.
- Independently assess feasibility of transformation conceptual alternatives and design tradeoffs.
- Verify system designs are compliant with specified guidelines; for example DHS Enterprise Architecture, CONOPS, Systems and Security Engineering requirements, while assuring requirements are tailored to mission objectives and business requirements.
- Assess custom development versus purchasing applications software (including COTS/ GOTS long range planning).
- Measure and report progress on transformation objectives using defined metrics, reporting processes and anticipatory corrective actions (following specified standards such as ISO for example).
- Capture and leverage Lessons Learned as DHS defines systems specifications.
- Manage Configuration Management efforts through User Acceptance for security testing, delivery phase tasks, and conversion strategies.
- Support audit processes (planned and ad hoc), utilizing business assurance reporting and walkthrough guidelines.
- Conduct post-deployment performance measurement and root cause analysis to ensure user suitability requirements and production operational results tie-back to mission effectiveness and user community needs.

**D.1.20 Privatization Support Services**

The contractor shall provide advice, consultation and assistance supporting studies conducted under the guidelines of OMB Circular A-76, or other private/commercial activities or projects.

**D.2 SECURITY MANAGEMENT****D.2.1 General**

The contractor shall appoint one or more senior officials to act as the Corporate Security Officer(s) for this requirement. The individual shall interface with the Component's or agencies' Security Office through the COR or CO on all security matters, to include physical, personnel, and protection of all Government information and data accessed by the contractor.

As required to meet specific program requirements, and identified in individual TOs, the contractor may be required to hold or obtain a specific security clearance, including Confidential, Secret or Top Secret. The Government may also require contractor personnel to possess a Top Secret, Sensitive Compartmentalized Information (SCI) security clearance.

The Department CO or COR and the DHS Security Office shall have the right to inspect the procedures, methods, and facilities utilized by the contractor in complying with the security requirements under this BPA and its subsequent TOs. Should the COR determine that the contractor is not complying with the security requirements of a TO, the CO will inform the contractor in writing of the proper action to be taken to effect compliance with such requirements. The contractor shall be proactive in mitigating all non-compliance security issues by communicating security concerns to the COR and CO immediately upon perceiving even the possibility of a non-compliant security issue.

**D.2.2 Using Electronic Information Technology**

When sensitive Government information is processed on DHS telecommunications and automated information systems, the contractor agrees to provide for the administrative control of sensitive data being processed and to adhere to the procedures governing such data. Contractor personnel must have favorably adjudicated background investigations commensurate with the sensitivity level identified or defined in the TO.

Contractors who fail to comply with DHS security policy are subject to having their access to Department IT systems and facilities terminated, whether or not the failure results in criminal prosecution. Any person who improperly discloses sensitive information is subject to criminal and civil penalties and sanctions under a variety of laws (e.g., Privacy Act).

**D.2.3 Security Considerations**

The contractor shall adhere to Government standards and best practices with regard to security in general. DHS Components and agencies will address and define specific security requirements in individual TOs.

The contractor may work with procurement sensitive and Privacy Act material and information. Any DHS information made available or to which access is provided to the contractor, and is marked or shall be marked "Official Use Only," shall be used only for the purpose of carrying out the provisions of the TO and shall not be divulged or made known in any manner to any person except as may be necessary in performing the TO.

The contractor shall adhere to DHS security policies for using all applications, data bases and data integrity. Additionally, contractors must satisfy requirements to work with and safeguard Security Sensitive Information. All contractor personnel must understand and follow DHS and agency requirements, policies, and procedures for safeguarding Security Sensitive Information.

DHS shall have and exercise full control over granting, denying, withholding or terminating unescorted Government facility and sensitive Government information access for contractor personnel.

**D.2.4 Background Investigations**



Contractor personnel working under a TO (including applicants, temporaries, part-time and replacement personnel), needing access to sensitive information, shall undergo a *position sensitivity analysis* based on the duties each individual will perform on the TO. The results of the *position sensitivity analysis* shall identify the appropriate background investigation to be conducted. All background investigations will be processed through the Component's Security Office.

In accordance with each Component's security policies and security requirements specified in the TO, prospective contractor personnel may be required to submit security-related forms to the Security Office. The following list represents possible forms which contractor personnel may need to submit to the CO or COR:

- Standard Form 85P, "Questionnaire for Public Trust Positions"
- FD Form 258, "Fingerprint Card" (2 copies)
- Conditional Access to Sensitive But Unclassified Information Non-Disclosure Agreement
- Disclosure and Authorization Pertaining to Consumer Reports Pursuant to the Fair Credit Reporting Act

The DHS Component will provide the required forms and specific instructions on submission of forms at the time of TO award.

**Attachment 2****REQUEST FOR QUOTE**

Date: April 11, 2006

To: Select GSA MOBIS Federal Supply Schedule Holders

From: GSA Federal Supply Service Management Service Center

Subject: Request for Quote: GS10F-06-LP-B-0002 – GSA Performance Work Statement (PWS) Multiple Award Blanket Purchase Agreement (BPA) in support of the DHS Strategic Sourcing Initiative for business oriented Professional and Program Management (PM) Support Services.

The BPAs will be awarded for a base period of 12 months, with 4 option periods of 12 months each. Work may be performed Worldwide. There is no minimum guarantee of work ordered against any awarded BPA.

GSA is issuing this Request for Quote (RFQ) to solicit MOBIS Federal Supply Schedule holders for the purpose of entering into multiple Blanket Purchase Agreements. This RFQ is being solicited on an unrestricted basis, utilizing full and open competition. The proposed team lead and all team members must possess, at time of RFQ closing, an existing GSA MOBIS Schedule contract with a period of performance, including options, which shall not expire during the 5 year period of this BPA. Approval and inclusion of the GSA Evergreen Clause (regardless of whether the options have been exercised yet or prices for the option periods have been established) in a contractor's basic GSA MOBIS contract is sufficient evidence to comply with this requirement. Proposed subcontractors need not possess a GSA Schedule contract, although must work under the prices, SINs, scope, and terms and conditions of the GSA Schedule held by the Prime contractor.

If you are interested in competing for this effort, you may participate by submitting your proposal in accordance with the procedures in this RFQ.

Offerors must demonstrate their capability to satisfy the entire breath and scope of the attached Statement of Work (SOW), Attachment (1). Teaming Agreements, especially with small business MOBIS Schedule contractors serving as the Contractor Team Lead, are highly encouraged. In order to promote small business team leadership, the Government intends to award a minimum of 3 BPAs to Contractor Teams led by small businesses MOBIS Schedule holders. Offerors will be required to submit proposed small business utilization goals under this BPA which will be closely monitored during BPA performance. The Government will award and assign a single BPA number to the each designated Contractor Team.

**BACKGROUND:**

The United States Department of Homeland Security (DHS) mission is to prevent terrorist attacks within the United States; reduce America's vulnerability to terrorism; and minimize damage from potential attacks and natural disasters

The United States General Services Administration (GSA) mission is to "help Federal agencies better serve the public by offering, at best value, superior workplaces, expert solutions, acquisition services and management policies."

The work reflected here is a collaborative effort between DHS and GSA, conducted under the DHS Strategic Sourcing Program, with GSA serving as the Contracting Office for the BPAs. The goal of this procurement is to better leverage DHS schedule spend with GSA for Professional and PM Support Services.

In 2006, GSA and DHS performed a spend analysis for Program Management (PM) services acquired in Fiscal Year (FY) 2005. The analysis indicated DHS spent approximately \$275 million for PM services in FY '05. DHS acquired some of those PM services from contracts other than the GSA Multiple Award Schedule (MAS) 874 *Mission Oriented Business Integrated Services* (MOBIS). The Government estimates that the MOBIS related DHS PM services approximated \$100 M during FY05. This information is being provided for informational purposes only and does not limit the value of this BPA.

## **FORMAT FOR WRITTEN TECHNICAL AND ORAL PROPOSALS**

The due date for submittal of the Written Technical and Price Proposals **(an original, 8 hardcopies, and one electronic copy on a CD ROM in Microsoft Compatible format)** will be **April 21, 2006 2:00 PM EDT**, to the FEDSIM POC, Mr. Talbot Dredge at the following address: **FEDSIM, Attn: Mr. Talbot Dredge, Suite 200, 6354 Walker Lane, Alexandria, VA, 22310**. An emailed copy of the proposal shall additionally be provided the Contracting Officer at [victor.angkico@gsa.gov](mailto:victor.angkico@gsa.gov) by the specified due date/time, although offerors shall be made aware this does not replace the requirement for the hardcopies and CD ROM submission by the required due date/date to the above specified address. Oral Proposals will be required for this solicitation. All hardcopies will be retained by the technical evaluation team members. It is anticipated that Oral Proposals will take place beginning on the morning or afternoon (depending upon the number of offerors) of April 24, 2006 at the GSA FEDSIM Office, 6354 Walker Lane, Alexandria , VA 22310.

### 400 WRITTEN TECHNICAL PROPOSAL

The written Technical Proposal shall be composed of the following:

- (1) Teaming Agreements between Team Lead and all Team Members
- (2) Relevant Past Performance Descriptions and Questionnaire Forms
- (3) Key Personnel Resumes
- (4) Small Business Subcontractor Agreements (if any)
- (5) Hard Copies of Oral Presentation Slides

#### **1. Teaming Agreements between Team Lead and all Team Members (no page limit)**

In the event a Contractor Teaming Arrangement is being proposed, the proposal shall be required to include a signed copy (by authorized representatives of each Team Member), of the Contracting Teaming Agreement(s) (CTA). The CTA(s) can be in whatever form and/or format the team collectively decides is most appropriate. At a minimum, the CTA(s) shall clearly state the name, MOBIS Schedule number, period of performance including options, and POC information of the proposed Team Lead; and the names, MOBIS Schedule number, period of performance including options, and POC information of each proposed Team Member. The CTA(s) shall at a minimum indicate the business size of the Team Lead and Team Members, and also clearly delineate the roles and responsibilities (including SINS and scope of work each team participant is proposed to satisfy) of the GSA MOBIS Schedule Team Lead and each Team Member. The CTA(s) shall also fully describe the manner in which the Contractor Team will decide upon the manner of adding or deleting Team Members, and the adding, deleting, and utilization of subcontractors (including any proposed small business goals) during BPA performance.

#### **2. Relevant Past Performance Descriptions (2 page maximum for each listed project) and Questionnaire Forms (no page limit)**

For each proposed Team Member, provide a description of two Professional and/or PM Support Services projects, related to the types of work specified in the attached SOW, which that particular Team Member has completed over the last three years. Past Performance for long-term on-going projects are acceptable provided that segregated portions of those projects have been completed within the last 3 years and the offerors performance can be properly assessed and rated. Past Performance references must be at the corporate/company level. This can include a mix of both Federal Government and Private Sector projects. At least one of the past performance projects provided by the proposed Team Lead must provide evidence of coordinating and managing multiple team members, preferably under a formal Contractor Teaming Agreement (CTA) involving the GSA MAS program. Offeror shall include a description of the project, project title, contract number, period of performance, contract amount, client identification including agency or company name, contracting and technical reviewing official, e-mail, and telephone number of reference.

Offeror's are additionally required to send a Past Performance Questionnaire form (Attachment 2) to each of the past performance references provided above. These customers must complete the surveys and either email or fax the survey to the Contracting Officer at: [victor.angkico@gsa.gov](mailto:victor.angkico@gsa.gov) or fax: 253-931-7111 no later than 4:00 PM EDT on Friday, April 28, 2006. Offerors are responsible for coordinating with their referenced customers to ensure that completed past performance questionnaires are submitted to the Contracting Officer no later than the above referenced date/time.

The Government will consider the relevance of past performance information obtained in relation to the scope of this procurement. Past Performance, either positive or negative, which is considered by the Government to be more closely related to the scope of this effort will be given additional weight in the evaluation process.

Note that Government Evaluators may avail themselves of various federal, state, and local past performance databases including, but not limited to, Past Performance Information Retrieval System (PPIRS), Contractor Performance Assessment Reporting System (CPARS), and DLA's Mechanization of Contract Administration Services (MOCAS) system. Government evaluators reserve the right to contact any of the provided references to solicit additional information or clarification regarding the offeror's past performance. The Contracting Officer and/or technical evaluators may research Offeror performance on any federal, state, local, and commercial contract performance of the Offeror that is known to the Contracting Officer, but not included as a reference on a submitted proposal. Additionally, personal experience and evaluator knowledge of Offeror performance may be utilized by the technical evaluation team members as long as there's sufficient documentation which can support their position.

Note, past performance information for proposed subcontractors are not required and will not be evaluated.

#### **401 Key Project Personnel Resumes (2 page maximum per resume)**

The offeror shall assign sufficient experienced personnel who are qualified in the conduct of similar operations (ie. Providing Professional and/or PM Support Services) and who have a proven background and level of experience for the work required. Key Project Personnel include only those persons who will be assigned to this task order and who will be the actual personnel responsible for management and/or performance in the event the proposal results in award. The offeror shall provide resumes for Key Project Personnel which the offeror deems essential to contract performance. At a minimum, the contractor shall submit resumes for their proposed Project/Program Manager and Alternate Project/Program Manager. The Government requires that only a single Project/Program manager be assigned for the entire Contractor Team. This individual would be the single point of contact for the Government to solicit Task Orders and to contact in the event of issues, questions, or concerns regarding performance under this BPA. In addition, resumes shall include the employee's education (including name of school, length of time and degree/certificate), and specific experiences that are directly related to the requirements of this RFQ. Resumes shall be in chronological order with the latest dates of employment first and will identify the company or agency, period of employment, title and job description of the individual, and level of responsibility.

All key personnel proposed shall be available to begin work immediately at BPA award.

Substitution of key personnel during BPA performance must meet the qualifications of the original key personnel and must be approved in advance by the Contracting Officer.

#### **4. Small Business Subcontractor Agreements (if any) (No page limit)**

The purpose of the Subcontractor Agreements (if the team decides to establish such agreements) are to allow the proposed Team to demonstrate to the Government, for evaluation credit, its further commitment to the utilization of small business subcontractors under this BPA. These Subcontractor Agreements may be incorporated into the CTA itself, or may also be provided as individual Agreements. It will be up to the team to decide the most appropriate format/manner of developing and approving any Subcontractor Agreements. In the event the Contractor Team has entered into agreements with specific small business subcontractors to perform work under this BPA, a copy of this agreement must be submitted with its proposal submission. The subcontractor agreement should clearly detail the subcontractor's name, the size of the subcontractor firm, POC, and the type and extent of work to be performed by the proposed subcontractor.

The NAICS and size standard applicable to small business subcontractors for small business credit will be 541611 “Administrative Management and General Management Consulting Services” with a size standard of \$6.5 M.

**5. Hard Copies of Oral Presentation Slides (no maximum, subject to 60 minute presentation limitation)**

There is no limit to the number of slides that can be presented during the oral proposal presentation, but only those slides actually presented and discussed **during the 60 minute presentation limit** will be considered for evaluation.

**B. ORAL PROPOSAL**

**All offeror’s are required to present an oral proposal.** At least one representative (no more than two) of each proposed Team Partner, the proposed Team Project Manager and Alternate Project Manager, and any other personnel determined “key” by the Offeror shall be in attendance at the presentation and the subsequent Q&A session. The Team Lead may bring upto 4 representatives (which would include the proposed Team Project Manager and Alternate Program Manager) to the oral presentation. No more than three additional corporate representatives of the Offeror’s Combined Team may also attend. The three additional people (e.g., CEO’s, company presidents, or contract representatives) from the Offeror’s Team may attend, but will not be allowed to participate in the presentation. Any of the three additional personnel may make a brief introduction which will not be evaluated, but will count towards the Offeror’s allotted time. For the remainder of the presentation, only key personnel and the Team Partner representatives shall be able to present.

NO professional presenters will be allowed. Oral Presentation content shall be structured to follow the guidelines listed below. Information shall be prepared in such a manner as to enable source selection personnel to make a thorough and complete evaluation and arrive at a sound determination as to the quality and relevance of your past performance experience and whether or not the services proposed and described will satisfy the requirements of the Government. To facilitate the evaluation, the oral proposal should be sufficiently detailed and complete to clearly demonstrate that the prospective Offeror has a thorough understanding of the requirements and the technical problems/challenges inherent therein. Data previously submitted will not be considered; therefore, such data should not be relied upon nor incorporated in the oral presentation by reference. Statements that the prospective Offeror understands and can or will comply with all specifications, statements paraphrasing the specifications or parts thereof, and phrases such as “standard procedures will be employed” or “well known techniques will be used,” etc., will be considered insufficient. Repeated inquiries regarding the technical requirements may be considered as an indication that the Offeror does not comprehend the requirements for accomplishing the work.

**402 Oral Presentation**

During the Oral Presentation, the Offeror shall address the following items and be organized in the following order:

- Item 1 – Management Approach:
  - 1.1: Managing the Project Team, proposed Key Personnel, and Teaming Agreements
  - 1.2: Integrating and using small business (team members and proposed subcontractors), with an overall estimate/goal of the percentage of small business utilization
  - 1.3: Management of task orders. Includes planning, reporting, tracking and execution, managing personnel change and staffing task orders
  - 1.4: Quality Control processes and methodologies
  - 1.5: Risk Management processes and methodologies

- Item 2 – Technical Understanding/Approach:

The Offeror’s overall understanding of the scope of work and its approach in providing support for all the SOW requirements in the RFQ.

- Item 3 – Past Performance

The relevance and details of the Past Performance projects for each Team Member in which completed surveys/questionnaires were requested.

**ITEM 1: MANAGEMENT APPROACH**

The Offeror shall identify the management approach, techniques, and tools that the Offeror will use to accomplish the objectives and requirements identified in this RFQ. The Offeror's management approach shall clearly describe the following:

- a) The Offeror's approach to managing the Project Team, teaming agreement details and mechanics (including adding and deleting team members), lines of authority and communication, key personnel proposed and their qualifications, and Project Team problem resolution methodologies.
- b) How the Offeror will integrate and use small business within the Offeror's overall BPA/task order/project management plan. The Offeror shall describe how decisions will be made for assigning small business (teaming partners and subcontractors) to task orders and functional elements; and provide any proposed small business utilization goals under this BPA and how it intends to ensure compliance to these goals. Offeror shall discuss any small business subcontracting agreements entered into.
- c) The Offeror's capability and approach to staffing multiple task orders. The Offeror shall also discuss what action the Offeror will take if the Offeror has a labor supply problem. The Offeror shall also discuss how project management will be planned and executed at the task order level. The Offeror's approach to personnel change management, including key personnel, such that the replacement is at least as well qualified as the initially proposed contractor personnel;
- d) The Offeror's approach to quality control, including the Offeror's processes and methodologies for 1) providing quality project documentation; 2) providing project status and cost reporting; and 3) program measurements;
- e) The Offeror's approach to risk management, including the processes and methodologies for identifying, mitigating and monitoring risks, including Organizational Conflict of Interest (OCI) risks.

**ITEM 2: TECHNICAL UNDERSTANDING/APPROACH**

The Offeror's technical understanding and approach shall clearly describe the following:

- The Offeror's overall understanding of the DHS Organization and its overall understanding of the scope and requirements of the SOW.
- The Offeror's approach to providing support under all of the MOBIS SINS and scope of work identified in the RFQ (as listed in the SOW chart in Paragraph D.1, page 6). Given the depth and breath of this requirement, and the reality that many of the specific requirements under the listed functions can only be defined at the task order level, Offerors are NOT being asked to respond to how it actually intends to perform each and every listed function. Response to this requirement shall clearly demonstrate the proposed Team's ability to provide support coverage for all the required functions/SINS, and its approach in allocating and assigning work to team members and/or subcontractors at the task order level. The Offeror shall describe in detail the role of each team member and which SINS and scope of work items each team member is being proposed to satisfy.

**ITEM 3: PAST PERFORMANCE**

During the Oral Presentation the Offeror's Key Personnel and Team Partner representatives shall, at a minimum, address the following topics relative to the offeror's Past Performance references provided in the written portion of the Technical Proposal:

- A brief description of the Past Performance Projects
- The relevance (ie. Similarities and differences) of each of the referenced projects and this requirement
- Problems that occurred during performance and how these were managed/mitigated

**403 Limitations on Oral Presentation**

- a) The oral proposal shall consist of the offeror's presentation of the topics listed above, followed by a Question & Answer (Q&A) session regarding the presented topics, the written submissions, and information that may have been gathered by the Government technical evaluators as a result of discussions with offerors' past performance references. The purpose of the oral presentation is to allow the offeror to demonstrate to the Government relevant past performance, a clear technical understanding of the DHS organization and environment, and the work that will be performed to satisfy the Government's requirements under the resulting BPA. The oral presentation shall not be simply a reading of the prepared slides. Do NOT mention price in any way during the oral presentation.
- b) **Schedule of Oral Presentation**: Oral proposals will be presented by the offerors beginning on Tuesday April 25, 2006, at GSA's FEDSIM office, 6354 Walker Lane, Alexandria, VA. The order in which offerors will make their presentations will be determined via a lottery drawing by the Contracting Officer after receipt of the emailed offer and confirmation of receipt of the written information. The Contracting Officer will notify offerors of the scheduled date and time of their presentation **NLT 2:00 PM PDT (5:00 PM EDT) on the day of closing of the RFQ**. Once notified of their scheduled presentation date and time, offeror's shall complete their presentations on the date and time assigned. **Offerors shall be made aware that based upon the expected number of proposals that may be received, the first oral presentation will be scheduled on the morning of Tuesday, April 25, 2006, and the conducting of all oral presentations may last through Friday, May 12, 2006. All offerors must be prepared to present their oral presentations on the date/time assigned. Offeror requests to reschedule will not be entertained. The Government reserves the right to reschedule any offeror's oral presentation at its sole discretion.**
- c) **Length**: The Offeror will be given 15 minutes for set-up. After Government opening remarks and introductions of Government personnel, the Offeror will be given 60 minutes to present. This includes any introductions of Offeror personnel. The presentation will be stopped precisely after 60 minutes. After completing the presentation, the Government will caucus to formulate questions regarding the written submission, oral presentation, and any past performance reference checks. The Government and Offeror will then address any questions or clarifications posed by the Contracting Officer or the TEB Chairman. The Q&A session is expected to last about one hour. If necessary, the Offeror may briefly caucus to coordinate responses to specific questions or clarifications. The total presentation, caucus, and Q&A session is expected to last about 3.5 hours. If required, the Government reserves the right to hold discussions with the Offeror during the Q&A discussion session.
- d) **Limitation of Presentation Media**: Only those presentation slides for which copies were provided with the original offer shall be used in the oral presentation. NO deviation from the originally submitted copies will be allowed. Presentation media is limited to computer-based graphics of the Offeror's choice or normal viewgraph slides displayed using an appropriate projector. Unobtrusive company logos or names may be inserted in any or all slides. Slides should be sequentially numbered in the lower right hand corner and shall utilize a font size that will clearly readable from the back of a normal sized conference room. Except for the screen provided in the conference room, the Government will not provide presentation equipment. The Offeror shall be responsible for any equipment necessary for the proper viewing of the presentation. Although the Offeror is not limited by a maximum number of slides, only those slides presented and discussed during the allotted 60 minute oral presentation will be evaluated. Information contained on slides, but not presented and discussed during the oral presentation, will not be evaluated.
- e) NO price or cost information shall be included in the presentation narrative or supporting slides/screens.
- f) The Government reserves the right to videotape or audio record all oral presentations and any subsequent Q&A discussion. **The offeror is not permitted to record its oral presentation.**
- g) All information provided during the oral presentation, including clarification and discussion responses, will become part of the offeror's official proposal and will be incorporated by reference into any resulting contract award.

**FORMAT FOR PRICE PROPOSAL**

The price proposal shall be a separate volume from the written portion of the technical proposal. There is no page limitation for the price proposal. It shall be submitted at the same time as the technical proposal.

For this BPA, the Government is only asking for a single, minimum “team” discount rate (proposed as a percentage) that shall apply to all labor categories/rates and support products contained in each Team Member’s GSA MOBIS Schedule.

Further discounts can and should be provided at the Task Order level.

**Offerors shall be made aware that although each Task Order will specify any travel and ODC requirements, the Government will not allow for the inclusion of any profit whatsoever on travel and ODCs, and will not allow any G&A or material handling charges based upon a percentage of cost, regardless of whether an Offeror’s GSA MOBIS schedule may state otherwise. The Offeror shall state in its pricing proposal, its understanding and compliance to this policy.**

## **EVALUATION OF PROPOSALS**

Each Offeror’s proposal shall be evaluated according to the factors shown below. The factors are listed in descending order of importance. Management Approach is the most important factor and is additionally slightly more important than Price. Price is slightly more important than Technical Understanding/Approach. Technical Understanding/Approach, is in turn, slightly more important than Past Performance. Proposal risk will be assessed and integrated in the rating of each individual factor and subfactor. Proposal risks are those risks associated with an Offeror’s proposed manner in complying with the requirements of the RFQ.

Offerors shall be made aware that Pricing may increase in importance, and become a discriminating factor as the proposals become similar in ratings for the other factors.

### **Factor 1: Management Approach –**

The Government will evaluate the quality and comprehensiveness of each listed subfactor (which are all of equal importance):

Subfactor 1) The Offeror’s approach to managing the Project Team, teaming agreement details and mechanics (including adding and deleting team members), lines of authority and communication, key personnel proposed and their qualifications, and Project Team problem resolution methodologies;

Subfactor 2) The Offeror’s ability to integrate and use small business within the Offeror’s overall BPA/task order/project management plan. How decisions will be made for assigning small business (teaming partners and subcontractors) to task orders and functional elements; the adequacy of its proposed small business utilization goals and small business subcontracting agreements under this BPA, and how it will ensure compliance to such goals and agreements;

Subfactor 3) The Offeror’s capability and approach to staffing multiple task orders. The Offeror’s plan of action in the event a labor supply problem occurs. How project management will be planned and executed at the task order level. The Offeror’s approach to personnel change management, including key personnel, such that the replacement is at least as well qualified as the initially proposed contractor personnel;

Subfactor 4) The Offeror’s approach to quality control, including the Offeror’s processes and methodologies for providing quality project documentation; providing project status and cost reporting; and program measurements;

Subfactor 5) The Offeror’s approach to risk management, including the processes and methodologies for identifying, mitigating and monitoring risks, including OCI risks.

### **Factor 2: Pricing**



Evaluation of Pricing shall be based upon the proposed minimum “team” discount (expressed as a percentage) which shall apply to all labor categories, labor rates, and support products contained in each team member’s GSA MOBIS Schedule. Travel costs will not be considered in the evaluation of overall costs.

Factor 3: Technical Understanding and Approach

The Government will evaluate the comprehensiveness of the offeror’s understanding of the DHS Organization and its understanding of the scope and requirements of the SOW; and the comprehensiveness, feasibility, innovativeness, appropriateness and quality of the Offeror’s approach to providing support under all required MOBIS SINs and scope of work, including the methodology and techniques the Offeror plans to incorporate to utilize each team member and subcontractor, to satisfy the requirements of the SOW with minimal risk.

Factor 4: Past Performance

The offeror will be evaluated based on the degree to which the experience submitted is relevant as it relates to the requirements of the solicitation. The offeror will also be evaluated on the quality of the referenced experience based on completed questionnaire/survey forms and/or Government discussions with provided references in terms of the quality of the work done and the timeliness and cost efficiency of the work performed. The quality of the relevant work performance is very important to the evaluation.

**METHODOLOGY FOR SELECTION OF AWARDEES**

Evaluation will be based upon a “best value” tradeoff analysis, considering Management Approach, Price, Technical Understanding/Approach, and Past Performance as described above. Proposal risk will be assessed and integrated into the rating of each individual factor and subfactor. Offerors will be ranked (ties allowed) based upon the results of this evaluation. The Government intends to award a maximum of 9 BPAs as a result of this RFQ. Offerors shall be placed on notice that the Government intends to award a minimum of three BPAs in which a Small Business MOBIS Contractor is designated as the Contractor Team Lead, and reserves the right to deviate from the assigned ranking and increase the maximum number of BPAs awarded, if necessary, in order to meet this goal (ie. If based upon the standard ranking, there is not 3 small business led teams among the most highly ranked offerors [maximum of 9], the Government will continue to award BPAs only to the most highly ranked responsive/responsible small business led teams, until the minimum goal of 3 small business led teams is met). The Government plans to incorporate wide discretion and award as many BPAs, up to the stated maximum goals, as it deems necessary to ensure that DHS has a sufficient number of quality contractors, both large and small, to successfully satisfy the anticipated collective needs of the Department of Homeland Security for the scope of work covered by this RFQ over the course of the next 5 years. **Offerors shall be placed on notice that the approach and extent of proposed small business utilization/goals, the amount of the proposed Team Discount, and any exceptions taken to the RFQ will be used by the Government to distinguish between similarly rated proposals.**

**MULTIPLE AWARD BLANKET PURCHASE AGREEMENT (BPA)**

This RFQ will result in the award of multiple BPAs, which will allow for the issuance of both FFP and T&M task orders by any contracting activity with DHS and designated authorized contracting activities within GSA.

Award of a BPA will be made only to the designated Contractor Team Lead, with each Team Member properly identified in the award document. Designated Ordering Activities will be permitted only to solicit and issue Task Orders through the assigned Contractor Team Lead. In accordance with the CTA, the Team Lead is responsible for managing its Team Members. Any and all labor categories and support products contained in a Team Member’s GSA MOBIS Schedule may be utilized by the Team in responding to Task Orders issued under this BPA.

The BPA will be awarded for a base period of 12 months, with four option periods of 12 months each. Although market research has determined that DHS FY05 PM spend at approximately \$100M, the total value of the Task Orders collectively issued under the awarded BPAs are not constrained by this figure.

**MONITORING OF SMALL BUSINESS UTILIZATION AND GOALS**

The Contractor Team Lead is required to submit with its monthly status reports to the Contracting Officer, progress reports detailing status of compliance with its proposed small business utilization goals. Given the importance this BPA is placing on small business

utilization, failure to demonstrate progress in complying with proposed small business goals will strongly be considered by the Contracting Officer in determining possible Option exercise.

## **INVOICING**

Specific Accounting and Invoicing procedures will be specified at the Task Order level including whether invoicing and payment will occur at the Team Lead or individual Team Member level.

## **INSPECTION AND ACCEPTANCE**

### **1. PLACE OF INSPECTION AND ACCEPTANCE**

Inspection and acceptance of all work performed, reports, and other deliverables under this BPA shall be performed by the Contracting Officer (CO)/Contracting Officer's Representative (COR) or his/her duly authorized representative as specified in each delivery order.

### **2. SCOPE OF INSPECTION**

All deliverables shall be inspected for content, completeness, accuracy and conformance to BPA/Order requirements, including conformance to specified Directives or Manuals. Specifically, work products shall be accurate in presentation, technical content, grammar and word usage, and industry standards style. All diagrams shall be easy to understand and be relevant to the supporting narrative.

### **3. BASIS OF ACCEPTANCE**

The following basis for acceptance applies unless other wise stated in the individual BPA task orders.

- a. The basis for acceptance of services will be compliance with best commercial practices and those requirements provided in the individual Orders from this BPA
- b. Reimbursable items such as travel will be accepted upon receipt of proper documentation.
- c. Reports, documents, and narrative type deliverables will be accepted when all discrepancies, errors, or other deficiencies identified in writing by the Government have been corrected.
- d. Unless otherwise specified by the specific task order, the contractor shall provide delivery of electronic copies of each deliverable. Electronic copies shall be delivered via email attachment or other media by mutual agreement of the parties. All electronic copies shall be compatible with MS Office 2003 or other applications as appropriate and mutually agreed to by the parties. The contractor guarantees electronic files delivered to the Government to be virus free.
- e. The contractor shall use best commercial practice for formatting deliverables under this contract.
- f. All of the Government's comments on deliverables must either be incorporated in the succeeding version or the contractor must demonstrate to the Government's satisfaction why such comments should not be incorporated.

- g. If the Government finds that a draft or final deliverable contains spelling errors, grammatical errors, improper format, or otherwise does not conform to the requirements stated within BPA/Order, the document may be immediately rejected without further review and returned to the contractor for correction and re-submission at no additional cost to the government. If the contractor requires additional Government guidance to produce an acceptable draft, the contractor shall arrange a meeting with the COR.

#### **4. DRAFT DELIVERABLES**

Unless otherwise stated in the individual BPA Orders:

- a. The Government shall provide written acceptance, comments and/or change requests, if any, within fifteen (15) working days from receipt by the Government of the initial deliverable.
- b. Upon receipt of the Government comments, the contractor shall have fifteen (15) working days to incorporate the government's comments and/or change requests and to resubmit the deliverable in its final form.

#### **5. WRITTEN ACCEPTANCE/REJECTION BY THE GOVERNMENT**

Unless otherwise stated in the individual BPA Orders, the Government will provide written notification of acceptance or rejection of all final deliverables within thirty (30) calendar days of receipt, except as noted below. All notifications of rejection will be accompanied with an explanation of the specific deficiencies causing the rejection.

#### **6. NON-CONFORMING PRODUCTS OR SERVICES**

Non-conforming products or services will be rejected. Unless otherwise stated in the individual BPA Orders, deficiencies will be corrected within 30 days of the rejection notice. If the deficiencies cannot be corrected within 30 days, the contractor will immediately notify the COR of the reason for the delay and provide a proposed corrective action plan within 10 (ten) working days.

#### **DELIVERABLES**

Specific deliverable requirements, including format, content, delivery, performance, and acceptance criteria will be specified at the Task Order level.

#### **PERIOD OF PERFORMANCE (POP)**

The POP for the BPAs awarded as a result of this RFQ, will be for a base period of 12 months, with 4 each 12 month option periods.

#### **PLACE(S) OF PERFORMANCE**

The contractor shall be able to perform the work described in the SOW, worldwide. Specific performance locations, including any travel requirements, will be detailed at the Task Order level.

#### **TRAVEL**

Travel may be required during the performance of this requirement and will be specified, if required, during task order issuance.

Travel shall be reimbursed to the extent allowable pursuant to the Federal Travel Regulations (FTR) – prescribed by the General Services Administration. **Offerors shall be made aware that although each Task Order will specify any travel and ODC requirements, the Government will not allow for the inclusion of any profit whatsoever on travel and ODCs, and will not allow any G&A or material handling charges based upon a percentage of cost, regardless of whether an Offeror’s GSA MOBIS schedule may state otherwise. The Offeror shall state in its pricing proposal, its understanding and compliance to this policy.**

Travel not receiving advanced written approval by the designated COR or the Ordering Officer will not be reimbursed by the government.

The contractor shall use only the minimum number of travelers and rental cars needed to accomplish the task(s). Travel shall be scheduled during normal duty hours whenever possible. Airfare shall be reimbursed for actual common carrier fares, which are obtained by the most reasonable and economical means. When required, the most dependable means of ground transportation (i.e., taxi, bus, train, car rental) shall be used.

## ORDERING PROCEDURES UNDER THIS BPA

Task Order ordering procedures will be in accordance with the provisions of FAR Part 8.4, and as further defined by the provisions of FAR Part 16.505, which requires the Government to provide fair opportunity to each multiple award contract holder. FAR Part 16.505 allows ordering agencies wide discretion, tailored to the specific requirement, regarding the manner in which task orders are solicited and evaluated.

During the Fair Opportunity process, the Government reserves the right to only solicit small business led Teams if at least two such Small Business led teams are deemed capable of providing quality service at a reasonable price, and /or consider other socio-economic factors in the selection of Teams to be solicited.

The Ordering Official will provide a Performance Work Statement (PWS) only to the designated Team Lead representative for all task orders to be solicited and awarded under this BPA. The Government will provide, at a minimum, the following in the PWS:

- A description of the Government’s requirement
- Required deliverables
- Acceptance criteria for the deliverables
- Expected delivery dates for the deliverables/service
- Expected travel requirements
- GFE, GFM, Government Information/Data, and/or Government Facilities provided
- Start date for the work/period of performance
- Schedule
- Type of task order (FFP, T&M, or combination)

The contractor shall respond to the Ordering Official with a proposal that provides, at a minimum, the following:

- Description of what the contractor will do to accomplish the requirements
- A schedule for accomplishing the requirements/deliverables
- Expected number of hours by labor category, labor rates (including awarded BPA discounts), and total cost
- Proposed ODCs and Travel costs

**The contractor is not authorized to perform work under this BPA unless specifically awarded and funded by individual task orders.**

## KEY PERSONNEL QUALIFICATIONS

The contractor shall represent/acknowledge that all personnel assigned to this BPA are capable of working independently and with the demonstrated knowledge, skills, and expertise in their respective areas, necessary to perform all assigned duties. If the contractor

personnel do not possess the expertise necessary to perform the tasks required under the BPA, then the contractor shall be responsible for appropriate training and/or replacing the personnel.

### **1. Substitution of Key Personnel**

Key Personnel may only be replaced or removed with the authorization of the BPA Contracting Officer. The contractor shall submit to the CO the qualifications for proposed replacement Key Personnel that are equivalent to the personnel being replaced.

If one or more of the key personnel for reasons beyond the control of the contractor becomes, or is expected to become unavailable for work under this BPA for a continuous period exceeding 15 calendar days, the contractor shall promptly notify the Government Contract Officer specified in the contract. Upon concurrence of the Contracting Officer or his authorized representative, the contractor shall promptly replace such personnel with personnel of at least equal ability and qualifications.

All requests for approval of substitutions hereunder must be in writing and provide a detailed explanation of the circumstances necessitating the proposed substitution(s). Requests must contain a complete resume for the proposed substitute, and any other information requested by the Contracting Officer to approve or disapprove the proposed substitution. The Contracting Officer or designated representative will evaluate such requests and promptly notify the contractor of the approval or disapproval thereof, in writing.

### **2. Key Personnel and Qualifications**

The following are the minimum personnel who shall be designated as “key”. The offeror shall propose appropriate labor categories for these positions. The Government does not intend to dictate the composition of the ideal team to perform this BPA. Therefore, the Government encourages and will evaluate additional key personnel as proposed by the offeror. The offeror shall provide the qualifications and experience for any key personnel based on the role(s) assigned by the offeror for performance under this BPA.

- a. Program Manager
- b. Alternate Program Manager

### **3. Program Manager/Alternate Program Manager**

The contractor team shall designate a Single Program Manager and Alternate Program Manager for this BPA who shall be the primary point of contact for the BPA Contracting Officer, and shall be responsible for the quality of work performed on this BPA. In the absence of the Program Manager, an Alternate Program Manager shall additionally be designated who shall take on the responsibilities of the Program Manager. The Program Manager or Alternate Program Manager may present deliverables and make presentations for a variety of audiences. The following experience is required for both the Program Manager and Alternate Program Manager:

- b. Experience in planning, directing, and managing project teams similar in size and scope as referenced in this solicitation.
- c. Experience managing and supervising employees of various labor categories and skills in projects similar in size and scope (type of work or functions and activities) as referenced under this BPA.
- d. Experience providing written and oral communications to high-level management.
- e. Experience managing FFP and Labor Hour task orders/contracts in the Federal Government.
- f. Knowledge of the Department of Homeland Security’s Components, agencies, missions, and business issues.

## **ORGANIZATIONAL CONFLICT OF INTEREST AND NON-DISCLOSURE REQUIREMENTS**

### **1. Organizational Conflict of Interest**

If the contractor is currently providing support or anticipates providing support to the DHS that creates or represents an actual or potential organizational conflict of interest (OCI), the contractor shall immediately disclose this actual or potential OCI in accordance with FAR Part 9.5. The contractor is also required to complete and sign an Organizational Conflict of Interest Statement in which the contractor (and any Subcontractors, consultants or teaming partners) agree to disclose information concerning the actual or potential conflict with any proposal for any task orders relating to any work in the BPA. All actual or potential OCI situations shall be handled in accordance with FAR Subpart 9.5.

**2. NON-DISCLOSURE REQUIREMENTS**

All contractor personnel (to include subcontractors, teaming partners, and consultants) who will be personally and substantially involved in the performance of the BPA issued which requires the contractor to act on behalf of, or provide advice with respect to any phase of an agency procurement shall submit an “Employee/Contractor Non-Disclosure Agreement” Form in accordance with FAR 3.104-4. This is required prior to the commencement of any work on such TO and whenever replacement personnel are proposed under the ongoing BPA. Any information obtained or provided in the performance of this BPA is only to be used in the performance of the BPA.

**CONTRACT CLAUSES**

**1. The following clauses are incorporated by reference:**

**FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION CLAUSES**

(<http://www.arnet.gov/far/>)

<u>CLAUSE NO</u>	<u>CLAUSE TITLE</u>	<u>DATE</u>
52.224-2	PRIVACY ACT	(APR 1984)
52.251-1	AUTHORIZATION TO USE GOVERNMENT SUPPLY SOURCES	(APR 1984)

**2. The following clause is incorporated in full text:**

52.217-9	OPTION TO EXTEND THE TERM OF THE CONTRACT	(MAR 2000)
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- a. The Government may extend the term of this BPA by written notice to the contractor no later than the BPA expiration date; provided, that the Government gives the contractor a preliminary written notice of its intent to extend at least 30 days before the contract expires. The preliminary notice does not commit the Government to an extension.
- b. If the Government exercises this option, the extended contract shall be considered to include this option clause.
- c. The total duration of this contract, including the exercise of any options under this clause, shall not exceed 5 years (12 month base period and four, 12 month option periods).

(End of Clause)

**QUESTIONS REGARDING THIS RFQ**

It is highly preferred that all questions be submitted in writing via e-mail to the Contracting Officer (listed below) no later than April 14, 2006.

**GSA CONTRACTING OFFICER**

Victor Angkico  
 Contracting Officer  
 GSA – Management Services Center  
 400 15<sup>th</sup> St SW  
 Auburn, WA 98001  
[Victor.Angkico@gsa.gov](mailto:Victor.Angkico@gsa.gov)  
 Phone: 253-931-7858

Fax: 253-931-7111

**ATTACHMENTS FOLLOWING:**

- Attachment 1: Statement of Work
- Attachment 2: Past Performance Questionnaire
- Attachment 3: Strategic Sourcing Procurement Spend Data DID
- Attachment 4: MD #1400
- Attachment 5: Quality Assurance Surveillance Plan

**Attachment 3****Procurement Price Reduction & Usage Tracking System (PPRUTS) Report**

PPRUTS is a monthly report of the Department of Homeland Security's usage and spending profile in relation to the contractor's General Services Administration (GSA) pricing or, in the absence of GSA pricing, the contractor's standard pricing for the Federal Government.

Each month the contractor shall provide a report of the previous month's activity. The report is due by the 20<sup>th</sup> of each month. The report shall be in the form of a completed Excel Spreadsheet.

An Excel Spreadsheet will be emailed to the contractor from [PPRUTS@DHS.gov](mailto:PPRUTS@DHS.gov) by the 10<sup>th</sup> day of the month. The spreadsheet will consist of two tabs: Tab 1 – Instructions and Tab 2 – Report file.

The report file will contain the following:

	Field Name & Description	Pre-populated or calculated	Contractor Must Complete
1.	Report Identification Number – a system generated number used for tracking purposes	√	
2.	Reporting Month	√	
3.	Reporting Year	√	
4.	Contractor Point of Contact eMail Address	√	
5.	Contractor Name	√	
6.	Contract Number	√	
7.	Order Number (if applicable)	√	
8.	Contract or Order Award Date	√	
9.	Contract Line Item Number or Sub Line Item Number	√	
10.	Item Description	√	
11.	Quantity Ordered		√
12.	Contract Unit Price	√	
13.	Contract Item Amount – the unit price in the basic contract/agreement	√	
14.	Discounted Unit Price (if applicable) – the final price charged on the order, a discount from the unit price in the basic contract/agreement		√
15.	GSA/Standard Price – the contractor's current GSA schedule rate or, in the absence of a GSA schedule, the contractor's current standard price for the Federal Government for the supply/service item procured		√

The contractor shall return the completed report (i.e., completed spreadsheet file) to [PPRUTS@DHS.gov](mailto:PPRUTS@DHS.gov) by the 20<sup>th</sup> of the month.



## Attachment 4

### GSA SCHEDULE BPA ORDERING PROCEDURES FOR STRATEGIC SOURCING

#### 7.0 Ordering Procedures For DHS Schedule BPAs

In accordance with Federal Acquisition Regulation (FAR) 8.405-3, GSA, in partnership with DHS, will establish multiple BPAs with Federal Supply Schedule contract holders.

- (a) *General.* The Government (defined as any authorized ordering activity designated within this BPA) shall use the procedures in this subsection when ordering services under this BPA.
- (b) *Statements of Work (SOWs).* The Government shall prepare SOWs that include, at a minimum, work to be performed, location of work, period of performance, deliverable schedule, applicable performance standards, and any special requirements. To the maximum extent practicable, Government requirements shall be performance-based statements.
- (c) *Request for Quotation (RFQ) procedures.* The Government shall provide the RFQ, to include, at a minimum, the SOW and evaluation criteria, to Schedule BPA holders that offer services that will meet the Government's needs.
  - (1) When determining the appropriate number of Schedule BPA holders, the Government may consider, among other factors, the following:
    - (A) The complexity, scope, and estimated value of the requirement.
    - (B) The market research results, which may include specialized capabilities of the Schedule contractor and/or Schedule contractor team.
    - (C) Socioeconomic factors.
  - (2) *Orders at, or below, the micro-purchase threshold.* Authorized Government Ordering Activities may place orders at, or below, the micro-purchase threshold with any Schedule BPA holder that can meet the Government's needs. The Government should attempt to distribute orders among Schedule BPA holders.
  - (3) *Orders exceeding the micro-purchase threshold, but not exceeding the maximum order threshold.*
    - (i) The Government shall develop an SOW, in accordance with the instructions stated in paragraph (b) above.
    - (ii) The Government shall provide the RFQ (including the SOW and evaluation criteria) to at least three Schedule BPA holders that offer services that will meet the Government's needs.
    - (iii) The Government should request that Schedule BPA holders submit firm-fixed prices to perform the services identified in the SOW.
  - (4) *Orders exceeding the maximum order threshold.* In addition to meeting the requirements of paragraph (c)(3) above, the Government shall provide the RFQ (including the SOW and evaluation criteria) to additional Schedule BPA holders that offer services that will meet the Government's needs.
  - (5) The Government shall provide the RFQ (including the SOW and evaluation criteria) to any Schedule BPA holder that requests a copy.
- (d) *Evaluation.* The Government shall evaluate all responses received using the evaluation criteria provided to the Schedule BPA holders. The Government 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. Place the task order with the Schedule BPA holder that represents the best value (see FAR 8.404 (d)). After award, the Government shall provide timely notification to unsuccessful Schedule BPA holders. If an unsuccessful Schedule BPA holder requests information on an award that was based on factors other than price alone, a brief explanation of the basis for the award decision shall be provided.
- (e) *Minimum documentation.* The Government shall document—

- (1) The Schedule BPA holders considered, noting the Schedule BPA holder from which the service was purchased;
- (2) The consideration rationale for Schedule BPA holders selected to receive the RFQ;
- (3) A description of the service purchased;
- (4) The amount paid;
- (5) The evaluation methodology used in selecting the Schedule BPA holder to receive the task order;
- (6) The rationale for any tradeoffs in making the selection;
- (7) The price reasonableness determination required by paragraph (d) of this subsection; and
- (8) The rationale for using other than—
  - (i) A firm-fixed price task order; or
  - (ii) A performance-based task order.

(f) *Review of BPAs.*

- (1) The Government shall review the BPA at least once a year to determine whether—
  - (i) The Schedule contract, upon which the BPA was established, is still in effect;
  - (ii) The BPA still represents the best value; and
  - (iii) Estimated quantities/amounts have been exceeded and additional price reductions can be obtained.
- (2) The Government shall document the results of its review.

Additional information regarding ordering from Schedules may be obtained by viewing the [Ordering Procedures for Services Requiring a Statement of Work \(SOW\)](#)

**Attachment 5****ROLES AND RESPONSIBILITIES****BPA CONTRACTING OFFICER (CO) AND ADMINISTRATIVE CONTRACTING OFFICER (ACO)**

The BPA level CO/ACO for this procurement is:

CO/ACO: Victor Angkico  
 U.S. General Services Administration  
 Management Services Center  
 400 15<sup>th</sup> St SW  
 Auburn, WA 98001  
 Email Address: [Victor.Angkico@gsa.gov](mailto:Victor.Angkico@gsa.gov)  
 Phone #: 253.931.7858  
 Fax #: 253.931.7111

The CO/ACO is responsible for:

- Interpreting the scope, terms or conditions of the basic BPAs;
- Managing all post award issues and changes to the BPAs;
- Maintaining active communication with the DHS Component Contracting Officers, the DHS Contracting Officer's Technical Representative, and the DHS Component Contracting Officer's Technical Representatives;
- Issuing and administering/modifying the basic BPAs ;
- Exercising BPA options; and
- Tracking BPA level performance and statistics .

**COMPONENT CONTRACTING OFFICER (CCO)**

The CCO (defined as any appropriately warranted Contracting Officer within DHS or GSA) will function as an Ordering Officer in accordance with FAR Part 8.4 and is responsible for:

- Issuing orders against the BPAs for the Component;
- Appointing a Component Contracting Officer's Representative for each order placed;
- Providing to the CO/ACO and BPA COTR a copy of all orders issued.

**BPA LEVEL CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (COTR)**

There will be a BPA level COTR assigned to manage the BPAs and support the GSA CO/ACO during administration of this effort. The BPA Level COTR for this BPA is:

COTR: Jane M.K. Hawn  
 Email Address: [Jane.Hawn@dhs.gov](mailto:Jane.Hawn@dhs.gov)  
 Phone #: 202.205.5045

The BPA Level COTR is responsible for:

- Managing all DHS interfaces with the BPA holders and reporting any issues arising from the Components to the CO/ACO;
- Furnishing the CO/ACO with documentation/comments on any request for change or deviation to the BPAs on behalf of the Components;
- Maintaining active communication with the CO/ACO and CCOs on items related to the BPAs;
- Monitoring the use of the BPAs to provide analysis as required by DHS/GSA partnership.

**DHS COMPONENT CONTRACTING OFFICER'S TECHNICAL REPRESENTATIVE (Component COTR)**

There will be a Component COTR assigned by the CCO to manage each order placed by the Component. The Component COTR is the individual who has overall technical responsibility for efforts associated with the order placed. The Component COTR supports the CCO during administration of this effort through day-to-day coordination of the order placed.

The Component COTR is responsible for:

- Inspecting deliverables and monitoring performance to assure compliance with the requirements of the order placed;
- Providing technical clarification relative to the statement of work;
- Ensuring that all invoices are reviewed, approved, and processed by appropriate personnel;
- Presenting all technical issues that are unresolved to the CCO; and
- Performing other similar duties as may be specified in the order placed.

The Component COTR also provides technical direction to the BPA holder. Technical direction shall be within the general statement of work. The Component COTR does NOT have the authority to and may NOT issue any technical direction which:

- Constitutes an assignment of work outside the general scope of efforts;
- Constitutes change as defined in the "Changes" clause;
- In any way causes an increase or decrease in cost or the time required for performance;
- Changes any of the terms, conditions, or other requirements; and
- Suspend or terminates any portion of efforts.

All technical direction shall be issued in writing by the Component COTR. A copy of the written technical direction shall be furnished to the CCO no later than 3 business days after issuance to the contractor.

The written technical direction letter shall include a statement that if, in the opinion of the BPA holder, any instruction or direction issued by a Component COTR is outside of their specific authority, the BPA holder shall not proceed but shall notify the CCO in writing within 1 working day after receipt of any instruction or direction for subsequent, potential action by the CCO.

**Attachment 6****QUALITY ASSURANCE SURVEILLANCE PLAN**

I. **Objective:** The purpose of this plan is to provide a quality assurance surveillance plan for use by the Contracting Officer (CO) and/or Contracting Officer's Representative (COR) in support of the technical and managerial support being provided to the Client. This plan provides a basis for the CO and COR to evaluate the quality of the contractor's performance.

**II. Performance Standards:**

- A. **Quality Level:** By monitoring the contractor, the CO/COR will determine whether the contractor is performing up to industry standards and expectations, and those standards specified in this BPA and any issued task orders.
- B. **Frequency:** During performance of this BPA, the CO/COR will make regular observations (i.e., conduct surveillance) of the contractor's performance, to include a review of deliverables and financial documents and by questioning DHS employees concerning the quality of the work done, to include the running of facilitation sessions.
- C. **Management Responsiveness:** The CO/COR will determine whether the contractor has managed the BPA effectively and efficiently, with successful and timely response to user and client needs. The CO/COR will confirm whether the contractor has satisfactorily met all reporting requirements, including subcontracting reports (demonstrating compliance with proposed subcontracting goals) when applicable.

III. **Evaluation Methods:** The CO/COR will conduct performance evaluations based upon Section II above and the required performance levels set forth in the contract and/or Task Orders. The following techniques will be used to perform surveillance:

- A. **Performance Monitoring**. The contractor is required to provide sufficient qualified personnel to perform the requirements of the BPA. Customer feedback will be sought. Further, the CO/COR will review measures taken by the contractor to keep all customers informed of situations that may affect performance and schedules.
- B. **Consultation with the contractor**. The CO/COR will periodically meet with the contractor's Project Manager to discuss any problems, identify circumstances beyond control of the contractor, identify possible remedies, and note positive accomplishments. The CO/COR will document the meeting.