



INFORMATION TECHNOLOGY SERVICES SMALL BUSINESS (ITS-SB)

ORDERING GUIDELINES

July 2011



FOREWARD

These ordering guidelines cover all the information needed to use the Information Technology Services – Small Business (ITS-SB) contracts to obtain information technology (IT) services within the continental United States (CONUS) as well as Alaska and Hawaii . These contracts were awarded under the Federal Acquisition Streamlining Act (FASA), the Clinger-Cohen Act, and Section 803 of the National Defense Authorization Act for Fiscal Year 2002, which require that the prime contractors be provided with a fair opportunity to be considered for delivery/task order awards. The contracts are structured as indefinite delivery/ indefinite quantity contracts, using task orders for acquisition of specified services.

These contracts are available to the Army, Department of Defense, and other federal agencies.

Questions regarding these guidelines and procedures for placing orders against the contracts should be directed to Computer Hardware, Enterprise Software and Solutions (CHESS). Questions of a contractual nature should be directed to the Procuring Contracting Office (PCO), Army Contracting Command- National Capital Region (ACC-NCR). These guidelines will be revised, as needed, to improve the process of awarding and managing orders under the ITS-SB contracts.

Computer Hardware, Enterprise Software and Solutions (CHESS)

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Fort Monmouth, NJ 07703-5605
Toll Free Customer Line 1-888-232-4405
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Army Contracting Command - National Capital Region (ACC-NCR)

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Information regarding the ITS-SB contracts, including links to the prime contractors' home pages, can be found at: <https://chess.army.mil>.



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CHAPTER 1 ITS-SB GENERAL INFORMATION

1. BACKGROUND

Information Technology Services – Small Business (ITS-SB) is a multiple award, indefinite delivery/indefinite quantity contract vehicle. It is the Army's source of set asides for Small Business Service contracts of information technology (IT)-related services within CONUS, Alaska, and Hawaii. The purpose of ITS-SB is to meet the Army's enterprise infrastructure and infostructure goals with a full range of innovative, world-class information technology support services and solutions at a reasonable price.

Working in partnership with the prime contractors, the U.S. Computer Hardware, Enterprise Software and Solutions (CHESS) manages the contracts, in coordination with the Army Contracting Command - National Capital Region (ACC-NCR). Through the use of ITS-SB, users have a flexible means of meeting IT service needs quickly, efficiently, and cost-effectively.

Ordering under the contracts is decentralized and is authorized to meet the needs of the Army, Department of Defense (DoD), and other federal agencies. Orders may be placed by any contracting officer from the aforementioned agencies. **There is no fee to place orders against the ITS-SB contract.**

2. SCOPE

The ITS-SB contract scope encompasses a full range of innovative, world-class information technology support services and solutions at a reasonable price. Contract line items (CLINs) cover the following services and contract types:

- IT solution services – firm fixed price (FFP), time and material (T&M), and cost reimbursement (CR)
- IT subject-matter expert – FFP, T&M, and CR
- IT functional area expert – FFP, T&M, and CR
- Incidental construction – FFP
- Other direct costs – CR
- IT solution equipment – CR for FP, T&M, and CR task orders
- Travel and per diem – CR for FP, T&M, and CR task orders
- IT solution software – CR for FP, T&M, and CR task orders
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(ITS-SB)
GENERAL INFORMATION

A listing of the task areas covered in the contracts is in Contract Section C.2.1. Copies of the ITS-SB contracts can be found on the CHESSE *IT e-mart*. The *IT e-mart* Web site is <https://chess.army.mil>. Services will be acquired by issuing individual task orders.

Contract types will be determined in accordance with the Federal Acquisition Regulation (FAR) and Defense Federal Acquisition Regulation Supplement (DFARS) based on the circumstances of each order.

3. PRIME CONTRACTORS

Following is a list of the ITS-SB prime contractors and their respective contract numbers. Subcontractors/teaming partners for each prime contractor, if applicable, are listed in attachment

1. Links to the prime contractor Web sites can be found at the CHESSE ITS-SB Web site <https://chess.army.mil>.

Prime Contractor	Contract Number
ActioNet	W91QUZ-11-D-0001
Creative Computing Solutions, Inc	W91QUZ-11-D-0002
Engineering Services Network, Inc.	W91QUZ-11-D-0003
Enterprise Information Services, Inc.	W91QUZ-11-D-0004
Exeter Information Technology Services, LLC	W91QUZ-11-D-0005
Future Research Corporation	W91QUZ-11-D-0006
Information Innovators, Inc.	W91QUZ-11-D-0007
Link Solutions, Inc.	W91QUZ-11-D-0008
M-Cubed Information Systems	W91QUZ-11-D-0009
MicroTechnologies, LLC	W91QUZ-11-D-0010
NetCentrics Corporation	W91QUZ-11-D-0011
Network Connectivity Solutions Corporation	W91QUZ-11-D-0012
SNVC, L.C.	W91QUZ-11-D-0013
Superlative Technologies, Inc.	W91QUZ-11-D-0014
T4, LLC	W91QUZ-11-D-0015
Tantus-OnPoint ATO Systems Support, LLC	W91QUZ-11-D-0021



4. CONTRACT TERMS

Separate, multiple awards were made for ITS-SB with the following contract terms and provisions:

Contract Terms	ITS-SB
Contract Ceiling	- The total amount of all orders placed against all ITS-SB contracts shall not exceed \$400,000,000.00 over the life of the contract
Period of Performance	- Five (5) years: <ul style="list-style-type: none"> • 36-month base period • One (1) 24-month option period.
Pricing Structure	- Firm-Fixed-Price - Time and Material - Cost Reimbursement
Performance-Based Contracting	- Preferred method for acquiring services
Fair Opportunity to be Considered	- Subject to FAR 16.505(b) and DFARS 216.505-70(b)
Ordering Guidance and Process	- See Chapter 3 below and Contract Section J, Attachment 4, Task Order Procedures

5. PERFORMANCE-BASED SERVICE ACQUISITION (PBSA)

PBSA is an acquisition structured around the results to be achieved as opposed to the manner by which the work is to be performed. Orders placed under ITS-SB are not required to be performance-based under all circumstances. However, policy promulgated by the National Defense Authorization Act for FY 2001 (PL 106-398, section 821), FAR 37.102, and FAR 16.505(a), establishes PBSA as the preferred method for acquiring services. In addition, for Defense agencies, DFARS 237.170-2 requires higher-level approval for any acquisition of services that is not performance-based. Accordingly, it is expected that most ITS-SB orders will be performance-based. A Performance Work Statement (PWS) or Statement of Objectives (SOO) should be prepared to accompany the Task Order Request (TOR) to the ITS-SB contractors. See Attachments 2, 3, 4, and 5 for further information on PBSA and specific details and resources for the preparation of a PWS or SOO.

6. FAIR OPPORTUNITY TO BE CONSIDERED.

- In accordance with 10 U.S. Code § 2304c(b) and FAR 16.505(b), the contracting officer must provide each ITS-SB contractor a fair opportunity to be considered for each order exceeding \$3,000 unless an exception applies.
- In addition, orders placed by or on behalf of the DoD must also comply with the requirements of DFARS 216.505-70. For orders exceeding \$150,000, DFARS 216.505-70 requires the contracting officer to (i) provide a fair notice of the intent to make the purchase, including a description of the supplies to be delivered or the services to be performed and the basis upon which the contracting officer will make the selection, to all ITS-SB contractors; and (ii) afford all contractors responding to the notice a fair opportunity to submit an offer and have that offer fairly considered.
- FAR 16.505, DFARS 216.5, and Chapter 3, Paragraph 6, below contain procedures on exceptions to the fair opportunity process, as well as details on the applicability and implementation of fair opportunity to be considered.

7. SITUATIONS REQUIRING HARDWARE OR SOFTWARE ACQUISITION.

- **Software:** In situations where it is necessary to purchase new commercial software, including preloaded software, to satisfy the requirements of a particular task order (TO), the contractor will first be required to review and utilize available Department of Defense Enterprise Software Initiative (DoD ESI) agreements.

If software is not available to the contractor through a DoD ESI source, the contractor shall be authorized to obtain the software through an alternate source. **For Army users, a waiver is required from CHES when acquiring non-ESI software regardless of the dollar value.**

The customer shall access the waiver process located on the Web at

<https://chess.army.mil/ascp/commerce/ESI/waiver/index.jsp;jsessionid=5B5BD3AE87A27AE321A2C9244FAC5D1D.PAPS2>. *The waiver should be included in the task order upon award.*

- **Commercial off-the-shelf (COTS) Hardware and Related Software:**

If hardware and related software are required for a particular task order, the CHES hardware contracts are the preferred source of supply. CHES also has a representative sample list on their Web site of Commercial IT Products and Services authorized for use by customers worldwide. RFQ's may be submitted for products not found on the CHES site. If the hardware and related software required is not available from a CHES contract or the authorized list, the contractor shall be authorized to obtain the hardware through an alternate source. **For Army users, a waiver is required for purchase of products from another source regardless of dollar value.** The listing of COTS hardware available from CHES sources can be viewed on the Web at <https://chess.army.mil>

The customer shall access the waiver process, located on the Web at

<https://chess.army.mil/ascp/commerce/ESI/waiver/index.jsp;jsessionid=5B5BD3AE87A>



27AE321A2C9244FAC5D1D.PAPS2. *The waiver should be included in the task order upon award.*



CHAPTER 2

ITS-SB ROLES AND RESPONSIBILITIES

The following is a summary of the roles and responsibilities for the primary organizations in the Information Technology Services – Small Business (ITS-SB) contract process.

1. ARMY CONTRACTING COMMAND – NATIONAL CAPITAL REGION (ACC-NCR)

- Provides the Procuring Contracting Office (PCO) for the ITS-SB contracts. The PCO has overall contractual responsibility for the ITS-SB contracts. All orders issued are subject to the terms and conditions of the contract. The contract takes precedence in the event of conflict with any order.
- The PCO provides advice and guidance to requiring activities, Ordering Contracting Officers, and contractors regarding contract scope, acquisition regulation requirements, and contracting policies.
- The PCO approves and issues contract modifications.
- Represents the contracting officer position at various contract-related meetings, including ITS-SB Executive Council Meetings, in-progress reviews (IPRs), negotiating sessions, and working meetings.

2. U.S. ARMY COMPUTER HARDWARE, ENTERPRISE SOFTWARE AND SOLUTIONS (CHESS)

- Designated by the Secretary of the Army as the Army's primary source for commercial IT.
- Performs the functions of Program Director (PD) for the ITS-SB contracts.
- Maintains the *IT e-mart*, a Web-based, e-commerce ordering and tracking system. The *IT e-mart* Web site is: <https://chess.army.mil>.
- With support from the Communications-Electronics Command, Information Systems Engineering Command (ISEC), Technology Integration Center (TIC), assists Army organizations in defining and analyzing requirements for meeting the Army's enterprise infrastructure and infostructure goals.
- Works with requiring activities, including those outside of the Army, to help them understand how ITS-SB can best be used to meet their enterprise requirements.



- Conducts periodic meetings with the prime contractors, e.g., quarterly IPRs, to ensure requirements, such as approved Department of Defense (DoD) standards, are understood.
- Provides the contract level Contracting Officer's Representative (COR).

3. REQUIRING ACTIVITY

Defined as any organizational element within the Army, DoD, or other federal agencies.

- Adheres to the requirements and procedures defined in the ITS-SB contracts and these ordering guidelines.
- Defines requirements.
- Prepares task order requirements packages.
- Funds the work to be performed under ITS-SB orders.
- Provides personnel to evaluate proposals submitted.
- Provides past performance assessments.
- Monitors and evaluates contractor performance.

4. ORDERING CONTRACTING OFFICER

- Ordering Contracting Officers within the Army, DoD, and other federal agencies are authorized to place orders within the terms of the contract and within the scope of their authority.
- They are not authorized to make changes to the contract terms. The Ordering Contracting Officer's authority is limited to the individual orders.
- Serves as the interface between the contractor and the government for individual orders issued under the ITS-SB contracts.
- Responsible for determining if bundling of requirements, (see Federal Acquisition Regulation (FAR) 2.101), is in compliance with FAR 7.107.
- Responsible for determining whether consolidation of requirements, compliance, and approval are in accordance with Defense Federal Acquisition Regulations Supplement (DFARS) 207.170.

Responsible for requesting, obtaining, and evaluating proposals and for obligating funds for orders issued.



5. ORDER CONTRACTING OFFICER'S REPRESENTATIVE

- Ordering Contracting Officer's Representative (CORs) will be designated by letter of appointment from the Ordering Contracting Officer.
- Serves as the focal point for all task activities and primary point of contact for the contractors.
- Provides technical guidance in direction of the work; is not authorized to change any of the terms and conditions of the contract or order.
- Obtains required COR training. *Note:* the ACC-NCR's Contracting Officer Representative Guide provides a list of approved COR training courses: <http://aca.saalt.army.mil/docs/Community/COR%20Guide.doc>.

6. CONTRACTORS

The principal role of the contractors is to perform services and/or deliver related products that meet requirements and/or achieve objectives/outcomes described in orders issued under the ITS-SB contracts.

7. OMBUDSMAN

In accordance with 10 U.S. Code § 2304c(e) and FAR 16.505(b)(6), ITS-SB contractors that are not selected for award under a task order competition may seek independent review by the designated ombudsman for the ITS-SB contracts. The ombudsman is responsible for reviewing complaints from the contractors and ensuring that all ITS-SB contractors are afforded a fair opportunity to be considered, consistent with applicable procedures and established guidelines. The designated ombudsman for the ITS-SB contracts is:

Steve Carrano, Army Contracting Command,
ACC-NCR

Alexandria, VA 2331 (703) 325-9760

Stephen.Carrano@us.army.mil

Note: FAR 16.505(a)(9)(i) provides,

No protest under [Subpart 33.1](#) is authorized in connection with the issuance or proposed issuance of an order under a task-order contract or delivery-order contract, except for—

- (A) A protest on the grounds that the order increases the scope, period, or maximum value of the contract; or
- (B) *A protest of an order valued in excess of \$10 million.* Protests of orders in excess of \$10 million may only *be filed with the Government Accountability Office, in accordance with the procedures at [33.104](#).*



(ii) The authority to protest the placement of an order under this subpart expires on September 30, 2016, for DoD, NASA and the Coast Guard (10 U.S.C. 2304a(d) and 2304c(e)), and on May 27, 2011, for other agencies (41 U.S.C. 4103(d) and 4106(f)).



CHAPTER 3

ITS-SB ORDERING GUIDANCE

1. GENERAL

- All Information Technology Services – Small Business (ITS-SB) contracts contain Task Order Procedures in Section J, Attachment 4. Additional detailed procedures are included herein.
- Ordering is decentralized for all ITS-SB requirements. Ordering under the contracts is authorized to meet the needs of the Army, DoD, and other federal agencies. There are no approvals, coordination, or oversight imposed by the PCO on any Ordering Contracting Officer. Ordering Contracting Officers are empowered to place orders in accordance with the terms and conditions of the contracts, ITS-SB ordering guidelines, the Federal Acquisition Regulation (FAR), Defense Federal Acquisition Regulations (DFARS) (as applicable), and their own agency procedures.
- The PCO will not make judgments or determinations regarding orders awarded under the ITS-SB contracts by an Ordering Contracting Officer. All issues must be resolved consistent with individual agency procedures and/or oversight.
- Upon request, the PCO is available to provide guidance to Ordering Contracting Officers executing orders under the ITS-SB contracts.
- The Computer Hardware, Enterprise Software and Solutions (CHES) *IT e-mart* at <https://chess.army.mil> is available to make price comparisons among all awardees and solicit competitive quotes. The Ordering Contracting Officer will initiate the TO process by issuing a TOR to all awardees via the CHES *IT e-mart*, <https://chess.army.mil/hen> posting a TOR, customers will identify specific delivery *instructions* for **proposal responses**. Contractors will indicate their interest via CHES *IT e-mart*, however, proposal packages shall be delivered by means identified in the TOR.

2. PRICING

- Contract line items allow for pricing of TOs on a firm **fixed price** (FFP) or time and material (T&M) basis. All TOs awarded pursuant to this contract, whether awarded on a FFP or T&M must be priced in accordance with the pricing set forth in the Labor Rate Table, Contract Section J, Attachment 1 and Labor Category Descriptions, Contract Section J, Attachment 2. The labor rates in the labor rate table reflect the fully burdened composite rates for each labor category and will apply to all direct labor hours. The composite rates include separate rates for work performed at the contractor site and at the government site for each labor category. An ITS-SB contractor may propose labor rates that are lower than those specified in its Labor Rate Table but may not exceed the labor rates in its Labor Rate Table.



- The government's minimum requirements for each labor category are identified in Labor Category Descriptions. Contractors may augment their labor categories and job descriptions on a TO basis. If a contractor decides to augment a labor category, the labor type and cost shall not change. Augmenting a labor category is not defined as adding a new labor category. TO proposals shall be limited to only those labor categories contained within the base contract. The contractor may propose to the government, at its discretion, additional labor categories and job descriptions within the scope of ITS-SB. The PCO is the only official authorized to add a labor category to the base contract via contract modification.
- Unlike other labor categories, the IT subject-matter expert (SME), IT functional area expert (FAE), and incidental construction category may only be used if no other labor category can satisfy the requirement. If the ITS-SB contractor proposes these categories when not directed by the Ordering Contracting Officer, no fee or profit is allowed. Ordering Contracting Officers are discouraged from directing the use of FAEs and SMEs. However, if the Ordering Contracting Officer deems it necessary to direct the ITS-SB contractor to propose these categories, a fixed fee of 3% is allowable. ITS-SB contractors are required to seek and obtain approval from the Ordering Contracting Officer for the use of these categories when proposed in a TO. There is no fixed labor rate associated with the SME, FAE, and incidental construction categories.
- **Contractor costs for ESI source software shall be reimbursed at the prices charged to the contractor, with no mark-up percentage for loadings, fee or profit, regardless of whether the contract type of the task order if FP, T&M or cost reimbursement.** For CHES contract source equipment, a fixed mark-up percentages for associated indirect loading shall be applied to the CHES contract source equipment for FP or T&M TOs; profit or fee shall not be allowed.

3. ORDER FORMS AND NUMBERING

- An appropriate order form (DD Form 1155, Order for Supplies or Services, or Non-Department of Defense (DoD) federal agencies equivalent) shall be issued for each task order.
- Ordering Contracting Officers shall not use any order beginning with 0001 thru 9999, which are reserved for ACC-NCR. DoD agencies should use ordering numbers as specified in DFARS 204.7004(d)(2)(i). Non-DoD federal agencies may use any numbering system provided it does not conflict with either of these numbering systems.

4. DELIVERY REQUIREMENTS

- Delivery of services shall be in accordance with individual orders.



5. SECURITY CONSIDERATIONS

- Contract Section H.8 requires that the level of classified access be incorporated into individual TOs as necessary. If determined necessary based on the level of classification, a DD Form 254, Contract Security Classification Specification, should be prepared and included in the TO request and resulting order.

6. FAIR OPPORTUNITY TO BE CONSIDERED

- In accordance with FAR 16.505(b)(2), for all orders exceeding \$3,000 but less than \$150,000, the Ordering Contracting Officer shall give every ITS-SB contractor a fair opportunity to be considered for a TO unless one of the exceptions to fair opportunity applies. (See paragraph 6.d below for further discussion of exceptions.) This means the Ordering Contracting Officer must consider all ITS-SB contractors for the work though he/she is not necessarily required to contact any of them. The Ordering Contracting Officer must document his/her rationale if applying one of the exceptions to fair opportunity; however, no special format is required.

All orders exceeding \$150,000 for Defense agencies must be placed on a competitive basis in accordance with FAR 16.505 and DFARS 216.505-70(c) unless a written waiver is obtained, using the limited sources justification and approval format in FAR 8.405-6. Refer to your agency's approval authorities for placing orders on other than a competitive basis. This competitive basis requirement applies to all orders by or on behalf of DoD. Each Non-DoD agency shall comply with its own agency's procedures.

For orders by or on behalf of DoD exceeding \$150,000, the requirement to place orders on a competitive basis is met only if the Ordering Contracting Officer:

- Provides a notice of intent to purchase to every ITS-SB contractor, including a description of work to be performed and the basis upon which the selection will be made; and
- Affords all ITS-SB contractors responding to the notice a fair opportunity to submit an offer and to be fairly considered.

In making the award, the Ordering Contracting Officer must document his/her selection and the selection must consider price. Finally, though not required, the Ordering Contracting Officer should consider past performance on earlier orders under ITS-SB and use streamlined procedures.

Exceptions to Fair Opportunity. As provided in FAR 16.505(b)(2) and DFARS 216.505-70(b), the Ordering Contracting Officer may waive the requirement to place an order on a competitive basis with a written limited sources justification and approval if one of the following circumstances applies:



- The agency's need for the supplies or services is so urgent that providing a fair opportunity would result in unacceptable delays. Use of this exception requires a justification that includes reasons why the ITS-SB processing time for a fair opportunity to be considered will result in an unacceptable delay to the agency. The justification should identify when the effort must be competed and describe the harm to the agency caused by such a delay.
- Only one contractor is capable of providing the supplies or services at the level of quality required because the supplies or services ordered are unique or highly specialized. Use of this exception should be rare. When using this exception, explain (1) what is unique or highly specialized about the supply or service; and (2) why only the specified contractor can meet the requirement. See DFARS Procedures, Guidance and Information (PGI) 216.505-70(1) for additional guidance.

The order must be issued on a sole-source basis in the interest of economy and efficiency because it is a logical follow-on to an order already issued under this contract, provided that all awardees were given a fair opportunity to be considered for the original order. See DFARS PGI 216.505-70(2) for additional guidance.

- A statute expressly authorizes or requires that the purchase be made from a specified source.
- When it is necessary to place an order to satisfy a minimum guarantee.

FAR 16.505(b)(1)(ii) provides that the Ordering Contracting Officer is not required to contact each of the awardees if information is available that will ensure that each awardee is provided a fair opportunity to be considered for each order. As noted above, however, a "mini-competition" — including contact with the contractors — is required by DFARS 216.505-70 for orders in excess of \$150,000 unless an exception applies.

The Ordering Contracting Officer must follow his/her agency's procedures for documenting the process and rationale for selection of the awardee for each task order. At a minimum, the Ordering Contracting Officer must document his/her selection and the selection must consider price.

7. ORDERING PROCEDURES

TO Request: The requiring activity prepares the TOR package and submits it to the Ordering Contracting Officer. *Attachment 2* contains a TOR checklist and instructions recommended for use when submitting TO requirements to the Ordering Contracting Officer. The checklist describes all documents needed for a complete requirements package.



Note: When submitting requests ensure that the customer and/or site address is correct and includes as much information as possible to allow for an accurate proposal. (i.e. serial numbers, manufacturer/part numbers, quantities, whether the requirement is a renewal or new requirement, customer ID number, contract numbers, renewal contract number or other type of account identifier.)

At a minimum, the package should contain the following:

- **Statement of Work (SOW), Performance Work Statement (PWS), or Statement of Objectives (SOO).** The requiring activity may select from these work statements, depending on their specific requirements.

However, performance-based orders must be used to the maximum extent possible for services as required by FAR 37.102 and FAR 16.505(a) (see *Attachment 3*).

- Specific formats have been developed to streamline the processing time. See examples of the SOW at *Attachment 4*, the PWS at *Attachment 5*, and the SOO at *Attachment 6*.

1. The PWS identifies the technical, functional, and performance characteristics of the government's requirements. The PWS describes the work in terms of the purpose of the work to be performed rather than either "how" the work is to be accomplished or the number of hours to be provided.
2. The SOO is an alternative to the PWS. It is a very brief document (commonly 2-10 pages, depending upon complexity, although there is no maximum or minimum required length) that summarizes key agency goals and outcomes to which contractors respond. It is different from a PWS in that, when a SOO is used, offerors are asked to develop and propose a PWS as part of their solution. Typically, SOO responses would also propose a technical approach, performance standards, incentives/disincentives, and a Quality Assurance Surveillance Plan based upon commercial practices.

At a minimum, a SOO must contain the following information:

- Purpose.
- Scope or mission.
- Period and place of performance.
- Background.
- Performance objectives (i.e., required results).
- Any operating constraints.

Upon award, the winning offeror's solution to the SOO should be incorporated into the resulting TO; the SOO itself is not part of the TO.



- **Funding Document** ITS-SB orders are funded by the requiring activity. Individual Ordering Contracting Officers should provide specific instructions as to the format and content.

2. Evaluation Criteria. All evaluation criteria must be identified and clearly explained in the solicitation. The solicitation must also describe the relative importance of the evaluation criteria. The Ordering Contracting Officer, in conjunction with the requiring activity, may consider the following evaluation criteria (price or cost must be a factor in the selection criteria) to evaluate contractors' proposals:

Technical/management approach

- Understanding of the requirement.
- Technical and management approach.
- Staffing plan (e.g., skill mix, personnel experience or qualifications and availability of personnel, performance location).
- Areas of expertise.
- Past performance on prior TOs under this contract (e.g., approach, personnel, responsiveness, timeliness, quality, and cost control) (*Note:* If practicable, automated systems such as Past Performance Information Management System (PPIMS) or Past Performance Information Retrieval System (PPIRS) should be utilized in lieu of requesting past performance information from the contractors).
- Current distribution of workload.
- Knowledge of the customer's organization.
- Teaming arrangements (including subcontracting).
- Security (including clearance level).
- Performance-based approach.
- Other specific criteria as applicable to the individual TO.

3. Cost/Price. This part of the proposal will vary depending upon the contract type planned for the TO. It should include detailed cost/price amounts of all resources required to accomplish the TO (labor hours, rates, travel, etc.). The contractor may not exceed the labor rates specified in the Labor Rate Table, Section J, *Attachment 1*. However, the contractor is permitted to propose labor rates that are lower than those established in the Labor Rate Table. The contractor shall fully explain the basis for proposing lower rates. The proposed reduced labor rates will not be subject to audit; however, the rates will be reviewed to ensure the government will not be placed at risk of nonperformance. The reduced labor rates will apply only to the respective TO and will not change the fixed rates in Labor Rate Tables. The level of detail required shall be primarily based on the contract type planned for use, as further discussed below.



- **Fixed Price (FP) and Time and Materials (T&M).** The proposal shall identify labor categories in accordance with the Labor Rate Tables and the number of hours required for performance of the task. The proposal must identify and justify use of all non-labor cost elements. It must also identify any government-furnished equipment and/or government-furnished information required for task performance. If travel is specified in the TOR, airfare and/or local mileage, per diem rates by total days, number of trips, and number of contractor employees traveling shall be included in the cost / price proposal. Other information shall be provided as requested in the proposal request.
- **Cost -Reimbursement.** Both “sanitized” and “unsanitized” cost/price proposals will be required for cost reimbursement-type TOs only. “Unsanitized” cost proposals are complete cost proposals that include all required information. “Sanitized” cost proposals shall exclude all company proprietary or sensitive data but must include a breakdown of the total labor hours proposed and a breakout of the types and associated costs of all proposed other direct charges (ODCs). Unless otherwise noted, unsanitized proposals will only be provided to the Ordering Contracting Officer, while sanitized proposals may be provided to the evaluator(s) and other personnel involved in the procurement. Cost/ price proposals shall include, at a minimum unless otherwise indicated in the proposal request, a complete work breakdown structure that coincides with the detailed technical approach and provides proposed labor categories, hours, wage rates, direct/indirect rates, ODCs, and fees. Cost reimbursement proposals shall be submitted in accordance with FAR clause 52.215-20 “Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data.”

4. Evaluation. If a “mini-competition” is being conducted, a panel of evaluators should be appointed to review the proposals submitted by ITS-SB vendors. For each non-price evaluation factor, the evaluators should identify strengths and weaknesses in the proposals and should assign an adjectival rating (e.g., outstanding, good, etc.) for each non-price factor. The evaluators’ findings should be documented in a written evaluation report. The price factor should be evaluated independently from the non-price factors. Individuals who are evaluating non-price aspects of the proposal should not have access to pricing information while performing their evaluations. Evaluations must be conducted fairly and in accordance with the selection criteria in the solicitation. After an initial evaluation of proposals, negotiations (discussions) may be held. Refer to FAR Part 15 for general guidance on the proper conduct of discussions.



5. **Award.** Once evaluations are completed, an authorized selection official must make an award decision and document the rationale for his/her decision. Prior to making a decision, copies of all evaluations must be forwarded to the selection official for his/her review and consideration. *Attachment 10* is an example of the Selection Recommendation Document. The form is signed by the selection official and forwarded to the Ordering Contracting Officer. This form can also be used to document an exception to the fair opportunity requirements.

At a minimum, the following information shall be specified in each task order awarded:

- Date of order.
- Contract and order number.
- Point of contact (name), commercial telephone and fax numbers, and e-mail address.
- Ordering Contracting Officer's commercial telephone number and e-mail address
- Description of the services to be provided, quantity unit price and extended price, or estimated cost and/or fee (TO INCLUDE THE CONTRACT LINE ITEM NUMBER FROM PART B). The work statement should be attached; the contractor's proposal may be incorporated by reference.
- Performance period and delivery date for supplies, including any option period, for services and delivery of supplies, if applicable.
- Address and place of performance or delivery, if applicable.
- Packaging, packing, and shipping instructions, if any.
- Accounting and appropriation data and Contract Accounting Classification Reference Number (ACRN) (DFAS requires an ACRN(s) on all orders.)
- Specific instructions regarding how payments are to be assigned when an order contains multiple ACRNs.
- Invoice and payment instructions.
- Any other pertinent information.

In accordance with 10 U.S. Code § 2304c(d) and FAR 16.505(a)(9), the ordering agency's award decision on each order that is valued at less than \$10 million is generally not subject to protest under FAR Subpart 33.1 except for a protest that an order increases the scope, period, or maximum value of the contract. In lieu of pursuing a bid protest, ITS-SB contractors may seek independent review by the designated ombudsman. The ombudsman will review complaints from the contractors and ensure that all contractors are afforded a fair opportunity to be considered for each order, consistent with the procedures in the contract. The designated ombudsman is identified in Chapter 2, paragraph 7, of these guidelines.

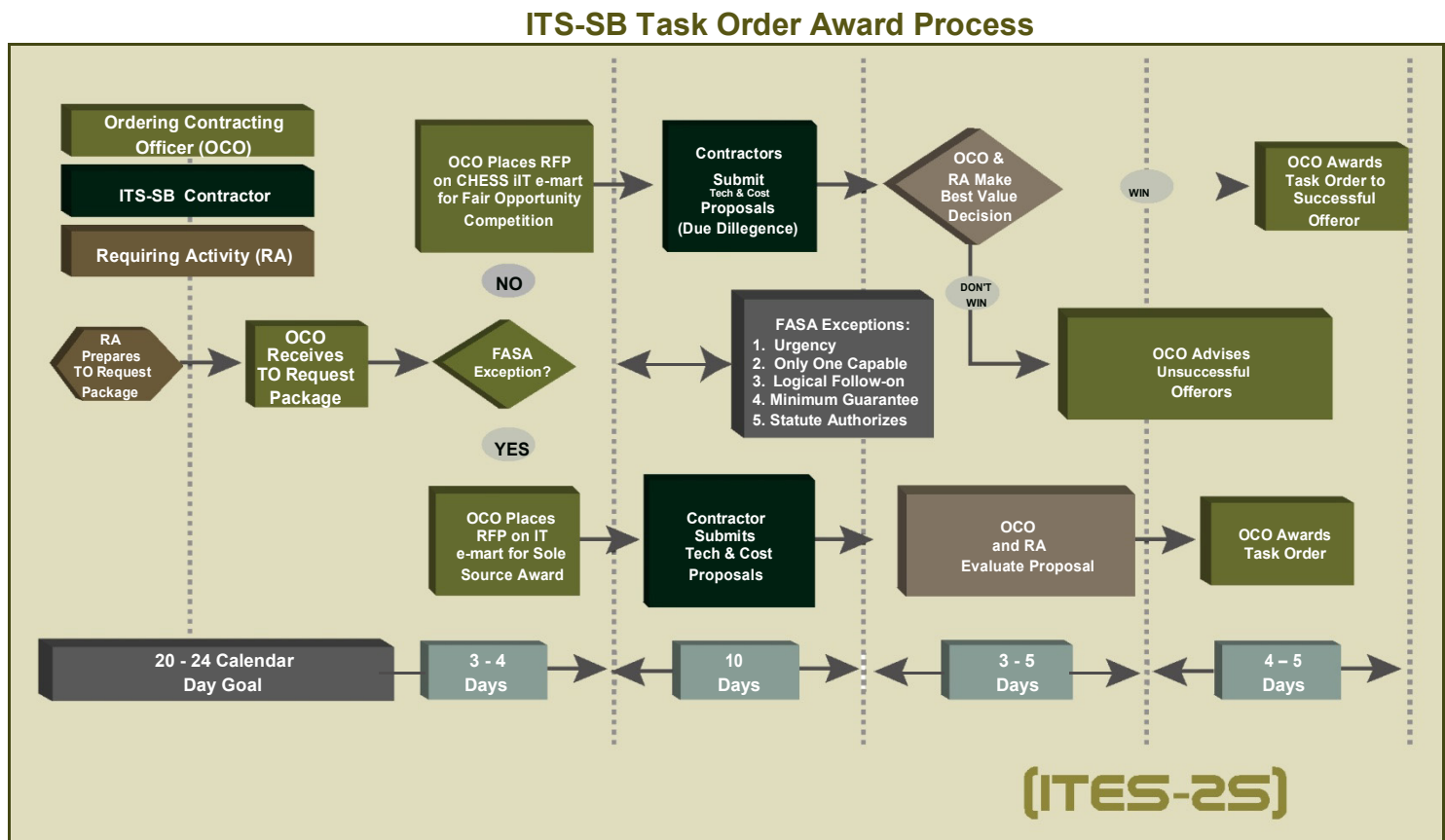


(ITS-SB)
ORDERING GUIDANCE

The executed order will be transmitted via fax, e-mail, or by verbal direction from the Ordering Contracting Officer. If verbal direction is given, written confirmation will be provided within five working days.

After award, timely notification shall be provided to the unsuccessful offerors and will identify, at a minimum, the awardee and award amount.

The ITS-SB Task Order award process is illustrated below:



6. Post Award Debriefing. Under 10 USC 2304a, unsuccessful offerors in competitions for task orders exceeding \$5,000,000.00 have the right to a post-award debriefing if they meet certain request deadline requirements. The deadline requirements can be found in FAR 15.506(a)(1). Under FAR 15.506(a)(4), untimely debriefing requests may be accommodated, and 15.506 is not limited to unsuccessful offerors. Timely requests for a post-award debriefing for task orders meeting the threshold above must be honored, and their debriefings must meet the requirements of FAR 15.506. Also, contracting officers are encouraged to provide debriefings to untimely offerors under competitions exceeding \$5,000,000.00 and to offer a debriefing to all other offerors under task order competitions, even those valued below the mandatory threshold described above. Non-mandatory debriefings should follow all of the requirements in FAR 15.506(d), (e), and (f). Debriefings may be done orally, in writing, or by any method acceptable to the contracting officer.



7. Evaluation of Contractor's Task Order Performance. Section G.4 of the contract requires that, at task order completion, the contractor submit a request for a performance evaluation to the order contracting officer's Representative (OCOR) or his/ her designated representative. The OCOR or his/her designated representative shall complete these evaluations for each task order, regardless of dollar value, within 30 days of completion. Performance evaluations shall also be completed annually for orders that have a performance period in excess of one year. Annual performance evaluations shall be completed within 30 days of task order renewals. Performance evaluations may also be done as otherwise considered necessary throughout the duration of the order (but generally no more than quarterly). The performance evaluations will be located on the CHES Web site at <https://chess.army.mil/scp/ites2s/ctorpp.jsp>



ATTACHMENT 1

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB) PRIME CONTRACTORS AND SUBCONTRACTORS

Below is a representative listing of the prime contractors and their subcontractors.
For a more updated list of the subcontractors, go to the links provided for each prime contractor.

Contract Number: W91QUZ-11-D-0001 PRIME: ActioNet

<http://www.actionet.com>

Subcontractors:

Dexisive, Inc.	Maden Technologies
Geneva Software	Perot Systems Government Services, Inc.
ICS	SONA Networks, LLC
INDUS Corporation	TechTeam Government Solutions, Inc.

Contract Number: W91QUZ-11-D-0002 PRIME: Creative Computing Solutions, Inc.

<http://www.ccsin.com>

Subcontractors:

Computer System Designers, Inc.	OPNET Analysis, Inc
Data Systems Analyst, Inc	Stanley Associates, Inc.
Eagle International Corporation	STG, Inc
Engineering and Professional Services, Inc.	Triumfant, Inc
Engineering Systems Solutions, Inc..	Tuskegee University
GDH Consulting	USfalcon
Hewlett-Packard/EDS	Versar, Inc
Information Security and Forensics Management Team	VMD Systems Integrators, Inc

Contract Number: W91QUZ-11-D-0003 PRIME: Engineering Services Network

<http://www.esncc.com>

Subcontractors:

Apptis, Inc.	LanTech
AUSGAR Technologies, Inc.	NBS Enterprise
Booz Allen Hamilton, Inc.	PearlNet, LLC
Computer Aid, Inc. (CAI)	Stanley Associates
Corporate Professional Services, Inc. (CPSI)	Sumaria Systems, Inc.
CrossMatch	VOSB
InfoStructures	Washington Square Associates, Inc. (WSA)
Infotech & Telecon Engineering Institute, Inc. (ITTECOM)	
Integral Business Solutions (IBS).	

Contract Number: W91QUZ-11-D-0004 PRIME: Enterprise Information Services, Inc.

<http://www.goeis.com>

Subcontractors:

Accenture	iBaseT	STL
CALNET	Immix Group	Subsidium
CoSolutions	Implemetrics	Trusted Tech
Dell	Iron Horse	TSC
Didlake	NGIT	Unitech
DRC	PE Systems	V2Soft
EIS	QuTech	VIVA USA
Elite IT	RTGX	Wyle
GTI Federal	SIM	



Contract Number: W91QUZ-11-D-0005 PRIME: Exeter Information Technology Services, Inc.

<http://www.exeter.com>

Subcontractors:

AAC, Inc.
ia2, Inc.
Mele Associates, Inc.
MPRI, a Division of L-3 Services, Inc.
P3S Corporation

STG, Inc.
The CENTECH Group, Inc
TranTech, Inc.
Wiikno, Inc

Contract Number: W91QUZ-11-D-0006 PRIME: Future Research Corporation

<http://www.future-research.com>

Subcontractors:

CACI
Future Research Corporation
International Logistics Group (ILG)
LOGZONE, Inc. (LZI)
Millennium
New World Solutions (NWS)
Northrop Grumman Corporation (NGC)
Optimum Solutions, Inc. (OSI)
Patrick Wolfe Group (PWG)
Pinnacle Solutions
Reynolds Research & Technology Corporation (R2TC)
Scientific Research Corporation (SRC)

SONA Networks Integration,
Specialized Business Software (SBS)
Spectrum Partners, LLC
SRA International
Stanfield Systems Information Security
Superior Solutions, Inc. (SSI)
SYNNEX
Tactical Missiles & Tactical Systems (TMTS)
Tactical Missiles & Tactical Systems (TMTS)
TBM Solutions
Tec-Masters, Inc. (TMI)

Contract Number: W91QUZ-11-D-0007 PRIME: Information Innovators, Inc.

<http://www.iiinfo.com>

Subcontractors:

SAIC
NES Associates
Solutions by Design II, LLC

Contract Number: W91QUZ-11-D-0008 PRIME: Link Solutions, Inc.

<http://www.linksol-inc.com>

Subcontractors:

ACS, Inc
ATSG, LLC
Bridgeborn
CACI, Inc

C5i Federal, Inc
Catapult Technologies, LLC
SBI Technologies Corporation

Contract Number: W91QUZ-11-D-0009 PRIME: M-Cubed Information Systems

<http://www.mcubedinfo.com>

Subcontractors:

A-Tech
Clear Avenue

Insys
MW Solutions



Contract Number: W91QUZ-11-D-0010 PRIME: MicroTechnologies, LLC.

<http://www.microtech.net>

Subcontractors:

Barrister	Insight
CSC	Tape
IBM	

Contract Number: W91QUZ-11-D-0011 PRIME: NetCentrics Corporation

<http://www.netcentrics.com>

Subcontractors:

Cassatt	Lockheed Martin
Castillo Technologies	NCI Information Systems
Diebold	RTL Networks
Dynamix	SEB Technologies
HBCU/MI Project Office (HPO)	SMS Data Products Group
Integrity	Technology Industries
JANUS	TechnoRescue
L-3 Communications	Turtle Wings

Contract Number: W91QUZ-11-D-0012 PRIME: Network Connectivity Solutions Corporation

<http://www.netcsc.com>

Subcontractors:

Aegis	ERPi
Bowie State University	General Dynamics Information Technology
By-Light	Global Network Solutions (GNS)
Cisco	GTSI
CSF Technologies	Logical Information Services
DISC	NDAC LLC
DSA	Patriot Technologies
DSHi	Prism Pointe Technologies
Dynosi Government Solutions	Softchoice
E&M Technologies	Tapestry Tech
EDS	US Max

Contract Number: W91QUZ-11-D-0013 PRIME: SNVC, L.C.

<http://www.snvc.com>

Subcontractors:

ABN Technologies	FedTek	PCN Strategies
AT&T	FSIS	Platinum Solutions
Barling Bay, LLC	GRSi	Richard S. Carson & Associates
BearingPoint	HCI	SAIC
CherryRoad	iLuMinA	Sigmatech Inc.



CMW	INNOLOG	ST Net
Cornet	Intelligent Decisions	TDI
Data Intelligence LLC	ISIS	Virginia State University
DESE	KPMG	
Digital Technologies Inc.	M&M	
EDC Consulting	McLane Advanced Technologies	
EM&I	Occoquan Crew	
FedConcepts	PAR (Roam Research)	

Contract Number: W91QUZ-11-D-0014 PRIME: Superlative Technologies, Inc.

<http://www.suprteck.com>

Subcontractors:

Access Systems	KeyBridge Technologies, Inc.
Altech Services, Inc.	KForce (AKA dNovus)
Array Information Technology, Inc.	Klett Consulting Group, Inc. (KCS)
CACI International, Inc.	Merlin International
California State University, Los Angeles	MountainTop Technologies, Inc
CDW-G, Inc.	NCI Information Systems, Inc.
CodePro	Newberry Group
Craig Technologies	Pacific Star, Inc.
Craytek, Inc.	Preferred Systems Solutions, Inc. (PSS)
Diligent Consulting, Inc.	Prism Pointe Technologies
Diverse Technologies Corporation	RCF Information Systems, Inc.
FourPoints	S4 Technologies, Inc.
ICS Nett, Inc	Sawdey Solutions Services, Inc.
Insight Global, Inc	Securva, Inc.
Integration Technologies Group, Inc.	Telos Corporation
International Computing Systems, Inc (ICS)	Universal Consulting Services, Inc.
Janus Research Group, Inc.	Wymond Associates, LLC

Contract Number: W91QUZ-11-D-0015 PRIME: T4, LLC

<http://www.t4jv.com>

Subcontractors:

Advantive Corp.	Intercom Federal Systems
Aiken Global Group LLC	Merkatum
Akimeka	Paradigm
Altech	PC Recycler
Alyn Group Technology (AGT)	Prairie View A&M Research Foundation
Atlantic CommTech	Precision Computing Intelligence
Avalon Technology, Inc.	SGIS
Bering Straits Native Corporation	TDG, Inc.
Computer World Services	TechNik
Consolidated Network Communication	The Moore Group
Dynamic Technology Systems, Inc. (DTS)	TWD
Global Technology Solutions (GTS)	
InDyne	
IntePros	

Contract Number: W91QUZ-11-D-0021 PRIME: Tantus-OnPoint ATO Systems Support, LLC

<http://www.tantusonpoint.com>

Subcontractors:

CACI	Advanced Resource Technology
DigiTellLink	Dillon Environmental Associates
Exalt Integrated Technologies	Full Circle Environmental




Lunarline
Schaffer Environmental
Systems Integration and Management
ZeNETex
Exalt Integrated Technologies
University of Texas at El Paso (HHU)

Goodman Networks
Secure IT Solutions
Waterman Engineering
Pamela Brody-Heine Consultant
Strohmer Consulting
Virginia State University

ATTACHMENT EXAMPLE 2

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB) TASK ORDER (TO) REQUEST CHECKLIST AND INSTRUCTIONS

This form constitutes a request for contract support under the ITS-SB contracts. The requiring activity shall complete this form, together with the associated attachments, and forward the entire package to the appropriate Ordering Contracting Officer for processing.

1. TO Title	
2. Requiring Activity Point of Contact. Include name, title, organization, commercial and DSN phone numbers for voice and fax, and e-mail address:	
3. Designated Order Contracting Officer's Representative (COR) Include. name, title, organization, commercial and DSN phone numbers for voice and fax, and e-mail address: (If same as Block 2, type "same.")	
4. Attachments Checklist. Complete package must include the following items. Send files electronically via e-mail or fax to the ordering contracting officer(All. files shall be completed using MS Word Office 2000 or MS Excel Office 2000, as appropriate.) <input type="checkbox"/> Work Statement (check one) <input type="checkbox"/> Statement of Work <input type="checkbox"/> Performance Work Statement includes Quality Assurance Surveillance Plan <input type="checkbox"/> Statement of Objectives <input type="checkbox"/> Funding Document(s) (scanned or other electronic version is preferable) <input type="checkbox"/> Independent Government Cost Estimate <input type="checkbox"/> Proposal Evaluation Plan Bundling Determination (if needed) <input type="checkbox"/> Consolidation Determination (if needed) <input type="checkbox"/> Justification for Work Statement that is not Performance-Based <input type="checkbox"/> TO unique DD Form 254 (only if security requirements)	
5. Task Order Information Contract Type (check one) Time and materials (T&M) and cost reimbursement (CR) contract types require justification in accordance with Federal Acquisition Regulations (the Ordering Contracting Officer makes the final determination of which order type is in the best interest of the government). <input type="checkbox"/> Firm fixed price (FFP) (no justification required) <input type="checkbox"/> CR (provide justification in the box, below) <input type="checkbox"/> T&M (provide justification in the box, below) Rationale: T&M and CR contract types require justification in accordance with Federal Acquisition Regulations.	
Federal Acquisition Streamlining Act (FASA) Exception. If you are citing a FASA exception to fair opportunity competition, designate which one below with a justification. FASA Exception Justification: <input type="checkbox"/> The agency need for services is of such urgency that providing such opportunity would result in unacceptable delays. <input type="checkbox"/> Only one such contractor is capable of providing services required at the level of quality required because they are unique or highly specialized. <input type="checkbox"/> The order should be issued on a sole-source basis in the interest of economy and efficiency as a logical follow-on to an order already issued under this contract, provided that all ITS-SB contractors were given a fair opportunity to be considered for the original order. <input type="checkbox"/> It is necessary to place an order to satisfy a minimum guarantee. A statute expressly authorizes or requires that the purchase be made from specified source. FASA Exception Justification:	
6. Order COR Training Certification: Army Order CORs are required to have COR training prior to appointment in accordance with paragraph 1.7 of the Army Contracting Command (ACC) Acquisition Instruction. Appendix A of the ACC Acquisition Instruction contains all list of ACC-approved training courses. Refer to: http://aca.saalt.army.mil/Community/procedures.htm	
	 28

Order COR Training Certification Date:

ATTACHMENT 3

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB) PERFORMANCE-BASED SERVICE ACQUISITION (PBSA)

1. GENERAL

PBSA is the preferred method of contracting for services and supplies. PBSA means an acquisition structured around the results to be achieved as opposed to the manner by which the work is to be performed. Essential elements of PBSA include: (1) performance requirements, expressed in either a Performance Work Statement (PWS) or Statement of Objective (SOO); performance requirements should be described in terms of what the required output is and should not specify how the work is to be accomplished; (2) Performance standards or measurements, which are criteria for determining whether the performance requirements are met; (3) Appropriate performance incentives, either positive or negative; and (4) A surveillance plan that documents the government's approach to monitoring the contractor's performance. These elements are discussed further below.

2. POLICY

Federal Acquisition Regulation (FAR) 37.102 has established the policy to use a PBSA approach, to the maximum extent practicable, for all services. Services exempted from this policy are: architect-engineer, construction, utility, and services that are incidental to supply purchases. Use of any other approach has to be justified to the ordering contacting officer. For Defense agencies, Defense Federal Acquisition Regulations Supplement 237.170-2 requires higher-level approval for any acquisition of services that is not performance-based.

3. CONTRACT TYPE

The order of precedence set forth in FAR 37.102(a)(2) must be followed for all task orders. It is:

- A firm fixed price, performance-based contract or task order.
 - A performance-based contract or task order that is not firm fixed price.
 - A contract or task order that is not performance-based. Requiring activities should use the contract type most likely to motivate contractors to perform at optimal levels.
- Firm fixed price is the preferred contracting type for PBSA. Work statements should be developed in sufficient detail to permit performance on a fixed-price basis.

4. PERFORMANCE WORK STATEMENTS (PWS)

The PWS identifies the technical, functional, and performance characteristics of the government's requirements. The PWS describes the work in terms of the purpose of the work to be performed rather than either how the work is to be accomplished or the number of hours to be provided. The format for the PWS is similar to the traditional Statement of Work (SOW). In addition, the PWS will include performance standards, incentives, and a Quality Assurance Surveillance Plan (QASP):



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

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

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

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

Note: if a financial incentive is promised, ensure that adequate funds are available at time of task order award to pay incentives that may be earned.

- Examples of monetary incentives include:
 1. Incentive fees.
 2. Share-in-savings.
 3. A negative incentive can be included if the desired results are not achieved (deduction should be equal to the value of the service lost).
- Examples of non-monetary incentives include:
 1. Revised schedule.
 2. Positive performance evaluation.
 3. Automatic extension of contract term or option exercise.
 4. Lengthened contract term (award term contracting) or purchase of extra items (award purchase).



QASP: The QASP is a plan for assessing contractor performance to ensure compliance with the government's performance objectives. It describes the surveillance schedule, methods, performance measures, and incentives.

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

A PWS sample format, including a QASP, is provided as *Attachment 5*.

5. SOO

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

- Purpose
- Scope or mission
- Period and place of performance
- Background
- Performance objectives (i.e., required results)
- Any operating constraints

Upon award, the winning offeror's solution to the SOO should be incorporated into the resulting task order. The SOO itself is not part of the task order.

A SOO sample format is provided as *Attachment 6*.



ATTACHMENT 4

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB) EXAMPLE FORMAT FOR STATEMENT OF WORK (SOW)

1. PROJECT TITLE

Provide a short, descriptive title of the work to be performed.

2. BACKGROUND

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

3. SCOPE

Indicate which Information Technology Solutions – Small Business (ITS-SB) contract task area(s) apply to the work to be performed. Include a high-level view of the procurement, its objectives, size, and projected outcomes. Do not include anything that won't contribute to the expected result. Do include impacts/implications.

4. APPLICABLE DOCUMENTS

An SOW should list legal, regulatory, policy, security, etc. documents that are relevant. Include publication number, title, version, date, where the document can be obtained, etc. If only portions of documents apply, that should be stated..

5. SPECIFIC TASKS

Provide a narrative of the specific tasks that make up the SOW. Number the tasks sequentially, e.g., Task 1 - Title of Task and description, Task 2 - Title of Task and description, etc. Describe in clear terms, using active language, what work will be performed. The requirement must be defined sufficiently for the contractor to submit a realistic proposal and for the government to negotiate a meaningful price or estimated cost. SOWs must be "outcome-based," i.e., they must include the development and delivery of actual products (e.g., assessment report, migration strategy, implementation plan, etc.).

6. DELIVERABLES AND DELIVERY SCHEDULE

List all outputs/outcomes with specific due dates or time frames. Include media type, quantity, and delivery point(s). State due dates in terms of calendar days after task order award.

7. GOVERNMENT-FURNISHED EQUIPMENT AND GOVERNMENT-FURNISHED INFORMATION

Identify the government-furnished equipment and information, if any, to be provided to the



contractor, and identify any limitations on use. Be as specific as possible.

8. PLACE OF PERFORMANCE

Specify whether the work will be performed at the contractor's site or at a government site (with exact address if possible). Describe any local or long distance travel the contractor will be required to perform.

9. PERIOD OF PERFORMANCE

State in terms of total calendar days after task order award (e.g., 365 calendar days after task order award), or in terms of start and end date (e.g., Oct. 1, 20XX through Sept. 30, 20XX).

10. SECURITY

State whether the work will be UNCLASSIFIED, CONFIDENTIAL, SECRET, TOP SECRET, or TOP SECRET with SENSITIVE COMPARTMENT INFORMATION. Contract Section H.8 requires that the level of classified access be incorporated into individual task orders as necessary. The Contract Security Classification Specification, DD Form 254, should be included if required.



ATTACHMENT 5

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB) EXAMPLE FORMAT FOR PERFORMANCE WORK STATEMENT (PWS)

1. PROJECT TITLE

Provide a short, descriptive title of the work to be performed.

2. BACKGROUND

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

3. SCOPE

Indicate which Information Technology Enterprise Solutions – 2 Services (ITS-SB) contract task area(s) apply to the work to be performed. Include a high-level view of the procurement, its objectives, size, and projected outcomes. Do not include anything that won't contribute to the expected result. Do include impacts/implications.

4. APPLICABLE DOCUMENTS

List all relevant legal, regulatory, policy, and security, or other documents.. Include publication number, title, version, date, where the document can be obtained, etc. Clearly state if only portions of documents apply.

5. PERFORMANCE REQUIREMENTS

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

6. PERFORMANCE STANDARDS

Performance standards establish the performance levels required by the government.

Examples of performance standards:

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



- **Quantity standards:** capacity, output, volume, amount.
- **Timeliness standards:** response times, delivery, completion times, milestones.

7. INCENTIVES

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

- **Positive incentives.** Actions to take if the work exceeds the standards. Standards should be challenging, yet reasonably attainable.
- **Negative Incentives.** Actions to take if work does not meet standards.

8. DELIVERABLES AND DELIVERY SCHEDULE

List all outputs/outcomes with specific due dates or time frames. Include media type, quantity, and delivery point(s). State due dates in terms of calendar days after task order award.

9. GOVERNMENT-FURNISHED EQUIPMENT AND INFORMATION

Identify the government-furnished equipment and information, if any, to be provided to the contractor and identify any limitations on use. Be as specific as possible.

10. PLACE OF PERFORMANCE

Specify whether the work will be performed at the contractor's site or at a government site with exact address if possible. Describe any local or long distance travel the contractor will be required to perform.

11. PERIOD OF PERFORMANCE

State in terms of total calendar days after task order award (e.g., 365 calendar days after task order award) or in terms of start and end date (e.g., Oct. 1, 20XX through Sept. 30, 20XX).

12. SECURITY

State whether the work will be UNCLASSIFIED, CONFIDENTIAL, SECRET, TOP SECRET, or TOP SECRET WITH SENSITIVE COMPARTMENTED INFORMATION and include Contract Security Classification Specification, DD Form 254, as required in individual task orders. ITS-SB Contract Section H.8 requires that the level of classified access be incorporated into individual task orders as necessary.

13. QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)



This portion of the PWS explains to the contractor what the government's expectations are, how (and how often) deliverables or services will be monitored and evaluated, and incentives that encourage the contractor to exceed the performance standards and that reduce payment or impose other negative incentives when the outputs/outcomes are below the performance standards. Attach the QASP to the PWS. An example is provided on the next page.

ATTACHMENT 5A

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB)

EXAMPLE QUALITY ASSURANCE SURVEILLANCE PLAN (QASP)

1. TASK ORDER TITLE: Mainframe Maintenance Service (*Example*)

2. WORK REQUIREMENTS: (*list below the tasks specified in Paragraph 5 of the Performance Work Statement (PWS)*)

Examples:

Task 1 – Predictive/Preventive Maintenance

Task 2 – Equipment Repair

Task 3 – Dispatch Center

Task 4 – Work Documentation/Service Log Section

Task 5 – Equipment Monitoring Section

Task 6 – Configuration Management Section

3. PRIMARY METHOD OF SURVEILLANCE: (*choose a method that best fits your requirement, e.g., criticality of work to be performed, the relative importance of some tasks to others, lot size/frequency of service, surveillance period, stated performance standard, performance requirement, availability of agency people/resources, and cost-effectiveness of surveillance vs. task importance.*)

Acceptable surveillance methods include:

- **100 Percent Inspection:** This is recommended only where health and safety are at issue; otherwise it is not cost-effective and is too stringent.
- **Random Sampling:** Appropriate for recurring tasks or productions requirements.
- **Periodic Inspection:** Use a pre-determined plan based on analyses of agency resources and requirements.
- **Customer Input:** Suitable for service-oriented tasks; use a standard form to document.
- **Contractor Self-Reporting:** Appropriate for tasks like system maintenance where the contractor can provide system records that document performance; for development projects, monthly reports can detail problems encountered.

Examples: Random sampling is scheduled for Items 2, 3, 5, and 6. There will be 100% inspection for Items 1 and 4.

4. SCOPE OF PERFORMANCE: (*provide the scope of the requirement as described in Paragraph 3 of the PWS*)



Example: The contractor will provide remedial maintenance service on-site with problem resolution completed within the specified timeframe. Remedial maintenance is defined to include service, including parts replacement, as necessary to restore

5. PERFORMANCE STANDARDS: *(insert the Performance Standards listed in Paragraph 6 of the PWS)*

Example: Mainframe processing availability must be 95% during the hours 0800 – 1600. Response times for maintenance calls should occur within four hours of placing a call.

6. ACCEPTABLE QUALITY LEVEL (AQL): *(must be realistic, stating the minimum standard, percentage of errors allowed, cost trade-offs, etc.)*

Example: The AQL for this project is 100% due to the critical support provided by mainframe operations.

7. EVALUATION METHOD:

Example: The contracting officer's technical representative (COTR) will document the time of verbal notification to the contractor. The COTR will document the official time and date of notification on the Maintenance Call Record. The COTR will review self-diagnostic systems logs, conduct a comparison with actual maintenance performance, and otherwise verify and validate contractor performance. The contractor shall enter in the record the official time the system is restored to full operational status. The COTR will confirm the date and time of problem resolution in the record.

8. INCENTIVES (POSITIVE AND/OR NEGATIVE): *(insert the Performance Incentives listed in Paragraph 7 of the PWS)*

Example: The following negative incentives apply:

- *If resolution is completed within four hours of notification, there will be no adjustment to the invoice amount.*

If resolution time exceeds four hours, the monthly invoice amount will be reduced by 10%. (insert any other appropriate incentives or disincentives)



ATTACHMENT 6

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB)

EXAMPLE STATEMENT OF OBJECTIVES (SOO)

The SOO provides basic, top-level objectives of a task order and is provided in lieu of a government-written statement of work (SOW) or Performance Work Statement. It provides contractors the flexibility to develop cost-effective solutions and the opportunity to propose innovative alternatives meeting the objectives.

FORMAT

- I. Purpose
- II. Scope or Mission
- III. Period and Place of Performance

■ **Overall Objectives**

1. Personnel - Provide a proper skill mix, experience, and required number of qualified personnel
2. Materials - Provide all necessary supplies, spare (parts), tools, test equipment, consumables, hardware, software, automatic data processing equipment, documentation, and other applicable properties.
3. Facilities - Provide administrative and workspaces.
4. Organizational Processes - Provide internal controls, management oversight, and supply support.

■ **Task Order Objectives**

Most objectives will already be identified within the contract document. You may include specific task order objectives here. If you do include this type of objective, you may need to include instructions for how you wish the Information Technology Services – Small Business (ITS-SB) contractors to address these objectives within their proposals. Objectives identified within the SOO are addressed by the ITS-SB contractors within a SOW, which they write. Therefore, consider how objectives identified in this section could be addressed within a SOW.

■ **Technical Objectives**

1. Make maximum use of commercial products.
2. Install the system with a minimum impact to other systems that may be located in the designated facility.
3. Develop and document procedures for managing system engineering, software, and hardware development. Utilize commercial standards and procedures to the maximum extent in achievement of this objective. The system engineering process includes parts management, quality assurance, electrostatic discharge control, reliability, maintainability, system safety, etc.

■ **Program Objectives**

1. Establish program management that provides accurate and timely schedule and



performance information throughout the life cycle of the program.

2. Establish a sound risk management system, which mitigates program risks and provides for special emphasis on software development efforts through integration of metrics to monitor program status.
 3. Obtain sufficient rights in technical data, both software and hardware, such that the government can maintain and modify the training system using government personnel and third-party contractors.
 4. Use electronic technologies to reduce paper copies of program information generated throughout the life of this contract.
 5. Use electronic technologies to communicate and pass data between government and contractor organizations.
- VI. Any operating or programmatic constraints. The following specifications, standards, policies, and procedures represent the constraints placed on this task order.



ATTACHMENT EXAMPLE 7

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB) PROPOSAL EVALUATION PLAN

BASIS OF EVALUATION

(CHECK ONE): **Best Value Trade-Off** **Lowest Price, Technically Acceptable**

Non-Price Factors

Note: Describe the relative weight of each evaluation factor compared with the other evaluation factors. For example, the evaluation factors may all be approximately equal in importance, or one factor may be more important than others.

List the specific areas of your technical/management requirements to be evaluated. These areas should correspond with, and relate to, specific requirements.

1. Technical/Management Approach

List the specific areas of your past performance requirements to be evaluated.

2. Past Performance

These areas should relate to specific work statement requirements.

3. Other Factors (if applicable).

List any other evaluation criteria important to you and the associated weights below.

Price Factors

Adjectival ratings (e.g., outstanding, good, etc.) are assigned to corporate experience, technical/management approach and any other non-price criteria for which you may want to evaluate contractor proposals. Note that balancing price against the non-price factors is how you make your best value trade-off decision, and, as a result, a rating is not assigned to the price factor. Indicate whether all non-price evaluation factors, when combined are:

- **Sign more important than the price factor**
- **More important than the price factor**
- **Comparatively equal to the price factor**
- **Less important than the price factor**
- **Significantly less important than the price factor**



ATTACHMENT 8

INFORMATION TECHNOLOGY SERVICES – SMALL BUSINESS (ITS-SB)

EXAMPLE ARMY CONTRACTING COMMAND (ACC)

LETTERHEAD

IN REPLY REFER TO: (DATE) MEMORANDUM TO: Information Technology Services – Small Business (ITS-SB) Contractors SUBJECT: Request for Task Order Proposals

1. The Director of Information Management for **[insert command]** has a requirement for **[insert, as appropriate]**. The period of performance is **[insert duration of order]**. The anticipated contract type is **[insert as appropriate]**. This requirement has been assigned tracking number **[insert number]**.
2. As provided by Part J, Attachment 4, paragraph (c), Task Order Procedures, of the contract, it is requested that you submit written technical and price proposals in response to the attached **[insert, as appropriate, e.g., Statement of Work, Performance Work Statement, or Statement of Objectives]** (Attachment 1). Specific proposal instructions and evaluation criteria are also attached (Attachment 2). Your proposal or “no-bid reply” shall be submitted no later than **[insert date/time]**. Any “no-bid reply” must include a brief statement as to why you are unable to perform. Please upload your proposal or no-bid reply to the Computer Hardware, Enterprise Software and Solutions *IT e-mart* at: <https://chess.army.mil>.
3. **Virtual Reading Room.** A Virtual Reading Room has been established to provide access to information related to this acquisition **[insert specific information as appropriate]**.
4. **Due Diligence.** As part of the proposal preparation process, the government will offer the ITS-SB contractors the opportunity for due diligence. This will enhance your understanding of the requirements and is in keeping with the principles identified by Federal Acquisition Regulation Part 15.201, Exchanges With Industry Before Receipt of Proposals. The following arrangements have been made for interested contractors to contact appropriate government representatives to ask questions that by their very nature they would not ask if the response would be posted and provided to their competition: **[insert information, as appropriate]**.
5. **Resolution of Issues.** The Ordering Contracting Officer (OCO) reserves the right to withdraw and cancel the proposed task. In such event, the contractor shall be notified in writing of the OCO’s decision. This decision is final and conclusive and shall not be subject to the “Disputes” clause or the “Contract Disputes Act.”



6. Questions should be addressed to the OCO at the following e-mail address: **[insert address]**. Please provide any questions no later than **[insert date/time]**. Questions received after this date may or may not be answered. Contact **[insert name/telephone number]** if you have any questions or require additional information.

Sincerely,

ITS-SB Ordering Contracting Officer

Attachments:

(1) Work Statement

(2) Proposal Submission Instructions and Evaluation Criteria



ATTACHMENT 9

EXAMPLE PROPOSAL SUBMISSION INSTRUCTIONS AND EVALUATION CRITERIA

1. PROPOSAL SUBMISSION INSTRUCTIONS

Technical and Price Proposals shall be separate documents and consist of the following tabs: *Note:* While the Technical Proposal must not contain any reference to price, resource information (such as data concerning labor hours and categories, materials, subcontracts, etc.) must be provided so that a contractor's understanding of the requirements may be evaluated.

- **TAB 1 – Technical Proposal.** Technical proposal information will be streamlined. Page limits are specified below. As a minimum, technical proposals shall address the following elements:
 1. Technical/Management Approach
 2. Key Personnel Assigned
 3. Teaming Arrangements (including subcontractors)
 4. Risks and Risk Mitigation Plan
 5. Period of Performance
 6. Government-Furnished Equipment (GFE)/Government-Furnished Information (GFI)
 7. Security (including clearance level)
 8. Other Pertinent Data
(10 page limit)

Note: If instructions are for a performance-based task order, and if a Performance Work Statement (PWS) is not already included in the solicitation, the Technical Proposal shall also include the offeror's proposed Statement of Work (SOW) or PWS detailing the performance requirements resulting from the Statement of Objectives. **(No page limit)**

- **TAB 2 – Cost/Price Proposal.** This part of the proposal shall include details for all resources required to accomplish the requirements (e.g., labor hours, rates, travel, incidental equipment, etc.). The price proposal shall identify labor categories in accordance with the Labor Rate Tables contained in Section B. It must also identify any GFE and/or GFI required for task performance. If travel is

specified in the SOW or PWS, airfare and/or local mileage, per diem rates by total days, number of trips, and number of contractor employees traveling shall be included.



2. EVALUATION CRITERIA

This is a best value award, and the evaluation criteria for this award will be based on the following factors and weights assigned to each factor.

INSERT CRITERIA AS APPROPRIATE; DESCRIBE THE RELATIVE WEIGHT OF EACH EVALUATION FACTOR COMPARED WITH THE OTHER EVALUATION FACTORS. FOR EXAMPLE, THE EVALUATION FACTORS MAY BE APPROXIMATELY EQUAL IN IMPORTANCE, OR ONE FACTOR MAY BE MORE IMPORTANT THAN OTHERS.

a. Technical/Management Approach:

(1)

(2)

(3)

b. Past Performance:

(1)

(2)

(3)

c. Other Factors:

(1)

(2)

(3)

d. Cost/Price: In performing the best value trade-off analysis, all non-price evaluation factors, when combined, are APPROXIMATELY EQUAL IN IMPORTANCE TO cost/price.

ATTACHMENT 10

EXAMPLE INFORMATION TECHNOLOGY ENTERPRISE SOLUTIONS – 2 SERVICES (ITES-2S) SELECTION RECOMMENDATION DOCUMENT (SRD)

<p>A. Task Order Title: (enter the title as shown in the work statement)</p>	
<p>B. Recommended Prime Contractor: Check the name/number of the ITS-SB prime contractor for whom you are recommending an award.</p>	<p>[fill in contractor name and contract number – example: Contractor ABC – Contract # 123]</p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>
<p>C. Justification:Note: the “Fair Opportunity to be Considered” evaluation and justification is mandatory unless the requirement meets one of the five Federal Acquisition Streamlining Act (FASA)-specified/Section 803 exceptions described in part D below. If one of the exceptions applies, leave section C blank and complete sections D and E.</p>	<p>Attach a narrative summarizing the evaluation results, including the adjectival ratings for each non-price evaluation factor and the identified strengths and weaknesses of the proposals received. Describe the evaluation methodology and the best value analysis that led to the recommendation of the prime contractor that should be awarded the task order in accordance with the ITES-2S Proposal Evaluation Plan. The justification should be streamlined while containing the following:</p> <ol style="list-style-type: none"> Results of Non-Price Evaluations: Discuss the results of the non-price evaluations for each vendor that submitted a proposal. Results of the Price Evaluations: Discuss the results of the price evaluations for each vendor that submitted a proposal. Trade-off Analysis: Describe the analysis that led to the recommendation of the prime contractor that should be awarded the task order.
<p>D. Exception: Note: Complete section D only if an exception to the “Fair Opportunity to be Considered” process is being claimed.</p>	<p>If the specific requirements meet the criteria for one of the five FASA-allowed (Section 803) exceptions to Fair Opportunity and the TO is, therefore, exempt from the evaluation described in part C above, check the appropriate exception and provide justification for why this task order is exempt from Fair Opportunity.</p> <p><input type="checkbox"/> 1. The agency has such urgent need for services that providing such opportunity would result in unacceptable delays. <i>(attach justification)</i></p> <p><input type="checkbox"/> 2. Only one contractor is capable of providing such services required at the level of quality required because the services ordered are unique or highly specialized. <i>(attach justification)</i></p> <p><input type="checkbox"/> 3. The order should be issued on a sole-source basis in the interest of economy and efficiency as a logical follow-on to a task order already issued under the ITS-SB contract, provided that all contractors were given fair opportunity to be considered for the original order. <i>(Enter the contract and task order number of the original task order.)</i></p> <p>Contract W91QUZ-06-D- , Task Order</p> <p>4. It is necessary to place an order to satisfy a minimum guarantee.</p> <p>5. A statute expressly authorizes or requires that the purchase be made from a specified source.</p>
<p>E. Authorized Official</p> <p>Name, Signature, and Date:</p>	<p><i>(SRD must be signed by the authorized selection official, e.g., ordering contracting officer. Electronic signature (/s//) is acceptable.)</i></p>

