



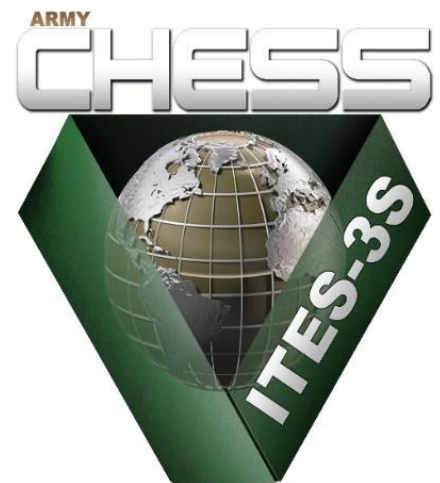
INFORMATION TECHNOLOGY ENTERPRISE SOLUTIONS – 3 SERVICES (ITES-3S)

ORDERING GUIDE

January 2019

HALFAKER

CONTINUING TO SERVE



FOREWORD

These ordering guidelines contain the information needed to use the Halfaker and Associates Information Technology Enterprise Solutions-3 Services (ITES-3S) contract to obtain Information Technology (IT) services worldwide. The Halfaker and Associates ITES-3S contract is structured as Indefinite Delivery/ Indefinite Quantity (ID/IQ) contracts, using task orders for acquisition of specified services.

The contract is available to the Army, Department of Defense (DOD), and other Federal agencies. In addition, Government support contractors may place orders against the contracts in support of their Government customers, in accordance with (IAW) Federal Acquisition Regulation (FAR) Part 51.

Questions regarding this ordering guide and services available from Halfaker through the ITES-3S contract should be directed to the Halfaker ITES-3S Program Management Office (PMO).

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 - Rock Island (ACC-RI). These guidelines will be revised, as needed, to improve the process of awarding and managing orders under the ITES-3S contracts.

CHESS

ATTN: SFAE-PS-CH
9351 Hall Road, Bldg. 1456
Fort Belvoir, VA 22060-5526
Toll Free Customer Line 1-888-232-4405
armychess@mail.mil

ACC-RI

ATTN: CCRC-TA
3055 Rodman Avenue
Rock Island, IL 61299-8000
309-782-4886
Nathan.e.acree.civ@mail.mil

Halfaker and Associates, LLC ITES-3S Program Management Office

ATTN: Amy Nichols
2900 S. Quincy Street, Suite #410
Arlington, VA 22206
(703) 559-1136
amy.nichols@halfaker.com

Government ITES-3S Contracting Specialist

Name: TBD

ITES-3S Contract Specialist

Phone Number: TBD

email: TBD

Government ITES-3S Contracting Officer

Name: TBD

ITES-3S Contracting Officer

Phone Number: TBD

email: TBD

Information regarding the ITES-3S contracts, can be found at: <https://chess.army.mil>.

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CHAPTER 1 ITES-3S GENERAL INFORMATION

1. BACKGROUND

The objective of the ITES-3S contracts is to meet the Army's enterprise infrastructure and infostructure goals with a full range of innovative, world-class Information Technology (IT) support services and solutions at a fair and reasonable price. ITES-3S is a multiple award, ID/IQ contract vehicle. It is the Army's primary source of IT-related services worldwide. All DOD and other Federal agencies are authorized to use the contracts to satisfy their IT requirements.

Working in partnership with the prime contractors, CHESSE manages the contracts, in coordination with the ACC-RI Contracting Center. Through the use of ITES-3S, users have a flexible means of meeting IT service needs quickly, efficiently, and cost-effectively. Orders may be placed by any contracting officer from the aforementioned agencies. There is **no fee** to place orders against the ITES-3S contract.

2. SCOPE

The ITES-3S contracts encompass a full range of innovative, world-class information technology support services and solutions at a reasonable price. Firm Fixed Price (FFP), Time and Materials (T&M), and Cost Reimbursement (CR) Task Orders (TOs) are authorized under this contract. Contract Line Item Numbers (CLINs) cover the following services.

- IT solution services
- IT Subject-Matter Expert (SME)
- IT Functional Area Expert (FAE)
- Incidental construction
- Other direct costs
- IT solution equipment
- Travel and per diem
- IT solution software
- IT solution – Other Direct Costs (ODCs)

The types of services and solutions offered by ITES-3S fall under the following Task Areas: Cybersecurity Services; Information Technology Services; Enterprise Design, Integration and Consolidation Services; Network/Systems Operation and Maintenance Services; Telecommunications/Systems Operation and Maintenance Services; Business Process Reengineering Services; IT Supply Chain Management Services; and IT Education & Training Services. Copies of the Halfaker and Associates, LLC ITES-3S contract 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 TOs.

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



3. Halfaker and Associates ITES-3S Team

Halfaker was awarded a prime ITES-3S contract, W52P1J18DA110. Halfaker’s global teaming approach provides the necessary breadth and depth of resources to cover a wide range of information technology Task Areas. The Halfaker ITES-3S team consists of 18 niche technology innovators, 2 large system integrators, and one large consulting firm. Below are the vendors that make up the Halfaker ITES-3S team:

Teammate	Value to Team and the Customer
Agile Six Applications, Inc.	<ul style="list-style-type: none"> ▪ VOSB, SDVOSB, SB Specializes in Cybersecurity Services, System Certification and Accreditation, Software Application, Simulation and Modeling
Axiologic Solutions LLC	<ul style="list-style-type: none"> ▪ VOSB, SDVOSB, SB Outstanding Army Past Performance- INSCOM Expertise in Systems Engineering, IT Infrastructure Engineering and Program Management
Cognitive Medical Systems	<ul style="list-style-type: none"> ▪ SDB, VOSB, SDVOSB, SB Experienced Subcontractor on ITES-2S Healthcare IT Specialist Expertise in Application and Service hosting, Design for Information Systems, Informatics
Deloitte Consulting LLP	<ul style="list-style-type: none"> ▪ Large Consulting firm Business Process Re-engineering (BPR) experience and past performance Outstanding Army Past Performance Expertise in Cybersecurity services, IT Services, Enterprise Design, Integration, and Consolidation
Excentium, Inc.	<ul style="list-style-type: none"> ▪ VOSB, SB Outstanding Army Past Performance- Army Materiel Command Expertise in IT Support (SharePoint, Solution Engineering), Cybersecurity, Web Enabled Applications
Four, Inc.	<ul style="list-style-type: none"> ▪ SDB, WOSB, SB Prime on ITES-2S SB (COTS Integration) Expertise in Business Case Analysis, Customer Relationship Management, IT Capital Planning, Cost Benefit/Cost Effectiveness Analysis, Help Desk Support
Greystones Consulting Group, LLC	<ul style="list-style-type: none"> ▪ SDB, WOSB, SB Outstanding Army Past Performance – Ft. Gordon Expertise in DODAF-based Op and System Architecture Design and Development, IT Services
Liberty IT Solutions, LLC	<ul style="list-style-type: none"> ▪ VOSB, SDVOSB, SB



	Expertise in Development platforms including Java, MUMPS, HTML5, JavaScript, Ruby on Rails, as well as other mission-critical technology areas
METCOR, Ltd., dba Learning Systems International (LSI)	<ul style="list-style-type: none"> ▪ VOSB, SB Experienced Subcontractor on ITES-2S Expertise in IT Education and Training, Instructional Design and Modeling & Simulation, 508 Compliance Support
MFSI Government Group	<ul style="list-style-type: none"> ▪ VOSB, SDVOSB, SB Army Past Performance- G-8 and Logistics Support Activity Experience in mission critical national security & warfighter support solutions to the U.S. Armed Forces Expertise in Software Middleware and Source Data Development, Business case analysis, Quality Assurance
n2grate Government Technology Solutions, LLC	<ul style="list-style-type: none"> ▪ HUBZone, SB Experienced Subcontractor on ITES-2S Expertise in IT Architecture Support, Legacy Systems Modernization, VOIP, Network infrastructure support
NCI Information Systems	<ul style="list-style-type: none"> ▪ Large IT firm Fifth highest contractor on ITES-2S (in dollars) Outstanding Past Performance Expertise in Cybersecurity and Information Assurance, IT Service Management, Cloud Computing and IT Infrastructure Optimization, Enterprise Information Management and Advanced Analytics
Nisga'a Data Systems, LLC	<ul style="list-style-type: none"> ▪ Alaskan Native, SDB, SB Considerable amount OCONUS Army work Expertise in Performance Benchmarking, Measurements, Data Warehousing, IT Architecture Support
Northrup Grumman Technology Services Sector	<ul style="list-style-type: none"> ▪ Large System Integrator Top contractor on ITES-2S (in dollars) Outstanding Past Performance Current and past teammate for multiple opportunities and awarded contracts with Halfaker

4. CONTRACT TERMS/APPROACH

The Halfaker ITES-3S contract has the following contract terms and provisions:

Contract Terms	ITES-3S
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Contract Maximum	<ul style="list-style-type: none"> • \$12,100,000,000 • The contract maximum represents the total requirement for the life of the contract (including options, if exercised)
Period of Performance	<ul style="list-style-type: none"> • 9 Years: <ul style="list-style-type: none"> ○ One five-year base Ordering Period ○ Four one-year Ordering Period options (if exercised)
Pricing Structure	<ul style="list-style-type: none"> • FFP • T&M • CR
Performance-Based Contracting	<ul style="list-style-type: none"> • Preferred method for acquiring services
Fair Opportunity to be Considered	<ul style="list-style-type: none"> • Subject to FAR 16.505
Ordering Guidance and Process	<ul style="list-style-type: none"> • See Chapter 3 Ordering Guide - Ordering Guidance

5. PERFORMANCE-BASED SERVICE ACQUISITION

Performance-Based Service Acquisition (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 ITES-3S are not required to be performance-based under all circumstances; however, policy promulgated by the NDAA 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 DOD 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 ITES-3S 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 ITES-3S contractors. Reference this Ordering Guide's 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

- IAW10 U.S. Code § 2304c(b) and FAR 16.505(b), the OCO must provide each ITES-3S contractor a fair opportunity to be considered for each order exceeding \$3,000 unless an exception applies.
- 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 TO, Halfaker will first be required to review and utilize available DOD Enterprise Software Initiative (ESI) agreements.

If software is not available to Halfaker through a DOD ESI source, Halfaker shall be authorized to obtain the software through an alternate source. For Army users, a Statement of Non-Availability (SoNA) is required from CHES when acquiring non-ESI software regardless of the dollar value. The customer shall access the SoNA process,



located on the IT e-mart at <https://chess.army.mil/Content/Page/SONA>. The SoNA should be included in the TO file upon award.

For DOD users, a Non-DOD contract certification and approval is required for software buys, with the exception of the Microsoft Premier software IAW DFARS 217.78. This Non-DOD documentation is required because the ESI Blanket Purchase Agreements are established against General Services Administration (GSA) ID/IQs.

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

If related incidental hardware and software are required for a particular TO, the CHES hardware contracts are the preferred source of supply. For Army users, it is the mandatory source for hardware and software IAW Army Federal Acquisition Regulation Supplement (AFARS) 5139.101. CHES also has a representative sample list on its web site of Commercial IT Products and Services authorized for use by customers worldwide. A request for quote 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, Halfaker shall be authorized to obtain the hardware through an alternate source.

For Army users, a SoNA 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 IT e-mart at <https://chess.army.mil>. The customer shall access the SoNA process, located on the IT e-mart at <https://chess.army.mil/Content/Page/SONA>. The SoNA should be included in the TO file upon award.



CHAPTER 2 ITES-3S ROLES AND RESPONSIBILITIES

The following is a summary of the roles and responsibilities for the primary organizations in the ITES-3S contract process.

1. ARMY CONTRACTING COMMAND – ROCK ISLAND (ACC-RI)

The ACC-RI Procuring Contracting Officer's (PCO) roles and responsibilities are as follows:

- Serves as the PCO for the ITES-3S contracts. The PCO has overall contractual responsibility for the ITES-3S 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 or the Ordering Guide.
- Provides advice and guidance to Requiring Activities' (RA), OCOs, and contractors regarding contract scope, acquisition regulation requirements, and contracting policies.
- Approves and issues base ITES-3S contract modifications.
- Represents the Contracting Officer position at various contract-related meetings.

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

The CHESS organization's roles and responsibilities are as follows:

- Requiring Activity (RA)s / Administrative Contracting Officer Representative (ACOR) for this acquisition
- Maintains the IT e-mart, a **no-fee** flexible procurement strategy through which an Army user may procure COTS IT hardware, software, and services. The CHESS IT e-mart website is: <https://chess.army.mil>.
- With support from the Information Systems Engineering Command, Technology Integration Center, CHESS assists Army organizations in defining and analyzing requirements for meeting the Army's enterprise infrastructure and infostructure goals.
- Works with other RAs, including those outside of the Army, to help them understand how ITES-3S can best be used to meet their enterprise requirements.
- Conducts periodic meetings with the prime contractors, e.g., In-Process Review, as needed to ensure requirements, such as approved DOD standards, are understood.

3. REQUIRING ACTIVITY (RA)

RA is defined as any organizational element within the Army, DOD, or other Federal Agencies. The RA's roles and responsibilities are as follows:

- Adheres to the requirements and procedures defined in the ITES-3S contracts and these ordering guidelines.
- Defines requirements.
- Prepares TO requirements packages.
- Funds the work to be performed under ITES-3S orders.
- Provides personnel to evaluate proposals submitted.
- Provides past performance assessments.
- Monitors and evaluates contractor performance.



4. ORDERING CONTRACTING OFFICER (OCO)

The OCO's roles and responsibilities are as follows:

- OCOs 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.
- Not authorized to make changes to the contract terms and/or conditions. The OCOs authority is limited to the individual orders.
- Serves as the interface between the contractor and the Government for individual orders issued under the ITES-3S contracts.
- Responsible for determining if bundling of requirements (see FAR 2.101) is in compliance with FAR 7.107.
- Responsible for determining whether consolidation of requirements, compliance, and approval are IAW DFARS 207.170.
- Responsible for requesting, obtaining, and evaluating proposals/quotations and for obligating funds for orders issued.
- The OCO reserves the right to withdraw and cancel a task if issues pertaining to the proposed task arise that cannot be satisfactorily resolved.
- Responsible for identifying when Earned Value Management System is applicable at the TO level IAW DFARS 252.234-7002.

5. ORDERING CONTRACTING OFFICER'S REPRESENTATIVE (OCOR)

The Task Order OCOR's roles and responsibilities are as follows:

- Task Order CORs will be designated by letter of appointment from the OCO.
- Serves as the focal point for all task activities, and primary Point of Contact (POC) with the contractors.
- Provides technical guidance in direction of the work; not authorized to change any of the terms and conditions of the contract or order.
- Shall use the measures and standards set forth in the Quality Assurance Surveillance Plan (QASP) to assess contractor performance, thereby ensuring the quality of services required by the TO are met.
- Obtains required COR training. Note: The Army Contracting Command (ACC) COR Guide provides a list of approved COR training courses: <https://www.us.army.mil/suite/doc/24452057&inline=true>.

6. Halfaker and Associates, LLC

The principal role of Halfaker is to perform services and/or deliver related products that meet requirements and/or achieve objectives/outcomes described in orders issued under the ITES-3S contracts.

7. OMBUDSMAN

IAW FAR 16.505(b), ITES-3S contractors that are not selected for award under a Task Order competition may seek independent review by the designated ITES-3S ordering agency's Ombudsman. The Ombudsman is responsible for reviewing complaints from contractors and ensures that all contractors are afforded a fair opportunity to be considered, consistent with the procedures set by this contract and regulation. The ACC-RI Ombudsman will review complaints from contractors on all TOs issued by ACC-RI. The Ombudsman for Task Orders not issued by ACC-RI will be the Ombudsman that supports the OCO. The designated Ombudsman for ITES-3S Task Orders issued by ACC-RI is:



Amy VanSickle
Army Contracting Command-Rock Island (ACC-RI)
CCRC-OC
3055 Rock Island Arsenal
Rock Island Arsenal
309-782-1002 / DSN 793-1002
amy.j.vansickle.civ@mail.mil

Note: IAW FY08 Authorization Act, Section 843, the U.S. Government Accountability Office (GAO) will entertain a protest filed on or after May 27, 2008, for delivery orders valued at more than \$10M. Procedures for protest are found on 4 Code of Federal Regulations Part 21 (GAO Bid Protest Regulations).



CHAPTER 3 ITES-3S ORDERING GUIDANCE

1. GENERAL

- Ordering is decentralized for all ITES-3S 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 OCO. OCOs are empowered to place orders IAW the terms and conditions of the ITES-3S contracts, ITES-3S ordering guidelines, the FAR, DFARS (as applicable), and the OCO's agency procedures.
- The PCO will not make judgments or determinations regarding orders awarded under the ITES-3S contracts by an OCO. All issues must be resolved consistent with individual agency procedures and/or oversight.
- Upon request, the PCO is available to provide guidance to OCOs executing orders under the ITES-3S contracts.
- The CHESSE IT e-mart at <https://chess.army.mil> is available to make price comparisons among all ITES-3S awardees and solicit competitive quotes. Only services and related incidental hardware/software items are to be released on the ITES-3S IT e-mart. Hardware/software-only items are to be placed on ADMC-2 or ITES- 2H/3H. The OCO will initiate the Task Order Request (TOR) process by issuing a TOR to all awardees via the CHESSE IT e-mart. OCOs MUST issue the Request for Proposal (RFP)/TORs via the IT e-mart.
- When posting an RFP/TOR, RAs are not to simply submit an ITES-3S contractor's quote as an RFP/TOR. This is considered to be contractor proprietary information.
- When posting a TOR, include specific delivery instructions for proposal responses. Contractors will indicate their interest via CHESSE IT e-mart; however, proposal packages shall be delivered by means identified in the TOR.

2. PRICING

- All TOs awarded pursuant to this contract on a FFP or T&M basis must be priced IAW the pricing set forth in the Labor Rate Table (reference contractors' ITES-3S Price Matrix, Section J, Attachment 3). 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 ITES-3S contractor may propose labor rates that are lower than those specified in its Labor Rate Table, but shall not exceed the labor rates in its Labor Rate Table.
- CR TOs are allowable under ITES-3S. CR TOs are suitable for use only when uncertainties involved in contract performance do not permit costs to be estimated with sufficient accuracy to use any type of FP TO. A CR TO may be used only when the contractor's accounting system is adequate for determining costs applicable to the TO and appropriate Government surveillance during performance will provide reasonable assurance that efficient methods and effective cost controls are used. 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 ITES-3S. 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 FAE, and incidental construction categories may only be used if no other labor category can satisfy the requirement. If the ITES-3S contractor proposes these categories when not directed by the OCO, no fee or profit is allowed. OCOs are discouraged from directing the use of FAEs and SMEs. However, if the OCO deems it necessary to direct the ITES-3S contractor to propose these categories, a fixed fee of 3% is allowable. ITES-3S contractors are required to seek and obtain approval from the OCO 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.

3. SMALL BUSINESS SET ASIDE

- The following clauses only apply at the order level when the requirement has been set-aside for Small Business:
 - 52.219-3 - Notice of HUBZone Set-Aside or Sole Source Award (Nov 2011)
 - 52.219-6 - Notice of Total Small Business Set-Aside (Nov 2011) with Alternate I
 - 52.219-13 - Notice of Set-Aside of Orders (Nov 2011)
 - 52.219-14 - Limitations on Subcontracting (Nov 2011)
 - 52.219-27 - Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (Nov 2011)
 - 52.219-29 - Notice of Set-Aside for, or Sole Source Award to, Economically Disadvantaged Women-Owned Small Business Concerns (Dec 2015)
 - 52.219-30 - Notice of Set-Aside for, or Sole Source Award to, Women-Owned Small Business Concern Eligible Under the Women-Owned Small Business Program (Dec 2015)
- Note that the Limitations on Subcontracting clause only applies at the Task Order level. Small businesses may compete on unrestricted TOs without having to meet the requirements of the Limitations on Subcontracting clause.

4. ORDER FORMS AND NUMBERING

- An appropriate order form (Defense Department (DD) Form 1155, Order for Supplies or Services, or Non-DOD Federal agencies equivalent) shall be issued for each TO. The use of Government credit cards is also authorized IAW applicable rules and procedures. TOs may be issued via telephone, fax, e-mail, postal mail or CHES's IT e-mart.

5. DELIVERY REQUIREMENTS

Delivery of services shall be IAW individual orders.

6. SECURITY CONSIDERATIONS

The level of classified access will 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.

7. FAIR OPPORTUNITY TO BE CONSIDERED

IAW FAR 16.505(b)(2), for all orders exceeding \$3,500, the OCO shall give every ITES-3S



contractor a fair opportunity to be considered for a TO unless one of the exceptions to fair opportunity applies (see paragraph below for further discussion of exceptions). The OCO must consider all ITES-3S contractors for the work though he/she is not necessarily required to contact any of them. The OCO 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 DOD agencies must be placed on a competitive basis IAW FAR 16.505 unless a written waiver is obtained, using the limited sources justification and approval format in FAR 16.505(b)(2)(ii)(B). OCO should refer to their agency's approval authorities for placing orders on an "other than a competitive" basis. This competitive basis requirement applies to all orders by, or on behalf of, DOD. Non-DOD agencies shall comply with their 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 OCO:

- Provides a notice of intent to purchase to every ITES-3S contractor, including a description of work to be performed and the basis upon which the selection will be made; and
- Affords all ITES-3S contractors responding to the notice a fair opportunity to submit an offer and to be fairly considered.

Exceptions to Fair Opportunity

As provided in FAR 16.505(b)(2), the OCO 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 ITES-3S 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 completed and describe the harm to the agency caused by such a delay.
- Only one contractor is capable of providing the supplies or services required 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.
- 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 these contracts, provided that all awardees were given a fair opportunity to be considered for the original order.
- A statute expressly authorizes or requires that the purchase be made from a specified source.

FAR 16.505(b)(1)(ii) provides that the OCO 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.

The OCO must follow his/her agency's procedures for documenting the process and rationale for selection of the awardee for each TO. At a minimum, the OCO must document the selection to include price consideration.



8. ORDERING PROCEDURES

Task Order Request

- The RA prepares the TOR package and submits it to the OCO. Ordering Guide Attachment 1 is an example of a TO checklist.

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), PWS, or SOO: the RA 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 Ordering Guide Attachment 2).
- Specific formats have been developed to streamline the processing time. See examples of the SOW at Ordering Guide Attachment 3, the PWS at Ordering Guide Attachment 4, and the SOO at Ordering Guide Attachment 5.
 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 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 TO; the SOO itself is not part of the TO.

- Funding Document: ITES-3S Orders are funded by the OCO's RA. Individual OCOs should provide specific instructions as to the format and content.
- Independent Government Cost Estimate: the estimate will assist the OCO in determining the reasonableness of the contractors' cost and technical proposals. The estimate is for Government use only and should not be made available to the



ITES-3S contractors.

- Basis for TO Award: the OCO, in conjunction with the RA, develops the evaluation criteria that form the basis for TO award. Whether the award will be based on low price, technical acceptability or best value, the criteria should be provided to the contractor. If the award will be based on best value, evaluation factors and significant sub factors that will affect contract award and their relative importance should be shown. Ordering Guide Attachment 6, Proposal Evaluation Plan, has been developed as a recommended format for documenting the basis for award.

Task Order Request Preparation

The OCO will issue a TOR to all ITES-3S contractors for orders exceeding \$3,500.00. The request will include a transmittal letter identifying the TO strategy, contract type, proposal receipt date and time, estimated contract start date, period of performance, and any other related information not contained elsewhere; the appropriate work statement; instructions for submission of a technical and cost/price proposal and selection criteria/basis for award, any special requirements (i.e., security clearances, travel, special knowledge); and other information deemed appropriate for the respective order. Ordering Guide Attachment 7 contains a recommended memo requesting proposals and Ordering Guide Attachment 8 contains sample instructions/basis for award.

- Recommend a submission date of 10 calendar days after issuing a TO request for receipt of proposals; however, the scope and complexity of the TO should be considered when determining proposal due date.
- If unable to perform a requirement, the contractor shall submit a “no bid” reply in response to the proposal request. All “no bids” shall include a brief statement as to why the contractor is unable to perform, e.g., conflict of interest.
- In responding to proposal requests that include a requirement to provide products as part of an overall IT services solution, ITES-3S contractors are expected to use CHES hardware contracts as preferred sources of supply. Other sources may be proposed, but will require justification by the contractor and the approval of the OCO. In addition, contractors are expected to facilitate maximum utilization of ESI source software.

Evaluation Criteria

All evaluation criteria must be identified and clearly explained in the TOR. The TOR must also describe the relative importance of the evaluation criteria. The OCO, in conjunction with the RA, 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 or Past Performance Information Retrieval System 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

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 its respective contract's ITES-3S Price Matrix, Section J, Attachment 3. 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.

- **FFP and T&M.** The proposal shall identify labor categories IAW the ITES-3S Price Matrices 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 (GFE) and/or Government Furnished-Information (GFI) 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.
- **CR.** Both "sanitized" and "unsanitized" cost/price proposals will be required for CR-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 ODCs. Unless otherwise noted, unsanitized proposals will only be provided to the OCO, 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 TOR, 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. CR proposals shall be submitted IAW FAR clause 52.215-20 "Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data."

Evaluation

If a "mini-competition" is being conducted, a panel of evaluators should be appointed to review the proposals submitted by ITES-3S contractors. 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 IAW 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.

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. Ordering Guide Attachment 9 is an example of the Selection Recommendation Document.

The Selection Recommendation Document is signed by the selection official and forwarded to the OCO. 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 TO Award:

- Date of order
- POC (name), commercial telephone and fax numbers, and e-mail address
- OCOs 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 CLIN FROM PART B). The work statement should be attached; the contractor's proposal may be incorporated by reference.
- Delivery date for supplies
- Address and place of performance
- Packaging, packing, and shipping instructions, if any
- Accounting and appropriation data and Contract Accounting Classification Reference Number (ACRN) (Defense Finance and Accounting Service 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

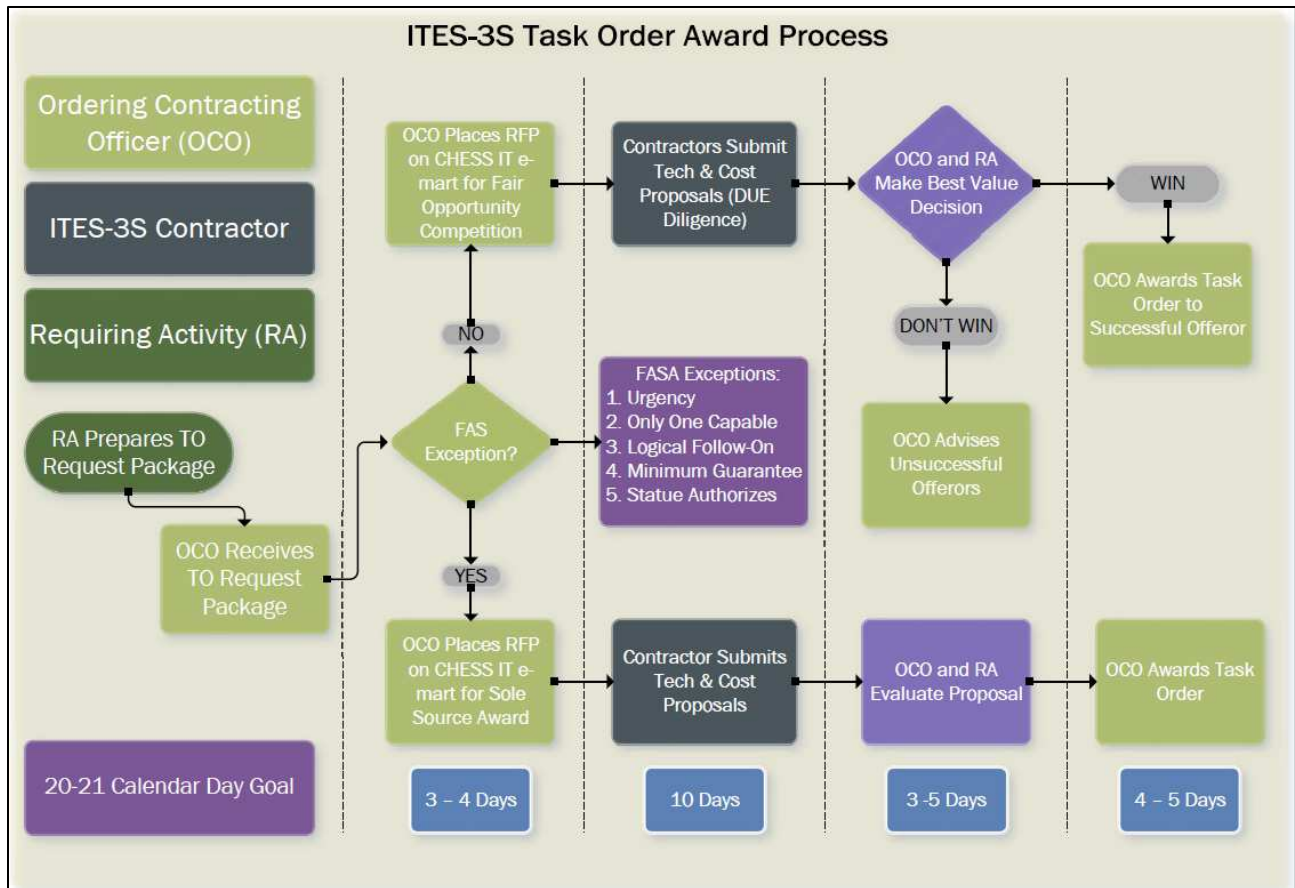
IAW 10 U.S. Code § 2304c(d) and FAR 16.505(a)(10), the ordering agency's award decision on each order is generally not subject to protest under FAR Subpart 33.1 except for a protest that an order increases the scope, period, or maximum value of the contract. In lieu of pursuing a bid protest, ITES-3S 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.

The executed order will be transmitted via fax, e-mail, or by verbal direction from the OCO. 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 ITES-3S TO award process is illustrated below:



Post Award Debriefing

Under 10 USC § 2305(b)(5), unsuccessful offerors in competitions for TOs exceeding \$5,500,000 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)(i), untimely debriefing requests may be accommodated, and 15.506 is not limited to unsuccessful offerors. Timely requests for a post-award debriefing for TOs 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 \$5,500,000 and to offer a debriefing to all other offerors under TO 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.

Evaluation of Contractor's TO Performance

At TO completion, the ITES-3S contractor submits a request for a performance evaluation to the order's COR or his/her designated representative. The order's COR or his/her designated representative shall complete these evaluations for each TO, 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 TO 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 IT e-mart at https://chess.army.mil/Static/SRV_ITS_SB_EVL_CON.

Contractor Performance Assessment Reports (CPARs) are required in the Information Technology or Services sectors for actions valued at \$1M or above. A final CPAR is performed when all performance on the contract is completed. Interim CPARs must be performed on deliveries/performance exceeding 18 months. A CPAR should contain past performance information that is current and relevant information for future source selection purposes. It includes the contractor's record of conforming to contract requirements, standards of good workmanship, forecasting and controlling costs, adherence to contract schedules, administrative aspects of performance, reasonable and cooperative behavior, commitment to customer satisfaction, and business-like concern for the interest of the customer.



ATTACHMENT 1 EXAMPLE

ITES-3S TASK ORDER REQUEST CHECKLIST and INSTRUCTIONS

This form constitutes a request for contract support under the ITES-3S contracts. The requiring activity (RA) shall complete this form, together with the associated Ordering Guide attachments, and forward the entire package to the appropriate ordering contracting officer for processing.

<p>1. Task Order (TO) Title.</p>	
<p>2. RA Point of Contact. Include name, title, organization, commercial and DSN phone numbers for voice and fax, and e-mail address:</p>	
<p>3. Designated Order Contracting Officer 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"):</p>	
<p>4. Attachments Checklist. Complete package must include the following items. Send files electronically via e-mail or fax to the ordering contracting officer.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Work Statement (check one) <ul style="list-style-type: none"> <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 Defense Department Form 254 (only if security requirements) 	
<p>5. TO Information</p> <p>Contract Type (check one) Time and Materials (T&M) and Cost Reimbursement (CR) contract types require justification in accordance with (IAW) Federal Acquisition Regulation (FAR) (the ordering contracting officer makes the final determination of which order type is in the best interest of the government).</p> <ul style="list-style-type: none"> <input type="checkbox"/> Firm Fixed Price (no justification required) <input type="checkbox"/> CR (provide justification in the box, below) <input type="checkbox"/> T&M (provide justification in the box, below) <p>Rationale: T&M and CR contract types require justification IAW FARs.</p>	
<p>Federal Acquisition Streamlining Act (FASA) Exception. If you are citing a FASA exception to fair opportunity competition, designate which one below with a justification.</p> <p>FASA Exception Justification:</p> <ul style="list-style-type: none"> <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 ITES-3S contractors were given a fair opportunity to be considered for the original order. <input type="checkbox"/> A statute expressly authorizes or requires that the purchase be made from specified source. 	
<p>6. Order COR Training Certification: Army Order CORs are required to have COR training prior to appointment IAW paragraph 1.7 of the Army Contracting Command (ACC) Acquisition Instruction. Appendix A of the ACC Acquisition Instruction contains a list of ACC-approved training courses. Refer to: https://arc.army.mil/COR/CORHandbooks_SelfServe.aspx</p>	
<p>Order COR Training Certification Date:</p>	



ATTACHMENT 2

PEFORMANCE-BASED SERVICE ACQUISITION

1. GENERAL

Performance-Based Service Acquisition (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 objectives (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

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, DFARS 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 (TOs). It is:

- A Firm Fixed Price (FFP), performance-based contract or TO.
- A performance-based contract or TO that is not FFP.
- A contract or TO that is not performance-based. Requiring activities should use the contract type most likely to motivate contractors to perform at optimal levels. FFP 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

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. In addition, the PWS will include performance standards, incentives, and a 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). They must also:

- 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 TOs.

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 TO award to pay incentives that may be earned.

Examples of monetary incentives include:

- Incentive fees
- Share-in-savings
- 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:

- Revised schedule
- Positive performance evaluation
- Automatic extension of contract term or option exercise
- 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 Ordering Guide Attachment 4.

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 TO. The SOO itself is not part of the TO.

A SOO sample format is provided as Ordering Guide Attachment 5.



ATTACHMENT 3

FORMAT FOR STATEMENT OF WORK EXAMPLE

See FAR Part 37, Subpart 37.602-1

Title: Provide a short title of the work to be performed
Customer Name and Office
Statement of Work (SOW)

Table of Contents

I. The Schedule

- A. Scope: Specify the work to be done in developing the goods to be delivered or services to be performed by a contractor. Define the breadth and limitations of the work to be done.
- B. Applicable Documents: Identify all documents that are relevant or required to perform the work outlined in the Scope section. This may include but is not limited to regulatory, security, and legal documents.
- C. Requirements/ Tasks: Identify the tasks that are required to satisfy the program objectives. These requirements shall reference minimal acceptable standards for work product and all applicable specifications.
- D. Deliverables and Delivery Schedule: List all outputs/outcomes with specific due dates or time frames. (A deliverable is anything that can be physically delivered but may include non-physical things such as required monthly meetings. It is advantageous to have this information depicted in a table).
- E. Government-furnished Equipment and Information (GFE/GFI): 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.
- F. Place of Performance: State where the work will be performed. Describe travel requirements if applicable
- G. Period of Performance: State the Start Date and End Date of the Contract as well as any possible contract extensions
- H. Security: State required Security Clearances

II. Contract Clauses

Include all Procurement Regulations or Law which pertain to this Procurement

Part III. List of Documents, Exhibits and other Attachments

Include all outstanding documents not previously referenced above. This may include specific security forms or exhibits



ATTACHMENT 4

FORMAT FOR PERFORMANCE WORK STATEMENT EXAMPLE

See FAR Part 37.602

Title: Provide a short title of the work to be performed

Customer Name and Office

Performance Work Statement (PWS)

- I. Table of Contents
- II. Scope: Specify the work to be done in developing the goods to be delivered or services to be performed by a contractor. Define the breadth and limitations of the work to be done.
- III. Applicable Documents: Identify all documents that are relevant or required to perform the work outlined in the Scope section. This may include but is not limited to regulatory, security, and legal documents
- IV. Tasks
- V. Contractor Quality Assurance
- VI. Applicable Documents: List legal, regulatory, policy, security, etc. documents that are relevant to the procurement.
- VII. 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.
- VIII. Performance Standards: Performance standards establish the performance levels required by the Government. Examples of performance standards:
 - i. Quality Standards: Condition, Error rates, Accuracy, Form/Function, Reliability, Maintainability
 - ii. Quantity Standards: Capacity, Output, Volume, Amount
 - iii. Timeliness Standards: Response times, Delivery, Completion times, Milestones
- IX. Deliverables and Delivery Schedule: List all outputs/outcomes with specific due dates or time frames. Include media type, quantity, and delivery point(s). (A deliverable is anything that can be physically delivered but may include non-physical things such as required monthly meetings. It is advantageous to have this information depicted in a table).



- X. Place of Performance: State where the work will be performed. Describe travel requirements if applicable
- XI. Period of Performance: State the Start Date and End Date of the Contract as well as any possible contract extensions
- XII. Security: State Security Clearances required to perform the work proposed
- XIII. Government-furnished Equipment and Information (GFE/GFI): 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.
- XIV. 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 4A

QUALITY ASSURANCE SURVEILLANCE PLAN EXAMPLE

See FAR Part 46, Subpart 46.4

- I. Purpose: Describe what will be monitored, how the monitoring will take place, who will conduct the monitoring, and how the monitoring efforts and results will be documented
- II. Performance Management Approach and Strategy: Describe how the customer will monitor the contractor's performance to ensure expected outcomes or performance standards communicated in the PWS are achieved
- III. Government Roles and Responsibilities: Identify which personnel shall oversee and coordinate surveillance activities
- IV. Performance Standards: Define the required level of performance for each of the deliverables outlined in the PWS
- V. Evaluation Method: Identify how the government personnel will conduct the review and communicate findings to the vendor



ATTACHMENT 5

STATEMENT OF OBJECTIVES EXAMPLE

FAR Part 37, Subpart 37.602

- I. Introduction: Provide context around the project and/or work as appropriate. This section should summarize historical information that is necessary to understand the current requirement. The information presented shall result in the offeror understanding how and/or why the requirement evolved and where this requirement is headed, if applicable.
- II. SCOPE: Identify the breadth and limitations of the work to be performed
- III. TASK OBJECTIVES STATEMENT: provide a concise overview of:
 1. The contract effort, goals and objectives; and
 2. How the results or end products will be used.)
- IV. DELIVERABLES: List all outputs/outcomes with specific due dates or time frames
- V. (A deliverable is anything that can be physically delivered but may include non-physical things such as required monthly meetings. It is advantageous to have this information depicted in a table).
- VI. Performance Objectives, Goals, and Outcomes: Provide the desired net result, end goal or product that the procurement was developed to achieve



ATTACHMENT 6

ITES-3S PROPOSAL EVALUATION

PLAN

(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.

Technical/Management Approach

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

Past Performance

These areas should relate to specific work statement requirements.

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 non-price factors facilitates a 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:

- Significantly 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 7

LETTER REQUEST FOR TASK ORDER PROPOSALS

LETTERHEAD

IN REPLY REFER TO:

(DATE) MEMORANDUM TO: Information Technology Enterprise Solutions – 3 Services
(ITES-3S) Contractors

SUBJECT: Request for Task Order (TO) Proposals

1. The Network Enterprise Center 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. 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]** (Ordering Guide Attachment 1). Specific proposal instructions and evaluation criteria are also attached (Ordering Guide 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 ITES-3S 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 reserves the right to withdraw and cancel the proposed task. In such event, the contractor shall be notified in writing of the ordering contracting officer’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 ordering contracting officer 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,
ITES-3S Ordering Contracting Officer

Attachments:
Work Statement (2) Proposal Submission Instructions and Evaluation Criteria



ATTACHMENT 8

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:

- Technical/Management Approach
- Key Personnel Assigned
- Teaming Arrangements (including subcontractors)
- Risks and Risk Mitigation Plan
- Period of Performance
- Government Furnished Equipment (GFE)/Government Furnished Information (GFI)
- Security (including clearance level)
- Other Pertinent Data (**10 pages**)

Note: If instructions are for a performance-based task order, and if a performance work statement (PWS) is not already included in the task order request, 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 compare with the other evolution 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 9

ITES-3S SELECTION RECOMMENDATION DOCUMENT EXAMPLE

<p>1. Task Order (TO) Title. Enter the title as shown in the work statement.</p>	
<p>2. Recommended Prime Contractor. Check the name/number of the ITES-3S prime contractor for whom you are recommending an award.</p>	<p>Fill in Contractor Name and Contract Number.</p> <p>(Example: Contractor ABC – Contractor #123)</p> <p style="text-align: center;"> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> </p>
<p>3. 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 4 below. If one of the exceptions applies, leave section 3 blank and complete sections 4 and 5.</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 TO the ITES-3S 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 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 TO.
<p>4. Exception: Note: Complete section 4 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 the Fair Opportunity and the TO is, therefore, exempt from the evaluation described in section 3 above, check the appropriate exception and provide justification for why this TO is exempt from Fair Opportunity.</p> <ol style="list-style-type: none"> The agency has such urgent need for services that providing such opportunity would result in unacceptable delays. (<i>Attach Justification</i>) 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>) The order should be issued on a sole-source bases in the interest of economy and efficiency as a logical follow-on to a TO already issued under the ITES-3S contract, provided that all contractors were given “Fair Opportunity to be Considered” for the original order. (<i>Enter the contract and TO number of the original TO.</i>) <p style="text-align: center;">Contract W91QUZ-06-D , TO</p> <ol style="list-style-type: none"> It is necessary to place an order to satisfy a minimum guarantee. A statute expressly authorizes or requires that the purchase be made from a specified store.
<p>5. Authorized Official:</p>	<p>Selection Recommendation Document must be signed by the authorized selection official, e.g. ordering contracting officer. Electronic signature (/s/) is acceptable.</p>
<p>Name, Signature and Date:</p>	



ATTACHMENT 10

ITES-3S ACRONYMS

Below is a list of acronyms pertinent to the ITES-3S ordering guide:

- ACC-RI - Army Contracting Command - Rock Island
- ACRN - Accounting Classification Reference Number
- AFARS - Army Federal Acquisition Regulation Supplement
- BPA – Blank Purchase Agreement
- CHESS – Computer Hardware Enterprise Software and Solutions
- CLINs - Contract Line Items
- COR - Contracting Officer Representative
- COTR - Contracting Officer's Technical Representative
- COTS - Commercial Off-the-Shelf
- CR - Cost Reimbursement
- DD - Defense Department
- DFARS - Defense Federal Acquisition Regulation Supplement
- DOD - Department of Defense
- ESI - Enterprise Software Initiative
- FAE - Functional Area Expert
- FAR - Federal Acquisition Regulation
- FASA - Federal Acquisition Streamlining Act
- FFP - Firm Fixed Price
- FY - Fiscal Year
- GAO - Government Accountability Office
- GFE - Government Furnished Equipment
- GFI - Government Furnished Information
- IAW - In Accordance With
- ID/IQ - Indefinite Delivery/Indefinite Quantity
- IT - Information Technology
- ITES-3S – Information Technology Enterprise Solutions – 3 Services
- NDAA - National Defense Authorization Act
- OCO – Ordering Contracting Officer
- OCOR – Ordering Contracting Officer Representative
- ODC - Other Direct Charges
- PBSA - Performance-Based Service Acquisition
- PCO- Procuring Contracting Office
- POC - Point of Contact
- PWS - Performance Work Statement
- QASP - Quality Assurance Surveillance Plan
- RA - Requiring Activity
- RFP - Request for Proposal
- SME - Subject Matter Expert
- SoNA – Statement of Non-Availability



- SOO - Statement of Objectives
- SOW - Statement of Work
- T&M - Time and Materials
- TO - Task Order
- TOR - Task Order Request

