

**SECTION B**

**SCHEDULE OF SUPPLIES OR SERVICE**

**B.1 DESCRIPTION OF SERVICES**

The Contractor shall furnish all personnel, facilities, technology infrastructure, supplies, and services required to plan, implement, operate, and manage multi-channel contact center services as specified in Section C, Statement of Work (SOW).

**B.1.1 Project Start-Up**

Charges associated with Project Start-Up shall include one or more of the following:

- a) Facility and Equipment – Costs incurred to prepare the site and systems at each center to support task requirements, including facility, equipment, supplies and services.
- b) Initial/Special Training – Labor and supply costs incurred to develop training materials and to conduct training of the initial complement of Information Specialists (ISs) or any additional ISs above the initial complement needed to support task requirements (note that this does not include any training costs for new personnel to replace ISs who leave the project [for example, through attrition training] or for any on-going or refresher training conducted by the Contractor to ensure compliance with performance requirements).
- c) Knowledge and Content Development – Labor and supply costs incurred to develop and prepare the knowledge base to support task requirements.
- d) Project Implementation Support – Labor, travel and supply costs incurred in support of start-up activities.

**B.1.1.1 Facility and Equipment**

This is a one-time charge to be paid for all facility, equipment, software, supplies and services needed at each center to support task requirements. The charge includes a fixed base component plus an incremental component.

**B.1.1.2 Initial/Special Training**

This is a one-time charge to be paid for labor and supply costs incurred to develop training materials and train the initial complement of ISs or any additional ISs above the initial complement needed to support task requirements. The charge can also be applied to any training or related activities directed by the Government to accommodate specific needs. The charge includes labor and supply costs for course development, training materials, and instructors and the labor costs for Information Specialists attending the training or related activities. This charge does not apply to any on going or refresher training conductor by the contractor to ensure compliance of performance requirements or training of replacement ISs due to attrition or other causes.

**B.1.1.3 Knowledge and Content Development**

This is a one-time charge to be paid for labor and supply costs incurred to develop the knowledgebase to support task requirements.

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### **B.1.1.4 Project Implementation Support**

This is a fixed fully burdened hourly charge for technical support needed during project implementation. This charge shall cover all work performed to make the contact center(s) fully operational, including achieving security certification and accreditation (C&A) on contractor's information systems in accordance with National Institute of Standards and Technology (NIST) and agency security requirements. Ongoing support for maintaining the facility and technology infrastructure and compliance with security requirements after C&A is achieved shall be included in Core Project Management and Incremental Project Management Support. Project Implementation Support functions may consist of support provided by one or more of the following labor groups, as defined in Sections C.3.5.2 through C.3.5.9:

- Site Management
- Program Management
- Technology Management
- Information Systems Security
- Content and Knowledge Management
- Contact/Case Management
- Relationship Management
- Customer Satisfaction Survey

### **B.1.2 Project Management**

This is a fixed charge to be paid for all technical and management services as defined in Section C.3.5 of the Statement of Work, including routine travel, as defined in Section H.15.1, required to support task requirements. The charge includes a Core Project Management Support component and, if necessary, an Incremental Support component. Core Project Management Support and Incremental Project Management Support cost components apply only to solutions involving dedicated resources. Project management support costs for shared or non-dedicated solutions are included in the hourly rate for such solutions.

#### **B.1.2.1 Core Project Management Support**

This is the fixed monthly charge to be paid for all work performed to support the project after the contact center(s) become fully operational, including all non-incremental core project management staff (e.g., Contractor's Project Manager, site manager, technical and security personnel, human resource personnel, administrative personnel, knowledge specialists, etc.), routine travel, and support services required to support task requirements. Core Project Management Support is the minimum resource level that the contractor has allocated in order to perform all of the project management functions identified in Section C.3.5 for each project complexity level for a dedicated single site solution. For dedicated solutions involving multiple sites and/or more complex implementation, the Contractor may augment the Core Project Management Support with Incremental Project Management Support identified in Section B.1.2.2 below.

#### **B.1.2.2 Incremental Project Management Support**

This is the fixed hourly charge for incremental support needed to accommodate specialized and unique requirements, or new requirements added subsequent to initial project implementation that require additional resources beyond those provided for under Core Project Management Support. The support may be ordered as a one-time support for a specialized project or for recurring support to augment the Core Project Management

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Support. The incremental support may consist of support provided by one or more of the following labor groups, as defined in Section C.3.5.2 thru C.3.5.9:

### **B.1.3 Telecommunications Services, Automated Services, and Other Support Services**

These are charges for services provided and maintained by the Contractor in support of task requirements for the duration of the performance period. Charges may include a one-time service initiation or change order charge and a monthly recurring or usage-sensitive charge. The one-time charge may be a fixed unit rate or hourly labor rate. The recurring charge may be a monthly charge or usage-sensitive charge based on a fixed unit or hourly labor rate.

### **B.1.4 Attended Services – Dedicated Solution**

These are charges for providing attended services using resources that are dedicated to the specific task. The requisite skill levels of the Information Specialists utilized to provide the services are those defined in Sections C.3.2 and C.4 respectively. The "IS Hourly Rate" is the fully burdened fixed unit rate to be paid for each hour of work performed by an IS for a specific task. The fixed IS Hourly Rate reflects the blended hourly rate for work performed by an IS plus any support personnel (e.g., quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment and software, and maintenance required to support the IS in the performance of task requirements.

### **B.1.5 Attended Services – Shared or Non-Dedicated Solution**

These are charges for providing temporary or long-term attended services using non-dedicated resources provided and managed by the Contractor. *The fixed unit rate reflects the fully burdened rate for work performed by an IS plus project management and any support personnel (e.g., project and site managers, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements.* The charges are based on the actual handling time (including call wrap-up time) required for Information Specialists to respond to telephone and e-mail inquiries using prepared scripts/responses. Content for scripts/responses will be provided by the Government or developed by the Contractor. The charges are subject to a minimum service charge for specific minimum daily call volume commitment when the project is active. The minimum service charge shall not apply when the project is in the non-active state. "Non-active state" is defined as any days that the Government has specified in the task order and/or operating directives as non-business days. The minimum service charge is calculated based on the minimum daily call volume commitment multiplied by the number of days the project is active during the month. For tasks that require support beyond normal business hours, the minimum service charge is the aggregate of the service charges for each time period of coverage (Normal Business Hours, Nights, Saturdays and Sundays, Holidays) during the month.

## **B.2 PRICE TABLES**

Prices identified in this section represent the ceiling prices for each of the contract items for the two-year base period, and each of the contract's four (4) two-year option periods.

The pricing tables also contain Extended Periods. Each Extended Period is one year in length. The purpose of the extended periods is to allow the Government to issue a task order, with a maximum performance period of five years, up to the last day of the last contract option period that is exercised

The Contractor may bid a lower price for any contract items in response to a task order request. The unit prices contained in the price tables below are used to create the one-time and recurring charges for individual task orders.

### **B.2.1 Project Start-Up**

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**B.2.1.1 Base Facility and Equipment (For Each Center)**

**Table B.2.1.1-1 Base Facility & Equipment - Fewer than 25 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 10000 | Phone & TTY Services                       | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 10001 | Phone, TTY, Fax, & E-mail Services         | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 10002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 10003 | Add Enhanced Quality Monitoring Solution   | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.1-2 Base Facility & Equipment – Between 25 – 50 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 11000 | Phone & TTY Services                       | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 11001 | Phone, TTY, Fax, & E-mail Services         | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 11002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 11003 | Add Enhanced Quality Monitoring Solution   | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.1-3 Base Facility & Equipment – Between 51 – 100 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 12000 | Phone & TTY Services                       | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 12001 | Phone, TTY, Fax, & E-mail Services         | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 12002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 12003 | Add Enhanced Quality Monitoring Solution   | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.1-4 Base Facility & Equipment - Between 101 – 250 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 13000 | Phone & TTY Services                       | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 13001 | Phone, TTY, Fax, & E-mail Services         | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 13002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 13003 | Add Enhanced Quality Monitoring Solution   | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.1-5 Base Facility & Equipment – Over 250 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 14000 | Phone & TTY Services                       | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 14001 | Phone, TTY, Fax, & E-mail Service          | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 14002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 14003 | Add Enhanced Quality Monitoring Solution   | Each          |                         |                                |                                |                                |                                 |                      |                      |                      |

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**B.2.1.2 Incremental Facility and Equipment (For Each Center)**

**Table B.2.1.2-1 Incremental Facility & Equipment - Fewer than 25 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue               | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|-----------------------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 20000 | Phone & TTY Services                       | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 20001 | Phone, TTY, Fax, & E-mail Services         | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 20002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 20003 | Add Enhanced Quality Monitoring Solution   | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.2-2 Incremental Facility & Equipment – Between 25 – 50 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue               | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|-----------------------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 21000 | Phone, & TTY Services                      | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 21001 | Phone, TTY, Fax, & E-mail Services         | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 21002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 21003 | Add Enhanced Quality Monitoring Solution   | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.2-3 Incremental Facility & Equipment –Between 51 -100 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue               | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|-----------------------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 22000 | Phone & TTY Services                       | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 22001 | Phone, TTY, Fax, & E-mail Services         | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 22002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 22003 | Add Enhanced Quality Monitoring Solution   | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.2-4 Incremental Facility & Equipment – Between 101 – 250 Equivalent Workstations**

| CLIN  | Service Description                        | Unit of Issue               | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|--|-----------------------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 23000 | Phone & TTY Services                       | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 23001 | Phone, TTY, Fax, & E-mail Services         | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 23002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 23003 | Add Enhanced Quality Monitoring Solution   | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.2-5 Incremental Base Facility & Equipment – Over 250 Equivalent Workstations**

| CLIN  | Service Description                | Unit of Issue               | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|------------------------------------|-----------------------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 24000 | Phone & TTY Services               | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |
| 24001 | Phone, TTY, Fax, & E-mail Services | Each Equivalent Workstation |                         |                                |                                |                                |                                 |                      |                      |                      |

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|-------|--|-----------------------------|--|--|--|--|--|--|--|--|
| 24002 | Phone, TTY, Fax, E-Mail, Web Chat Services | Each Equivalent Workstation |  |  |  |  |  |  |  |  |
| 24003 | Add Enhanced Quality Monitoring Solution   | Each Equivalent Workstation |  |  |  |  |  |  |  |  |

**B.2.1.3 Initial/Special Training**

**B.2.1.3.1 Course Development and Training**

**Table B.2.1.3-1 Hourly Rate for Course Development and Training**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 30000 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 30001 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 30002 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 30003 | Level 4             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

**B.2.1.3.2 Information Specialist (IS)/Supervisor Hourly Rate While In Training**

This is the fixed unit rate to be paid for each hour an IS or IS Supervisor is in initial training in preparation of the task. Separate rates are provided for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below. This rate shall also apply for any training requested by the Government subsequent to the initial training.

*Normal Business Hours* are defined as the time period between 7:00 am to 9:00 pm local time, Monday through Friday, except designated federal holidays.

*Nights* are defined as the time period between 12:01 am and 7:00 am local time on Monday, and between 9:00 pm and 7:00 am local time, Monday through Friday, except designated federal holidays.

*Saturdays and Sundays* are defined as the time period between 12:01 am Saturday and 12:01 am Sunday, and between 12:01 am Sunday and 12:01 am Monday local time respectively.

*Holiday hours* are defined as the 24 hour period beginning at 12:00 midnight local time on the day of the holiday.

**Table B.2.1.3.2-1 Information Specialist (IS) Hourly Rate (In Training) – English – Normal Business Hours**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 31000 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31001 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31002 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31003 | Level 4             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31004 | Level 5             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

**Table B.2.1.3.2-1.a Information Specialist (IS) Hourly Rate (In Training) – English – Nights**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 31010 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

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|-------|---------|------|--|--|--|--|--|--|--|--|
| 31011 | Level 2 | Hour |  |  |  |  |  |  |  |  |
| 31012 | Level 3 | Hour |  |  |  |  |  |  |  |  |
| 31013 | Level 4 | Hour |  |  |  |  |  |  |  |  |
| 31014 | Level 5 | Hour |  |  |  |  |  |  |  |  |

**Table B.2.1.3.2-1.b Information Specialist (IS) Hourly Rate (In Training) – English – Saturdays and Sundays**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 31020 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31021 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31022 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31023 | Level 4             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31024 | Level 5             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

**Table B.2.1.3.2-1 .c Information Specialist (IS) Hourly Rate (In Training) – English – Holidays**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 31030 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31031 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31032 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31033 | Level 4             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 31034 | Level 5             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

**Table B.2.1.3.2-2 Supervisory Information Specialist (IS) Hourly Rate (In Training) – English - Normal**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 32000 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 32001 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 32002 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 32003 | Level 4             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 32004 | Level 5             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

**Table B.2.1.3.2-2.a Supervisory Information Specialist (IS) Hourly Rate (In Training) – English - Nights**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 32010 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 32011 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 32012 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

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|-------|---------|------|--|--|--|--|--|--|--|--|
| 32013 | Level 4 | Hour |  |  |  |  |  |  |  |  |
| 32014 | Level 5 | Hour |  |  |  |  |  |  |  |  |

**Table B.2.1.3.2-2.b Supervisory Information Specialist (IS) Hourly Rate (In Training) – English – Saturdays and Sundays**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 32020 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32021 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32022 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32023 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32024 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.3.2-2.c Supervisory Information Specialist (IS) Hourly Rate (In Training) – English - Holidays**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 32030 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32031 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32032 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32033 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 32034 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.3.2-3 Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Normal Business Hours**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 33000 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33001 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33002 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33003 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33004 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.3.2-3.a Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Nights**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 33010 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33011 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33012 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33013 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33014 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

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**Table B.2.1.3.2-3.b Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Saturday and Sunday**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 33020 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33021 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33022 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33023 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33024 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.3.2-3.c Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Holidays**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 33030 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33031 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33032 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33033 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 33034 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.3.2-4 Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Normal Business Hours**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 34000 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34001 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34002 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34003 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34004 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.1.3.2-4.a Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Nights**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 34010 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34011 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34012 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34013 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 34014 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

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**Table B.2.1.3.2-4.b Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Saturday and Sunday**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 34020 | Level 1             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34021 | Level 2             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34022 | Level 3             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34023 | Level 4             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34024 | Level 5             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

**Table B.2.1.3.2-4.c Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Holidays**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 34030 | Level 1             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34031 | Level 2             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34032 | Level 3             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34033 | Level 4             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 34034 | Level 5             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

**B.2.1.3.3 Knowledge and Content Development**

**Table B.2.1.3.3 Knowledge and Content Development Charge**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 40000 | Level 1             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 40001 | Level 2             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 40002 | Level 3             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 40003 | Level 4             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

**B.2.1.3.4 Project Implementation Support Table**

**B.2.1.3.4 Project Implementation Support**

| CLIN  | Service Description              | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|----------------------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 50000 | Site Management                  | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 50001 | Program Management               | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 50002 | Technology Management            | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 50003 | Information Systems Security     | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 50004 | Content and Knowledge Management | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

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|       |                              |      |  |  |  |  |  |  |  |  |
|-------|------------------------------|------|--|--|--|--|--|--|--|--|
| 50005 | Contact/Case Management      | Hour |  |  |  |  |  |  |  |  |
| 50006 | Relationship Management      | Hour |  |  |  |  |  |  |  |  |
| 50007 | Customer Satisfaction Survey | Hour |  |  |  |  |  |  |  |  |

**B.2.2 Project Management**

**Table B.2.2-1 Core Project Management Support (Monthly)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 60000 | Level 1             | Each Month    |                         |                             |                             |                             |                              |                   |                   |                   |
| 60001 | Level 2             | Each Month    |                         |                             |                             |                             |                              |                   |                   |                   |
| 60002 | Level 3             | Each Month    |                         |                             |                             |                             |                              |                   |                   |                   |
| 60003 | Level 4             | Each Month    |                         |                             |                             |                             |                              |                   |                   |                   |

**Table B.2.2-2 Incremental Project Management Support (Monthly)**

| CLIN  | Service Description              | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|----------------------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 61000 | Site Management                  | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61001 | Program Management               | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61002 | Technology Management            | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61003 | Information Systems Security     | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61004 | Content and Knowledge Management | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61005 | Contact/Case Management          | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61006 | Relationship Management          | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 61007 | Customer Satisfaction Survey     | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

**B.2.3 One-time Charges for Telecommunicated Services, Automated Services and Other Support Services**

**Table B.2.3-1 Service initiation Change Order Charges for Telecommunications Services**

| CLIN  | Service Description                   | Unit of Issue        | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------------------------|----------------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 70000 | Toll-Free Number                      | Each                 |                         |                             |                             |                             |                              |                   |                   |                   |
| 70001 | Telecommunications Access Termination | Each T-1 Termination |                         |                             |                             |                             |                              |                   |                   |                   |
| 70002 | Telecommunications Access Termination | Each T-3 Termination |                         |                             |                             |                             |                              |                   |                   |                   |

**Table B.2.3-2 Service Initiation/Change Order Charges for Automated Services**

| CLIN  | Service Description                      | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|--|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 71000 | Interactive Voice Response (IVR) Service | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 71001 | Voice/Speech Recognition                 | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

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|       |                                     |                                     |  |  |  |  |  |  |  |  |
|-------|-------------------------------------|-------------------------------------|--|--|--|--|--|--|--|--|
| 71002 | Text-to-Speech                      | Hour                                |  |  |  |  |  |  |  |  |
| 71003 | Fax-Back/ Fax-on-Demand             | Hour                                |  |  |  |  |  |  |  |  |
| 71004 | Voice Mail                          | Each Voice Mail Box                 |  |  |  |  |  |  |  |  |
| 71005 | Automated Callback                  | Each                                |  |  |  |  |  |  |  |  |
| 71006 | Web Callback                        | Each                                |  |  |  |  |  |  |  |  |
| 71007 | Automated Outbound Dialing Campaign | Each                                |  |  |  |  |  |  |  |  |
| 71008 | Automated Facsimile Service         | Each                                |  |  |  |  |  |  |  |  |
| 71009 | Automated E-Mail Delivery           | Each                                |  |  |  |  |  |  |  |  |
| 71010 | Hosted On Line Ordering             | Hour                                |  |  |  |  |  |  |  |  |
| 71011 | Hosted Web Form                     | Hour                                |  |  |  |  |  |  |  |  |
| 71012 | Hosted FAQ Service                  | Each Database or Group of Databases |  |  |  |  |  |  |  |  |
| 71013 | Hosted Web Chat                     | Hour                                |  |  |  |  |  |  |  |  |

**Table B.2.3-3 Service Initiation/Change Order Charges – Other Support Services**

| CLIN  | Service Description           | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|-------------------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 72000 | Language Translation Services | Each          |                      |                          |                          |                          |                           |                   |                   |                   |
| 72001 | Transcription Services        | Each          |                      |                          |                          |                          |                           |                   |                   |                   |
| 72002 | Fulfillment Services          | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

**B.2.4 Recurring Charges for Telecommunications Services, Automated Services and Other Support Services**

**Table B.2.4-1 Recurring Charges for Telecommunications Services**

| CLIN  | Service Description             | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 80000 | Toll Free Number                | Each          |                      |                          |                          |                          |                           |                   |                   |                   |
| 80001 | Toll-Free Telephone Service     | Each Minute   |                      |                          |                          |                          |                           |                   |                   |                   |
| 80002 | Long-Distance Telephone Service | Each Minute   |                      |                          |                          |                          |                           |                   |                   |                   |

**Table B.2.4-2 Recurring Charges for Automated Services**

| CLIN  | Service Description      | Unit of Issue                 | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|--------------------------|-------------------------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 81000 | IVR Service              | Each Minute                   |                      |                          |                          |                          |                           |                   |                   |                   |
| 81001 | Voice/Speech Recognition | Each Minute                   |                      |                          |                          |                          |                           |                   |                   |                   |
| 81002 | Text-to-Speech           | Each Minute                   |                      |                          |                          |                          |                           |                   |                   |                   |
| 81003 | Fax-Back/Fax-on-Demand   | Each Successful Page          |                      |                          |                          |                          |                           |                   |                   |                   |
| 81004 | Voice Mail               | Each Voice Mail Box per Month |                      |                          |                          |                          |                           |                   |                   |                   |
| 81005 | Automated Callback       | Each Completed Call           |                      |                          |                          |                          |                           |                   |                   |                   |
| 81006 | Web Callback             | Each Completed Call           |                      |                          |                          |                          |                           |                   |                   |                   |

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|--------|--|---|--|--|--|--|--|--|--|--|
| 81007  | Automated Outbound Dialing Campaign                                | Each Successful Call                          |  |  |  |  |  |  |  |  |
| 81008  | Automated Fax Delivery   | Each Successful Delivery                      |  |  |  |  |  |  |  |  |
| 81009  | Automated E-Mail Delivery  | Each Successful Delivery                      |  |  |  |  |  |  |  |  |
| 81010  | Hosted On-Line Ordering  | Each Successful Transaction                   |  |  |  |  |  |  |  |  |
| 81011  | Hosted Web Form  | Each Form per Month                           |  |  |  |  |  |  |  |  |
| 81012  | Hosted FAQ Service – Less than 200,000 page views per month        | Each Database or Group of Databases per Month |  |  |  |  |  |  |  |  |
| 81012a | Hosted FAQ Service – Between 200K to 500K page views per month     | Each Database or Group of Databases per Month |  |  |  |  |  |  |  |  |
| 81012b | Hosted FAQ Service – Between 500K to 1,000K page views per month   | Each Database or Group of Databases per Month |  |  |  |  |  |  |  |  |
| 81012c | Hosted FAQ Service – Between 1,000K to 1,500K page views per month | Each Database or Group of Databases per Month |  |  |  |  |  |  |  |  |
| 81012d | Hosted FAQ Service – Over 1,500K page views per month              | Each Database or Group of Databases per Month |  |  |  |  |  |  |  |  |
| 81013  | Hosted Web Chat  | Each per Month                                |  |  |  |  |  |  |  |  |

**Table B.2.4-3 Recurring Charges for Other Support Services**

| CLIN  | Service Description                      | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|--|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 82000 | Transcription Service                    | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 82001 | Fulfillment Services                     | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 82002 | Language Translation Service - Telephone | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 82003 | Language Translation Service - Written   | Word          |                      |                          |                          |                          |                           |                   |                   |                   |

**B.2.5 Attended Services (Dedicated Solution) - Information Specialist (IS) Hourly Rate**

This is the fully burdened fixed unit rate to be paid for each IS hour worked. The hourly rate includes the blended labor costs of IS and relevant support personnel (e.g., quality monitoring personnel, trainers, human resources personnel, etc.) required to meet task requirements. Separate rates are provided for normal business hours, nights, Saturdays and Sundays, and federal holidays (see Section B.2.1.2.2 for definitions).

**Table B.2.5.1-1 IS Hourly Rate – Normal Business Hours (English)**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 90001 | Level 1             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 90002 | Level 2             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 90003 | Level 3             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 90004 | Level 4             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |
| 90005 | Level 5             | Hour          |                      |                          |                          |                          |                           |                   |                   |                   |

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**Table B.2.5.1-2 IS Hourly Rate – Normal Business Hours (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 90011 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 90012 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 90013 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 90014 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 90015 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.2-1 Supervisory IS Hourly Rate – Normal Business Hours (English)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 91001 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91002 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91003 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91004 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91005 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.2-2 Supervisory IS Hourly Rate – Normal Business Hours (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 91011 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91012 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91013 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91014 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 91015 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.3-1 IS Hourly Rate - Nights (English)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 92001 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 92002 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 90003 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 92004 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 92005 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.3-2 IS Hourly Rate - Nights (Bi-Lingual)**

| CLIN | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
|------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|

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|       |         |      |  |  |  |  |  |  |  |  |
|-------|---------|------|--|--|--|--|--|--|--|--|
| 92011 | Level 1 | Hour |  |  |  |  |  |  |  |  |
| 92012 | Level 2 | Hour |  |  |  |  |  |  |  |  |
| 92013 | Level 3 | Hour |  |  |  |  |  |  |  |  |
| 92014 | Level 4 | Hour |  |  |  |  |  |  |  |  |
| 92015 | Level 5 | Hour |  |  |  |  |  |  |  |  |

**Table B.2.5.4-1 Supervisory IS Hourly Rate Nights (English)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 93001 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93002 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93003 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93004 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93005 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.4-2 Supervisory IS Hourly Rate – Nights (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 93011 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93012 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93013 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93014 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 93015 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.5-1 IS Hourly Rate – Saturdays and Sundays (English)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 94001 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94002 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94003 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94004 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94005 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.5-2 IS Hourly Rate – Saturdays and Sundays (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 94011 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94012 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94013 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 94014 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

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|-------|---------|------|--|--|--|--|--|--|--|--|
| 94015 | Level 5 | Hour |  |  |  |  |  |  |  |  |
|-------|---------|------|--|--|--|--|--|--|--|--|

**Table B.2.5.6-1 Supervisory IS Hourly Rate – Saturdays and Sundays (English)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 95001 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95002 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95003 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95004 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95005 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.6-2 Supervisory IS Hourly Rate – Saturdays and Sundays (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 95011 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95012 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95013 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95014 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 95015 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.7-1 IS Hourly Rate – Holidays (English)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 96001 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96002 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96003 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96004 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96005 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.7-2 IS Hourly Rate – Holidays (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 96011 | Level 1             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96012 | Level 2             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96013 | Level 3             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96014 | Level 4             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |
| 96015 | Level 5             | Hour          |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.5.8-1 Supervisory IS Hourly Rate – Holidays (English)**

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| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 97001 | Level 1             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97002 | Level 2             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97003 | Level 3             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97004 | Level 4             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97005 | Level 5             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

**Table B.2.5.8-2 Supervisory IS Hourly Rate – Holidays (Bi-Lingual)**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 97011 | Level 1             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97012 | Level 2             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97013 | Level 3             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97014 | Level 4             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |
| 97015 | Level 5             | Hour          |                         |                             |                             |                             |                              |                   |                   |                   |

**B.2.6 QA Personnel Multiplier**

The QA Personnel Multiplier is a factor to be applied to the IS and IS Supervisor hourly rate to calculate the effective hourly rate for IS and IS Supervisors when task requirements require the Contractor to provide a solution with IS to QA personnel ratio that is above or below the average requirement. This multiplier is to be used only for dedicated solutions.

**Table B.2.6 QA Personnel Multiplier**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 98001 | Low                 | X Factor      |                         |                             |                             |                             |                              |                   |                   |                   |
| 98002 | Average             | X Factor      | 1.00                    | 1.00                        | 1.00                        | 1.00                        | 1.00                         | 1.00              | 1.00              | 1.00              |
| 98003 | High                | X Factor      |                         |                             |                             |                             |                              |                   |                   |                   |

**B.2.7 Shared or Non-Dedicated Telephone Inquiry Response Solution - Information Specialist (IS) Hourly Rate**

The charges are based on the actual handle time required for Information Specialists to respond to telephone inquiries using prepared scripts/response provided by the Government. The fixed unit rate reflects the fully burdened unit rate for work performed by an IS plus any support personnel (e.g., program and project management, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements for a specific daily work volume commitment. For billing purposes, the actual handle time (including wrap-up time) of all calls during the month shall be totaled and rounded up to the nearest hour. The call handle time shall not include time spent waiting in queue or listening to automated messages.

**Table B.2.7-1 IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Normal Business Hours))**

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| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 99001 | 4 Hours/Day         | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99002 | 8 Hours/Day         | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99003 | 12 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99004 | 24 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99005 | 48 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99006 | 96 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99007 | 192 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99008 | 384 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99009 | 576 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |

**Table B.2.7-1.a IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Nights))**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 99011 | 4 Hours/Day         | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99012 | 8 Hours/Day         | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99013 | 12 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99014 | 24 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99015 | 48 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99016 | 96 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99017 | 192 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99018 | 384 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99019 | 576 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |

**Table B.2.7-1.b IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Saturdays and Sundays))**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option Period 1<br>Yr 3 / 4 | Option Period 2<br>Yr 5 / 6 | Option Period 3<br>Yr 7 / 8 | Option Period 4<br>Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|-------------------------|-----------------------------|-----------------------------|-----------------------------|------------------------------|-------------------|-------------------|-------------------|
| 99021 | 4 Hours/Day         | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99022 | 8 Hours/Day         | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99023 | 12 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99024 | 24 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99025 | 48 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99026 | 96 Hours/Day        | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99027 | 192 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |
| 99028 | 384 Hours/Day       | Each Hour     |                         |                             |                             |                             |                              |                   |                   |                   |

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|-------|---------------|-----------|--|--|--|--|--|--|--|--|
| 99029 | 576 Hours/Day | Each Hour |  |  |  |  |  |  |  |  |
|-------|---------------|-----------|--|--|--|--|--|--|--|--|

**Table B.2.7-1.c IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – English (Holidays))**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 99031 | 4 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99032 | 8 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99033 | 12 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99034 | 24 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99035 | 48 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99036 | 96 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99037 | 192 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99038 | 384 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99039 | 576 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.7-2 IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Normal Business Hours))**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 99041 | 4 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99042 | 8 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99043 | 12 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99044 | 24 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99045 | 48 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99046 | 96 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99047 | 192 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99048 | 384 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99049 | 576 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.7-2.a IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Nights))**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 99051 | 4 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99052 | 8 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99053 | 12 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99054 | 24 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99055 | 48 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99056 | 96 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |

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|-------|---------------|-----------|--|--|--|--|--|--|--|--|
| 99057 | 192 Hours/Day | Each Hour |  |  |  |  |  |  |  |  |
| 99058 | 384 Hours/Day | Each Hour |  |  |  |  |  |  |  |  |
| 99059 | 576 Hours/Day | Each Hour |  |  |  |  |  |  |  |  |

**Table B.2.7-2.b IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Saturdays and Sundays))**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 99061 | 4 Hours/Day         | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99062 | 8 Hours/Day         | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99063 | 12 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99064 | 24 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99065 | 48 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99066 | 96 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99067 | 192 Hours/Day       | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99068 | 384 Hours/Day       | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99069 | 576 Hours/Day       | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |

**Table B.2.7-2.c IS Hourly Rate (Shared or Non-Dedicated Telephone Inquiry Response Solution – Bi-Lingual (Holidays))**

| CLIN  | Service Description | Unit of Issue | Base Period Yr 1 / 2 | Option Period 1 Yr 3 / 4 | Option Period 2 Yr 5 / 6 | Option Period 3 Yr 7 / 8 | Option Period 4 Yr 9 / 10 | Extended Period 1 | Extended Period 2 | Extended Period 3 |
|-------|---------------------|---------------|----------------------|--------------------------|--------------------------|--------------------------|---------------------------|-------------------|-------------------|-------------------|
| 99071 | 4 Hours/Day         | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99072 | 8 Hours/Day         | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99073 | 12 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99074 | 24 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99075 | 48 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99076 | 96 Hours/Day        | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99077 | 192 Hours/Day       | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99078 | 384 Hours/Day       | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |
| 99079 | 576 Hours/Day       | Each Hour     |                      |                          |                          |                          |                           |                   |                   |                   |

**B.2.8 Shared or Non-Dedicated E-Mail Inquiry Response Solution - Information Specialist (IS) Hourly Rate**

The charges are based on the actual handling time required for Information Specialists to respond to e-mail inquiries using prepared scripts/response provided by the Government. The fixed unit rate reflects the fully burdened unit rate for work performed by an IS plus any support personnel (e.g., program and project management, supervisors, quality monitoring personnel, trainers, etc.) and any recurring costs associated with facility, equipment, and maintenance required to support the IS in the performance of task requirements for a specific daily work volume commitment. For billing purposes, the actual time expended by ISs in responding to e-mail inquiries during the month in support of specific task requirements shall be totaled and rounded up to the nearest hour.

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**Table B.2.8-1 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution) - English**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 99101 | 4 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99102 | 8 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99103 | 12 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99104 | 24 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99105 | 48 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99106 | 96 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99107 | 192 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99108 | 384 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99109 | 576 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |

**Table B.2.8-2 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution) – Bi-Lingual**

| CLIN  | Service Description | Unit of Issue | Base Period<br>Yr 1 / 2 | Option<br>Period 1<br>Yr 3 / 4 | Option<br>Period 2<br>Yr 5 / 6 | Option<br>Period 3<br>Yr 7 / 8 | Option<br>Period 4<br>Yr 9 / 10 | Extended<br>Period 1 | Extended<br>Period 2 | Extended<br>Period 3 |
|-------|---------------------|---------------|-------------------------|--------------------------------|--------------------------------|--------------------------------|---------------------------------|----------------------|----------------------|----------------------|
| 99201 | 4 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99202 | 8 Hours/Day         | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99203 | 12 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99204 | 24 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99205 | 48 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99206 | 96 Hours/Day        | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99207 | 192 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99208 | 384 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |
| 99209 | 576 Hours/Day       | Each Hour     |                         |                                |                                |                                |                                 |                      |                      |                      |

**SECTION C**

**PERFORMANCE WORK STATEMENT (PWS)**

**C.1 OVERVIEW**

**C.1.1 Background**

The General Services Administration (GSA) is responsible for implementing the USA Services E-Gov initiative. The USA Services initiative is one of the current Administration's 24 E-Gov initiatives designed to improve the delivery of Government information and services to the American public. In support of the initiative, GSA awarded indefinite delivery, indefinite quantity contracts to five different awardees in July 2004. These contracts are managed as the FirstContact program. As such, they are commonly referred to as the FirstContact contracts. The objective of the FirstContact program was to provide a qualified source of suppliers of contact center and related services to enable Federal agencies to obtain support to serve their customers on a timely and cost effective basis. The performance period of these contracts was one base year with four one year options. The total value of task orders that can be issued under these contracts was set at \$150 million. Although the expiration of the last option year is not scheduled until July 2009, GSA expects to exhaust the \$150 million contract ceiling by September 2007 or earlier. The purpose of this procurement action is to provide a qualified source of suppliers of contact center and related services to enable current FirstContact customer agencies to recompetete their requirements with the new suppliers at or before the end of their current task orders, and to meet new agency requirements. However, the Government makes no commitment that any of the existing customers of the FirstContact contracts will consider the use of the new contracts awarded under this procurement prior to the expiration of their task orders under the FirstContact contracts.

**C.1.2 Scope of Work**

This Statement of Work (SOW) provides a baseline of both general and specific requirements that the Contractor will be expected to accomplish to meet the needs of the Government.

The Contractor shall provide a wide range of automated and manual customer support services to respond to inquiries about Federal Government programs, policies, information sources and agencies from the general public, Congressional offices, business and professional communities, academia, Government offices, and electronic and print media. The Contractor shall furnish the necessary facilities, personnel, equipment, supplies, and services, as required, to meet the requirements of the Government. In addition to providing customer support services, the Contractor shall perform all technical and management functions, as described in this SOW, to plan, design, implement, operate, and manage the contact center solutions. The Contractor shall also provide any special project support needed to analyze, plan, design, implement, operate and manage special customer support services that may be needed to meet the diverse needs of the Government.

The geographic scope of this solicitation encompasses primarily contact centers that will be located in the United States. Where appropriate and on a task order-by-task order basis, the Government may allow centers to be located outside of the United States. The Contractor shall respond to inquiries and fulfillment requests originated from within the United States and from foreign countries.

The term "multi-channel contact center," as used in this solicitation, refers to a customer contact center that performs all functions associated with receiving and responding to inquiries, and providing information and services through the use of various communications media, including telephones,

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50 telecommunications devices for the deaf (TDD/TTY), e-mail, postal mail, facsimile, the Internet, and  
51 other media as appropriate.

52  
53 **C.1.3 Objectives**

54 Through the services offered under this contract, the Government expects to realize the following  
55 objectives:

- 56
- 57 ○ Position the Government’s public information services on par with or exceeding private industry  
58 standards by providing customers with easily accessible, accurate, timely, and professional  
59 responses to their inquiries via their preferred method of communication.
- 60
- 61 ○ Provide capability to respond quickly to provide fully managed multi-channel inquiry response  
62 and management solutions to meet the needs of Federal agencies and programs in emergency and  
63 crisis situations.
- 64
- 65 ○ Provide increased capability to measure and control the delivery of information services to meet  
66 the evolving needs of citizens.
- 67
- 68 ○ Provide solutions that comply with federal information systems security requirements.
- 69
- 70 ○ Gain and sustain access to commercial off-the-shelf, state-of-the-art technology that is secure and  
71 scalable to meet current and future requirements.
- 72
- 73 ○ Control information dissemination costs.
- 74
- 75 ○ Promote job opportunities for individuals who are blind or with severe disability.
- 76

77 **C.2 PROGRAM REQUIREMENTS**

78  
79 **C.2.1 General Requirements**

80  
81 **C.2.1.1 Contact Center Location**

82 Unless approved by the Government, all Contractor-provided, operated, and managed contact centers  
83 shall be located within the United States. For location-specific applications where it is not practical or  
84 economical to locate the center(s) within the United States, the Government may allow the Contractor to  
85 deviate from such requirement. Any such deviation must be approved by the Contracting Officer in  
86 advance of such placement.

87  
88 **C.2.1.2 Hours of Operation**

89 Due to the diversity of agency requirements, the Contractor must have the capability to provide attended  
90 (live) service on a 24 hours a day, 7 days a week (24 x 7) basis. The Contractor shall provide separate  
91 rates for Normal Business Hours, Nights, Saturdays and Sundays, and Holidays, as defined below for  
92 attended services.

93  
94 Normal Business Hours are defined as the time period between 7:00 am to 9:00 pm local time, Monday  
95 through Friday, except designated federal holidays.

96

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97 Nights are defined as the time period between 12:01 am and 7:00 am local time on Monday, between  
98 9:00 pm and 7:00 am local time, Monday through Friday, and between 9:00 pm Friday and 12:01 am  
99 local time Saturday, except on designated federal holidays.

100  
101 Saturdays and Sundays are defined as the time period between 12:01 am Saturday and 12:01 am Sunday,  
102 and between 12:01 am Sunday and 12:01 am Monday local time respectively.

103  
104 Holiday hours are defined as the 24 hour period beginning at 12:00 midnight on the day of the holiday.

105  
106 Specific operating hours, including coverage for normal business hours, nights, Saturdays and Sundays,  
107 and holidays, and emergency notification requirements, if any, will be determined on a case-by-case basis  
108 and be included in task orders issued by the Government.

109  
110 An automated service (e.g., Interactive Voice Response [IVR] or equivalent) shall be used to provide  
111 unattended service 24 hours a day, seven days a week. The Contractor shall provide options that allow  
112 the Government to select the automated service either from the Contractor or from any service providers  
113 under the General Services Administration Federal Government Long Distance Carrier or other  
114 Government contracts (e.g. Verizon, Sprint, Qwest, AT&T), or both.

### 115 116 **C.2.1.3 Place of Performance**

117 All inquiry response work shall be performed at contractor managed facilities within the United States  
118 unless specifically authorized by the Government.

### 119 120 **C.2.1.4 Work Types**

121 Due to the diversity of agency requirements, the Contractor must have the capability to support a wide  
122 range of customer support work types for all communications channels (e.g. telephone, e-mail, facsimile,  
123 postal mail, web chat), including but not limited to the types of inquiries listed below. Specific work  
124 types will be identified in task orders issued by the Government.

- 125
- 126 ○ Referrals
- 127 ○ General information inquiries
- 128 ○ Inquiries on specific programs, applications, and services
- 129 ○ Fulfillment requests
- 130 ○ Order intakes
- 131 ○ Congressional inquiries
- 132 ○ Emergency inquiries
- 133 ○ Contingency-related inquiries (e.g., inquiries resulting from the activation of an agency's  
134 Contingency Of Operations Plan [COOP])
- 135 ○ Service inquiries
- 136 ○ Scheduling of appointments
- 137 ○ Complaint inquiries
- 138 ○ Public comments
- 139 ○ Customer surveys/feedback

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- 140 ○ Transcription services
- 141 ○ Information delivery/collection via outbound service
- 142 ○ Eligibility screening
- 143 ○ Inquiries on news and current events

144

### 145 **C.2.1.5 Language Support**

146 The Contractor must have the capability to support a wide range of languages in responding to live  
147 inquiries under various workload conditions, including but not limited to the languages listed below.  
148 Specific languages and volumes will be identified in task orders issued by the Government. The  
149 Contractor may provide foreign language support via “foreign language line” instead of on-site support if  
150 such is the most effective solution.

151

- 152 ○ English
- 153 ○ Spanish
- 154 ○ Mandarin
- 155 ○ Cantonese
- 156 ○ French
- 157 ○ German
- 158 ○ Japanese
- 159 ○ Korean
- 160 ○ Vietnamese

161

### 162 **C.2.1.6 Rapid Ramp-Up/Ramp-Down**

163 The Contractor must have the capability to ramp-up contact center operation to fully operational status  
164 within forty-eight (48) hours or sooner after task order award in response to crisis and emergency  
165 situations. This means that the contractor must have the facility, technology, and staffing in place to start  
166 taking calls within 48 hours of task award. The 48 hour ramp-up requirement is for tasks requiring  
167 support of up to 250 seats. This includes the provision of required equipment and facilities, trained staff,  
168 telecommunications and automated response solutions, possible round-the-clock attended coverage, and  
169 management reports on inquiry activities. The Contractor must ramp-down to the desired staffing level  
170 within 24 hours of notification by the Government or within the minimum notification period for  
171 terminating employment set forth in employment law, whichever is longer.

172

### 173 **C.2.1.7 Dedicated and Shared or Non-Dedicated Service Solutions**

174 The Contractor must have the capability to provide dedicated and shared or non-dedicated service  
175 solutions in response to specific Government requirements. A dedicate solution is defined as a solution  
176 that utilizes work space, equipment, and staffing which are dedicated to the project. A shared or non-  
177 dedicated solution is defined as a solution that utilizes work space, equipment, and staffing which are  
178 shared with other projects managed by the contractor or its subcontractors. The Contractor is required to  
179 provide dedicated solutions to support all project complexity and skill levels within the timeframe  
180 specified in individual task orders. The Contractor is required to provide shared or non-dedicated service  
181 solutions to support less complex projects that require short ramp-up time and lower skill levels.

182

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183 The Contractor shall provide shared or non-dedicated service solutions to respond to telephone and e-mail  
184 inquiries. At a minimum, shared or non-dedicated telephone inquiry response solutions shall respond to  
185 seventy (70) percent of all calls within twenty (20) seconds after the calls are offered to the Information  
186 Specialists at an abandonment rate of three (3) percent or less. Shared or non-dedicated e-mail inquiry  
187 response solutions shall respond to eighty (80) percent of all e-mail inquiries within two (2) business days  
188 of receipt.  
189

### **190 C.2.2 Sample Workflow**

191 The following sample workflow descriptions are provided for illustrative purposes only. Actual  
192 workflow will be described in individual task orders. The Contractor shall have the capability to  
193 accommodate workflow requirements of varying complexity. The Contractor shall develop the optimum  
194 workflow based on requirements and business rules as identified in individual task order requirements and  
195 industry best practices, as applicable. The Government reserves the right to change the workflow  
196 requirements at any time after task order issuance to accommodate changes in program requirements on  
197 an as-needed basis.  
198

#### **199 C.2.2.1 Sample Call Flow**

200 A sample call flow process is provided below.  
201

202 The caller dials a direct-dial or toll-free telephone number terminating at or routed to the Contractor  
203 provided contact center for Government information and assistance.  
204

205 The call is delivered to an automated service (e.g., IVR or equivalent) furnished either by the Contractor  
206 or the Government. The automated service provides a menu of services that access answers to frequently  
207 asked questions and automated facsimile services. The automated service may also provide an option for  
208 the caller to be transferred automatically to another Government contact center for assistance. If the  
209 caller is unable to satisfy his or her inquiry via the self-service options offered by the automated service,  
210 or prefers to talk to a live Information Specialist (IS), the caller can, during normal business hours, select  
211 the option to speak to a live IS for assistance. If the call is received after normal business hours, the caller  
212 is informed of the business hours and asked to call back during those hours on the next business day, or to  
213 leave a message for a return call. If the call is of an emergency nature, the caller is provided with  
214 directions to call a designated telephone number for assistance.  
215

216 After the caller is routed to an IS, the IS responds to the caller's initial request and any other additional  
217 requests the caller makes. The IS retrieves data from a knowledge base to respond to customer requests  
218 and/or records the required information needed to complete any fulfillment actions. The Contractor shall  
219 provide an inquiry tracking tool whereby the IS shall have the capability to initiate actions or check the  
220 status of previous actions initiated on behalf of the caller. When possible, all systems work shall be  
221 performed while the IS is engaged with the caller during the phone call.  
222

223 The IS either completes the call or routes the call to more experienced Contractor personnel for further  
224 assistance. If information requested is beyond the scope of Contractor's agreed to level of service as  
225 specified in the task order, the IS refers the caller to the appropriate Government agency personnel for  
226 completion. Calls requiring transfer may be accomplished using blind or attended transfer as specified by  
227 the agency, or may be referred to the appropriate agency via e-mail or facsimile rather than via telephone  
228 transfer. In cases where the caller indicates an emergency situation, however, the Contractor personnel  
229 shall stay on the line with the caller (attended transfer) until a live person is reached. The caller has the  
230 option of making multiple requests during any one phone call. At call termination, the IS will perform  
231 after-call wrap-up procedures and logs necessary action items and call information.

232  
233 The nature of the caller's request may require that information be sent to the caller. If the requested  
234 information is available and can be sent by facsimile, the IS shall complete the facsimile transmission. If  
235 printed information is requested, the IS will record the required information needed to complete the  
236 fulfillment action. The fulfillment action may be completed by the Contractor or by the Government.

237  
238 The IS records caller/case profile information for the contact/case management system.  
239

240 Complex requests may require one or more follow up calls by the IS. The IS shall have the capability to  
241 dispatch information to a caller through mail, e-mail, and facsimile. The Contractor-provided inquiry  
242 tracking tool shall monitor all requests that require follow up and automatically assign those requests to  
243 an IS for further action. Where follow up telephone contact is required, the system shall prompt the  
244 assigned IS to make such contact. The IS shall both resolve the issue and initiate the customer callback,  
245 or escalate the issue internally for resolution.  
246

247 **C.2.2.2 E-Mail Workflow (Normal)**

248 A sample description of a normal e-mail workflow process is provided below.  
249

250 The inquirer visits a Government web site (e.g., USA.gov's website @ www.usa.gov). If the inquirer  
251 cannot find what he or she is looking for, the web site provides alternatives for further assistance. One of  
252 the alternatives is a toll-free phone number to call for assistance. Another alternative is to access an  
253 automated tool or service from the website that provides answers to frequently asked questions (FAQs)  
254 (see Section C.3.1.11). If further assistance is needed, the inquirer can access an e-mail form on the  
255 website to send an inquiry on the desired subject. A variation of the web-based e-mail form alternative  
256 may be to allow the inquirer to send an e-mail message directly to a published Government e-mail  
257 address.  
258

259 If the inquirer elects to use the e-mail form alternative, an e-mail form at the website will provide helpful  
260 hints and frequently asked topics to guide the inquirer through the process of submitting the request and  
261 help focus the nature of the inquiry. The request is then forwarded to the contractor-provided contact  
262 center for response.  
263

264 Upon receipt of the inquiry at the center, the Contractor-provided e-mail distribution and management  
265 system will time-stamp, sort, categorize, and prioritize the inquiry based on agency specified business  
266 rules, and assign a tracking number that will be used throughout the process to track the status of the  
267 inquiry. Upon receipt of the inquiry by the contractor's e-mail system, the Contractor may be asked to  
268 immediately forward a copy of the original inquiry to a Government-furnished e-mail address for  
269 informational purposes. The system will capture all relevant information about the inquiry and present it  
270 for use by the IS during the response process. As a first step in the response process, a Government  
271 approved auto-response will be sent immediately to the e-mail address provided by the inquirer to  
272 acknowledge receipt, provide the tracking number for any future communication, and provide an  
273 estimated response time. Over time, as the Contractor develops preformatted responses to frequently  
274 asked subjects, the Contractor may include preformatted responses as part of the auto-response.  
275

276 After the initial acknowledgment, the inquiry will be routed to an IS with the appropriate skills for  
277 responding to the inquiry. Depending on the nature of the inquiry, the IS will either respond directly or  
278 will refer the inquiry to the appropriate contractor or agency personnel for direct response. If the IS  
279 decides to refer the inquiry to an agency (or agencies) for response, the IS will send a notice to inform the  
280 inquirer of this decision and to provide relevant information on the responding office(s), the expected  
281 response time as determined by the agency (if applicable), and contact information. The status log for

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282 this inquiry will then be updated. In either case, the Government may require the Contractor to provide a  
283 copy of the response to a Government-furnished e-mail address for agency monitoring and quality control  
284 purposes.  
285

286 Upon completion of the response to an e-mail message forwarded by the Contractor, the responding  
287 agency may send a completion notice to the Contractor contact center for status update. The completion  
288 notice may be in the form of a batch listing containing all referred e-mails handled by that agency  
289 organized by tracking number and including a date and time, or a cc or bcc copy of each e-mail response,  
290 which then can be used by the Contractor to close out the case. With consensus of all parties, an  
291 alternative method of updating the status can be used. The Contractor shall work with the agency to  
292 develop a method that meets the needs of both parties. If the responding agency elects, as part of its  
293 business rules, not to send a completion notice to the Contractor, the inquiry will be considered closed  
294 and no further action will be required.  
295

### 296 **C.2.2.2.1 E-Mail Workflow (Misdirected)**

297 The Contractor may receive e-mail inquiries from other agency(ies) who have determined that they are  
298 not the appropriate agent for responding to these inquiries. One of the goals of the USA Services  
299 initiative is to reroute these misdirected inquiries to the appropriate agencies for direct response. These  
300 misdirected inquiries may be routed to the Contractor via a central forwarding mail box established by  
301 each agency or from one or more individual mail boxes. Once received, the inquiries are processed in a  
302 manner similar to that described in Section C.2.2.2. The Contractor shall work with the agencies to  
303 develop the appropriate protocols and procedures for responding to and managing the disposition status of  
304 the misdirected inquiries.  
305

### 306 **C.2.2.2.2 E-Mail Response Options**

307 E-mail response options may vary from one agency to another. When responding to e-mail inquiries, the  
308 IS shall analyze the message content to determine the nature of each inquiry. The IS shall evaluate the  
309 available response options to determine which is the most appropriate for the inquiry and, if necessary,  
310 query the appropriate database(s) for relevant information to be included in the response, and then record  
311 aspects of the inquiry in a contact/case management status log. For example:  
312

313 No response - If the inquiry does not require a response (some examples are pranks, spam, duplicate  
314 messages, and incomprehensible submissions), the IS records the type of message in the status log and  
315 notes that no further action is required.  
316

317 Comment or opinion - If the inquiry is a comment or opinion not requiring a customized response, the IS  
318 forwards the inquiry to the appropriate agency and sends an acknowledgment to the inquirer thanking  
319 them for the input, and identifying agency to which it has been transmitted. The IS records the topic of  
320 the question using specific categories provided through the system for in reporting such data to agencies  
321 and updates the status log for this inquiry.  
322

323 General inquiry easily answered - If the inquiry is general in nature and can be answered immediately, the  
324 IS produces the response using preformatted responses. The IS records the topic of the question using  
325 specific categories provided through the system for use in reporting to agencies and updates the status log  
326 for this inquiry.  
327

328 Inquiry to be forwarded to a single agency - If the inquiry requires a customized response and must be  
329 forwarded to an agency, the IS forwards the inquiry to the appropriate agency. The IS also sends a  
330 response to inform the inquirer of this action as to what type of response time to expect, and how to  
331 follow up with the responding agency. The IS records the topic of the question using specific categories

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332 provided through the system for reporting such data to agencies and updates the status log for this inquiry.  
333 Both the forwarding and response action are accomplished simultaneously with one automated action.

334  
335 Inquiry to be forwarded to multiple agencies - If the inquiry requires a customized response and must be  
336 forwarded to more than one agency to receive a complete reply, the IS prompts the system to assign sub-  
337 level tracking numbers and forwards the inquiry to the appropriate agencies, notifying them which other  
338 agencies are also receiving the message. The IS also sends a response to inform the inquirer of this  
339 action, what type of response time to expect, and how to follow up with the responding agencies. The IS  
340 records the topic of the question(s) using specific categories provided through the system for use in  
341 reporting to agencies and updates the status log for this inquiry. Both the forwarding and response action  
342 are accomplished simultaneously with one automated action.

343  
344 Inquiry to be referred to agency without e-mail - If the inquiry requires a customized response and must  
345 be forwarded to an agency, but there is no established contact at that agency, the IS provides the inquirer  
346 with an alternative means of communicating with the agency, such as the agency website URL, call center  
347 number, or mailing address. The IS records the need for follow up action to establish an appropriate  
348 contact at that agency and updates the status log for this inquiry.

349  
350 Additional information required - If the IS determines that additional information from the inquirer is  
351 necessary to answer the question or to determine who can answer the question, the IS may use a  
352 preformatted or customized response to make a specific request for the additional information necessary  
353 to reply to the e-mail or to suggest that the inquirer call a toll-free number at a specified contact center to  
354 discuss the question. The IS records the topic of the question using specific categories provided through  
355 the system for use in reporting to agencies and updates the status log for this e-mail.

356  
357 Referral to law enforcement for action - If the IS determines that the message is of a suspicious nature or  
358 contains a specific threat against life or property as defined by the agency, the Contractor shall escalate  
359 the matter to the appropriate authority. The Contractor will use established escalation procedures to  
360 ensure that the message is passed on to the appropriate law enforcement authorities within a pre-defined  
361 time interval.

362  
363 Removal of extraneous data – To the extent practicable, the Contractor shall employ automated means to  
364 remove the extraneous routing and other data from the response (rather than relying on manual agent  
365 action).

366  
367 Undeliverable responses - The Contractor shall track all undeliverable e-mail responses addressed to  
368 inquirers and perform analyses, as required, to determine the causes of non-delivery. If the IS determines  
369 that non-delivery was caused by an erroneous e-mail address, the Contractor shall make a reasonable  
370 attempt to identify and correct the error and to attempt redelivery of the message. The Contractor shall  
371 record any non-delivery in the case management database.

### 372 373 **C.2.2.3 Facsimile Inquiry Workflow**

374 A sample workflow process for facsimile inquiries is provided below.

375  
376 The inquirer sends an inquiry via facsimile to a direct-dial or toll-free telephone number for Government  
377 information and assistance. The Government may direct the contractor to respond to facsimile inquiries  
378 via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and  
379 satisfies the inquirer. The Contractor-provided system receives the facsimile inquiry and, if necessary,  
380 converts and stores the facsimile inquiry in a commonly used format and distributes the inquiry to a  
381 qualified IS for response. The Contractor shall be responsible for tracking the status of facsimile

382 inquiries in a manner similar to e-mail inquiries. Facsimile inquiries referred to other federal agencies for  
383 direct response shall be transmitted as e-mail attachments. The Contractor shall note in the e-mail that the  
384 original inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone,  
385 facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the  
386 inquirer. The Contractor shall retain a copy of all responses for recordkeeping.  
387

#### 388 **C.2.2.4 Postal Mail Inquiry Workflow**

389 A sample workflow process for postal mail inquiries is provided below.  
390

391 The inquirer sends an inquiry via postal mail to a specified postal address maintained by the Contractor or  
392 the Government. If the address is maintained by the Government, the mail will be forwarded to the  
393 Contractor using one or more of the following methods:

- 394 ○ forwarded by postal mail and/or courier service by the Government to an address maintained by  
395 the Contractor;
- 396 ○ picked up by the Contractor from a Government location; or
- 397 ○ converted documents forwarded to the Contractor by electronic means (e.g. e-mail, facsimile).  
398
- 399
- 400

401 The Contractor receives the postal mail, assigns time and date of receipt to each inquiry, and, if required,  
402 converts each inquiry, including associated envelope/packaging, to a commonly used electronic format to  
403 facilitate routing, response, and records management. The inquiry is then routed to a qualified IS for  
404 response. The Contractor shall be responsible for tracking the status of postal mail inquiries in a manner  
405 similar to facsimile and e-mail inquiries. Postal mail inquiries referred to other federal agencies for direct  
406 response shall be scanned and transmitted as e-mail attachments. The Contractor shall note in the e-mail  
407 that the original inquiry was received via postal mail. Responses to postal mail inquiries may be via  
408 telephone, facsimile, e-mail, postal mail, or other communications media, whichever is the most efficient  
409 and satisfies the inquirer. The Contractor shall retain a copy of the original inquiries and all responses for  
410 recordkeeping. Storage and disposition of originals and responses shall be in accordance with the  
411 requirements contained in individual task orders.  
412

#### 413 **C.2.3 Response Protocols**

414 The Contractor shall respond to information requests generally through the use of one or a combination of  
415 the following methods:  
416

417 *Automated Response* – The Contractor shall use automated tools (e.g., IVR, Fax-on-Demand) to provide  
418 unattended service responded to frequently asked questions.  
419

420 *Telephone response* - When responding to inquiries, the Contractor shall analyze the inquiry, assess the  
421 appropriate response modes, gather available information from all pertinent sources, analyze and confirm  
422 the accuracy of the information, and provide the requested information and/or assistance in the manner  
423 most efficient to satisfy the inquirer's needs. For inquiries involving more complex subjects that may  
424 require further research off line, the Contractor shall conduct the research in accordance with agency-  
425 provided guidelines and provide the appropriate information within the timeframe specified by the  
426 Government. Whenever possible, immediate responses shall be given.  
427

428 *TDD/TTY response* – The Contractor shall ensure that TDD/TTY users are offered similar levels of  
429 service similar to that received by telephone users supported by this contract.  
430

431

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432 *Facsimile response* - In certain cases, the Contractor may be requested to provide to the inquirer written  
433 documentation that supports the oral response given over the telephone and/or conveys the information  
434 requested. When requested and where possible, the Contractor shall send a copy of the document to the  
435 caller via facsimile within the timeframe specified by the Government. The Contractor shall employ  
436 automated means of sending the requested documents. The Contractor shall use instructions provided by  
437 the Government for handling facsimile responses.  
438

439 *Electronic response* – The Contractor shall respond to requests received through electronic media (e.g., e-  
440 mail, Internet websites, facsimile) within the timeframe specified by the Government. These responses  
441 may require the Contractor to provide copies of any information source documents as attachments to the  
442 electronic response. If the source documents are not available in electronic format, the Contractor may be  
443 required to convert the documents to a suitable format to facilitate electronic transmission and records  
444 management. The Contractor shall retain a copy of the electronic inquiry and response for recordkeeping  
445 for a period specified by the Government.  
446

447 *Written (postal mail) response* – The Contractor shall respond to written requests accurately and  
448 completely within the timeframe specified by the Government. These responses may require the  
449 Contractor to provide copies of any information source documents as attachments to the written response.  
450 The Contractor may be required to convert the documents to a suitable format to facilitate routing,  
451 response and records management. Response to written inquiries may be provided by telephone, e-mail,  
452 facsimile, postal mail, or other communications media, whichever is more efficient and satisfies the  
453 inquirer. The Contractor shall retain a copy of the written inquiry and response for record-keeping for a  
454 period specified by the Government. For written inquiries where the Contractor is unable to decipher the  
455 content of the request, Contractor shall, if possible, contact the customer by telephone or mail and attempt  
456 to resolve the inquiry in the most expeditious fashion.  
457

458 *Form letter response* – The Contractor may develop and prepare form letters for dissemination in  
459 response to telephone, electronic, and written inquiries. The Government shall approve all such form  
460 letters before they are used to fulfill information requests.  
461

462 *Interim response* - In cases where the Contractor cannot provide an immediate response because further  
463 research is necessary, the Contractor shall provide the requestor with an interim response within the  
464 timeframe specified by the Government. The interim response shall indicate when the inquirer will  
465 receive a complete response.  
466

467 *Coordinated response* - Any inquiry, especially one involving legal matters, policy interpretation, and/or  
468 a highly technical response that cannot be answered readily from approved materials in the knowledge  
469 database shall be referred to the appropriate authority for direct response. Telephone inquiries of such  
470 nature shall be forwarded immediately after identification. Electronic, facsimile and written inquiries  
471 identified as requiring special support from appropriate authority shall be forwarded in the timeframe  
472 specified by the Government, but no later than two (2) business days after receipt.  
473

474 *Referral* – Some inquiries may be misdirected and/or not within the scope of the specific program  
475 mission. The Contractor shall differentiate these inquiries and re-direct and refer inquiries that are  
476 misdirected and/or not within the scope of the programs, to individuals or organizations that may be able  
477 to provide answers to questions or otherwise offer assistance. When appropriate the Government will  
478 provide the Contractor with a baseline referral list of such individuals and organizations on a program-by-  
479 program basis. The Contractor shall maintain, expand, and update this list throughout the contract  
480 performance period to ensure it is current and complete.  
481

482 **C.3 SERVICES TO BE PROVIDED**  
483

484 The Contractor shall provide all of the services identified in this SOW. Specific service requirements will  
485 be identified on a case-by-case basis and be included in individual Task Orders to be issued by the  
486 Government. The Contractor shall ensure that services delivered employ technology that is effective and  
487 scalable to meet the evolving needs of the Government and adhere to business processes that conform to  
488 industry best practices.

489  
490 The Government reserves the right to add additional services required to meet the evolving needs of the  
491 citizens and agency programs at any time during the life of the contract. Any additions will be subject to  
492 written mutual agreement between the Government and Contractor.

493  
494 **C.3.1 Automated Services**

495 The Contractor shall provide automated services to enable the Government to deliver unattended service  
496 24 hours a day, 7 days a week (24 x 7). The Contractor is responsible for the provision, maintenance,  
497 design, implementation, operation, and management of these services.

498  
499 **C.3.1.1 Automated Voice Response Services**

500 Automated voice response services are intended to provide unattended service to telephone callers on a 24  
501 x 7 basis. These services include the traditional interactive voice response (IVR) service, which uses the  
502 telephone touch-tone pad or simple voice commands to access pre-recorded information. They also  
503 include advanced services that make use of speech recognition and text-to-speech technologies to enhance  
504 efficiency and customer service. At a minimum, the Contractor-provided automated voice response  
505 services shall support the following languages:

- 506 ○ Cantonese
- 507 ○ English
- 508 ○ French
- 509 ○ German
- 510 ○ Japanese
- 511 ○ Korean
- 512 ○ Mandarin
- 513 ○ Spanish
- 514 ○ Vietnamese

515  
516  
517 Specific language support requirements will be identified in task orders issued by the Government.

518  
519 The Contractor shall provide qualified personnel to develop and regularly maintain call flow and  
520 messages for automated voice response services in keeping with the current informational needs of the  
521 callers. The Contractor shall ensure timely update of all messages in accordance with the turn-around  
522 timeframes established by the Government. Unless otherwise directed by the Government in individual  
523 task orders, Contractor shall post changes within 24 hours of receipt for all non-emergency information  
524 and within 2 hours of receipt for emergency notices. Support for emergency postings and updates is  
525 required on a 24 hour a day, 7 days a week basis. Updates of the script and/or the “call flow” may be  
526 made on demand and on an “as required” basis.

527

528 The Government may elect to furnish its own network-based automated voice response services, obtained  
529 from the Federal Government Long Distance Carrier or other contracts, as part of the toll-free telephone  
530 service requirement if the use of such service is determined to be in the best interest of the Government.  
531 The Government reserves the right to furnish these services at the outset of a project or to implement  
532 these services to augment or replace the contractor-provided services at any time during the effective  
533 contract period. In the event the Government elects to furnish its own automated voice response service,  
534 the Contractor shall provide qualified personnel to develop and maintain call flow and scripts for the  
535 Government furnished services as specified in Section C.3.5.6.a.  
536

537 **C.3.1.1 .1 Interactive Voice Response (IVR) Service**

538 The IVR service shall accommodate callers having touch-tone and rotary telephones/dial pulse telephones  
539 who seek information via the unattended mode. All IVR messages shall be recorded using broadcast  
540 standard recording techniques, and any changes to the script will be made using the same voice pattern, at  
541 the same pitch, speed and tone of delivery, and at the same volume as the initial recordings. The IVR  
542 service shall provide options to allow the caller to return to the main menu and select live operator  
543 assistance during the normal business hours. The IVR solution shall provide access to information via  
544 Fax-Back/Fax-on-demand services, and other automated services, when such services are ordered and  
545 implemented as part of the IVR solution.  
546

547 **C.3.1.1.2 Voice/Speech Recognition Service**

548 The Contractor shall provide voice recognition service to augment and/or replace the traditional IVR  
549 service. The service shall provide access to information via other automated services and/or live  
550 assistance as appropriate. The service shall provide an intuitive, convenient, customer-friendly, and  
551 naturally-sounding speech interface that serves callers quickly, efficiently, accurately, and consistently.  
552 The service shall automatically adapt to callers' language, speech patterns, accents, and noise  
553 environment to ensure accurate and responsive service. The service shall incorporate self-learning  
554 technology to enable recognition and response accuracy to continually improve as the service adapts to  
555 caller usage of the service. The service shall support VoiceXML and other industry standards for voice-  
556 driven applications.  
557

558 **C.3.1.1.3 Text-to-Speech Service**

559 The Contractor shall provide text-to-speech service to augment and/or replace the traditional IVR service.  
560 The service shall convert textual information into speech that closely resembles natural voice over any  
561 telephone. The service shall provide an intuitive, convenient, customer friendly, and natural-sounding  
562 speech interface that serves callers quickly, efficiently, accurately, and consistently. The service shall be  
563 able to distinguish between homophones (words with identical spellings but different pronunciations) and  
564 understand word context as they appear in a sentence. The service shall provide word, phoneme, and  
565 bookmarks support. The service shall provide the capability for authorized personnel to update  
566 dictionaries remotely to improve accuracy. The caller shall not experience any noticeable latency during  
567 the processing of long text strings. The service shall support speech synthesis mark-up language (SSML)  
568 and other industry standards for text-to-speech applications.  
569

570 **C.3.1.2 Facsimile Services**

571 The Contractor shall respond to requests for information via automated facsimile services, including  
572 Automatic Fax-Back and Fax-On-Demand services. Automatic Fax-Back allows a caller to select a  
573 document from a list via a self-service menu and direct the document to be sent to a specified fax number.  
574 Fax-On-Demand allows an Information Specialist to automatically fax a document requested by the caller  
575 to a specified fax number. Specific documents to be provided via facsimile services will be identified in  
576 individual task orders.

577  
578

**C.3.1.2.1 Automatic Fax-Back Service**

579 The Contractor shall respond to requests for information via automated Fax-Back immediately upon  
580 receipt of such requests. The Contractor shall integrate the automated Fax-Back service with its IVR  
581 and/or other automated voice response services to enable the caller to select the requested information,  
582 and to enter a fax number for receiving the information without the assistance of an Information  
583 Specialist. The selection menu for the automated Fax-Back service shall allow the caller to return to the  
584 main menu and/or to allow the caller to access the Information Specialist for assistance.  
585

586

**C.3.1.2.2 Fax-On-Demand Service**

587 When it is more efficient and cost effective to respond to inquiries (telephone, letter, e-mail, etc.) by  
588 facsimile, the Contractor shall deliver the requested information via Fax-on-Demand service immediately  
589 upon receipt of such requests. The Fax-On-Demand service shall allow the Information Specialist and/or  
590 the caller to select the requested information and either request the information be sent immediately via  
591 facsimile to the calling number during the same telephone session, or have the information sent to a  
592 different fax number entered by the IS or caller. The Fax-on-Demand service shall be integrated with the  
593 IVR and/or other automated service to enable the caller to access other services.  
594

595

**C.3.1.3 Voice Mail Service**

596 The Contractor shall provide voice mail service to enable callers to leave suggestions, comments, callback  
597 information, and messages on specific subjects. The voice mail service shall be accessible from the IVR  
598 and/or other automated services and provide sufficient capacity to handle anticipated call volume and call  
599 duration as defined on individual Task Orders. The Contractor shall retrieve and act on the recorded  
600 information in accordance with task order requirements. When required, the Contractor shall provide a  
601 taped copy of voice mail messages recorded. The Contractor shall maintain a copy of the voice mail  
602 messages for at least 90 days from the record date.  
603

604

**C.3.1.4 Automated Callback (Telephone)**

605 The Contractor shall provide an automated callback service that allows a telephone caller the option of  
606 leaving callback information for Contractor call-back at a later time, instead of waiting in queue for an  
607 available Information Specialist. The service shall prompt the caller to provide the callback information  
608 and provide an estimated callback time to the caller. The service shall automatically contact the caller at  
609 the estimated callback time, and connect the caller to an available Information Specialist for assistance. If  
610 the callback encounters a busy or no-answer condition, the service shall repeat the callback for up to 3  
611 additional attempts within an appropriate time interval (as specified in individual task orders) before  
612 aborting. If the callback encounters a voicemail or answering service, the service shall leave a brief  
613 message indicating the purpose and time of the callback and instructions for calling back, if any, as  
614 provided by the Government. For billing purposes, each group of six callback attempts encountering a  
615 busy and/or no-answer condition will be counted as a completed call.  
616

617

**C.3.1.5 Web Callback**

618 The Contractor shall provide a fully managed hosted web callback service to allow a visitor to a  
619 Government website to access the service and leave callback information for the Contractor to call back at  
620 a later time. The service shall prompt the caller to provide the callback information, including the subject  
621 of the inquiry, and provide an estimated callback time to the caller. The service shall automatically  
622 contact the caller at the estimated callback time and connect the caller to an available Information  
623 Specialist for assistance. If the callback encounters a busy or no-answer condition, the service shall  
624 repeat the call back for up to 3 additional attempts within an appropriate time interval as specified in

625 individual task orders before aborting. If the callback encounters a voice mail or answering service, the  
626 service shall leave a brief message indicating the purpose and time of the callback and instructions for  
627 calling back, if any, as provided by the Government. For billing purposes, each group of six callback  
628 attempts encountering a busy and/or no-answer condition will be counted as a completed call.

629

630 **C.3.1.6 Automated Outbound Dialing Campaign**

631 The Contractor shall provide a fully-automated solution to deliver a pre-recorded message furnished or  
632 specified by the Government to individuals/organizations on a listing provided by the Government. The  
633 service shall have the capacity to accommodate a message length of up to 90 seconds. The service shall  
634 automatically call the individuals at specified phone numbers for up to six attempts at time periods and  
635 intervals specified by the Government. Upon answer by an individual, voice-mail, or telephone  
636 answering equipment, the service shall deliver a pre-recorded message specified by the Government. If  
637 the service encounters a busy or no-answer condition, the service shall repeat the calling for up to 5  
638 additional attempts before aborting. For billing purposes, each group of six (6) dialing attempts  
639 encountering a busy and/or no-answer condition will be counted as one (1) completed call.

640

641 **C.3.1.7 Automated Fax Delivery**

642 The Contractor shall provide a fully automated solution to transmit documents, via facsimile, to  
643 individuals/organizations on a listing provided by the Government. The service shall have the capacity to  
644 accommodate documents of up to 3 pages in length, excluding the cover page, for each transmission. The  
645 service shall automatically call the individuals at specified telephone numbers for up to six attempts at  
646 time periods and intervals specified by the Government. Upon answer by functional facsimile equipment,  
647 the service shall transmit the document specified by the Government. If the service encounters a busy or  
648 no-answer condition, the service shall redial the call for up to 5 additional attempts before aborting. For  
649 billing purposes, each group of six (6) callback attempts encountering a busy and/or no-answer condition  
650 will be counted as one (1) completed call.

651

652 **C.3.1.8 Automated E-Mail Delivery**

653 The Contractor shall provide a fully automated solution to transmit e-mail messages via the Internet to  
654 individuals/organizations on a listing provided by the Government. The service shall have the capacity to  
655 accommodate text messages of up to 15K bytes in length for each e-mail message. The contractor shall  
656 identify all unsuccessful transmission attempts and determine the cause of such failures. If the  
657 unsuccessful attempts were caused by contractor errors, the Contractor shall correct the errors and  
658 retransmit the message within 24 hours of the corrections.

659

660 **C.3.1.9 Hosted On-Line Ordering**

661 The Contractor shall provide a fully managed secure, scalable, hosted service to allow visitors to a  
662 Government and/or Contractor-provided website to access an on-line ordering service to order free and/or  
663 paid Government publications on a 24 x 7 basis. The ordering interface must be designed to  
664 accommodate multiple browsers, including at a minimum: AOL 6.0 and higher; MS Internet Explorer 5.0  
665 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and  
666 higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of  
667 1998. The service shall capture the required information and either provides the recorded information to  
668 the Government in electronic format, or uses the captured information to complete fulfillment requests.

669

670 **C.3.1.10 Hosted E-Mail Web Form**

671 The Contractor shall provide a fully managed hosted service to allow visitors to a Government website to  
672 access a contractor-developed and maintained web form for submitting e-mail inquiries to a designated e-

673 mail address. The web form interface must be designed to accommodate multiple browsers, including at  
674 minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0  
675 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with  
676 Section 508 of the Rehabilitation Act Amendments of 1998. The web form shall allow users to associate  
677 the topics of their inquiries with a list of frequently requested topics identified by the Government. The  
678 service shall capture all relevant information regarding the inquiry for transmission to the designated e-  
679 mail system.

680  
681 **C.3.1.11 Hosted FAQ Service**

682 Government agencies operate a large number of websites that are accessed by the general public for  
683 information. Increased public usage of these web sites has generated a substantial increase in the number  
684 of e-mail inquiries to which agencies must respond. To reduce the workload associated with processing  
685 e-mail inquiries and to provide better customer service, the Government requires a technology-based  
686 solution that will enable agencies to leverage previous good answers to frequently asked questions  
687 (FAQs) and provide the answers to their customers 24 x 7 via self-service using the Internet.  
688

689 The Contractor shall provide a secure, highly available and scalable hosted solution to enable visitors to  
690 subscribing Government websites to access answers to FAQs on a 24 x 7 basis. The service must  
691 accommodate multiple browsers, including at minimum: AOL 6.0 and higher; MS Internet Explorer 5.0  
692 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and  
693 higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of  
694 1998. The service must be able to be implemented within 45 calendar days from the date of the service  
695 request and:

- 696  
697 ○ Provide a user/administrator-friendly and intuitive interface that is easily configurable to match a  
698 website's look and feel.  
699
- 700 ○ Allow the content of the FAQ knowledge base to be published to multiple web sites, each with a  
701 customizable "look and feel" for different audiences, or for multiple audiences on a single site.  
702
- 703 ○ Support multiple languages, including at a minimum, English, Spanish, and Chinese.  
704
- 705 ○ Meet federal information systems security requirements.  
706
- 707 ○ Allow both browse and search of FAQs answers from a single or multiple knowledge bases by  
708 subject and response categories, with results automatically ranked by relevancy, usefulness, or  
709 other appropriate methods selected by the Government, including manual ranking to increase or  
710 decrease a particular FAQ's prominence relative to others.  
711
- 712 ○ Have the capability for a user to submit an inquiry to either the Contractor or the subscribing  
713 agency for response. Allow Government and/or contractor personnel to review and/or respond to  
714 user inquiries in real time  
715
- 716 ○ Have the capability to collect user feedback on the effectiveness, usefulness, and customer  
717 satisfaction of the service  
718
- 719 ○ Allow users to subscribe to automatic notification of FAQ updates.  
720
- 721 ○ Provide both remote and onsite access to authorized personnel to all administrative functions, as  
722 appropriate

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- 723
- 724 ○ Store each FAQ and its corresponding answer as a separate record with a unique ID number; and
- 725 allow information to be posted and modified in real time; enable each FAQ to be tagged with
- 726 meta-data, which might include subject keywords, ownership, last updated date, expiration date,
- 727 and other information.
- 728
- 729 ○ Display last update for each FAQ, if required.
- 730
- 731 ○ Allow content managers to automate content management tasks, which might include reviewing,
- 732 archiving, and purging of data. Provides automatic notification on expiring or outdated content
- 733 based on specified review schedule
- 734
- 735 ○ Be capable of presenting FAQs and their corresponding answers in a format that can be indexed
- 736 by search engines (internal or external) without affecting performance metrics
- 737
- 738 ○ Search, select, and sort FAQ answers from within separate knowledge bases. Provide capability
- 739 to select which knowledge bases will be included in each topic query
- 740
- 741 ○ Provide management reports on a scheduled or on-demand basis. Reports can be accessed via the
- 742 web or by e-mail.
- 743
- 744 ○ Provide time/date stamping and user-friendly tracking numbers for all information requests.
- 745 Allow multiple sub-tracking numbers to be assigned to a single request if required for internal or
- 746 external purposes
- 747
- 748 ○ Include an automated query acknowledgement mechanism with a choice of customizable
- 749 response messages.
- 750
- 751 ○ Have the capability to automatically verify the validity of internal and/or external links contained
- 752 in the FAQ system on a daily basis and notifying the Contractor of any invalid links. The link
- 753 verification process shall not disrupt availability of the hosted FAQ service to end users.
- 754

755 The Government intends to harvest some or all of the information contained in the Contractor's FAQ  
756 knowledge bases through the USAgov.gov search service or other agency search services on a regular  
757 basis. The Contractor shall allow these Government search services to access and retrieve relevant  
758 content of the FAQ knowledge bases and/or provide the capability to publish the data in Extensible  
759 Markup Language (XML) code to a designated Government or contractor system using standards and  
760 access/replication schedules that are mutually acceptable to the Contractor and Government.

### 761 **C.3.1.11.1 FAQ Guidelines**

762 The hosted FAQ service may be ordered with other Attended Services described in Section C.3.2 of this  
763 SOW or as a stand-alone service. If the Contractor is tasked to develop and administer the FAQ service,  
764 the Contractor shall conform to the following FAQ implementation guidelines:  
765

- 766
- 767 ○ All answers to FAQ prepared by the Contractor shall be self contained and written in easy to read
- 768 and understand language.
- 769
- 770 ○ All acronyms/abbreviations used and associated descriptions must be included within each
- 771 answer
- 772 ○ URLs in all FAQ answers shall be written out in answer text (not embedded)

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- 773 ○ Limit screen to 1 per answer (break content into usable chunks)
- 774 ○ Link to other answers rather than refer to a number or position on the page
- 775 ○ Last review/update date included with each answer
- 776 ○ Include an identification number for each FAQ
- 777 ○ Include identifiers for like FAQs (e.g., agency jurisdiction) for grouping and subsequent
- 778 extraction
- 779

### 780 **C.3.2 Attended Services**

781 The Contractor shall provide accurate, timely, complete, and courteous responses to all customer  
782 inquiries. The Contractor shall provide qualified staff to support the work types identified in Section  
783 C.2.1.4 of the SOW. The Contractor shall provide Attended Services via a dedicated solution or shared  
784 or non-dedicated solution, as specified by the Government in individual task orders.

785

#### 786 **C.3.2.1 Responding to Telephone Inquiries**

787 The Contractor shall provide all qualified staff and required equipment and services necessary to respond  
788 to telephone and TDD/TTY inquiries in accordance with performance parameters and instructions  
789 provided by the Government in individual task orders. The tasks to be performed include, but are not  
790 limited to, the following:

791

- 792 ○ Accurately responding to inquiries in a professional and courteous manner. These inquiries may  
793 be in the form of telephone and TDD/TTY calls. When necessary, transfer or referral the  
794 inquiries to the appropriate agency for response.
- 795
- 796 ○ Conducting research of Government-approved sources of information to prepare responses to  
797 inbound inquiries and developing appropriate responses accordingly.
- 798
- 799 ○ Capturing and tracking information related to inbound inquiries including date and time of  
800 receipt, nature of inquiry, source of inquiry if multiple telephone numbers are involved, customer  
801 identity when appropriate, information requested, disposition, response date, and any fulfillment  
802 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided  
803 case management tool.
- 804
- 805 ○ When necessary, forwarding recorded information via telephone, facsimile, or e-mail or other  
806 electronic transmission to the appropriate authority for further processing.
- 807
- 808 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile,  
809 whichever is the most efficient delivery method and satisfies the customer.
- 810
- 811 ○ Recognizing new trends of inquiries for referral to management for development of common  
812 responses and reporting to the agency regarding sudden new lines of inquiry.
- 813

813

#### 814 **C.3.2.2 Outbound Calling Services**

815 The Contractor shall provide all qualified staff and required equipment and services necessary to perform  
816 outbound calling to selected customers in accordance with performance parameters and instructions  
817 provided by the Government in individual task orders. The tasks to be performed include, but are not  
818 limited to, the following:

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- 820 ○ Performing outbound callbacks in response to user requests for callback service.  
821
- 822 ○ Performing outbound callbacks to selected customers in order to follow up on questions or issues  
823 that could not be resolved during the initial contact, to verify problem resolution, or to measure  
824 customer satisfaction as directed by the Government.  
825
- 826 ○ Launching outbound calls to Government agencies for the purposes of relaying customer  
827 information, obtaining information in response to customer questions and/or issues that could not  
828 be resolved during the initial contact, or verifying problem resolution.  
829
- 830 ○ Performing outbound calls in support of customer surveys, program and/or product promotions,  
831 product recalls, sales and marketing, and special events.  
832
- 833 ○ Performing outbound calls in response to inquiries from callers using TDD/TTY devices.  
834

### 835 C.3.2.3 Responding to Postal Mail Inquiries

836 The Contractor shall provide all qualified staff, and required equipment, services, and supplies necessary  
837 to respond to written inquiries received via postal mail in accordance with business rules, guidelines, and  
838 performance parameters specified by the Government in individual task orders. The tasks to be  
839 performed include, but are not limited to:

- 840
- 841 ○ Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is  
842 more efficient and satisfies the inquirer. When necessary, sending the requested information to a  
843 customer through the postal services, E-mail or facsimile whichever is more efficient and satisfies  
844 the inquirer  
845
- 846 ○ When requested by the Government, converting the inquiry documents to electronic format to  
847 facilitate routing, and response, and records management.  
848
- 849 ○ Conducting research of Government-approved sources of information to prepare responses to  
850 written inquiries, and developing appropriate responses accordingly.  
851
- 852 ○ Recording and tracking data/information related to the inquiries, including date and time of  
853 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment  
854 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided  
855 case management tool.  
856
- 857 ○ When necessary, forwarding the inquiries to the appropriate authority for further processing.  
858
- 859 ○ Reviewing to ensure that outgoing responses are accurate and complete in accordance with  
860 business rules and guidelines established by the Government.  
861

862 The Contractor shall respond to postal mail inquiries within the designated time frame specified by the  
863 Government. The Contractor shall collect and deliver written correspondence in accordance with the  
864 format, process, and procedures established by the Government. Unless otherwise directed by the  
865 Government, the written response may not identify the Contractor by name unless that is the subject of  
866 the inquiry. If the information needed for the response is not available within a designated time frame,  
867 the Contractor shall call the inquirer or send an interim response stating when a final response may be  
868 expected. A form letter is acceptable. The Contractor may elect to use a Government-approved  
869 pseudonym rather than the name of an employee as the signer of the letter.

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**C.3.2.4 Responding to E-Mail Inquiries**

The Contractor shall provide qualified staff and required equipment and services to respond to written inquiries received via e-mail. Responses shall be prepared in accordance with business rules, guidelines, and performance parameters specified by the Government in individual task orders. The tasks to be performed include, but are not limited to:

- o Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is more efficient and satisfies the inquirer.
- o Conducting research of Government-approved sources of information to prepare responses to written inquiries, and developing appropriate responses accordingly.
- o Recording and tracking data/information related to the inquiries including date and time of receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided case management tool.
- o When necessary, forwarding the inquiries to the appropriate authority for further processing.
- o Sending the requested information to a customer through the postal services, E-mail or facsimile, whichever is more efficient and satisfies the inquirer.
- o Reviewing to ensure that outgoing responses are accurate and complete in accordance with business rules and guidelines established by the Government. If the initial response is found to be erroneous by the Contractor and/or the Government and further action is needed to inform the inquirer, the Contractor shall send a corrected response to the inquirer immediately.

The Contractor shall respond to e-mail inquiries within the designated time frame specified by the Government. The Contractor shall prepare the responses in accordance with business rules it has developed in conjunction with the Government, and/or with other guidelines provided by the Government. A preformatted response or telephone response, if such is the most efficient and satisfies the inquirer, is acceptable.

The Contractor shall provide the required support to identify, record, and track the nature and volume of e-mail inquiries, and to measure the quality and timeliness of the response process from time of receipt to completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing e-mail messages and monitor the processing activities to determine the volume, nature and disposition of the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing time of various types of e-mail inquiries and the skill sets required for responding to different types of inquiries and include the benchmark results in the requisite management reports. The Contractor shall monitor the performance of its personnel to ensure that productivity and quality standards, as specified in individual task orders, are met.

The Contractor shall provide ongoing support to refine business rules and prepare preformatted responses for use in responding to public inquiries in the most efficient and effective manner. The Contractor shall retain a history of agency contacts, including agency name and address, contact name, address, phone number, fax number, e-mail address, agency web site URL(s), and dates of previous contacts and nature of communications, and updates the information regularly.

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920 The Contractor shall utilize auto-filtering, auto-response, and auto-suggestions where appropriate to  
921 identify and populate appropriate e-mail responses to customers. The Contractor shall ensure that all  
922 outgoing e-mail responses are accurate and complete.

923  
924 The Contractor shall on its own initiative recognize and quantify new lines of inquiry, sometimes  
925 developing suddenly in response to a recent social/political/news event, and prepare (with the support of  
926 the Government) appropriate responses. The Contractor shall quickly apprise the Government of any  
927 new topical trend in inquiries in a timely fashion.

928  
929 If a direct response to an e-mail inquiry cannot be provided, the Contractor shall forward the e-mail  
930 message to the appropriate Federal agency(ies) for direct response based on guidelines provided by the  
931 Government. The Contractor shall maintain a system to track the status of all inquiries directed to other  
932 agencies for response, including updates on final disposition of inquiries.

### 933 934 **C.3.2.5 Responding to Facsimile Inquiries**

935 The Contractor shall provide qualified staff and required equipment and services to respond to written  
936 inquiries received via facsimile. Responses shall be prepared in accordance with business rules,  
937 guidelines, and performance parameters specified by the Government in individual task orders. The tasks  
938 to be performed include, but are not limited to:

- 939 ○ Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is  
940 more efficient and satisfies the inquirer.
- 941  
942 ○ Conducting research of Government-approved sources of information to prepare responses to  
943 facsimile inquiries, and developing appropriate responses accordingly.
- 944  
945 ○ Recording and tracking data/information related to the inquiries, including date and time of  
946 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment  
947 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided  
948 case management tool.
- 949  
950 ○ When necessary, forwarding the inquiries to the appropriate authority for further processing.
- 951  
952 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile  
953 whichever is more efficient and satisfies the inquirer.
- 954  
955 ○ Reviewing to ensure that outgoing responses are accurate and complete in accordance with  
956 business rules and guidelines established by the Government.
- 957  
958

959 The Contractor shall respond to facsimile inquiries within the designated time frame specified by the  
960 Government in individual task orders. Unless otherwise directed by the Government, all facsimile  
961 inquiries shall be received and stored electronically to facilitate distribution and processing. The  
962 Contractor shall convert and store incoming facsimile inquiries to a commonly used electronic format to  
963 facilitate distribution and processing. Unless otherwise directed by the Government, facsimile inquiries  
964 referred to other federal agencies for direct response shall be transmitted as e-mail attachments. When  
965 referring the inquiry, the Contractor shall note in the e-mail that the original inquiry was received as a fax  
966 document. Responses to facsimile inquiries may be via telephone, facsimile, e-mail, or other  
967 communications media, whichever is the most efficient and satisfies the inquirer. The Contractor shall  
968 retain a copy of all responses for recordkeeping. A preformatted or telephone response, if such is the  
969 most efficient and satisfies the inquirer, is acceptable.

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The Contractor shall provide the required support to identify, record, and track the nature and volume of facsimile inquiries, and to measure the quality and timeliness of the response process from time of receipt to completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing facsimile messages and monitor the processing activities to determine volume, nature and disposition of the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing time of various types of facsimile inquiries and the skill sets required for responding to different types of inquiries and include the benchmark results in the requisite management reports.

**C.3.2.6 Interactive Web-Based Services**

The Contractor shall provide qualified staff, equipment, software and services to support online interactive Internet-based services, such as web chat, using real-time text-based communication. The system supporting the chat service shall have the capabilities described in Section C.6.13 of this SOW.

**C.3.3 Other Support Services**

**C.3.3.1 Fulfillment Services**

Some Government agencies utilize fulfillment services provided by a Government entity, such as the Government Printing Office’s Pueblo operations. However, there will be instances when an agency may require fulfillment services that can be performed more efficiently by the Contractor. When requested by the Government, the Contractor shall provide a complete fulfillment solution for purposes of providing customers with printed information. This information may be downloaded from sources including the Internet and/or other appropriate database applications (e.g., agency web site, Contractor-provided knowledge database). The tasks to be performed include, but are not limited to the following:

- Retrieving the document from appropriate sources and, if necessary, printing the document for distribution.
- Developing and/or implementing application(s) to track the print fulfillment status of all required records and files as specified.
- Ensuring that tracking information is recorded and made available upon request as part of the Contractor-provided case management tool.
- Ensuring the system can accept multiple requests from a customer made during any one phone call or written inquiry.
- Providing relevant documents to customers through the postal services, E-mail or facsimile, whichever is the most efficient and satisfies the inquirer.

The Contractor shall be responsible for supplying all printing equipment and supplies, mailing supplies, including envelopes and postage, and performing all fulfillment functions, such as addressing, insertion, and posting. The Government will provide the materials to be mailed or provide the sources where the materials can be obtained. Unless otherwise directed by the Government, all materials are to be sent via the least expensive class of U.S. Mail it can qualify for. Postage incurred by the Contractor for fulfillments will be reimbursed by the Government as Other Direct Charges (ODC).

1017 **C.3.3.2 Transcription Service**

1018 The Contractor shall provide qualified staff and equipment to transcribe messages recorded on voice mail  
1019 and other recorded services. The Contractor shall perform transcription service on an as needed basis as  
1020 specified in individual task orders (e.g., daily, weekly, monthly)

1021  
1022 **C.3.3.3 Language Translation Services**

1023 The Contractor shall provide language translation services on an as-needed basis to allow non-English  
1024 speaking customers the ability to communicate their needs to the Government. This capability shall  
1025 include, but not be limited to:

- 1026 ○ Supporting over-the-phone, e-mail, and fax language translation capabilities.
- 1027
- 1028
- 1029 ○ Supporting for multiple languages, including English and Spanish. (Note: Agency language  
1030 requirements may be extensive and will vary widely from agency to agency. The specific  
1031 languages to be supported by the Contractor will be identified in task orders issued by the  
1032 Government.)
- 1033
- 1034 ○ Providing a data collection tool to evaluate the need and usage of language translation services.
- 1035

1036 **C.3.4 Directory Listing Services**

1037 The Contractor shall arrange for the listing of public contact numbers (both voice and TTY) and website  
1038 URLs to appear in selected telephone directories, as specified in task orders issued by the Government.  
1039 The Contractor shall ensure that contact numbers and web site URL appear in the “U.S. Government”  
1040 sections of the Blue or White Pages, as appropriate. The contact numbers and web site URL shall be in  
1041 bold type where that is available.

1042  
1043 The Contractor is hereby advised that GSA currently manages a Government-wide Blue Pages project to  
1044 provide a more centralized and citizen friendly approach of listing Government agency telephone  
1045 numbers in certain Blue and Yellow Pages directories. For those directories that are not covered under  
1046 the Blue Pages project, the Contractor shall provide for the listing of the telephone number, the associated  
1047 web site URL, and the location address of each agency that serves the area covered by the applicable Blue  
1048 and Yellow Pages directories. The Contractor shall coordinate with designated Government  
1049 representatives to avoid duplication of listing. The costs of these listing shall be borne by the Contractor.  
1050 The Contractor shall report these costs to the Government for reimbursement as Other Direct Costs  
1051 (ODC).

1052  
1053 **C.3.5 Technical and Management Services**

1054 The Contractor shall provide all required technical and management services as part of the citizen inquiry  
1055 response and management solution. The functions to be performed include the following:

- 1056 ○ Site Management
- 1057
- 1058 ○ Program Management
- 1059 ○ Technology Management
- 1060 ○ Information Systems Security Management
- 1061 ○ Content and Knowledge Management
- 1062 ○ Contact/Case Management

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- 1063 ○ Relationship Management
- 1064 ○ Customer Satisfaction Survey

1065  
1066 The above functions are further described in Sections C.3.5.2 through C.3.5.9 of this SOW. The  
1067 Contractor shall provide a tiered pricing structure for providing technical and management services  
1068 commensurate with the complexity of the requirements identified in task orders issued by the  
1069 Government. The tiered structure shall include a core support component and an incremental support  
1070 component.

### 1071 1072 **C.3.5.1 Core Project Management Support**

1073 The core support component shall include, at a minimum, a project management staff (e.g., Contractor's  
1074 Project Manager, site manager, technical personnel, human resources and quality assurance personnel,  
1075 administrative personnel, content specialists, security personnel) and support services required to meet  
1076 task requirements for a single site solution that involves information and information systems that are  
1077 categorized as low impact in accordance with FIPS Publications 800-199, Standards for Security  
1078 Categorization for Federal Information and Information Systems. The level of support required will be  
1079 dependent on complexity of task requirements, as described below. For multi site solutions or more  
1080 complex implementations and for information and information systems that are categorized as “moderate”  
1081 or “high” impact, the Contractor may augment the core project management support with an incremental  
1082 project management support component.

1083  
1084 C.3.5.1.1 *Level 1* - encompasses tasks that involve work that is low complexity in scope. These tasks  
1085 generally require the development and maintenance of simple scripts for automated voice response  
1086 service and knowledge and/or customer databases. Training requirement of new employees is generally  
1087 limited to 40 hours or less. Knowledge base and content development and maintenance, inquiry tracking  
1088 and contact management, requirements are generally low. Reporting requirements are generally limited  
1089 to system generated reports and periodic program summaries.

1090  
1091 C.3.5.1.2 *Level 2* – encompasses tasks that involve work that is low to moderate complexity in scope.  
1092 These tasks general require the development and maintenance of moderately complex scripts for  
1093 automated voice response service and knowledge and/or customer databases. Training requirement of  
1094 new employees is generally limited to between 40 and 80 hours. Knowledge base and content  
1095 development and maintenance, inquiry tracking and contact management, and reporting requirements are  
1096 low to moderate.

1097  
1098 C.3.5.1.3 *Level 3* – encompasses tasks that involve work that is high complexity in scope. These tasks  
1099 generally require the development and maintenance of highly complex scripts for automated voice  
1100 response service and knowledge and/or customer databases. Training requirement of new employees is  
1101 generally between 80 to 120 hours. Knowledge base and content development and maintenance, inquiry  
1102 tracking and contact management, and reporting requirements are high.

1103  
1104 C.3.5.1.4 *Level 4* – encompasses tasks that involve work that is very high complexity in scope. These  
1105 tasks generally require the recruitment and training of 100 or fewer new employees and the development  
1106 and maintenance of extremely complex scripts for automated voice response service and knowledge  
1107 and/or customer databases. Training requirement of new employees is generally between 120 to 160  
1108 hours. Knowledge base and content development and maintenance, inquiry tracking and contact  
1109 management, and reporting requirements are very high.

1110

1111 **C.3.5.1.1 Incremental Support**

1112 The Contractor shall provide incremental support to accommodate multi-site solutions and/or to support  
1113 projects involving more complex implementations, and/or for projects that involve information and  
1114 information systems that are categorized as “moderate” or “high” impact, and/or to support new  
1115 requirements added subsequent to initial project implementation.  
1116

1117 **C.3.5.2 Site Management**

1118 The Contractor shall provide qualified personnel to manage and operate the contact center(s) to ensure  
1119 optimum performance of systems and personnel. The Contractor shall analyze historical work volume,  
1120 employee availability and schedule preferences, and trends to accurately forecast and schedule staffing  
1121 resources to meet fluctuating workload requirements for all communications channels. The Contract shall  
1122 employ proven best practices management approaches to ensure optimum utilization of available staffing  
1123 resources to meet service objectives.  
1124

1125 **C.3.5.3 Program Management**

1126 The Contractor shall provide program management, oversight, and quality control of contact center  
1127 services, systems, and components, including, but not limited to the following tasks:  
1128

1129 C.3.5.3.1 *Project management* - Ensure the successful implementation, operation, and management of  
1130 the inquiry response and management solution as prescribed in this Statement of Work and task orders  
1131 issued by the Government.  
1132

1133 C.3.5.3.2 *Oversight* - Serve as the single point of contact to: assist in engineering, planning, and  
1134 administrative functions as needed to meet task order requirements; coordinate activities among  
1135 Government offices, business partners, contractors, and other relevant organizations; resolve questions or  
1136 issues related to hardware, software, communications, applications, and programs, including dispute  
1137 resolution with service providers; escalate irresolvable technical issues to the appropriate Government  
1138 official for final resolution; and develop resolution mechanisms to resolve technical issues and problems  
1139 among contractors to minimize conflict and delay of services.  
1140

1141 C.3.5.3.3 *Process Management* - Develop, document, and maintain work processes and business rules  
1142 used to support task requirements.  
1143

1144 C.3.5.3.4 *Recruitment and Retention* - Develop and implement plans for the recruitment and retention  
1145 of qualified personnel needed to meet task requirements.  
1146

1147 C.3.5.3.5 *Workforce Management* – Analyze historical work volume, employee availability and  
1148 schedule preferences, and trends to accurately forecast and schedule staffing resources to meet fluctuating  
1149 workload requirements for all communications channels. The Contractor shall employ proven best  
1150 practices management approaches to ensure optimum utilization of available staffing resources to meet  
1151 service objectives.  
1152

1153 C.3.5.3.6 *Performance Management* - Develop and implement the required plans, procedures,  
1154 methodologies, and tools, and perform the planning, oversight, and management functions to ensure that  
1155 all service delivery performance standards and program deliverables specified in the task order are met.  
1156

1157 C.3.5.3.7 *Training* – Develop and implement a comprehensive Training Plan to ensure that contact  
1158 center staff provides superior levels of customer service across all customer access channels.  
1159

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1160 C.3.5.3.8 *Quality Assurance/Quality Improvement* - Develop, implement, and manage a Quality  
1161 Assurance/Quality Improvement Plan to ensure that services delivered comply with the performance  
1162 standards specified by the Government.

1163  
1164 C.3.5.3.9 *Continuous Process Improvement* - Develop and implement action plans based on analysis of  
1165 performance results and customer feedback. These plans shall be available to the Government for review  
1166 upon request.

1167  
1168 C.3.5.3.10 *Information Systems Security Compliance Oversight* – Serve as a single point of coordination  
1169 to ensure compliance with minimum federal information systems security requirements, including  
1170 keeping abreast of and distribution of Federal security requirements, and preparation and submission of  
1171 required documentations and deliverables pertaining to compliance with these requirements. Maintain  
1172 Contingency/Disaster Recovery Plan and activate and oversee emergency/disaster recovery activities in  
1173 accordance with the Plan.

1174  
1175 C.3.5.3.11 *Management Reports* – Develop and deliver all requisite management reports and ensure all  
1176 reports are accurate and provided in a timely basis.

1177  
1178 C.3.5.3.12 *Value Engineering* – Develop and implement action plans to identify opportunities to  
1179 improve service offerings, reduce costs, and increase customer satisfaction.

1180  
1181 C.3.5.3.13 *Topic Trend and Reporting* – Collect information and provide reports on topics introduced by  
1182 the public, often in response to social/political issues of the day, and to work with the Government to  
1183 prepare appropriate responses.

### 1184 **C.3.5.4 Technology Management**

1185  
1186 The Contractor shall provide all required technology management services to effectively plan, implement,  
1187 operate and manage the contact center solution, including, but not limited to the following:

1188  
1189 C.3.5.4.1 *Infrastructure and Network Management* - Plan, design, implement, operate, maintain, and  
1190 manage the contact center site and technology infrastructure and related networks, including, but not  
1191 limited to: information and telecommunications systems hardware, software, and services.

1192  
1193 C.3.5.4.2 *Coordination* - Recommend, process, coordinate, and monitor telecommunications orders,  
1194 serving as a liaison with telecommunications vendors.

1195  
1196 C.3.5.4.3 *Monitoring* - Perform real-time monitoring of call delivery. Monitor network and system  
1197 performance and identify problems and outages; compile and maintain a log of problems, outages, service  
1198 interruptions, and unauthorized access; notify designated Government personnel promptly of any  
1199 problems, service disruptions, and unauthorized access.

1200  
1201 C.3.5.4.4 *Traffic Analysis* - Analyze traffic and usage data to determine network performance levels.  
1202 Recommend improvements in network design in accordance with customer service standards and cost  
1203 efficiencies.

1204  
1205 C.3.5.4.5 *Optimization* - Provide optimized call routing design based on availability of network-based  
1206 or systems-based call routing capabilities. Provide optimized automated announcement system design  
1207 based on availability of network-based and systems-based automated announcement capabilities.

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1209 C.3.5.4.6 *Contingency/Disaster Recovery* – Perform all functions in support of implementing the  
1210 Contingency/Disaster Recovery Plan.

1211

### 1212 **C.3.5.5 Information Systems Security Management**

1213 The E-Government Act (Public Law 107-347) recognizes the importance of information security to the  
1214 economic and national security interests of the United States. Title III of the E-Government Act, entitled  
1215 the Federal Information Security Management Act (FISMA) requires each federal agency to develop,  
1216 document, and implement an agency-wide program to provide information security for the information  
1217 and information systems that support the operations and assets of the agency, including those provided or  
1218 managed by another agency, contractor, or other source.

1219

1220 The Office of Management and Budget (OMB) through Circular A-130, *Management of Federal*  
1221 *Information Resources*, requires federal agencies to: plan for security; ensure that appropriate officials are  
1222 assigned security responsibility; periodically review the security controls in their information systems;  
1223 and authorize system processing prior to operations and, periodically, thereafter. This authorization by  
1224 senior agency officials, often referred to as the Designated Approving Authorities (DAA), is sometimes  
1225 referred to as accreditation. The technical and non-technical evaluation of an IT system that produces the  
1226 necessary information required by the authorizing official to make a credible, risk-based decision on  
1227 whether to place the system into operation is known as certification. The individual responsible for  
1228 making a technical judgment of the IT system's compliance with stated security requirements,  
1229 identifying, assessing, and documenting the risks associated with operating the systems, coordinating the  
1230 certification activities, and consolidating the certification and accreditation documents, is referred to as  
1231 the certification agent or certifier. For additional information on Federal information systems security  
1232 requirements, the Contractor should consult and become familiar the publications and guidance found at  
1233 the National Institute of Standards and Technology Computer Science Resources Center website at  
1234 <http://csrc.nist.gov/publications/nistpubs/index.html>. Publications of special interest include but are not  
1235 limited to the following:

1236

1237 ○ FIPS Publication 200, Minimum Security Requirements of Federal Information Systems

1238 ○ FIPS Publication 199, Standards for Security Categorization of Federal Information and  
1239 Information Systems

1240 ○ NIST Special Publication 800 – 53 - Recommended Security Controls for Federal Information  
1241 Systems

1242 ○ NIST Draft Special Publication 800-53A – Guide for Assessing the Security Controls in Federal  
1243 Information Systems

1244 ○ NIST Special Publication 800 – 30 – Risk Management Guide for Federal Information  
1245 Technology Systems

1246 ○ NIST Publication 800-18, Guide for Developing Security Plans for Information Technology  
1247 Systems

1248 ○ NIST Publication 800-34, Contingency Planning Guide for Information Technology Systems

1249 ○ NIST Publication 800-37, Guide for Security Certification and Accreditation of Federal  
1250 Information Systems

1251

1252 In additional to the above documents, the contractor is expected to adhere to agency security guidelines  
1253 that provide further guidance on information systems security requirements for individual task orders.

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1255 Unless stated otherwise in the task order, the contractor is responsible for preparing, managing and  
1256 maintaining all required documentation and fulfilling agency reporting requirements for the FISMA  
1257 compliance process, including e-authentication risk assessment, system categorization, security plan, risk  
1258 assessments, contingency and contingency test plans, configuration management plan, POA&M, system  
1259 test and evaluation reports, security certification and accreditation package.

1260  
1261 The Contractor shall develop, implement, and maintain a security plan that ensures the confidentiality,  
1262 integrity, and availability of information and systems for the duration of this contract. The security plan  
1263 shall contain, at a minimum, the information outlined in Special NIST Publication 800-18, Guide for  
1264 Developing Security Plans for Information Technology Systems. Additional information may be required  
1265 at the discretion of agency DAAs in accordance with agency policies or directives as specified in task  
1266 orders. The Contractor shall be responsible for preparing all required documentation needed for the  
1267 compliance process. The Contractor shall assign a technically qualified Information Systems Security  
1268 Manager (ISSM) who will be responsible for ensuring compliance with all Federal information systems  
1269 security requirements, including the preparation and submission of the following:

1270  
1271 *Security Plan* – provides an overview of the security requirements for the information and IT systems and  
1272 describes the existing or planned controls (management, operational, and technical) for meeting those  
1273 requirements. The Plan also describes the systems and delineates responsibilities and expected behavior  
1274 of individuals who access the systems.

1275  
1276 *Security Test and Evaluation Reports* – determines the systems' compliance with security requirements  
1277 documented in the Security Plan and verifies that the security controls identified in the Plan are correctly  
1278 implemented and effective. The Security Test and Evaluation Reports shall be prepared by a third party  
1279 vendor selected and paid for by the Contractor. All work performed by the third party vendor shall be  
1280 submitted, reviewed, and approved directly by the Government. The Government reserves the right to  
1281 have the Security Tests and Evaluation Reports done by its own contractor. The contractor shall  
1282 cooperate fully with the third party vendor or the Government's contractor in the preparation of such  
1283 reports.

1284  
1285 *Risk Assessment Report* – determines the degree of risk associated with the confidentiality, integrity, and  
1286 availability of the IT systems and the information they process, store, and transmit.

1287  
1288 *Certifier's Statement* – documents that the security controls are correctly implemented and effective in  
1289 their applications. The statement provides an overview of the security status of the system, and brings  
1290 together, all of the information necessary for the DAA to make an informed, risk-based decision. The  
1291 contractor ISSM shall prepare all certification and accreditation (C&A) documents for submission to an  
1292 agency-designated ISSM. The agency ISSM will coordinate the submission of the C&A documents to  
1293 the DAA for approval.

1294  
1295 The Contractor shall correct any deficiencies identified in the certification and accreditation process until  
1296 full accreditation from the DAA is obtained. The Contractor shall implement procedures for  
1297 communicating to the Contracting Officer and/or designated key personnel security-related issues that  
1298 impact Contractor performance under this contract. Such procedures shall include an escalation process  
1299 defining various stages of issue severity and the notification level appropriate to each.

### 1300 1301 **C.3.5.5.1 Personnel Security**

1302 The Contractor shall perform appropriate personnel screening in accordance with their administrative  
1303 hiring policies and agency requirements, including compliance with Homeland Security Presidential  
1304 Directive 12 (HSPD-12). Such policies may or may not include collecting and reviewing any or all of the

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1305 following information for each prospective candidate to determine if the applicant is a potential candidate  
1306 for employment:

- 1307
- 1308 ○ credit and/or criminal history inquiry
- 1309 ○ employment verification
- 1310 ○ drug screening
- 1311

1312 All information collected and actions taken shall be done in accordance with applicable Federal, state and  
1313 local laws and statues.

### 1314 **C.3.5.5.2 Information and Telecommunications Systems Security**

1316 The Government requires that all contractor-provided information and telecommunications systems be  
1317 made secure from unauthorized access and use. Access to the required filing system, including but not  
1318 limited to written correspondence, shall be limited to only those personnel who are authorized to support  
1319 a given task. The Contractor shall maintain a listing of those employees with authorized access. When  
1320 designing system security, Contractor shall address factors including, but not limited to:

1321  
1322 *Information systems* - Ensure that all information handled by computer systems is protected against  
1323 unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and inadvertent or deliberate  
1324 compromise.

1325  
1326 *Telecommunications systems* - Provision of telecommunications security is sufficient to protect all  
1327 incoming and outgoing calls and electronic inquiries/responses, and all data collected from these  
1328 activities, from unauthorized access or loss.

1329  
1330 *Software applications and databases* - Access to software applications and databases is limited to only  
1331 those personnel who are authorized to support a given task. Such restriction is accomplished through the  
1332 use of customized menus, user log-on identification codes, operator-defined password protection, and or  
1333 automatic timeout values. The Contractor shall use expiration dating as a method of password security  
1334 maintenance.

1335  
1336 *Internet and E-mail usage policy* – Guidelines regarding to appropriate Internet access and usage is  
1337 implemented and enforced. Policies addressing access to and disclosure of electronic mail messages sent  
1338 or received by employees using Contractor's corporate E-mail system shall also be implemented and  
1339 enforced. Such guidelines will inform employees that their privacy does not extend to their use of  
1340 Contractor-provided equipment or supplies.

1341  
1342 *System testing* - System testing is performed on a regular basis to monitor adherence to, and compliance  
1343 with, stated security measures.

1344  
1345 *Audits* - Contractor shall be subject to periodic system audits in the same manner and fashion as  
1346 conducted by the Government. Such audits shall relate to both Contractor-provided systems and  
1347 Contractor's use of Government-provided data under this contract. Examples of such audits include IG  
1348 and security audits, generation of active employee listings to verify user identification maintenance  
1349 practices, retrieval of user activity reports and archived security information, and demonstration of  
1350 Contractor's ability to monitor, collect, store, and control access to usage data.

1351  
1352 *Proper Notification* - Contractor shall report all attempts made, whether successful or not, to breach the  
1353 physical security of the facilities or primary data centers where the work is performed, or any related

1354 telecommunications and information systems that support each task. The Contractor shall adhere to  
1355 applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation  
1356 to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the  
1357 Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the  
1358 incident. In rare instances, the Contractor may receive calls that threaten the well being of the  
1359 Government and/or other personnel or property. The Contractor shall ensure that procedures are in place  
1360 to report the calls immediately to the appropriate law enforcement agency(ies).  
1361

1362 **C.3.5.5.3 Facility Security**

1363 Contractor is responsible for providing a physically secure facility for people, equipment, and  
1364 documentation. All security requirements apply to the Contractor facility, alternative facility, or any  
1365 subcontractor facilities. When designing physical security measures, Contractor shall address factors  
1366 including, but not limited to:  
1367

1368 *Controlled access* - All personnel who enter the facility shall be issued a badge or identification card.  
1369 Employees have a permanent badge and approved visitors receive a temporary badge. In general, facility  
1370 access is limited to: Contractor personnel performing work under contract; authorized Government  
1371 personnel; maintenance personnel or suppliers performing upkeep or repair of facilities or equipment;  
1372 customer personnel visiting the site on official business; and personnel as approved jointly by Contractor  
1373 and the Government. Contractor must obtain Government approval prior to granting either current or  
1374 potential customers access to areas where Government work is performed. Terminated employees shall  
1375 have their badges removed and their accounts deactivated and/or deleted from any system access  
1376 immediately upon termination. Proof of such removal shall be documented by Contractor and made  
1377 available to the Government upon request.  
1378

1379 *Data and telecommunications center* - The primary data and telecommunications center is secured  
1380 through the use of key-code access or equivalent technology with entrance granted only to those requiring  
1381 access to this area on a regular basis to perform their normal job functions or who are escorted as in the  
1382 case of visitors or technicians.  
1383

1384 *Confidential information* - Subsequent to the award of each task order, the Government will provide  
1385 Contractor with a listing of items it deems proprietary and confidential in nature. Examples of such data  
1386 include, but are not limited to, customer names, addresses, and social security numbers. Contractor shall  
1387 implement appropriate security measures to ensure such data is safeguarded in a manner consistent with  
1388 those employed by the Government. Examples of data security include locked file storage, confidentiality  
1389 stamping, restricted system access, data encryption, restricted print options, and disposal by shredding.  
1390

1391 *Proper notification* - Contractor shall report all attempts made, whether successful or not, to breach the  
1392 physical security of the facilities or primary data centers where the work is performed, or any related  
1393 telecommunications and information systems that support each task. The Contractor shall adhere to  
1394 applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation  
1395 to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the  
1396 Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the  
1397 incident. In rare instances, the Contractor may receive communications such as calls or e-mail that  
1398 threaten the well being of the Government and/or other personnel or property. The Contractor shall  
1399 ensure that procedures are in place to report the threatening communications immediately to the  
1400 appropriate law enforcement agency(ies).  
1401

1402 **C.3.5.5.4 Contingency/Disaster Recovery**

1403 The Contractor shall develop and implement, as part of the Security Plan, contingency/disaster recovery  
1404 plans and procedures addressing operations in the event of a shutdown or lapse in service for any reason.  
1405 This is to minimize service disruption to Government customers. The plan shall identify risks as well as  
1406 steps necessary to prevent it from happening in the first place. The plan shall include an alternate set of  
1407 steps to minimize the impact should prevention fails. The plan must define the precise steps to be taken  
1408 to recover as quickly as possible, including recovery procedures for physical facility, data systems,  
1409 contact center systems and applications, communications networks, electrical service, customer access  
1410 points, partners and procedures, and staff. The Contractor shall develop and implement procedures to test  
1411 the plan on an annual basis, at a minimum. The plan shall be developed in accordance with  
1412 Contingency/Disaster Recovery requirements specified in individual task orders and applicable agency IT  
1413 Security Policy and NIST Special Publication 800-34, Contingency Planning Guide for Information  
1414 Technology Systems.

1415  
1416 **C.3.5.5.4.1 Program Operations Recovery**

1417 In the event of periodic or catastrophic failures that restrict or terminate program operations, the design of  
1418 both the contact center infrastructure and the communications network servicing the Government  
1419 requirements shall include sufficient redundancy to allow normal business operations to continue with  
1420 minimal disruption and inconvenience to customers for all access channels.

1421  
1422 **C.3.5.5.4.2 Voice Recovery**

1423 When designing disaster recovery plans for the communications network, Contractor shall address factors  
1424 including, but not limited to:

- 1425
- 1426 ○ Network routing - If an individual facility should become inaccessible, a sufficient  
1427 communications network shall be in place to allow for forwarding of customer calls to one or  
1428 more alternate facilities. If the outage is brief, the network shall resume normal call routing as  
1429 soon as the primary facility is operational again.
  - 1430
  - 1431 ○ Operational impact - Documented policies shall exist for assuming workload from an  
1432 incapacitated facility for immediate, short-term, and long-term relief.
  - 1433
  - 1434 ○ Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of  
1435 preparing the staff and assessing the plan's viability.
  - 1436

1437 **C.3.5.5.4.3 Data Recovery**

1438 When designing disaster recovery plans for data recovery, Contractor shall address factors including, but  
1439 not limited to:

- 1440
- 1441 ○ Backup routines - The ease and frequency of which backup routines are conducted and the ability  
1442 to backup data on remote servers/processors.
  - 1443
  - 1444 ○ Effectiveness - The degree to which data can be compressed for backup purposes and the ability  
1445 to perform unattended backups on high-density/high-capacity storage devices.
  - 1446
  - 1447 ○ Operational impact - The time that is required to complete backups and the need to remove users  
1448 from the system to conduct backup routines.
  - 1449

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- 1450 ○ Data integrity - The methods of maintaining data integrity so that completed transactions are not  
1451 lost due to outages, system failures, etc. In long-running transactions, such as when a IS needs to  
1452 navigate several screens of data entry, there should be interim checkpoints that save the  
1453 transaction so that it may be re-entered from the last checkpoint if the transaction wasn't  
1454 completed prior to the failure.
- 1455
- 1456 ○ Data recovery - The methods of restoring data from backup in the event of a failure (e.g.,  
1457 commercial power failure, system or hardware failures).
- 1458
- 1459 ○ Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of  
1460 preparing the staff and assessing the plan's viability.
- 1461

### 1462 **C.3.5.5.4 Notification Process**

1463 Contractor shall implement procedures for communicating to the Government primary point of contact  
1464 and/or designated key personnel disaster-related issues that inhibit contact center operations. Such  
1465 procedure shall include an escalation process defining various stages of issue severity and the notification  
1466 level appropriate to each.

### 1467 **C.3.5.6 Content and Knowledge Management**

1468 The Contractor shall perform all content and knowledge management functions including the following:

1469  
1470  
1471 *Automated Voice Response Development and Maintenance* - The Contractor shall be responsible for call  
1472 flow design and development and maintenance of the information content and audio messages used for all  
1473 automated voice response services, such as IVR, voice recognition, and text-to-speech services. The  
1474 Contractor shall provide analysis and ongoing support for script design and optimization, call flow  
1475 analyses, service request processing and coordination, if required, and script management. The  
1476 Contractor shall develop and regularly maintain messages for the automated voice response services in  
1477 keeping with the current informational needs of the callers. The Contractor shall work closely with the  
1478 Government to develop the automated responses. The Government shall approve all automated responses  
1479 before they are implemented. The Contractor shall ensure timely updates of all automated messaging in  
1480 accordance with the turnaround timeframes established by the Government. At a minimum, Contractor  
1481 shall post changes within 24-hours of receipt for all non-emergency information and within 2-hours of  
1482 receipt for emergency notices. Support for emergency postings and updates, as determined by the  
1483 requesting agency, is required on a 24 hour a day, 7 day a week basis.

1484  
1485 *Knowledge Management* - The Contractor shall develop, implement, administer and manage the required  
1486 knowledge management system to effectively meet task order requirements. The Contractor shall update,  
1487 revise, and otherwise maintain currency and accuracy of the knowledge base as new information becomes  
1488 available. The Contractor shall incorporate best practices in system design to minimize the burden of  
1489 maintaining the required knowledge base and maximize its effectiveness. The Contractor shall develop  
1490 systematic approaches to finding, understanding, and using relevant knowledge to achieve task objectives,  
1491 including, but not limited to, reviewing newspapers, the Internet, publications, and other information  
1492 resources. The knowledge management system shall be accessible to all Contractor personnel. The  
1493 Contractor shall also provide access to the system via the Internet to designated Government employees at  
1494 remote locations. The number of individuals to be provided access will be specified in individual task  
1495 orders. Access to the knowledge databases shall be limited based on the individual user's program  
1496 support needs and level of authority, and shall be restricted only to authorized personnel. The  
1497 Government will brief the Contractor on the relevant programs and services and current business  
1498 processes, and provide the initial content data to be recorded in the knowledge management system.

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1499 Subsequent to the initial effort, the Contractor shall provide services, including, but not limited to the  
1500 following:

- 1501
- 1502 ○ Collect, organize, select, record, verify, update, and present relevant information in the  
1503 knowledge management system on an ongoing basis.
- 1504
- 1505 ○ Update and manage the content of the knowledge management system on an on-going basis.
- 1506
- 1507 ○ Develop a procedure to ensure agency concurrence on all updates and information dissemination  
1508 from the knowledge management system to any other media.
- 1509
- 1510 ○ Conduct research of agency-approved sources of information and develop appropriate responses  
1511 to customer inquiries.
- 1512
- 1513 ○ Organize information into suitable means for easy access by all contact center employees,  
1514 Government employees, and/or customers.
- 1515
- 1516 ○ Analyze usage data of the knowledge management system to determine trends and patterns.
- 1517
- 1518 ○ Analyze new inquiries and inquiry trends to develop responses based on research.
- 1519
- 1520 ○ Collect, organize, and prepare information and answers to frequently asked questions for  
1521 dissemination using automated systems, such as interactive voice response, automatic fax-back,  
1522 information search and retrieval systems, and web-based systems.
- 1523
- 1524 ○ Where new and topical inquiries arrive, have a mechanism for collection (from IS to  
1525 management), quick preparation of response, and a means of advising the Government of these  
1526 sudden unexpected influxes of question categories
- 1527
- 1528 ○ Ensure that, where applicable, additions, changes, or deletions of materials from the knowledge  
1529 database are carried over to corresponding IS training and support materials.
- 1530
- 1531 ○ Website Content Coordination - The Contractor shall share relevant inquiry data and trends with  
1532 agency web support team to ensure that information provided at the agency websites and the  
1533 contact center is accurate, up-to-date, and meets the needs of agency customers.
- 1534 ○ Filing System - The Contractor shall establish and maintain a filing system that shall allow  
1535 Government oversight of, at a minimum, written and electronic correspondence, employee (but  
1536 not individual) performance, work stoppages, agency liaison, hardware and software  
1537 maintenance, database maintenance, call data, and contract reports.

### 1538 1539 **C.3.5.7 Contact/Case Management**

1540 The Contractor shall develop, implement, administer and manage the required contact/case management  
1541 system to effectively track the status and disposition of all customer contacts as required in individual task  
1542 orders. The Contractor shall incorporate best practices in system design to minimize, to the extent  
1543 possible, keystrokes or data entry required for recording inquiry tracking and management data (i.e., use  
1544 of preformatted data entry forms with pull-down and/or multiple choice selection items). This system  
1545 shall be accessible to authorized contractor personnel and Government employees onsite and via Internet  
1546 access from remote locations. Access to the contact/case management shall be limited based on the  
1547 individual agency program support needs and level of authority, and shall be restricted only to authorized

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1548 personnel. The Contractor shall obtain Government approval to ensure usefulness and efficiency in the  
1549 design of any screens related to inquiry tracking and management.

1550

### 1551 **C.3.5.8 Relationship Management**

1552 The Contractor shall provide required customer coordination support to meet task order requirements,  
1553 including, but not limited to the following tasks:

1554

1555 ○ Coordinate with Government agency representatives, business partners, contractors, and other  
1556 relevant individuals or organizations to discuss implementation, operational, and programmatic  
1557 issues.

1558

1559 ○ Provide planning and coordination support to implement and manage the Directory Listing  
1560 Service.

1561

### 1562 **C.3.5.9 Customer Satisfaction Assessments**

1563 The Contractor shall provide support to design, develop, and implement customer satisfaction surveys in  
1564 conjunction with Government personnel to measure the performance level of the Contractor-provided  
1565 services. The Government will obtain all appropriate approvals in compliance with Federal regulations  
1566 and statutes prior to initiating any survey activities. The Contractor shall analyze the results of the  
1567 customer satisfaction assessment to determine customer perceptions about the quality of the service  
1568 delivery. Contractor shall use these results to develop and implement action plans to continually improve  
1569 customer satisfaction, and shall provide the results of both the survey and action plans to the Government  
1570 for review upon request.

1571

### 1572 **C.3.6 Special Project Support**

1573 The Contractor shall provide technical and management support needed to analyze, plan, design,  
1574 implement, operate, and manage special services that may be needed to meet the diverse needs of the  
1575 Government. These special services (e.g. web hosting, prototyping of new capabilities, special  
1576 applications and systems interconnectivity) will be priced on a task order-by-task order basis utilizing the  
1577 support functions identified in Section C.3.5 of this SOW, as deemed appropriate by the Contractor. The  
1578 Contractor shall provide all necessary personnel, facilities, equipment and services needed to support  
1579 special services as identified in task orders issued by the Government. Equipment, software, and services  
1580 not otherwise priced in Section B may be priced as Other Direct Costs (OCD).

1581

## 1582 **C.4 STAFF TO BE PROVIDED**

1583

1584 The Contractor is expected to support the diverse needs of a wide range of Government programs. The  
1585 Contractor shall provide qualified personnel in sufficient quantities to perform the functions identified in  
1586 this SOW and individual task orders. Unless specifically allowed in individual task orders, all work  
1587 performed shall be at contractor-managed facilities. All matters pertaining to the employment,  
1588 supervision, compensation, promotion, and discharge of the Contractor's employees shall be the  
1589 responsibility of the Contractor, which is in all respects the employer of such employees. All proposed  
1590 substitutes for key personnel shall meet or exceed the qualifications of the person to be replaced. The  
1591 Government shall be notified in writing of any proposed substitution of key personnel at least thirty days  
1592 in advance of the proposed substitution.

1593

1594 The Contractor shall perform background checks on all prospective employees in accordance with  
1595 applicable agency Personnel Security Handbook prior to providing them for service under the contract.  
1596 At a minimum, this check shall ensure that no prospective employee has a criminal misdemeanor or a

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1597 felony record and has a satisfactory history of credit. Additional background checks or security  
1598 clearances may be required as specified in individual task orders.

1599

### 1600 **C.4.1 Key Personnel**

1601

1602 The Contractor must have the capability to provide qualified personnel to meet the specific requirements  
1603 of each task order. At a minimum, the Contractor shall provide the following key personnel:

1604

1605 C.4.1.1 *Program Manager* - responsible for managing and implementing the overall contract  
1606 requirement and oversee implementation of more complex tasks; organizes, directs, coordinates planning,  
1607 and implements all contract and/or task order support activities; interacts with high level program officials  
1608 regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources;  
1609 monitors and analyzes contract and performance data and reports results to senior Government officials;  
1610 coordinates recruitment and training activities to keep staff current on agency programs and performance  
1611 objectives; manages the activities of subcontractors; and reviews contract, operations and management  
1612 reports. The Government reserves the right to approve the selection of the Contractor-assigned Program  
1613 Manager prior to his/her placement in supporting the task if such assignment is warranted.

1614

1615 C.4.1.2 *Project Manager* - responsible for managing and implementing individual task requirement;  
1616 organizes, directs, coordinates planning, and implements all project support activities; interacts with  
1617 program officials regarding issues and status of the project; coordinates financial and staffing resources;  
1618 monitors and analyzes performance data and reports results to the Government; coordinates training  
1619 activities to keep staff current on agency programs and customer service objectives; manages the  
1620 activities of subcontractors; and prepares operations and management reports. For each task, the  
1621 Government reserves the right to approve the selection of the Contractor-assigned Project Manager prior  
1622 to his/her placement in supporting the task.

1623

1624 C.4.1.3 *Site Manager* - responsible for overall daily operations and management of the contact center,  
1625 including staffing, facility, training, service delivery, problem escalation and resolution, and performance  
1626 monitoring; provides technical assistance to the planning, design, installation, modification, and operation  
1627 of telecommunications and information systems capabilities; ensures all functions and processes are  
1628 implemented and operated properly.

1629

1630 C.4.1.4 *Information Systems Security Manager (ISSM)* – responsible for ensuring that information  
1631 systems used in supporting task requirements meet initial and ongoing compliance of information systems  
1632 security requirements in accordance with FIPS Publication 200, Minimum Security Requirements of  
1633 Federal Information Systems. The ISSM shall ensure that information systems used to support a specific  
1634 task meet the minimum security requirements as defined in FIPS Publication 200 through the use of  
1635 security controls in accordance with the NIST Special Publication 800 – 53, Recommended Security  
1636 Controls for Federal Information Systems, As Amended. This includes preparing all required  
1637 documentations for the compliance process, including security plan, risk assessments, contingency and  
1638 contingency test plans, configuration management plan, system test and evaluation reports, security  
1639 certification and accreditation package.

1640

1641 To meet specific task requirements, the Government may require the assignment of one or more key  
1642 personnel in support of a task. The Government may also identify additional key personnel requirements  
1643 in individual task orders.

1644

### 1645 **C.4.2 Support Staff**

1646

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1647 The Contractor shall provide sufficient qualified support staff to perform functions including, but not  
1648 limited to:

1649

1650 C.4.2.1 *Human Resources Management* - ensure the placement of qualified candidates into open  
1651 positions by participating in employment-related activities such as recruiting, screening, testing,  
1652 evaluating, behavioral interviewing, and hiring for a wide variety of positions; prepares employment-  
1653 related reports; conduct new employee orientation sessions; experienced in employee relations, legal  
1654 compliance, and compensation matters.

1655

1656 C.4.2.2 *Supervision* - supervise and coordinate the daily workflow to ensure productivity and quality  
1657 standards are met and customer service efforts are consistently achieved; assist the manager in the  
1658 administration of the unit; provide leadership, guidance, training, and work direction to assigned  
1659 personnel to ensure goals and objectives are met; foster a work environment that respects individuals,  
1660 promotes teamwork, and encourages innovation and creativity.

1661

1662 C.4.2.3 *Quality Assurance* - assess the quality of service provided by ISs through monitoring  
1663 incoming calls and other work types while focusing on the quality of customer service, accuracy of  
1664 information provided, and adherence to departmental policies and procedures; analyze operational  
1665 performance against company and customer expectations and identifies areas of competency and areas of  
1666 needed improvement; establish and maintain systems for capturing, analyzing and reporting quality  
1667 measures; interface with other operational and cross-functional areas to ensure consistency in reporting  
1668 practices and to help determine quality needs; provide recommendations on continual process  
1669 improvement.

1670

1671 C.4.2.4 *Training* - design, develop, evaluate, and deliver training programs for all levels of staff;  
1672 evaluate the applicability and quality of training programs offered by outside vendors; complete needs  
1673 assessments to identify future training needs and provide guidance to staff on matters related to  
1674 continuing education; design course manuals, support materials and tools; perform administrative duties  
1675 related to employee training such as scheduling classes, ordering/maintaining supplies, maintaining  
1676 training records and a library/database of training materials and subject matter experts; conduct surveys of  
1677 training and equipment needs; conduct follow up studies to determine overall training effectiveness;  
1678 prepare formal reports and correspondence. Where appropriate, effective, and efficient, arrange for  
1679 training, initial or refresher, by Government staff if the Government agrees.

1680

1681 C.4.2.5 *Service Level Management* - manage overall forecasting and staffing processes to ensure  
1682 efficient, cost-effective overall IS utilization; creates, execute and oversee effective plan (annual, weekly,  
1683 daily); work closely with Project and Site Managers to assist in determining future staffing requirements,  
1684 optimize site scheduling, balance workload across the network, maximize performance and meet overall  
1685 objectives; review on an on-going basis, existing technologies and software recommending changes as  
1686 needed to ensure maximum utilization of resources; manage actual performance feedback against targets,  
1687 identify shortfalls, take corrective action and make adjustments accordingly; conduct need assessment to  
1688 ensure continual improvement of overall forecasting and staffing performance.

1689

1690 C.4.2.6 *Knowledge/Content Management* - research and resolve open issues by thorough and efficient  
1691 investigation; create, index, and maintain knowledge database records and answers to FAQs; ensure the  
1692 accuracy and clarity of information recorded; purge outdated records from the system in accordance with  
1693 records management guidelines provided by the agency; communicate record additions or changes to all  
1694 staff on a timely basis.

1695

1696 C.4.2.7 *Inquiry tracking* – capture and track all relevant information and disposition of all inquiries;  
1697 ensure inquiries are completed on a timely basis.

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C.4.2.8 *Technical support* - ensure all areas of systems architecture, security, design, development, analysis, installation, programming, testing, maintenance, administration, and ongoing support for contact center hardware, software, network, telecommunications, and Internet equipment and services.

This is not a complete list of all responsibilities, duties, efforts, or skills associated with these positions, but is intended to serve as an overview of the functions that the Contractor is expected to perform.

**C.4.3 Information Specialists (IS)**

The Contractor shall provide sufficient contact center IS staff to perform the functions specified in individual task orders. The Contractor shall ensure that ISs possess the appropriate qualifications and skills required to perform the task. Unless specifically authorized in the task orders, all ISs shall be situated in contractor-provided facilities with restricted access.

C.4.3.1 Qualifications - Each member of the Contractor-provided IS staff shall meet the following minimum requirements:

- High school diploma or General Educational Development (GED) Certificate
- Language proficiency equivalent to meeting an Interagency Language Roundtable (ILR) Level-5 or S-5 requirement. An individual at this level is described as follows: a) has a speaking proficiency equivalent to that of an educated native speaker; and b) has complete fluency in the language, such that speech on all levels is fully accepted by educated native speakers in all of its features, including breadth of vocabulary and idiom, colloquialism, and pertinent cultural preferences.

C.4.3.2 Competencies - The Contractor-provided IS staff shall demonstrate the requisite skills and knowledge to perform the following functions, at a minimum:

- Oral and written communication skills sufficient to facilitate clear and accurate information exchanges with customers.
- Ability to control the pace and flow of the inquiry/request and manage call time effectively.
- Ability to handle inquiries and requests in a courteous and professional manner, including calls received in crisis situations, and/or from abusive callers.
- Ability to listen to and empathize with customers and acknowledge their concerns.
- Ability to follow protocol and to apply sensitivity and discretion in handling confidential information.
- Ability to gather information to determine a customer's needs, apply problem-solving skills, and resolve the inquiry/request effectively.
- Computer and keyboarding skills sufficient to record information from the inquirer in an accurate and efficient manner.
- Ability to use the web to search and retrieve information.

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- 1748 ○ Ability to receive inquiries from the hearing, speech, and visually impaired, as well as other  
1749 physically impaired callers and route them to the appropriate IS or queue for response.  
1750
- 1751 ○ Ability to take direction within a team setting and complete team-related work promptly.  
1752
- 1753 ○ For IS assigned specifically to support TTY callers, ability to effectively respond to inquiries  
1754 using appropriate equipment.  
1755

### 1756 C.4.3.3 Skills Categories

1757 The Contractor shall provide qualified personnel in sufficient quantities to perform the functions  
1758 identified in task orders issued by the Government. The Contractor is expected to support the diverse  
1759 needs of Government programs. The skills categories identified below are those that the Government  
1760 anticipates may be required to satisfy the diverse needs of agency programs. The specific skills  
1761 category(ies) required will depend on the complexity of work to be performed, as identified in individual  
1762 task orders. The Government reserves the right to add other skills categories to meet agency requirements  
1763 at any time during the effective period of this contract.  
1764

1765 C.4.3.3.1 *Level 1* - Handles telephone and e-mail inquiries that are routine and transactional in nature.  
1766 Captures or disseminates basic information, utilizing a prepared script. Little or no deviation from script  
1767 is permitted in responding to inquiries. Proficient in using automated tools, search and information  
1768 retrieval systems, and knowledge and contact management systems. Requires High School diploma, or  
1769 GED.  
1770

1771 C.4.3.3.2 *Level 2* – Handles inquiries received via multiple communication channels (e.g., phone, e-  
1772 mail). Nature of inquiries involves subjects that are moderate in complexity. Responses are generally  
1773 scripted but may require probing of callers for specific information. Proficient in using automated tools,  
1774 search and information retrieval systems, and knowledge and contact management systems. Requires  
1775 High School diploma, or GED and some college, or equivalent combination of education and prior  
1776 customer service experience. Requires general knowledge of Government programs.  
1777

1778 C.4.3.3.3 *Level 3* - Handles inquiries via multiple communication channels. Nature of inquiries  
1779 involves subjects that are high in complexity. Responses are not scripted and require frequent probing of  
1780 callers for specific information. Proficient in using automated tools, search and information retrieval  
1781 systems, and knowledge and contact management systems. Requires Associate degree and prior  
1782 experience in one or more specialized areas. Requires specialized knowledge of Government programs  
1783 and/or subject matters.  
1784

1785 C.4.3.3.4 *Level 4* - Handles inquiries via multiple communication channels. Nature of inquiries  
1786 involves subjects that are very high in complexity and requires subject matter experience. Responses are  
1787 not scripted and require extensive probing of callers for specific information. Proficient in using  
1788 automated tools, search and information retrieval systems, knowledge and contact management systems,  
1789 and other specialized systems. Requires Bachelors degree or equivalent work experience and subject  
1790 matter experience.  
1791

1792 C.4.3.3.4 *Level 5* - Handles inquiries via multiple communication channels. Nature of inquiries  
1793 involves subjects that are highly specialized and requires subject matter expertise. Responses are not  
1794 scripted and require extensive probing of callers for specific information. Proficient in using automated  
1795 tools, search and information retrieval systems, and knowledge and contact management systems, and  
1796 other specialized systems. Requires advanced degree or equivalent work experience and subject matter  
1797 expertise.

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1798

1799 C.4.3.3.5 Minimum Qualifications Requirements for Supervisory Information Specialists

1800

1801 In addition to meeting minimum education and/or experience requirements specified for Information  
1802 Specialists specified above for the respective skill category, Supervisory Information Specialists shall  
1803 meet the following minimum requirements:

1804

1805 • Two or more years experience serving as an Information Specialist at the respective skill level, or  
1806 one or more years of experience supervising Information Specialists at the respective skill level.

1807

• Excellent oral and written communications skills

1808

• Strong organizational skills

1809

• Skilled at oral and written reviews as well as coaching to improve performance

1810

• Must be positive and self-motivated with the ability to change priorities on demand

1811

• Solid understanding of computer basics (Windows, Excel, Word, Operating Systems and Internet  
1812 applications such as web, email, and chat).

1813

### 1814 C.4.3.4 Multi-language Support

1815 The Contractor shall provide qualified personnel in sufficient quantities to meet the language  
1816 requirements specified in individual task orders. At a minimum, the Contractor must have the capability  
1817 to supply ISs who are proficient the following languages:

1818

○ English

1820

○ Spanish

1821

○ Mandarin

1822

○ Cantonese

1823

○ French

1824

○ German

1825

○ Japanese

1826

○ Korean

1827

○ Vietnamese

1828

1829 The specific language requirement and associated work volumes will be specified in individual task  
1830 orders issued by the Government. The Contractor shall incorporate all appropriate considerations for  
1831 multi-language requirement into the support for each task including, but not limited to, areas such as  
1832 training, quality monitoring, supervision, and automated services.

1833

## 1834 C.5 FACILITIES TO BE PROVIDED

1835

### 1836 C.5.1 General

1837

1838 The Contractor shall provide adequate facilities to support the contact center operations, including, but  
1839 not limited to the following:

1840

○ Work areas,

1841

○ Employee lounge areas,

1842

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- 1843 ○ Storage areas,
- 1844 ○ Training and conference facilities with supporting audio and visual equipment,
- 1845 ○ Telecommunications and computer facilities,
- 1846 ○ IS work stations, including modular and/or other furniture and chairs,
- 1847 ○ File cabinets and file storage systems,
- 1848 ○ Lighting and office appliances, and
- 1849 ○ Other required office furnishings.

1850  
1851 The Contractor is responsible for the ongoing maintenance, upkeep, and management of the contact  
1852 center facilities. For security purposes, the Contractor shall generally be prohibited from identifying the  
1853 facility(ies) as supporting Government business on either the exterior building walls or signage. Specific  
1854 approval to do so can only be granted by the Contracting Officer.

### 1855 1856 **C.5.2 Facility Infrastructure**

1857  
1858 The Contractor shall be responsible for the acquisition, installation, and maintenance of all cable, wiring  
1859 and support infrastructure required to operate the facility, including, but not limited to: cable distribution  
1860 systems; conduits; terminals and connectors; raised flooring; and other equipment needed to interconnect  
1861 and support the contact center systems and operations.

### 1862 1863 **C.5.3 Site Selection and Facility Design Requirements**

1864  
1865 When selecting and/or designing contact center site, the Contractor shall factor in the following:

- 1866 ○ The site selected shall provide a geographic location chosen to minimize the effect of catastrophic  
1867 weather conditions on customer contact center operations. For multi-site solutions, the sites shall  
1868 be spaced located in different geographic locations to minimize the possibility of adverse weather  
1869 conditions affecting the operations
- 1870 ○ The site shall be located at a safe location deemed appropriate for contact center operations.
- 1871 ○ The site shall be easy to access in terms of relative proximity to local air transportation and major  
1872 air carrier services.
- 1873 ○ The site shall be located within the United States unless specifically approved by the  
1874 Government.
- 1875 ○ The site shall be designed and built to comply with all applicable state, local, and Federal  
1876 Government standards and regulations, such as the Occupational Safety and Health Act (OHSA)  
1877 of 1970, as revised, and the Americans with Disabilities Act of 1990. The site shall remain in  
1878 compliance with such standards and regulations throughout the term of the contract.
- 1879 ○ The site shall be situated in a location where the local labor market can support the contact center  
1880 size and the skill sets of the labor pool required to support the task requirements, including  
1881 foreign language, subject matter expertise, and other special requirements that the programs may  
1882 present. Considerations should include the degree of competition for the labor pool from other  
1883 contact centers and related industries and its impact on recruiting and retaining contact center  
1884 personnel.

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- The site shall be designed to provide an office environment that is conducive to providing customer support, supporting private conversations, and facilitating communication among staff.
  - The site shall be designed to provide space, furnishing, acoustic, lighting, and temperature environment that meets or exceeds contact center industry standards.
  - The site shall be designed to accommodate modern telecommunications and computer systems and contact center furnishing.
  - The site shall be designed to meet other environmental control standards that are in compliance with Federal, state, local, and industry standards.
  - The site shall be supported by an appropriately sized backup generator and a non-interruptible power supply.
  - The site shall be designed to provide redundant, high bandwidth, high availability connections to the telephone network and the Internet.

1910 **C.5.4 Project Housing**

1911 The Contractor-provided workspace assigned to support specific tasks shall meet the following criteria:

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- Contiguous workspace shall be provided for the entire complement of IS staff supporting a specific task within a given site.
  - Security of information is a key concern of the Government. The Contractor shall provide a secure facility with restrictive access to only those Contractor employees and authorized Government representatives who support specific tasks.
  - Unless specifically authorized by the Government on an individual task order basis, hoteling of IS seats, whereby no specified grouping of seats is assigned to the task on a permanent basis, is not permitted.
  - Contractor shall designate at no additional cost to the Government a non-exclusive space for an authorized Government representative, to work when onsite. The space shall include enclosed office space and workstation, computer and Internet access, telephone and modem lines, administrative support and services, and security. Transitory Government personnel shall be provided workspace if available.

1931 **C.5.4.1 Exclusive-Use Space**

1932 To meet specific program requirements, the Contractor may be requested to provide space for the  
1933 exclusive use of one or more authorized Government representatives. Specific space requirements, if  
1934 required, will be included in individual task orders.

1935

1936 **C.5.5 Facility and Systems Access**

1937 The Contractor-provided facilities and systems shall be designed to provide physical and information  
1938 access security with security monitoring and access restriction at all times. Access to the contractor-  
1939 provided facilities shall be provided to authorized Government personnel at anytime during the normal  
1940

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1941 operation of the contact center. Access to contractor provided systems, including remote access by  
1942 Contractor employees and authorized Government employees, shall be restricted to authorized personnel  
1943 at all time.

1944  
1945 Designated Government employees, and/or their authorized representatives may visit any contact center  
1946 facility used to support its programs without prior notice for the purpose of conducting on-site reviews,  
1947 information gathering, or program observation.

### 1948 1949 **C.6 TECHNOLOGY INFRASTRUCTURE TO BE PROVIDED**

1950  
1951 The contractor shall provide and maintain robust and scalable, state-of-the-art multi-channel contact  
1952 center system hardware, software, and accessories to meet task order requirements. The Contractor shall  
1953 provide a commercial off-the-shelf (COTS) solution that meets the Government requirements. The  
1954 systems shall be adequately sized and equipped to handle fluctuations in the volume of inquiries received.  
1955 The systems shall be configured such that they can be easily expanded to accommodate growth in work  
1956 volume. The systems shall have adequate backup capability to maximize availability and reliability of all  
1957 services. At a minimum, the system shall be Section 508 compliant and meet the requirements specified  
1958 in Sections C.6.1 through C.6.15 below. Call processing and E-mail routing and management systems  
1959 provided by the contractor shall incorporate automated capabilities to perform periodic checks on the  
1960 systems to verify operational status of the contractor systems and alert contractor's system maintenance  
1961 personnel and/or the Government if there is a failure.

1962  
1963 Contact center staff shall be provided desktop workstations, including computers, telephones and  
1964 headsets, and other equipment, software, and accessories required to sustain contact center operations.  
1965 Unless specified by the Government, all workstations shall be equipped with telecommunications, e-mail  
1966 and Internet access.

#### 1967 1968 **C.6.1 Call Processing Technology and Services**

1969  
1970 Contractor shall provide the required call processing technology and services to handle the workload  
1971 presented by the Government. These include, but are not limited to:

1972  
1973 C.6.1.1 *Call Routing and Distribution* – The system shall provide routing/distribution of incoming  
1974 calls based on sequence of arrival/origination, inquiry type, IS availability and skills, contact center  
1975 availability, or other predefined routing instructions, as specified by the Government. The system shall  
1976 provide at a minimum:

- 1977
- 1978 ○ The capability to monitor and visually display the work state and availability status of all ISs on  
1979 a real-time basis.
  - 1980 ○ The capability to display call-handling statistics real-time.
  - 1981 ○ The capability to provide electronic and hard copy reports on all trunks, IS, and workgroup  
1982 performance statistics.
  - 1983 ○ The capability to provide incoming calls by Dialed Number Identification Service (DNIS)  
1984 reporting.
  - 1985 ○ The capability to originate and least-cost route outgoing and follow up calls.
  - 1986 ○ The ability to transfer calls within the contact center or to transfer calls to other locations via  
1987 attended or unattended transfers.
- 1988

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- 1989 C.6.1.2 *Automated Fax-Back/Fax on Demand* – The system shall have the capability to allow  
1990 customers to generate a request for a document to be automatically sent to their fax machine. This  
1991 function can also be activated internally by a IS to send documents to a customer's fax machine.  
1992
- 1993 C.6.1.3 *Automatic Numbering Identification (ANI)* - Certain caller information, such as the caller's  
1994 telephone number, may be used to identify the caller and access caller information to facilitate customer  
1995 service and/or to support the compilation of caller demographic information. Numeric area code  
1996 information shall be translated to reflect its corresponding geographic location (e.g., area code 202 would  
1997 be reflected as Washington, DC) for reporting purposes. The contact center system shall be ANI-enabled  
1998 and possess any additional software required to support such functionality.  
1999
- 2000 C.6.1.4 *Accounting and Management* – The system shall provide accounting and management  
2001 capabilities for all inquiry types.  
2002
- 2003 C.6.1.5 *Call Queuing* – The system shall queue incoming calls and provide callers with an estimated  
2004 wait time in queue and other recorded messages. The system shall provide the caller with an option to  
2005 stay in queue or leave a message for callback based upon response to prompts. During or upon  
2006 completion of the callback message, callers shall have the option of returning to the queue without losing  
2007 his or her place in the queue.  
2008
- 2009 C.6.1.6 *Call Transfer* – The system shall be capable of transferring calls to a different workgroup  
2010 within the contact center and/or to a workgroup located in a different contact center via blind or attended  
2011 transfer, as specified by the Government. The call transfer function may be activated automatically by the  
2012 caller or manually through the IS. The Contractor shall provide the most efficient and cost effective way  
2013 of transferring the calls unless otherwise directed by the Government. The system shall be capable of  
2014 tracking the quantity and duration of calls transferred from one program to another program within the  
2015 Contractor's system.  
2016
- 2017 C.6.1.7 *Computer Telephony Integration (CTI)* – The system shall be capable of displaying caller-  
2018 relevant information at the IS workstations (e.g., via screen pop technology). The displayed information  
2019 may be triggered by DNIS, and/or ANI information, and/or through information entered by the caller or  
2020 IS, and/or through data gathered by the IVR service.  
2021
- 2022 C.6.1.8 *Dialed Number Identification Service (DNIS)* – The system shall be DNIS-enabled, in order  
2023 to distinguish incoming calls by the called number and route them to the appropriate response system  
2024 and/or IS. The system shall be capable of providing the appropriate program identification (e.g., via  
2025 whisper announcement) at the IS workstation.  
2026
- 2027 C.6.1.9 *Automated Voice Response* – The system shall be equipped with innovative and effective  
2028 automated voice response solutions that enables the callers to obtain answers to frequently asked  
2029 questions quickly and in a customer friendly manner. The solutions include the use of IVR, voice  
2030 recognition and text-to-speech technologies. The system shall have the ability to quantify (aggregate by  
2031 menu and message) the selections of callers by business and non-business hours and days for reporting  
2032 purposes. The system shall accommodate callers with touch-tone and rotary telephones/dial pulse  
2033 telephones who seek information via self service and/or assistance.  
2034
- 2035 C.6.1.10 *TDD/TTY Calls* – The system shall be equipped with Telephone Device for the Deaf (TDD)  
2036 or TTY (ASCII) terminals for responding to inquiries from individuals who are hearing and visually  
2037 impaired.  
2038

2039 C.6.1.11 *System Capacity* – The Government requires that Contractor provides sufficient capacity on  
2040 the system to support projected call volumes, workload estimates, and call routing in accordance with  
2041 service level goals (e.g., blockage). The Contractor shall provide sufficient expansion capability to  
2042 accommodate call pattern variations.

2043

2044 **C.6.2 E-Mail Routing and Management**

2045

2046 The contractor-provided e-mail routing and management system shall be integrated with the inquiry  
2047 processing system described in Section C.6.1 to ensure efficient staff utilization. At a minimum, the  
2048 system shall provide the following:

2049

2050 C.6.2.1 *Time/Date Stamping of Receipt* – automatically stamps the time and date of receipt of e-mail  
2051 messages.

2052

2053 C.6.2.2 *Auto Copy of Messages Upon Receipt* – automatically forwards a copy of the e-mail  
2054 messages to up to 3 Government-designated e-mail addresses immediately upon receipt.

2055

2056 C.6.2.3 *Automated Inquiry Tracking Number Assignment* – automatically assigns a tracking number  
2057 to each incoming e-mail message; provides a capability to automatically assign sub-tracking number(s),  
2058 when prompted, for tracking e-mail messages forwarded to multiple agencies.

2059

2060 C.6.2.4 *Auto-Message Processing* – monitors incoming mailboxes for incoming mail; automatically  
2061 scans, filters, analyzes, sorts, categorizes, prioritizes, routes, queues, and responds to e-mail messages  
2062 based on predefined rules; includes spam control, auto-acknowledgement, content-driven auto-response,  
2063 and external notification capabilities. The auto-acknowledgement and auto-respond features must be able  
2064 to retrieve the e-mail address of the inquirer from a web e-mail form, an auto-forwarding e-mailbox,  
2065 and/or free form e-mail and use it for responding to the inquiry. To the extent practicable, the e-mail  
2066 system shall employ automated means to remove extraneous routing and other information from the  
2067 response (rather than relying on manual action by the IS) before its transmission.

2068

2069 C.6.2.5 *Automated Response Aids* – provides storage and retrieval of customized and preformatted  
2070 messages, automated response suggestions, spell-check, and auto-text insertion of commonly used words,  
2071 phrases, and responses to enhance response efficiency.

2072

2073 C.6.2.6 *Attachments/Web Links* – provides the ability to receive e-mail attachments and send  
2074 attachments and/or embedded web links with the outgoing e-mail message.

2075

2076 C.6.2.7 *Monitoring* – allows customer support supervisors, managers, and up to 5 designated  
2077 Government representatives from remote locations, to closely monitor message queues, agent activity,  
2078 and performance levels; provides automatic escalation of messages that are past performance level  
2079 thresholds.

2080

2081 C.6.2.8 *Mail Tracking* – allows off-site respondents to receive and respond to messages via their  
2082 existing e-mail client, while maintaining full message tracking.

2083

2084 C.6.2.9 *Inquiry Tracking* – records and tracks all relevant information and disposition of all e-mail  
2085 inquiries; provides problem-tracking functionality and is capable of recording and generating records of  
2086 problems reported, tracking the problem through to resolution, and maintaining historical data on  
2087 problems by the inquirer and by problem category and frequency. Case tracking database information  
2088 shall be available to ISs for inquiry and real-time update as appropriate.

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2090 C.6.2.10 *Management Reports* – provides a full array of scheduled and ad hoc management reports in  
2091 a commonly used electronic format that track e-mail volume statistics, category and agency breakouts,  
2092 historical data, trends, case tracking, productivity and performance measurements. The reports shall  
2093 include both summary and detailed data. The Contractor shall assure that the information on the reports  
2094 can be grouped and sorted by the fields in the inquiry tracking database. Reports shall be accessible via a  
2095 secure web site. The preferred delivery method will be through the use of XML.  
2096

2097 C.6.2.11 *Interoperability* – The systems shall be able to exchange e-mail with Government e-mail  
2098 systems.  
2099

2100 C.6.2.12 *Security* – security all required measures to ensure that the security of the e-mail and  
2101 associated systems are not compromised (e.g. content checking, anti-virus, e-mail exploit detection and  
2102 defense, and threats analysis).  
2103

2104 C.6.2.13 *Storage* – provides sufficient capacity to store all incoming and outgoing e-mail messages,  
2105 case tracking data, and other relevant information - at a minimum - for the current fiscal year and the  
2106 previous fiscal year.  
2107

2108 C.6.2.14 *Mass Mailing* – provides the ability to transmit information via e-mail to lists of recipients  
2109 stored within the system in accordance to pre-established schedule and/or as directed in the task orders.  
2110

2111 C.6.2.15 *Message Blocking* – provides the capability to automatically block e-mail inquiries sent from  
2112 other than web form(s) designated by the Government from reaching the e-mail messaging system. This  
2113 includes replies to the Contractor’s responses sent by the inquirers using the “reply to” function.  
2114

2115 C.6.2.16 *Auto Copy of Responses* – provides the capability to send a copy of the responses via bcc to  
2116 up to 5 e-mail addresses at the time of the response.  
2117

### 2118 **C.6.3 FAQ System**

2119 The Contractor shall provide a reliable, scalable, and secure FAQ solution that provides the capabilities  
2120 specified in Section C.3.1.11 of this SOW.  
2121  
2122

### 2123 **C.6.4 Knowledge Management System**

2124 The Contractor shall provide an integrated knowledge management system to store, organize, search and  
2125 retrieve knowledge needed to respond to inquiries received via all communications channels, including  
2126 those received through the hosted FAQ service. The service shall incorporate innovative self-learning or  
2127 equivalent technology to analyze, organize, and present information to enhance the user’s ability to  
2128 effectively find information. At a minimum, the system shall have the following capabilities:  
2129  
2130

2131 6.4.1 Real-time access to knowledge base via an easy-to-use secure web or equivalent interface for  
2132 posting, updating, searching and retrieving information, including management reports by authorized  
2133 personnel. Capability of sharing FAQ answers and information in the knowledge base with other systems  
2134 and/or services through the use of XML.  
2135

2136 6.4.2 Real-time and historical insight in the usage pattern and usefulness of the stored knowledge.  
2137

2138 6.4.3 Real-time access to search and retrieve information via the Internet by the general public.  
2139

2140 6.4.4 Capability of automatically verifying the validity of internal and external links contained in the  
2141 knowledgebase on a daily basis and notifying the Contractor of any invalid links. The link verification  
2142 process shall not disrupt availability of the knowledgebase to end users.  
2143

2144 **C.6.5 Contact Management System**  
2145

2146 The Contractor shall provide a contact management system for capturing, tracking, assigning and  
2147 managing all inquiries from initial contact through resolution, regardless of the access channel. The  
2148 system shall include problem-tracking functionality and be capable of recording and generating records of  
2149 problems reported via any channel, tracking the problem through to resolution, and maintaining historical  
2150 data on problems by caller, tracking identification number, and by problem category and frequency. The  
2151 system shall have the capability to capture blended channel communications in a single customer record.  
2152 The system shall be available to all ISs for inquiry and real-time update as appropriate. The Contractor  
2153 shall provide summary and detailed system and management data via secure web access. The system  
2154 shall be capable of automatically extracting the relevant information from electronic inquiries populating  
2155 the corresponding database fields via the use of XML.  
2156

2157 The Contractor-provided contact management system must have the capability to track a wide range of  
2158 data and activities, including personal data and customer demographic, contact logging and interaction,  
2159 nature of inquiry and disposition, and inquiry tracking information. Specific requirements to be  
2160 supported will be identified in individual task orders.  
2161

2162 The Contractor-provided inquiry tracking and management system shall provide functionality including,  
2163 but not limited to the ability to:  
2164

2165 6.5.1 Capture, record, and document all customer inquiries and responses made to those inquiries  
2166 whether via telephone, facsimile, E-mail, written correspondence, or any other communication channels  
2167 supported. This includes date and time of receipt, nature of inquiry, information requested, disposition,  
2168 response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action.  
2169 The system shall also identify whether the inquiries are resolved by the Contractor or forwarded to  
2170 Government personnel for resolution.  
2171

2172 6.5.2 Retain a history of customer inquiries, interactions, and responses.  
2173

2174 6.5.3 Support reporting requirements that include data and management information analysis.  
2175 Incorporate multiple sorting and reporting alternatives including, but not limited to: by case number, by  
2176 caller name, by applicant name, by date, by disposition code, by inquiry type, by program, by method of  
2177 inquiry receipt, by method of inquiry response, by frequently asked question (FAQ).  
2178

2179 6.5.4 Provide the Government with the capability and support required to ensure uninterrupted access  
2180 to the application outside of scheduled system maintenance periods.  
2181

2182 **C.6.6 Workforce Management System**  
2183

2184 The Contractor shall provide a multi-channel workforce management system that will enable management  
2185 personnel to analyze historical work volume, employee availability and schedule preferences, and trends  
2186 to accurately forecast and schedule staffing resources to meet work volume requirements. The system  
2187 shall be able to generate staff shift schedules based on traffic, staff availability, and service objectives.  
2188 The system shall have the capability to optimize the schedule for skill-based routing.  
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**C.6.7 Customer Survey Automation**

The Contractor shall provide the capability to survey callers in an automated fashion for purposes of customer satisfaction assessment. The system shall provide the means to capture and transcribe the comments for analyses. The system shall be capable of capturing, storing, aggregating, and reporting survey results. All surveys shall be conducted in accordance with rules prescribed by the Government as defined in individual task orders (e.g. no surveying of calls placed for emergency purposes, surveys not offered to the same caller more than x times in x months).

**C.6.8 Compliment and Complaint Management**

The Contractor shall provide an automated capability to gather and report on customer complaints, compliments, and other service related comments/suggestions. The system shall provide the means to capture and transcribe the comments for analyses

**C.6.9 Service Monitoring and Quality Control**

The Contractor shall provide the capability for performance monitoring from a remote location. Supervisory and quality control personnel shall be able to monitor the performance of the ISs without plugging into the IS telephone sets. The monitoring system shall allow for silent monitoring both with and without tone indication to the IS during monitoring. The system shall have the following capabilities:

6.9.1 Monitoring sessions that can be scheduled and recorded for later review by supervisory and quality assurance personnel

6.9.2 Monitoring system that can record the voice and data portions of the transaction

6.9.3 All calls recorded for quality monitoring purposes shall be retained for a 90-day period, at a minimum, and permit tracking of IS actions in securing the response. The monitoring mechanism should permit calls recorded in sufficient quantity to allow for random selection of calls for review..

6.9.4 Remote access for monitoring by authorized Government personnel.

**C.6.10 Training**

The Contractor shall provide audio and visual equipment, computer workstations and servers, and other training aids to facilitate training of contractor staff.

**C.6.11 Literature Fulfillment**

The contact center system shall be capable of generating transactions fulfilling information requests (e.g., postal mail, E-mailing or facsimile of forms or information booklets) and relevant communications with customers. The system used for this function shall incorporate an alert process that notifies the appropriate resource to open and process requests as they are received. The contact center shall use laser-quality printers to provide the capability to print letters, product information, or other relevant information in black and white and/or in color. Contractor shall also be capable of electronically tracking the request through fulfillment.

**C.6.12 Voice Mail and Electronic Mail**

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2241 The contact center system shall be equipped with voice-mail and electronic mail capabilities to support  
2242 internal and external communications. The Contractor shall provide E-mail accounts and addresses and  
2243 Internet access for receiving and responding to customer inquiries at the contact center.  
2244

### 2245 **C.6.13 Online Ordering System**

2246  
2247 The Contractor shall provide a reliable, scalable, and secure Online Ordering solution that the  
2248 Government can link to from subscribing websites to allow users to order products and services from the  
2249 Government. The user interface shall be user friendly, be configurable to provide similar look and feel as  
2250 the subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. At  
2251 a minimum, the contractor online ordering system shall have the following capabilities:  
2252

- 2253 ○ Ability to capture and store user-entered data in Government-specified formats and deliver batch  
2254 orders to Government-specified location via secure protocol on a scheduled basis.
- 2255 ○ Ability to post orders/reports via a secure FTP site.
- 2256 ○ Provides a shopping cart feature to enable user to review order information, delete items and/or  
2257 change quantities before submitting the order.
- 2258 ○ Ability for user to easily print order receipt.
- 2259 ○ Provides address verification and can automatically correct addressing mistakes made by the user.
- 2260 ○ Ability to assigns unique order ID to each order.
- 2261 ○ Allows inventory reports to be generated at any time
- 2262 ○ Accepts payments through commercial credit cards in a secure manner

### 2263 2264 **C.6.14 Web Chat System**

2265  
2266 The Contractor shall provide a reliable, scalable, and secure Web Chat solution that the Government can  
2267 link to from subscribing websites to access real-time web chat service.  
2268

2269 The user interface shall be user friendly, be configurable to provide similar look and feel as the  
2270 subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. The  
2271 services shall enable an IS to provide near real-time assistance to multiple users at the same time span. At  
2272 a minimum, the contractor web chat system shall have the following capabilities:  
2273

- 2274 ○ Ability to route inquiries to specific queue based on agent skills.
- 2275 ○ Ability to push active web pages to end users
- 2276 ○ Allows IS to guide end users through a website or application.
- 2277 ○ Provides access to knowledgebase and preformatted responses to facilitate inquiry response
- 2278 ○ Allows users access to knowledgebases to enable them to find answers while waiting in queue
- 2279 ○ Provides automated greetings and responses
- 2280 ○ Provides real-time monitoring capability
- 2281 ○ Ability to track response and transaction time for each session and exchange
- 2282 ○ Provides real-time and historical management reports on chat sessions and activities

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- 2283 ○ Ability to send copy of the session transcription via e-mail to the user and/or the Government
- 2284 ○ Ability to enable users of the chat service to copy and/or print the content of the entire chat
- 2285 session onto an electronic or print media.

**C.6.15 Power Supply**

2287  
2288  
2289 The Contractor shall provide emergency electrical power generation capability, as well as an  
2290 uninterruptible power supply (UPS) to ensure continuity of contact center operations. The UPS shall be  
2291 capable of protecting systems from voltage lags, over-voltage conditions, line frequency fluctuations, and  
2292 power blackouts. It shall be capable of sustaining operations in the event of loss of normal sources of  
2293 power until the backup generators can come online. The backup generator shall be capable of sustaining  
2294 full contact center operation for a minimum of 24 hours. The transition from normal to emergency to  
2295 backup power shall occur without loss of power to systems and without the disconnection of calls in  
2296 process, loss of data, or customer calls queued for service.

**C.6.16 Database Design**

2297  
2298  
2299 All database design shall conform to industry standards and conventions and shall be capable of sharing  
2300 data with other Government/contractor systems through the use of XML. Any such databases shall be  
2301 capable of sustaining a heavy query transaction load without impacting required system response  
2302 requirements. These databases shall be designed and implemented to provide continuous read/write  
2303 access during the Project required availability times. Maintenance cycles may restrict access as long as  
2304 they are of short duration, scheduled outside of normal business hours and coordinated and approved by  
2305 the Government.

**C.7 TELECOMMUNICATIONS SERVICES TO BE PROVIDED**

**C.7.1 Local Telecommunications Services and Internet Access**

2307  
2308  
2309  
2310  
2311  
2312 The Contractor shall provide the required local exchange carrier (LEC) and Internet access services to  
2313 meet task requirements.

**C.7.2 Intercity Telecommunications Services**

2314  
2315  
2316  
2317 The Government may provide its own intercity telecommunications services as Government Furnished  
2318 Equipment or request the Contractor to provide the services as part of the overall solution.

2319  
2320 Government furnished intercity telecommunications services may include domestic and international toll-  
2321 free services and outbound intercity telecommunications and dedicated transmission services (between  
2322 the contractor facility and Government location(s)) furnished through the Federal Government's long  
2323 distance carrier and other contracts. Dedicated transmission services between contractor facilities shall be  
2324 provided by the Contractor. Intercity telecommunications services provided by the Government may  
2325 include the following features:

- 2326 ○ Domestic and international toll-free services with nation-wide single number coverage and call  
2327 routing features (e.g. area code routing, time of day and day of week routing, percent allocation  
2328 routing, area code routing, allocation routing, alternative routing)
- 2329 ○ Call termination features (e.g. network call transfer, dialed number identification service (DNIS)
- 2330 ○ Automatic number identification (ANI)

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- 2332 ○ Automated voice response service (e.g. IVR, voice recognition)
- 2333 ○ Outbound long distance service
- 2334 ○ Management reports

2335

2336 When requested, the Contractor shall provide the necessary intercity telecommunications services to meet  
2337 the needs of the Government. At a minimum, the Contractor shall provide services and features  
2338 equivalent to those described in this section. The Contractor shall price telecommunications services  
2339 separately in Section B to enable the Government to select the optimum solution. The Government may  
2340 change service provider at any time during the effective period of a task order if such a change is in the  
2341 best interest of the Government. The Contractor will be notified in writing if such a change is to occur.

2342

### 2343 **C.7.3 Network Design**

2344

2345 The Contractor shall be responsible for the overall network design, traffic engineering, and meeting the  
2346 interface requirements of all telecommunications and Internet access services needed to sustain both the  
2347 voice and data requirements of the contact center operations. This requirement includes supporting data  
2348 transmission between the Contractor and Government systems and appropriate security mechanisms to  
2349 protect sensitive data.

2350

### 2351 **C.7.4 Network Termination Equipment**

2352

2353 The Contractor shall provide any equipment necessary to terminate the telecommunications and Internet  
2354 access services to the contact center, including any inside wiring and connectors between the network  
2355 service demarcation point and the contact center system.

2356

### 2357 **C.7.5 Service Coordination**

2358

2359 The Contractor shall be responsible for coordinating with the Government's telecommunications  
2360 contractors and/or other telecommunications service provider(s) for service provisioning, trouble  
2361 resolution, and service restoration.

2362

### 2363 **C.7.6 Telephone Number Ownership**

2364

2365 The Government may furnish its own toll-free telephone number(s) for use by the Contractor or request  
2366 the Contractor to provide the toll-free telephone number as part of the solution. The Contractor shall  
2367 expedite transfer of all toll-free telephone number(s) used to support tasks issued under this contract to the  
2368 Government at the conclusion of each task.

2369

### 2370 **C.7.7 Internet Domain Ownership**

2371

2372 The Government may furnish its own Internet domain(s) for use by the Contractor or request the  
2373 Contractor to provide the Internet domain(s) as part of the solution. The Contractor shall expedite  
2374 transfer of all Internet domain(s) used to support tasks issued under this contract to the Government at the  
2375 conclusion of each task.

2376

### 2377 **C.8 Human Resources Management**

2378

2379 The Contractor shall develop and implement an effective Human Resources Management program to  
2380 support recruitment, training, and retention of qualified personnel needed to meet task requirements. The

2381 Contractor shall schedule and manage the contact center workforce to ensure adequate staffing is  
2382 available to meet workload requirements.

2383

2384 **C.8.1 Recruitment and Retention**

2385

2386 The Contractor shall develop and implement an effective program to ensure timely recruitment and long  
2387 term retention of qualified personnel to support task order requirements. At a minimum, the program  
2388 shall address corporate human resources support, recruitment sources, testing and qualification processes,  
2389 retention techniques and incentives, and employee satisfaction.

2390

2391 **C.8.2 Training**

2392

2393 The Contractor shall develop and implement a comprehensive training program that shall ensure that  
2394 contact center staff provides superior levels of customer service across all customer access channels.  
2395 Training courses shall provide participants the opportunity to develop skill levels in comprehensive  
2396 customer contact and subject knowledge, and shall be provided through both classroom instruction and  
2397 technical on-the-job training.

2398

2399 On a task order basis, the Government and the Contractor shall work together to jointly develop initial  
2400 training. The Government will provide content-unique and organization-specific material as part of initial  
2401 training. The Contractor shall provide customer service skills, equipment, database(s), and  
2402 policy/procedure training. The duration of the training will vary depending on the task requirements. The  
2403 training shall be both classroom and hands-on, computer-based and should include, at a minimum,  
2404 working with databases and applicable Government furnished systems. The training shall be conducted at  
2405 the Contractor's facility, and the Contractor shall bear all related costs.

2406

2407 **C.8.2.1 Training Curriculum**

2408 Contractor shall construct training coursework and materials to address specific learning objectives of  
2409 various groups. All training coursework and materials are to be approved by the Government prior to  
2410 presentation to contractor personnel. The training curriculum shall include the following minimum  
2411 components:

2412

2413 C.8.2.1.1 *Information Specialists* –Training programs shall be developed from the premise that all new  
2414 staff has little or no contact center experience. The courses shall provide participants the opportunity to  
2415 develop skill levels in telephone etiquette, listening, problem-solving, verbal and written communication,  
2416 managing stress, working in teams, and other course modules related to foundational customer contact  
2417 and human interaction skills. The Contractor shall ensure that ISs are adequately trained in the handling  
2418 of calls from: non-English speaking individuals; individuals who are hearing, speech, or visually  
2419 impaired; individuals with low literacy ability; irate and/or abusive callers; callers in crisis situations; and  
2420 any other caller diversity issues that may be identified. In addition, training shall be developed to  
2421 educate ISs in the terminology, services, laws and regulations (e.g., Privacy Act), systems, and protocols  
2422 specific to the task requirements.

2423

2424 C.8.2.1.2 *Leadership* – Courses shall provide participants with an overview of project goals and  
2425 objectives, performance goals (e.g., quality, and productivity) and contact center management (e.g.,  
2426 operations, and service level). Participants shall be provided the opportunity to develop skills in  
2427 coaching, team-building, time management, problem solving, and other course modules related to human  
2428 performance management. In addition, training shall be developed to educate the leadership team in the  
2429 terminology, services, systems, and protocols specific to the task requirements.

2430

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2431 C.8.2.1.3 *Support Personnel* – Courses shall provide participants with an overview of project goals and  
2432 objectives. Participants shall be provided the opportunity to develop specific skills relating to their areas  
2433 of expertise including, but not limited to, supervision, training, quality, service level management, and  
2434 technical support. In addition, training shall be developed to educate support personnel in the  
2435 terminology, services, and protocols specific to the task requirements.

2436  
2437 Contractor shall also include enhanced training modules to inform staff of Government organizational  
2438 structure and agency missions, applicable laws and regulations, new or modified programs and/or service  
2439 offerings specific to the task requirements.

2440

### 2441 **C.8.2.2 Training Facilities**

2442 Contractor shall provide all training facilities, computer terminals (including desktop content,  
2443 functionality, and connectivity), audio and visual equipment, and other materials/supplies necessary for  
2444 training as well as appropriate workspace for students. The Contractor shall design the training facilities  
2445 to provide training in an effective and efficient manner. The Contractor shall provide the storage space  
2446 for all course materials and references.

2447

### 2448 **C.8.2.3 Instructor and Classroom Criteria**

2449 The Contractor shall provide certified instructors to deliver all training provided under this contract. The  
2450 training is to be provided at Contractor-provided facilities that are designed for optimum learning with  
2451 effective student-to-instructor ratio and class size limits.

2452

2453 Government personnel will be available during start-up to provide content knowledge training for the  
2454 start-up ISs and/or conduct train-the-trainer style learning sessions with Contractor's training instructions  
2455 for course modules. Additionally, the Government may make personnel available to provide initial and/or  
2456 regularly scheduled (e.g., biannual) task-specific training sessions with Contractor's staff.

2457

### 2458 **C.8.2.4 Course and Reference Materials**

2459 The Contractor shall develop the course materials based on relevant information and materials provided  
2460 by the Government, including but not limited to, program background, laws and regulations (e.g., Privacy  
2461 Act), services, work types, policies and procedures, and related systems. Specific materials to be provided  
2462 will be included in individual task orders. Contractor shall develop or revise training materials as  
2463 necessary to accommodate such changes, keeping all training materials up-to-date for the duration of the  
2464 contract. All training coursework and materials are to be approved by the Government prior to  
2465 presentation to contractor personnel.

2466

2467 Contractor shall ensure that updates to training materials are carried over to applicable ancillary reference  
2468 materials, job aides and supporting processes inclusive of contact center operations, quality assurance,  
2469 and information systems (e.g., Contractor-provided knowledge database).

2470

2471 Prior to task implementation, Contractor must provide the Government with a copy of task-specific  
2472 training materials for review and approval and with a copy of all other training materials to be delivered  
2473 under a specific task order for review only. Contractor shall provide a copy of the most recent training  
2474 materials upon request by the Government at any time during the performance of the task.

2475

### 2476 **C.8.2.5 Reporting and Recordkeeping**

2477 The Contractor shall maintain a comprehensive list of contact center employees who have received  
2478 training and/or obtained certification, including the frequency of training, types of training, and results of

2479 training. The Contractor shall maintain copies of all training records and reports for the duration of the  
2480 contract.

2481  
2482 **C.8.2.6 Training Metrics and Analysis**

2483 The Contractor shall provide training metrics and analysis, including, but not limited to the following  
2484 tasks:

- 2485
- 2486 ○ Measure IS classroom training performance by a combination of written tests and job-simulated  
2487 exercises at the level of baseline performance goals for new ISs and target performance goals for  
2488 experienced ISs.
  - 2489 ○ Analyze the results of IS training performance measures.
  - 2490 ○ Measure training effectiveness and performance of the instructor(s) by third party analysis or  
2491 student survey.
  - 2492 ○ Revise the training program based on the results of IS and instructor performance metrics,  
2493 focusing on those ISs for whom additional/modified training may be indicated.
  - 2494
  - 2495
  - 2496
  - 2497

2498 **C.9 QUALITY ASSURANCE/QUALITY IMPROVEMENT**

2499  
2500 The Contractor shall develop, implement, and manage a Quality Assurance/Quality Improvement  
2501 Program to ensure that services delivered comply with the performance standards specified by the  
2502 Government. The program shall include on-site and remote service monitoring capabilities and  
2503 performance analysis to support planning and operation of the contact center on an ongoing basis. The  
2504 program shall also include regular call calibration sessions to ensure all its quality professionals define  
2505 and perceive customer interactions in the same way. Calibrated quality professionals shall monitor each  
2506 full time IS assigned to specific programs a mutually agreed upon number of times and shall prorate  
2507 monitoring sessions for part time employees so that they receive the same level of monitoring as do full-  
2508 time employees. For each IS, quality professionals shall schedule monitoring sessions at various times of  
2509 the day and various days of the week to ensure a fair representation of IS performance (e.g., monitoring  
2510 back-to-back calls for a single IS would not be acceptable). The Contractor and the Government will  
2511 mutually agree upon the criterion for calibration. Upon task order award, the Government and Contractor  
2512 shall schedule and conduct calibration sessions to reach the acceptable criterion for calibration.  
2513 Evaluations conducted by quality professionals shall be available to the Government both in an individual  
2514 and an approved consolidated report format. The Government requires that Contractor documents in  
2515 detail the data, results, conclusions, recommendations, action plans, and improvement priorities identified  
2516 as a result of quality monitoring. Contractor shall ensure legal and regulatory compliance concerning  
2517 notification and consent when monitoring calls for quality purposes and shall verify that call monitoring  
2518 complies with all applicable Federal, State, and local laws and statutes.

2519  
2520 **C.9.1 Service Monitoring and Calibration**

2521  
2522 The Contractor shall provide on-site and remote service monitoring and performance analysis to support  
2523 planning and operation of the contact center. Contractor shall develop a comprehensive service  
2524 monitoring plan, including, but not limited to, the following components:

2525  
2526 Monitoring processes - Contractor shall develop and implement a continuous performance-monitoring  
2527 program to ensure that ISs are performing in accordance with the performance standards defined by the  
2528 Government as specified in individual task orders for all communications channels. Contractor shall

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2529 devise methods for: capturing time, date, application name, and comments for the inquiries monitored;  
2530 tracking and trending by IS, supervisor, manager, and application; reporting for training need, individual  
2531 and operational performance issues, and hiring considerations; and communicating monitoring results to  
2532 ISs and other operational areas within the contact center to ensure continual performance and process  
2533 improvement. At the request of the Government, monitoring sessions may be held jointly.  
2534

2535 Monitoring system - Contractor shall utilize an automated inquiry monitoring and recording system with  
2536 remote access. The Contractor shall have the capability to monitor both voice and data capabilities.  
2537 Should data capabilities not be available, a description will be required to explain how the Contractor  
2538 monitors and evaluates the accuracy of information both provided and recorded by the ISs. The  
2539 Government reserves the right to remotely monitor Contractor's ISs at anytime without pre-arrangement  
2540 and to contract with a third party to remotely monitor Contractor's ISs. The Government will provide  
2541 input to the Contractor concerning remotely monitored inquiries.  
2542

2543 Calibration - Contractor shall ensure all its quality professionals define and perceive customer interactions  
2544 in the same way. Calibrated quality professionals shall monitor each full time IS assigned to specific  
2545 programs a mutually agreed upon number of times and shall prorate monitoring sessions for part time  
2546 employees so that they receive the same level of monitoring as do full-time employees. For each IS,  
2547 quality professionals shall schedule monitoring sessions at various times of the day and various days of  
2548 the week to ensure a fair representation of IS performance (e.g., monitoring back-to-back calls for a single  
2549 IS would not be acceptable). The Contractor and the Government will mutually agree upon the criterion  
2550 for calibration. Upon task order award, the Government and Contractor shall schedule and conduct  
2551 calibration sessions to reach the acceptable criterion for calibration.  
2552

2553 Continual process improvement - To improve operations, Contractor shall develop and implement action  
2554 plans based on analysis of monitoring results. These plans shall be available to the Government for  
2555 review upon request. In addition, evaluations conducted by quality professionals shall be available to the  
2556 Government both in an individual and an approved consolidated report format. The Government requires  
2557 that Contractor documents in detail the data, results, conclusions, recommendations, action plans, and  
2558 improvement priorities identified as a result of quality monitoring.  
2559

2560 The Government will work closely with the Contractor to determine which customer calls shall be  
2561 recorded for monitoring purposes.  
2562

### 2563 **C.9.2 Effectiveness of Service Delivery**

2564  
2565 The Contractor shall provide measurements and analysis of the effectiveness of service delivery  
2566 including, but not limited to:  
2567

2568 C.9.2.1 *Accuracy of information provided* – Perform regular assessments of the accuracy of  
2569 information provided by ISs to the inquirers. Such assessments shall be conducted through regularly-  
2570 scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments  
2571 to the Government in accordance with task order reporting requirements.  
2572

2573 C.9.2.2 *Accuracy of information recorded* – Perform regular assessments of the accuracy of data and  
2574 information collected and recorded by ISs. Such assessments shall be conducted through regular-  
2575 scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments  
2576 to the Government in accordance with task order reporting requirements.  
2577

2578 C.9.2.3 *Customer satisfaction assessments* – Design develop, and implement customer satisfaction  
2579 surveys in conjunction with Government personnel to measure the performance level of the Contractor-

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2580 provided services. Obtain all appropriate approvals in compliance with Federal regulations and statutes  
2581 prior to initiating any survey activities. The Contractor shall use the results of the customer satisfaction  
2582 assessment to determine customer perceptions about the quality of the service delivery, IS system  
2583 performance, and the overall process of service fulfillment. Contractor shall use these results to develop  
2584 and implement action plans to continually improve customer satisfaction, and shall provide the results of  
2585 both the survey and action plans to the Government for review upon request.  
2586

2587 C.9.2.4 *Employee satisfaction assessments* – Develop and implement a continuous program both to  
2588 monitor employee satisfaction, assess employee job needs, and to determine employee perceptions about  
2589 the quality of the support provided by Contractor and the operational environment. Provide the results of  
2590 the assessments (including prioritized recommendations) to the Government for review upon request and  
2591 cooperate with the Government to devise action plan to target any suggested improvements, including  
2592 required actions, responsibilities, and timeframes.  
2593

### 2594 C.9.3 Quality Improvement Program 2595

2596 The Contractor shall develop, implement, and manage a Quality Improvement Plan that incorporates  
2597 customer-focused initiatives into the contact center solution, including, but not limited to:  
2598

2599 C.9.3.1 *Compliment and complaint management* – Contractor shall have an automated Compliment  
2600 and Complaint Management process to capture customer service information regarding areas of service  
2601 issues and customer need. Contractor shall compile and analyze such data, identifying market  
2602 opportunities or opportunities for improvement where appropriate, and reporting such information to the  
2603 Government on a monthly basis.  
2604

2605 C.9.3.2 *Employee suggestions* – Contractor shall conduct regular surveys to collect ideas from ISs for  
2606 improving customer satisfaction. This input shall be provided to the Government on a monthly basis.  
2607 The Government will use this information in their efforts to improve customer satisfaction. For those  
2608 areas related to Contractor’s performance, Contractor shall develop and implement action plans to  
2609 continually improve customer satisfaction and shall make these plans available to the Government upon  
2610 request.  
2611

2612 C.9.3.3 *External operational assessments* – Contractor shall permit the Government, and/or a  
2613 Government authorized third party, to conduct, at the Government’s expense, operational assessments of  
2614 Contractor’s operations to determine the quality of service delivery, the quality of IS system performance,  
2615 and the efficiencies of the operations. Operational assessment includes a validation and an audit of the  
2616 contact center. It may include organizational and training assessments as well as other task-related  
2617 activities performed by the Contractor. The purpose of these assessments is to gain information  
2618 concerning the operation, identify opportunities to support improvements of contact center operations,  
2619 and opportunities for the Government to support Contractor. The Contractor shall cooperate fully in any  
2620 such review, provide the Government (or designated third party) with information, and explain  
2621 Contractor’s procedures and operations to the Government, if necessary. The Government will provide  
2622 Contractor feedback on the results of any operational assessments. The Government and Contractor shall  
2623 identify high-priority recommendations, and cooperate to develop and implement action plans that target  
2624 high-priority improvements.  
2625

### 2626 C.10 PERFORMANCE MANAGEMENT 2627

2628 The Government intends to establish performance standards that will be used to measure contractor  
2629 performance and a methodology for calculating incentive awards for superior performance on a task  
2630 order-by-task order basis. The Government will consult the Citizen Services Level Committee (CSLIC)

2631 report “Proposed Performance Measures, Practices and Approaches for Government-wide Citizen Contact  
2632 Activities when developing individual task order performance standards. Specific performance standards,  
2633 incentive award schedule, and methodology for calculating incentive award amount will be identified in  
2634 individual task orders issued by the Government. The Contractor is expected to work with the  
2635 Government to develop plans and procedures for implementing new or revised performance standards.  
2636

2637 **C.11 MANAGEMENT REPORTS**  
2638

2639 The Contractor shall provide for the automatic generation of comprehensive, accurate, easy to understand,  
2640 and timely reports. The Government intends to request and receive only those reports that provide insight  
2641 to the Contractor’s level of performance in meeting contractual requirements and satisfying customer  
2642 needs. The Government may also request the Contractor to provide management and operational reports  
2643 on an ad hoc basis for purposes of gaining insight to specific program and customer service needs. The  
2644 Contractor shall provide management reports via e-mail or a secure web site for remote access and  
2645 download via the Internet. Access to these reports shall be controlled via User Identification Code and  
2646 Unique Password. When requested by the Government, the Contractor shall provide these reports in  
2647 electronic and/or hard copy format. Specific report formats, content, frequency, and delivery methods of  
2648 all reports shall be coordinated with and approved by the Government on an individual task order basis.  
2649

2650 **C.11.1 Weekly and Monthly Status Reports**  
2651

2652 At a minimum, the Contractor shall provide weekly and monthly status reports. These reports shall be  
2653 brief, factual, and shall include, but not be limited to:  
2654

2655 Management summary - shall document major events or problems and progress in their resolution.  
2656

2657 Continual improvement opportunities - shall document input received from Contractor’s ISs concerning  
2658 ideas for improving customer satisfaction.  
2659

2660 Narrative - shall describe work performed during the reporting period and work expected to be performed  
2661 in the next reporting period, including assessment of Project status against schedule/plan, discussions of  
2662 any problems, issues, change requests, recommendations for correction, and variances between  
2663 Contractor billed versus proposed pricing where applicable.  
2664

2665 **C.11.2 Operational Reports**  
2666

2667 The Contractor shall provide operation reports that provide a recap of key contact center activities in  
2668 support of each task. Reports shall provide information by individual programs and in aggregate.  
2669

2670 Such reports shall provide detail sufficient to reflect the level of effort provided. The reports shall be  
2671 supported with measurements occurring by second, minute, hour, or day, as appropriate. Activity reports  
2672 shall include hourly, daily, weekly, monthly, and annual trending of key data elements in both tabular and  
2673 graphic formats.

2674 Specific data elements appropriate to each work type including responses handled via automated services,  
2675 inbound and outbound calls, incoming and outgoing facsimiles, incoming and outgoing E-mail messages,  
2676 incoming and outgoing written correspondence, volume of escalated inquiries, and hosted FAQ services  
2677 activities shall be included. At a minimum, the reports shall provide all relevant information on volume  
2678 and disposition of inquiries by work type, call origin by area code and/or geographic area if available,  
2679 performance statistics (e.g., call attempts, blockage, speed of answer, abandonment rate, holding and call  
2680 wrap-up time, etc.), and IS occupancy rate. Specific data elements, formats, and data collection and  
2681 reporting intervals shall be coordinated and approved by the Government.

2682

2683 The Government reserves the right, during and for a 3 month period immediately after the Start-Up Phase  
2684 of each task, or in cases of special circumstances/crisis situations, or non-performance, to request more  
2685 detailed and more frequent reporting at no additional cost to the Government. In cases of non-  
2686 performance, the Government may request such reports until such time as Contractor performance levels  
2687 have stabilized and are in full compliance of contract requirements.

2688

2689 **C.11.3 Problem Resolution Reports**

2690

2691 In support of each task, the Contractor shall collect and compile a list of customer requests for  
2692 information, services, or fulfillment literature that the Contractor is unable to answer or provide given the  
2693 tools and data at its disposal. Such reports shall include both detailed and consolidated data and reference  
2694 the specific information or item requested. The reports shall provide an explanation of how these  
2695 inquiries were handled and/or resolved.

2696

2697 **C.11.4 Monitoring Reports**

2698

2699 In support of each task, the Contractor shall compile the results of call and work monitoring efforts  
2700 including monitoring results, conclusions, recommendations, action plans, and improvement priorities.  
2701 Such results should include both accuracy of information provided and accuracy of information recorded.  
2702 These results shall be available in both individual and consolidated report formats.

2703

2704 **C.11.5 Compliment and Complaint Management Reports**

2705

2706 In support of each task, the Contractor shall gather and report customer comments to the Government on a  
2707 monthly basis. At a minimum, this report shall include a categorization and tally of comments received  
2708 according to predefined disposition codes, verbatim customer comments as captured by the automated  
2709 survey equipment or IS, or the actual document from which they were received, and an analysis and  
2710 trending of the type and quantity of comments recorded over the life of each task.

2711

2712 **C.11.6 Ad Hoc Reports**

2713

2714 In support of each task, the Contractor shall provide up to twelve (12) ad hoc reports annually at no  
2715 additional cost to the Government. Such requests will be initiated and approved by the Contracting  
2716 Officer or his/her duly authorized representative. The Government reserves the right, during initial  
2717 project implementation or in cases of non-performance, to request more detailed and more frequent  
2718 reporting at no additional cost to the Government until the need for such reports subside or Contractor  
2719 performance levels have stabilized and are in full compliance of contract requirements.

2720

2721 **C.12 GOVERNMENT FURNISHED PROPERTY**

2722

2723 The Government will furnish pertinent information to the Contractor for use in the performance of each  
2724 task. Examples of information that may be provided by the Government include, but are not limited to,  
2725 the following:

2726

2727 ○ Privacy Act guidelines

2728

○ Escalation procedures and guidelines

2729

○ Business rules and/or response formats and guidelines

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- 2730 ○ General Government and program specific training materials
- 2731 ○ Existing methods and procedures manuals
- 2732 ○ Government agency contact listing
- 2733 ○ Government travel guidelines
- 2734 ○ Contact listing for Congressional and Diplomatic offices
- 2735 ○ Existing script or call guides as presently used to support current agency programs
- 2736 ○ Federal information systems security guidelines
- 2737 ○ Screen layout and file structure for data transmitted by agencies
- 2738 ○ Access to Government databases where applicable
- 2739 ○ Public distribution materials (e.g., publications, applications, forms, brochures) where applicable.
- 2740 ○ Initial content for knowledge database
- 2741 ○ Conflict of interest guidelines
- 2742 ○ Relevant laws, regulations, policies and procedures
- 2743 ○ Reference materials
- 2744 ○ Database files
- 2745 ○ Envelopes and mailing supplies

2746  
2747 For any materials to be distributed to the inquiring public, the Contractor shall be responsible for stocking  
2748 adequate supply and submitting re-supply requests on a timely basis to ensure continuous availability.  
2749

### 2750 **C.13 DOCUMENTATION TO BE PROVIDED**

2751  
2752 The Contractor shall provide the documentation in accordance with the schedule set forth in task orders  
2753 issued by the Government. Identified below are some of the plans that the contractor is expected to  
2754 provide as part of the task deliverables. The Contractor shall review all plans on a continual basis  
2755 throughout the life of the contract in order to maintain their accuracy and appropriateness to the current  
2756 operating environment. Subsequent to their initial acceptance by the Government, any changes to these  
2757 plans shall require Government review and approval prior to their implementation. The Government  
2758 reserves the right to require additional documents to meet specific task requirements.  
2759

2760 C.13.1 *Conflict of Interest Compliance Plan* – identifies plans and procedures to identify, evaluate,  
2761 and mitigate all actual, apparent, and potential conflicts of interest that preclude or would appear to  
2762 preclude the Contractor from rendering impartial assistance or advice.  
2763

2764 C.13.2 *Customer Satisfaction Plan* – identifies plans and procedures to survey customers to  
2765 determine the degree of customer satisfaction on the services rendered. The plan shall include details on  
2766 the processes and methodologies that the Contractor will use to identify problems and implement  
2767 corrective actions.  
2768

2769 C.13.3 *Design, Engineering, Implementation and Management Plan* – includes the following:  
2770

2771 C.13.3.1 *Site Selection* – identifies processes, methodologies, and criteria used for site selection,  
2772 including those that affect staffing, foreign language support, and emergency/disaster recovery.

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2773  
2774 C.13.3.2 *Facilities* – identifies and defines the contact center design, including work and office space  
2775 and training facilities.

2776  
2777 C.13.3.3 *Technology* – identifies and defines the system architecture and configurations for both  
2778 primary operation and backup systems, including those supporting automated and manual inquiry  
2779 processing, workforce management systems, knowledge/inquiry tracking databases, quality monitoring  
2780 and training systems, management reports and other support tools used to support the contact center  
2781 operations. Defines the use of XML within the system architecture to maximize data sharing with other  
2782 Government/contractor systems.

2783  
2784 C.13.3.4 *Networks* - identifies and defines the telecommunications/Internet services and most cost  
2785 effective network design for supporting the contact center operations.

2786  
2787 C.13.3.5 *Operations* - identifies processes and procedures for managing automated and attended  
2788 functions, automated voice response script design and maintenance, call routing design and management,  
2789 workforce scheduling and management, and service delivery strategies.

2790  
2791 C.13.3.6 *Disaster Recovery/Contingency Plan* – identifies every risk as well as the steps necessary to  
2792 prevent it from happening in the first place. The plan shall include an alternate set of steps to minimize  
2793 the impact should prevention fail. The plan must define backup and restoration processes and the precise  
2794 steps to take to recover as quickly as possible, including recovery procedures for physical facility, voice,  
2795 data, and desktop systems and applications, communications networks, electrical service, customer access  
2796 points, partners and procedures and staff. The Plan shall define the roles and responsibilities of contractor  
2797 personnel during contingent and disaster events, including plans for training the personnel to prepare  
2798 them to respond to such events. The plan shall include implementation procedures to test and execute the  
2799 plan on a regular basis to ensure preparedness for such events. The plan shall be developed in accordance  
2800 with applicable agency IT Security Policy and NISI Special Publication 800-34, Contingency Planning  
2801 Guide for Information Technology Systems.

2802  
2803 C.13.3.7 *Human Resources Management Plan* – includes the following:

2804  
2805 C.13.3.7.1 *Staffing* – identifies staffing resources for contact center operation and project  
2806 management. The plan shall include a staffing chart that identifies the allocated resources (expertise and  
2807 staff hours) needed to perform each of the required functions to support the project. The plan shall  
2808 include relevant details on recruiting and retaining employees, workforce scheduling and workload  
2809 management, supervision and quality monitoring practices. The Plan shall also address roles and  
2810 responsibilities of project and contact center staff by title and define supervisor and Quality Assurance  
2811 (QA) monitor to IS ratios that will be used in support of the task.

2812  
2813 C.13.3.7.2 *Training* – identifies plans, procedures, and methodologies for training contact center  
2814 employees, including the types and schedule of training to be provided, and criteria for selecting  
2815 instructors and training evaluation assessment methods.

2816  
2817 C.13.3.7.3 *Dismissal Procedures* – identifies procedures that the Contractor shall follow in the event  
2818 of a Federal Government closure or other emergency affecting the area in which the contact center is  
2819 located.

2820  
2821 C.13.3.8 *Knowledge/Case Management Plan* – identifies methodologies, processes and procedures  
2822 for effective knowledge management, including those required for developing, operating, and maintaining  
2823 the required knowledge and case management databases to support the contact center operations. Where

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2824 appropriate, the plan shall include methodologies and procedures for effective management of distributed  
2825 knowledge databases and sharing of knowledge/case management data with other Government and/or  
2826 contractor systems.

2827  
2828 C.13.3.9 *Operations Management Plan* – identifies plans and procedures for managing staff,  
2829 facilities, equipment and processes effectively; includes procedures that the Contractor shall follow in the  
2830 event of a service outage, an unexpected surge in call volume, a Federal Government closure or other  
2831 emergency affecting the area in which the contact centers is located.

2832  
2833 C.13.3.10 *Performance Management Plan* – identifies plans and procedures to measure any  
2834 customer service performance standards deemed appropriate.

2835  
2836 C.13.3.11 *Phase-In Plan* – identifies plans and approaches for implementing the proposed solution,  
2837 including required tasks, schedule and milestones, and deliverables. The plan shall include  
2838 methodologies and procedures for minimizing disruption of service to current customers.

2839  
2840 C.13.3.12 *Program Management Plan* – identifies and defines the Contractor’s organization, roles  
2841 and responsibilities, and lines of authority, management procedures/policies/plans, plans and programs for  
2842 managing team partners and subcontractors, escalation procedures for problem/dispute resolution, and  
2843 reporting requirements for the tasks and services to be performed under this contract.

2844  
2845 C.13.3.13 *Project Plan* – provides a comprehensive plan for implementing the project, which  
2846 addresses all strategies, objectives, required actions, roles and responsibilities and target dates for  
2847 implementation of tasks. Identifies critical paths and task dependencies.

2848  
2849 C.13.3.7.14 *Quality Assurance/Quality Improvement Program Plan* – identifies plans, methodologies,  
2850 and procedures for maintaining effective quality assurance and service improvement programs, including  
2851 monitoring and assessing performance and service activities to ensure quality services are provided to  
2852 customers. Included in the program shall be a Quality Improvement Plan to identify and document  
2853 performance assessment and improvement opportunities and procedures for implementing the service  
2854 improvements. The Plan shall address all areas, including, staffing, training, operations, contract  
2855 deliverables, performance management, process engineering, service delivery, service improvements, and  
2856 customer satisfaction.

2857  
2858 C.13.3.7.15 *Security Plan* – provides an overview of the security requirements for the information  
2859 and IT systems and describes the existing or planned controls (management, operational, and technical)  
2860 for meeting those requirements. The Plan also describes the systems and delineates responsibilities and  
2861 expected behavior of individuals who access the systems. The plan shall be developed in accordance with  
2862 applicable agency IT Security Policy and NIST Special Publication 800-18, Guide for Developing  
2863 Security Plans for Federal Information Technology Systems and other relevant publications.

2864  
2865 C.13.3.7.16 *Service Level Management Plan* – identifies processes and methodologies for effective  
2866 service level management, including workload forecasting, IS scheduling, service recovery (from system  
2867 failures, disasters, etc.), problem identification and resolution, problem notification, and contingency  
2868 planning and escalation.

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2870 C.13.3.7.17 *Test and Acceptance Plan* – identifies plans and procedures that the contractor shall use  
2871 to ensure that the full range of services to be provided are successfully tested prior to actual  
2872 implementation.

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2874 C.13.3.7.18 *Value Engineering/Process Improvement Plan* – identifies plans and procedures to  
2875 evaluate new and emerging technologies and/or reengineering business processes to improve program  
2876 efficiency and customer service.

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2878 Additionally, the Contractor shall obtain and provide all permits, contracts, copyrights, licenses, etc.,  
2879 necessary for its performance of any tasks issued under this contract and shall provide copies of such  
2880 information to the Government upon request.

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**SECTION D**  
**PACKING AND MARKING**

**D.1 PRESERVATION, PACKAGING AND PACKING**

All reports shall be properly packaged to ensure against any possible damage resulting from improper handling, inclement weather, water damage, or excessive heat or cold to ensure acceptance by common carrier for safe transportation to the point of delivery.

**D.2 PACKING LIST (GSAM 552-210-7) (APR 1984)**

A packing slip or other suitable shipping document shall accompany each shipment and shall show the (a) name and address of the consignor (b) name and address of consignee, (c) Government purchase order (d) Government bill of lading number covering the shipment, if any, and (e) description of the material shipped, including item number, quantity, number of containers, and package number, if any.

**D.3 FOB POINT**

All reports called for in the contract shall be shipped by the Contractor to the Government F.O.B. destination.

**D.4 SHIPPING INSTRUCTIONS**

Unless otherwise directed by the Contracting Officer or the Contracting Officer's Technical Representative (COTR), all reports shall be submitted in accordance with Section F of the contract.

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**SECTION E**  
**INSPECTION AND ACCEPTANCE**

**E.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

2910 This contract incorporates the following clauses by reference, with the same force and effect as if they  
2911 were given in full text. Upon request, the Contracting Officer will make a copy of the full text available.  
2912 Also, the full text of a clause may be accessed electronically at this/these address(es):  
2913 <http://www.arnet.gov/far>.

**Federal Acquisition Regulation (48 CFR, APR 1984) Clauses**

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| Clause No. | Clause Title  | Date     |
|------------|---|----------|
| 52.246-02  | Inspection of Supplies - Fixed Price                                      | AUG 1996 |
| 52.246-04  | Inspection of Services - Fixed Price                                      | AUG 1996 |
| 52-246-06  | Inspection of Services Time and Materials and Labor Hour                  | MAY 2001 |
| 52.246-06  | Inspection of Services Time and Materials and Labor Hour (ALT I APR 1984) | MAY 2001 |

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**E.2 QUALITY CONTROL RESPONSIBILITIES**

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**E.2.1 General**

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The quality control of services provided under this contract shall be based on: (i) operational requirements and standards contained in this contract; (ii) work performance; and (iii) productivity requirements and standards, and (iv) data base information resource development and maintenance standards.

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**E.2.2 Contractor Quality Control Responsibility**

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The Contractor shall implement and adhere to the quality control plan provided as part of its Technical Proposal. The quality control plan shall be written by the Contractor's Quality Control Manager and approved by his/her immediate supervisor.

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The Contractor is solely responsible for quality control of services that it provides. The Contractor's quality control program, which is embodied in the quality control plan, shall include, but not be limited to, the following. A monitoring and inspection system covering all the services listed in the Performance Requirements Summary. It must specify the elements of work performance to be monitored and inspected, either on a scheduled or unscheduled basis; the methods to be used; frequency of monitoring and inspection; the format and content of records and reports to be generated; and the title(s) of the individual(s) who will perform the monitoring and inspection. It shall include, but is not limited to:

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- the method for identifying and preventing deficiencies in the quality of services performed before the level of performance can become unsatisfactory;

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- the administrative procedures to be followed for reporting to the Contracting Officer's Technical Representative (COTR); and for responding to operational problems or complaints concerning work performance, qualifications, or other complaints about Contractor personnel; and

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- preparation of system of on-site records of all inspections conducted by the Contractor and the corrective action(s) taken.

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This documentation shall be available to the Government at all times during the term of the contract. The Contractor shall provide to the COTR a detailed monthly summary of all quality control actions, including descriptions of events which require quality control activity, and the corrective action taken.

**E.2.3 Government Quality Assurance Responsibilities**

The Government will monitor the Contractor’s performance using predetermined quality assurance surveillance procedures to examine and determine compliance with contract performance requirements. A copy of these procedures will be provided to the Contractor prior to the start of contract performance. In keeping with the Government’s responsibility for quality assurance, the Government reserves the right to review all administrative, managerial, and statistical reports; telecommunications services; publicity materials and resource library materials using the Performance Requirements Summary. A copy of the Performance Requirements Summary will be provided to the Contractor prior to the start of contract performance. Final determination that reports, resource and publicity materials, and services rendered meet the requirements is solely the responsibility of the Government. All surveillance observations will be recorded by the Government. When an observation indicates defective performance, the Quality Assurance Evaluator (QAE) will request that the Contract Manager or designee initial the observation record. The Contractor shall, within 48 hours, notify the Contracting Officer, or his/her technical representative if so directed by the Contracting Officer, of the corrective action(s) taken in accordance with methods and techniques specified by the Contractor in its quality control plan. If the Contractor disputes any part of the QAE’s observation, he/she shall request that the Contracting Officer hold a Performance Evaluation Meeting.

**E.2.3.1 Performance Evaluation Meetings**

The Contract Manager may be required to meet with the COTR, the QAE, and the Contracting Officer whether by telephone or at a designated Contractor-operated location on at least a weekly basis during the first month after the issuance of a Task Order under this contract. Meetings will be held as often as necessary thereafter at the discretion of the Contracting Officer or the COTR. However, a meeting will be held whenever a contract discrepancy report is issued. A mutual good faith effort will be made to resolve all problems identified.

The COTR will write the minutes of these meetings, and the minutes will be signed by the Contract Manager and the COTR. The attendee will, within three (3) business days, identify any areas wherein he/she does not agree by providing written notice to the COTR.

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**SECTION F**  
**DELIVERIES OR PERFORMANCE**

**F.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

2995 This contract incorporates the following clauses by reference, with the same force and effect as if they  
2996 were given in full text. Upon request, the Contracting Officer will make a copy of the full text available.  
2997 Also, the full text of a clause may be accessed electronically at this/these address(es):  
2998 <http://www.arnet.gov/far>.

**Federal Acquisition Regulation (48 CFR, APR 1984) Clauses**

| Clause No. | Clause Title    | Date     |
|------------|-----------------|----------|
| 52.242-15  | Stop-Work Order | AUG 1989 |

**F.2 PERIOD OF CONTRACT**

3006 The contract becomes effective on Date of Award and continues in effect for a 2-year base period. In  
3007 addition, the period of the contract is subject to four (4) two-year option periods at the prices provided for  
3008 in Section B.

**F.3 OPTION TO EXTEND THE TERM OF THE CONTRACT**

3011 The Government may exercise the options identified in Section F.2 by written notice to the Contractor  
3012 within thirty (30) days prior to contract expiration. If the Government exercises this option, the extended  
3013 contract shall be considered to include this option provision.

**F.4 SCHEDULE OF DELIVERABLES**

3016 Within thirty (30) days after award of a contract, the Contractor shall provide to the Administrative  
3017 Contracting Officer a fully redacted version of the contract, including all documents that are incorporated  
3018 by reference on the Standard Form 26. The Contractor shall provide a camera-ready redacted copy and a  
3019 matching copy that highlights the portions that have been redacted. Both copies must be in electronic  
3020 format, and will be provided on the same CD- ROM. The Contractor must work diligently with the ACO  
3021 until the Government and Contractor can agree upon all redacted material.

3023 The Contractor shall provide the required deliverables based on the schedule identified in individual task  
3024 orders issued by the Government. Specific means and format of deliverables will be specified in  
3025 individual task orders.

**F.5 CONTRACT DELIVERABLE ACCEPTANCE**

3028 Any contract documentation deliverable produced under this contract will be accepted or rejected in  
3029 writing by the Government. Unless otherwise specified in the task order, the Government will have up  
3030 to ten (10) working days to review the deliverable and provide comments. During this review period, the  
3031 Government will have the right to reject or require correction of any deficiencies found in the deliverable  
3032 that are contrary to the information contained in the Contractor's accepted proposal. After receiving the  
3033 comments, the Contractor shall incorporate the changes into the deliverable and resubmit the final

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3034 deliverable to the Government for approval. After final submission, the Government will have ten (10)  
3035 working days to approve the final submission.

3036  
3037 If the Government fails to complete the review within ten (10) working days after receiving the  
3038 deliverable, the deliverable will become acceptable on an interim basis. If deficiencies are discovered  
3039 after this period, the Government will provide in writing a description of all discrepancies to be corrected  
3040 by the Contractor. After receiving the description of the discrepancies, the Contractor shall incorporate  
3041 the changes into the deliverable and resubmit the deliverable to the Government. If the Government fails  
3042 to respond within ten (10) working days of the final submission, the submission will be considered  
3043 accepted.

**SECTION G**

**CONTRACT ADMINISTRATION DATA**

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**G.1 CONTRACT ADMINISTRATION**

Notwithstanding the Contractor's responsibility for total management during the performance of the contract, the administration of the contract will require maximum coordination between the Government and the Contractor. The following sections describe the roles and responsibilities of individuals who will be the Government and Contractor points of contact.

**G.1.1 Procuring Contracting Officer**

During the solicitation phase of this procurement, which is up to and including contract award, the Procuring Contracting Officer (PCO) is the Government's sole point of contact. The person designated as PCO for this procurement is Mr. Robert H. Corey. All documents and issues concerning the procurement should be provided to Mr. Corey at the following address:

General Services Administration  
Office of Chief Acquisition Officer  
Operational Contracting Staff (VC)  
1800 F Street NW (Room G127)  
Washington DC, 20405  
Attention: Mr. Robert H. Corey

Mr. Corey's telephone number is (202) 501-1797; his facsimile number is (202) 501-4281; and his e-mail address is: bob.corey@gsa.gov.

**G.1.2 Administrative Contracting Officer**

After contract award, Mr. Corey will appoint the General Services Administration Administrative Contracting Officer (ACO) by written notice to the Contractor. Upon appointment, the ACO will become the Government's sole point of contact. The ACO is responsible for administration of the contract. The right to issue contract modifications to the terms and conditions of the basic contract that is within the scope of that contract, to terminate the contract, to exercise option renewals, and to approve subcontractors will be delegated in writing to the ACO.

Communications pertaining to contract administration matters shall be addressed to the ACO. The ACO will be the only person authorized to make or approve changes in any of the requirements of this contract, and, notwithstanding any provision and/or clause contained elsewhere in the contract, said authority will remain solely with the ACO. In the event that the Contractor makes any change in the contract price, the Performance Work Statement, or any other contract terms and conditions at the direction of any person other than the ACO, such change shall be considered to have been made without authority, and no adjustment shall be made in the contract price to cover any increase in costs incurred as a result thereof.

When necessary, the ACO will:

- o Serve as liaison between the Contractor and Using Agencies

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- 3090 ○ Assist in expediting orders
- 3091 ○ Ensure compliance with contract requirements
- 3092 ○ Issue final decisions and handle all disputes under the Contract Dispute Act
- 3093 ○ Delegate contracting authority to a Federal Department, Agency, or Other Authorized Entity
- 3094 (“Using Activity”) Contracting Officer for the purposes of requesting quotes and awarding task
- 3095 orders and subsequent task order modifications under this contract.
- 3096

### 3097 **G.1.3 Task Order Contracting Officer (TO/CO)**

3098 Subsequent to contract award, task order requests will be issued primarily by the ACO. GSA may,  
3099 however, delegate contracting authority to a Using Activity’s contracting officer to request quotations  
3100 directly from USA Contact Contractors, and to award task orders and modifications to task orders under  
3101 the appropriate indefinite-delivery, indefinite-quantity contract. The Contracting Officer who is  
3102 responsible for issuing a Request for Quotation (either the ACO or a Using Activity Contracting Officer)  
3103 becomes the cognizant Contracting Officer for that requirement, and, therefore assumes the title of Task  
3104 Order Contracting Officer (TO/CO). The TO/CO is the Government’s single point of contact for each  
3105 task order issued by that TC/CO. The TO/CO is responsible for administration of the task order, issuance  
3106 of task order modifications, authorizing changes in terms and conditions of the task order, terminating the  
3107 task order, exercising option renewals, and approval of subcontractors.

3108  
3109 The Activity Contracting Officer will be appointed as a TO/CO in writing by the ACO. A copy of each  
3110 appointment letter will be provided to all USA Contact Contractors. Contractors are cautioned that,  
3111 unless they are in receipt of an appointment letter signed by the ACO, they should take no action in  
3112 response to a Request for Quotation which has been identified as a requirement under the USA Contact  
3113 program. Instead, the Contractor shall immediately notify the ACO, and provide him/her with the details  
3114 of the request.

3115  
3116 Communications pertaining to task order administration matters shall be addressed to the TO/CO. The  
3117 TO/CO will be the only person authorized to make or approve any changes in any of the requirements of  
3118 the task order for which he/she is responsible. In the event that the Contractor makes any changes at the  
3119 direction of any person other than the TO/CO, such change shall be considered to have been made  
3120 without authority, and no adjustment shall be made in the task order price to cover any increase in costs  
3121 incurred as a result thereof. When necessary, the TO/CO will:

- 3122 ○ Serve as liaison between the Contractor and Using Agencies
- 3123 ○ Assist in expediting orders
- 3124 ○ Ensure compliance with task requirements
- 3125 ○ Issue final decisions and handle all task order disputes under the Contract Dispute Act
- 3126
- 3127

### 3128 **G.1.4 Contracting Officer’s Technical Representative**

3129 The TO/CO will appoint a Contracting Officer’s Technical Representative (COTR) to ensure orderly  
3130 performance of this contract and subsequent task orders. Appointment of the COTR will be made in  
3131 writing upon contract/task order award. A copy of the appointment letter will provided to the task order  
3132 Contractor.

3133

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3134 The COTR is authorized to be the technical point of contact under this contract; however, the Contractor  
3135 shall direct all inquiries of either a technical or a non-technical nature through the TO/CO.  
3136

3137 The types of actions within the purview of the COTR's authority include:  
3138

- 3139 ○ Ensuring that the Contractor performs the technical requirements of the contract;  
3140
- 3141 ○ Conducting or causing to be conducted inspections necessary in connection with performance of  
3142 the contract;  
3143
- 3144 ○ Monitoring the Contractor's performance under the contract, and notifying the Contractor and  
3145 TO/CO of any deficiencies observed;  
3146
- 3147 ○ Coordinating Government-furnished property availability (if required); and  
3148
- 3149 ○ Providing for site entry of Contractor personnel if required.  
3150

3151 The COTR may provide technical direction and general performance-related guidance to the Contractor.  
3152 As used herein, "technical direction" means direction to the Contractor that fills in details, suggests  
3153 possible lines of inquiry, or otherwise completes the general scope of the work. "Technical direction"  
3154 must be within the terms of this contract; shall not change or modify the contract/task order in any way;  
3155 and shall not constitute changes, as described in contract clause 53.243-1, Changes -Fixed Price or  
3156 52.243-3 Changes - Time and Materials or Labor Hour, which may only be accomplished by the TO/CO.  
3157

3158 The COTR will provide no supervisory or instructional assistance to Contractor personnel. The COTR's  
3159 responsibility is to provide Contractor access to working data, and to clarify technical requirements as  
3160 necessary to ensure useful expenditure of Contractor effort. The COTR is not empowered to make any  
3161 commitments or changes which affect the contract/task order price, other terms and conditions, or  
3162 delivery provisions. Any such proposed changes must be brought to the immediate attention of the  
3163 TO/CO for action. The acceptance of any changes by the Contractor without the specific approval and  
3164 written consent of the TO/CO shall be at the Contractor's risk.  
3165

3166 If in the Contractor's opinion, the COTR requests or indicates an expectation of effort which would justify  
3167 or require an equitable adjustment to the contract/task order, the Contractor shall promptly notify the  
3168 TO/CO in writing; however the Contractor shall take no other action on that request or effort until the  
3169 TO/CO has issued a change or otherwise resolved the issue.  
3170

### 3171 **G.1.5 Contractor's Points of Contact**

3172 The Contractor shall provide an organizational structure for the management and administration of task  
3173 orders under this program. The organizational structure shall include personnel to perform the following  
3174 functions:  
3175

- 3176 ○ Serve as the point of contact to interface with the Government (GSA and Using Agencies) on  
3177 issues related to program administration  
3178
- 3179 ○ Oversee the overall management and operations of services provided under each task order  
3180

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- 3181 ○ Serve as the point of contact to interface with the Government (GSA and Using Agencies) on  
3182 major issues related to operational support and implementation  
3183
- 3184 ○ Coordinate as necessary with the COTR, Using Agencies, and subcontractors in providing  
3185 services under a task order  
3186
- 3187 ○ Serve as the single point of contact to interface with the CO/COTR and meet with the  
3188 Government (GSA and Using Agencies) on planning and operational issues related to classified  
3189 requirements and/or problems, in the event of national security threats and/or disaster situations.  
3190
- 3191 ○ All key personnel assigned by the Contractor to fulfill contract management and administrative  
3192 functions shall be accessible to the Government (GSA and Using Agencies) 24 hours a day, 7  
3193 days a week by telephone, cellular telephone, Blackberry-type device, or pager. Lists of all  
3194 Contractor points of contact shall be provided, including telephone, cellular telephone, and pager  
3195 numbers and e-mail addresses. The Contractor shall provide the TO/CO with an updated list of  
3196 all points of contact within five (5) calendar days after changes to the list.  
3197

### 3198 **G.2 SERVICE ORDERING**

3199 This contract will be used by the Government to provide complete managed multi-channel inquiry  
3200 response and management solutions to support the USA Services project, including support for other E-  
3201 Gov initiatives, and other Using Agency programs. Section C, the Performance Work Statement,  
3202 establishes the overall scope of work that may be performed under this contract.  
3203

3204 The Government will order services under this contract by means of task orders with specifically defined  
3205 work requirements, deliverable products, performance standards, and schedules. The Contractor shall  
3206 perform work under this contract only as directed in task orders issued by the TO/CO.  
3207

3208 The Contractor shall provide the services and, if required, incidental supplies specified on each task order  
3209 at the price set forth on each task order. Orders may be issued under this contract from date of each IDIQ  
3210 contract award through the life of the contract. All task orders issued under this contract are subject to the  
3211 terms and conditions of the contract. If there is a conflict between the terms and conditions of the  
3212 contract and those of the task order, the terms and conditions of the contract shall prevail. All task orders  
3213 issued prior to the end of the contract shall be honored and performed by the Contractor according to all  
3214 terms and conditions of the contract, subject to the Government's rights and remedies thereunder. Copies  
3215 of all task orders shall be maintained by the Contractor for the duration of the contract through final  
3216 closeout.  
3217

#### 3218 **G.2.1 Fair Consideration Process**

3219 When a requirement is identified by a Government agency, the TO/CO will issue a Request for Quotation.  
3220 Requirements will be grouped together to the extent that it is practical to do so. All contract holders will  
3221 be provided a fair opportunity to propose on all requirements in excess of \$2,500.  
3222

3223 Contract holders need not be given an opportunity to be considered for a particular order in excess of  
3224 \$2,500 when the TO/CO determines that:

- 3225 ○ The need for services is of such urgency that providing a fair opportunity to all Contractors would  
3226 result in unacceptable delays  
3227
- 3228 ○ Only one such contract holder is capable of providing the services at the level of quality required  
3229 because the services ordered are unique or highly specialized  
3230

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- 3231
- 3232       ○ The order should be issued on a sole-source basis in the interest of economy and efficiency as a
- 3233       logical follow-on to a task already issued under the contract
- 3234
- 3235       ○ It is necessary to place an order to satisfy a minimum guarantee
- 3236

3237       Examples of exceptions include, but are not limited to, those described in the following table. These

3238       examples are provided only for purposes of illustration.

3239

3240

**Table G.1. Exceptions to Fair Opportunity**

| Exception Provided for by 41 USC §253j [abbreviated description]                              | Examples of Task Order Types that Qualify As Exceptions  |
|---|--|
| Unusual urgency that would lead to unacceptable delays  | <ul style="list-style-type: none"> <li>○ Natural disaster or other emergency needs</li> <li>○ Military/mobilization needs</li> <li>○ Immediate short-term need arising on short notice</li> </ul>  |
| Only one capable Contractor   | <ul style="list-style-type: none"> <li>○ Only one Contractor offers the service</li> <li>○ Only one Contractor offers the service to the locations where the service is needed</li> <li>○ Only one Contractor can demonstrate that it is capable of providing service in the manner required by the user or to the required locations</li> </ul>   |
| Economy, efficiency and logical follow-on to an order already issued under fair consideration | <ul style="list-style-type: none"> <li>○ Task orders associated with any moves, additions, changes, or similar needs</li> <li>○ Incremental task orders for the same or a new service to locations where service already exists or has been ordered</li> <li>○ Task orders placed to minimize inefficiencies or additional costs that would result from introducing multiple maintenance, operations, training network management, or other support systems</li> <li>○ Task orders placed to maintain the engineering and operational integrity of, or to augment an established telecommunications capability within an organization</li> </ul> |
| Meet a minimum revenue guarantee  | <ul style="list-style-type: none"> <li>○ No examples provided.</li> </ul>  |

3241

3242

3243       The TO/CO’s source selection decision on each task order is final, and is not subject to the protest or

3244       disputes provisions of the contract, except for a protest asserting that the task order increases the scope,

3245       period, or maximum value of the contract. Disputes related to other matters affecting the task order

3246       award may be directed to the Ombudsman designated for this contract. The Ombudsman will be

3247       responsible for those duties described in FAR §16.505(b)(5). The Ombudsman for GSA is:

3248

3249       Name:       George N. Barclay

3250       Title:       GSA Service Order Ombudsman

3251       Address:    1800 F Street, NW

3252               Washington, D.C. 20405

3253       Phone:       (202) 501-2200

3254

3255       The Government reserves the right to modify this fair consideration process, and will notify the

3256       Contractors of any such modifications in advance of any task orders being placed using such a modified

3257       process.

3258

**3259 G.2.2 Task Order Request for Quotation**

3260 The normal method for issuing Requests for Quotation will be by electronic mail; however, the TO/CO  
3261 may choose to use postal mail or facsimile. Proposed contracting actions will not be synopsized in  
3262 FedBizOpps per the exception at Federal Acquisition Regulation §5.202(a)(6).

3263  
3264 Contract holders will submit a task quotation to the TO/CO not later than ten (10) working days after the  
3265 issue date of the task request, unless a specific date is identified in the task request. All costs associated  
3266 with the development and presentation of the contract holder's quotation shall be borne by the contract  
3267 holder.

3268  
3269 If a contract holder needs a pre-quotation meeting, a request for such meetings shall be made to the  
3270 TO/CO not later than three (3) working days after receipt of the task request. All contract holders will be  
3271 invited to any such meeting unless the Request for Quotation is being issued under one of the exceptions  
3272 to the fair consideration process identified in paragraph G.2.1. If a pre-quotation meeting is held, the  
3273 quotation shall be submitted within ten (10) working days after the pre-quotation meeting.

3274  
3275 At a minimum, Requests for Quotation will contain the following information:

- 3276 ○ Performance Work Statement
- 3277 ○ performance standards
- 3278 ○ instructions on quotation preparation
- 3279 ○ period of performance
- 3280 ○ date, time and place for receipt of quotations
- 3281 ○ method of evaluation (lowest price technically acceptable or best value)
- 3282 ○ evaluation factors to be used.

3283  
3284  
3285 The offeror's quotation shall comply with the specific requirements of the Request for Quotation. As a  
3286 general rule, these requirements will include the following sections:

- 3287 ○ A narrative description of the plans for performance and technical approach, including a  
3288 description of the work and how it will be accomplished; qualitative descriptions of any  
3289 automated tools and any structured methodology proposed; and any potential risks or problem  
3290 areas.
- 3291 ○ Identification of assumptions on the Contractor's part used in developing the technical or cost  
3292 portions of the quotation.
- 3293 ○ Definitions and schedules for milestones and deliverables products; description of acceptance  
3294 criteria, including when and how the Contractor shall ensure each is met.
- 3295 ○ A general work breakdown structure for accomplishing the task requirements and functions  
3296 identified above, showing the skill level, number of people (full and part time, and indicating the  
3297 number of hours for part time personnel), and the total hours that shall be applied to each period  
3298 of time.
- 3299 ○ A general work breakdown structure for accomplishing the task requirements and functions  
3300 identified above, showing the skill level, number of people (full and part time, and indicating the  
3301 number of hours for part time personnel), and the total hours that shall be applied to each period  
3302 of time.

3303

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- 3304 ○ Detailed discussion of any other overtime or other-than-normal work schedule hours that the  
3305 Contractor may propose, or a Work Breakdown Structure for Fixed Price Task Orders.  
3306
- 3307 ○ A detailed work breakdown structure for accomplishing the task requirements identified above,  
3308 showing the skill level, number of people, and labor hours shall be applied to each milestone and  
3309 deliverable product. The proposed staffing and work hours must be consistent with the  
3310 Contractor's staffing plan, including a detailed rationale of how the skill level and number of  
3311 people were determined, and how they will be utilized  
3312
- 3313 ○ An affirmation that the fully burdened rates contained in Section B of this contract are ceiling  
3314 price rates. However, the Contractor may, at its discretion, elect to propose lower rates on a task-  
3315 by-task basis.  
3316

3317 Each ODC (Other Direct Costs) entry must be accompanied by a breakdown by element of its  
3318 composition, and an estimate for each element, together with a total estimated ODC cost. The Contractor  
3319 will also provide an explanation of why the ODC is required. All travel requirements in the Request for  
3320 Quotation's PWS must be included. Any additional travel the Contractor considers necessary for  
3321 performance under the task order must be described, justified, and included in the cost estimate. If  
3322 required by the task request, the Contractor will use the rates in the then-current Federal Travel  
3323 Regulation for estimating the cost of travel and per diem.  
3324

3325 Quotations shall be submitted in accordance with the instructions provided in each Request for Quotation.  
3326 All staffing, staffing hours and costs, ODCs by principal category, and totals shall be shown.  
3327

3328 The Contractor shall submit a quotation that conforms to the requirements of a Request for Quotation's  
3329 PWS. In addition to that quotation, the Contractor may submit a separate alternative quotation, if the  
3330 Contractor feels that another technical approach or pricing structure more economically or efficiently  
3331 accommodates the Government's requirements. The alternative quotation must be identified as such and  
3332 include a clear explanation of the differences in approach the perceived benefits to the Government.  
3333

3334 Once quotations have been received, the TO/CO need not contact each of the contract holders under the  
3335 contract before selecting an awardee, if the TO/CO has ensured that each contract holder was provided a  
3336 fair opportunity to be considered for the order. Award will be made to the successful Contractor based on  
3337 the evaluation criteria established in the task request.  
3338

### 3339 **G.2.3 Discussions and Final Quotation**

3340 When required, discussions will take place at a place and time designated by the TO/CO. After each  
3341 round of discussions, each offeror will be given the opportunity to revise its quotation, making whatever  
3342 changes it feels necessary to enhance the possibility of an award. When the TO/CO feels there is a clear  
3343 meeting of the minds with all offerors, he/she will conclude discussions and call for a Final Quotation  
3344 Revision. The final revised quotation shall reflect all agreements reached during discussions.  
3345

### 3346 **G.2.4 Award of a Task Order**

3347 A task order specifies work to be accomplished by the Contractor to satisfy a Government requirement,  
3348 and establishes a time-frame and price, or not-to-exceed price (so identified), for accomplishing the work.  
3349 The task order defines the performance of a specified unit of work in a definable service or applications  
3350 area, and may have one or more deliverable products.  
3351

3352 The TO/CO will award task orders using a GSA Form 300 (or other appropriate Using Agency form  
3353 "Award Document") that incorporates the Performance Work Statement and the contract holder's final

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3354 revised quotation by reference. The Award Document authorizes the Contractor to proceed based upon  
3355 the agreed-to technical requirements, milestone and deliverable schedules, and total award price. For  
3356 fixed price tasks, a milestone schedule including start and end dates for each milestone or deliverable  
3357 shall be submitted with the quotation.

3358  
3359 All tasks must be fully staffed within ninety (90) calendar days after task award (the date in block 1 of the  
3360 GSA Form 300, or Agency equivalent) unless otherwise specified in the task order.

3361  
3362 Resumes for key personnel as defined in the Request for Quotation shall be submitted to the Government  
3363 in the format specified in the task order. The Government will approve or reject the resume in writing  
3364 within five (5) workdays of its receipt. For approved resumes, the Contractor shall notify the Government  
3365 when the individual will report for work on the task order. If review of the resume determines the  
3366 individual not to be qualified for the position indicated, the resume shall be rejected and a written  
3367 explanation provided. If the Contractor desires further consideration of the candidate, the resume must be  
3368 resubmitted within two workdays of the notice of rejection with the necessary clarification or additional  
3369 information. Rejection of a resume does not obviate the Contractor's responsibility to fully staff the  
3370 facility with ninety (90) calendar days after task award, or as otherwise specified in the task order.

### **3371 3372 G.2.5 Task Order Changes**

3373 Task orders may be modified, either at the Government's initiative, or in response to a request from the  
3374 Contractor. No direction changing the requirements of a task order will be binding upon the Contractor  
3375 unless issued by the TO/CO in writing. Likewise, the Government shall not be liable for an equitable  
3376 adjustment to the price of a task order on account of a change, unless the change is authorized in writing  
3377 by the TO/CO. Task order modifications are issued by means of a Standard Form 30 (Amendment of  
3378 Solicitation/Modification of Contract).

### **3379 3380 G.2.6 Failure to Reach Agreement**

3381 If agreement cannot be reached on total task order price, time for performance, or other terms of the  
3382 agreement, the TO/CO may unilaterally establish the terms at issuance. The Contractor may pursue any  
3383 disagreement as a dispute under the "Disputes" clause of this contract.

### **3384 3385 G.2.7 Types of Tasks**

3386 G.2.7.1 Fixed-Price Task  
3387 A task order with well-defined requirements and fixed deliverable products will normally be issued on a  
3388 fixed price basis.

3389  
3390 G.2.7.2 Time and Material or Labor Hour Task

3391 A task order for which the performance requirements or deliverable products cannot be quantified or  
3392 well-defined in advance typically will be issued on a time and material or a labor hour basis. Work orders  
3393 are issued by the Government to define individual performance requirements for specific work or  
3394 milestones to be accomplished.

## **3395 3396 G.3 CONTRACT ACCESS FEE**

3397 GSA operating costs associated with awarding and managing this contract may be recovered through a  
3398 Contract Access Fee (CAF) of the total invoice amount.

3399  
3400 GSA will determine the amount of the CAF after contract award. GSA has the unilateral right to change  
3401 the percentage at any time, but not more than once per year. As part of each invoice, the Contractor shall

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3402 collect the CAF and then rebate it to GSA. The timing of the rebate, the organization to which it will be  
3403 delivered, and the method of delivery will all be specified in the individual task orders.

3404  
3405 Where multiple invoices and/or multiple orders are involved, the CAF may be consolidated into one  
3406 payment. To ensure that the payment is credited properly, the Contractor shall submit a check along with  
3407 a printed copy of the "Cost Recovery Report (CRR)" as required by section G.5.4. Each check shall be  
3408 annotated with the corresponding contract number.

3409  
3410 The Contractor shall pay GSA not later than 30 calendar days after the end of the reporting quarters  
3411 specified in section G.5.

3412  
3413 If the full amount of the CAF is not paid within 30 calendar days after the end of the applicable reporting  
3414 period, it shall constitute a debt to the United States Government under the terms of FAR 32.6. The  
3415 Government may exercise all rights under the Debt Collection Act of 1982, including withholding or  
3416 setting off payments and interest on the debt (see FAR 52.232-17, Interest).

3417  
3418 The Contractor shall submit to GSA sales reports and payment information in a timely manner.

3419  
3420 Failure on the part of the Contractor to pay GSA all CAF which is currently due in a timely manner, or  
3421 the willful submission of inaccurate information in sales reports or payment information, constitutes a  
3422 material breach of the contract's terms and conditions.

### 3423 3424 **G.4 BILLING AND PAYMENT**

#### 3425 **G.4.1 General Billing Information**

3426 The Contractor shall deliver invoices and billing support data to GSA, and, if so specified in task orders,  
3427 to the Using Agency via paper or electronic format in a mutually agreed upon medium. Agreement will be  
3428 reached at time of award. If agreement cannot be reached, the TO/CO will establish the medium to be  
3429 used. Each invoice shall reflect all charges from the first day through the last day of the previous billing  
3430 cycle. The Contractor shall charge for all services or equipment within three billing cycles after the  
3431 services were rendered.

3432  
3433 The Contractor shall submit a properly prepared invoice for services or supplies that have been accepted  
3434 by the Government not later than five (5) work days after such acceptance has taken place. In the absence  
3435 of Government acceptance within 30 days, the Contractor shall submit the invoice.

3436  
3437 A separate invoice shall be submitted for each task order. Invoices shall be prepared on official company  
3438 letterhead, and provide price information for each contract line item number (CLIN) being billed. In  
3439 addition, each invoice shall include the following minimum task order identification data:

- 3440
- 3441 ○ GSA contract number
  - 3442 ○ GSA or Using Agency task order number
  - 3443 ○ Purchase Request Number: the number used by GSA or the Using Agency to control the  
3444 commitment of funds
  - 3445 ○ Period of Performance: monthly services performed or deliverable completed
  - 3446 ○ Invoice Number
  - 3447 ○ Client name and address
- 3448

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3449 When the paying office is GSA, the original of each invoice with supporting documentation shall be  
3450 submitted to the GSA Paying Office designated in Block 24 of the Award Document. In those cases  
3451 where the paying office is other than GSA, the invoice/paying office will be designated on an order-by-  
3452 order basis. Up to two additional copies of each invoice with supporting documentation shall be  
3453 submitted to the address(es) as designated on an order-by-order basis.  
3454

3455 For fixed price tasks, an invoice reflecting amounts that do not exceed the fixed price approved for that  
3456 deliverable product or service in the task order shall be submitted for those tangible deliverable products  
3457 or services that have been accepted by the Government.  
3458

3459 For time and materials tasks, the amount invoiced shall include labor charges for actual hours worked and  
3460 other allowable and allocable expenses based upon contract rates and conditions, not to exceed the limits  
3461 specified in the task order, provided that such charges have been accepted by the Government.  
3462 Contractors should note that profit is to be applied to labor charges only.  
3463

3464 For other direct costs (ODC) such as equipment, software, supplies and services not previously priced  
3465 under this contract, non-routine travel or per diem, etc., invoices shall reflect the Contractor's actual  
3466 expense for the item, plus General and Administrative costs (G&A) (the only allowable indirect cost).  
3467 These charges shall not exceed the limits specified in the task order. No charges will be paid by the  
3468 Government for goods, services, or rates which are not specifically detailed in the individual task order.  
3469 The invoices shall also include the CAF as ODC. CAF is a percentage of the total amount of goods or  
3470 services being invoiced. The percentage to be used will be stipulated by GSA prior to issuance of the  
3471 Requests for Quotation.  
3472

3473 Copies of Contractor paid invoices, receipts, and travel vouchers completed in accordance with Federal  
3474 Travel Regulations (FTR) shall be maintained by the Contractor, for the duration of the task order and for  
3475 three (3) years thereafter, and made available to the Government upon request.  
3476

3477 Invoices for final payment must be so identified, and submitted when tasks have been completed and no  
3478 further charges are to be incurred. These close-out invoices, or a written notification that final invoicing  
3479 has been completed, must be submitted to the ordering agency within 60 days of task order completion.  
3480 A copy of the Government's written acceptance of task completion must be attached to final invoices. If  
3481 the Contractor requires an extension of the 60-day period, a request with supporting rationale must be  
3482 received by the TO/CO prior to the end of the 60-day period.  
3483

3484 The Contractor shall not be compensated directly for payment of the salaries or wages of the Program  
3485 Manager, Group Managers, or any other management or staff member not directly associated with and  
3486 negotiated for task order performance as direct-charge hourly-rate contract line items.  
3487

### 3488 **G.4.2 Billing Content**

3489 At least fifteen (15) days prior to its initial submittal, the Contractor shall provide an example and specify  
3490 the content and format of all invoice(s) to be used for the billing of services required under this contract.  
3491 Each invoice shall contain all pricing components in sufficient detail necessary to reconcile charges with  
3492 actual usage.  
3493

### 3494 **G.4.3 Payment of Invoices**

3495 Payment of invoices will be made based upon acceptance by the Government of the entire task, of the  
3496 completion of payable milestones (identified as such) in the task order, of the tangible product  
3497 deliverable(s) invoiced, or for services rendered during the time period invoiced and accepted on a  
3498 periodic basis.

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3499  
3500 If the services provided fail to conform to the technical requirements of the task order or do not conform  
3501 to the terms and conditions of the contract, the TO/CO will take action in accordance with FAR clause  
3502 52.246-04 entitled, "Inspection of Services-Fixed Price", or 52.246-06 entitled, "Inspection of Services  
3503 Time and Materials and Labor Hour", whichever is applicable.  
3504

3505 Payment to the Contractor will not be made for temporary work stoppage due to circumstances beyond  
3506 the control of the Government, such as acts of God, inclement weather or power outages and the results  
3507 thereof, or temporary closings of facilities at which Contractor personnel are performing. This may,  
3508 however, be justification consideration under the clause entitled, "Excusable Delays".  
3509

3510 Section B of this contract contains Contract Line Item Numbers (CLINs) for overtime. However,  
3511 overtime CLINs will only be billable when approved in advance and in writing by the TO/CO to meet  
3512 task order requirements on a bonafide exigency basis. The Government will not authorize overtime to  
3513 compensate for shortcomings in Contractor performance.  
3514

3515 The Contractor will be reimbursed by the Government for non-routine travel and per diem expenses  
3516 incurred by Contractor personnel for travel specifically authorized in a task order and approved by the  
3517 Government. The Government may require the Contractor to use Government supply sources for official  
3518 travel, subject to the same conditions as those applicable to Government employees; except that the  
3519 Contractor's employees are not "employees of the Government" as defined by 28 U.S.C. 2671, and thus  
3520 are not covered under the tort claims provisions of 28 U.S.C. 2679(b). Note: if a time and materials task  
3521 order is issued under this contract, only actual costs for material are reimbursable, per FAR 16.601.  
3522

3523 **G.4.4 Billing Disputes**

3524 The Government requires evidence that the services ordered have been provided, and that each associated  
3525 charge has been priced correctly, or it may dispute the charge.  
3526

3527 The Contractor shall attempt to resolve billing disputes to the satisfaction of the Government within sixty  
3528 (60) calendar days following official notification from the TO/CO or COTR that such a dispute exists.  
3529 The Contractor shall take a proactive lead in resolving disputes promptly with the initiator of the dispute  
3530 by establishing and maintaining meaningful dialogue directed toward a fair and equitable resolution. In  
3531 cases where a resolution is not forthcoming, the Contractor shall submit partial resolutions valued at (less  
3532 than the total amount in dispute) to the Government for acceptance or denial. The TO/CO or his/her  
3533 representative, so designated in writing by the TO/CO, will respond within five business days with a  
3534 proposed resolution. If either party wants to escalate the dispute to the TO/CO at any time, it may do so.  
3535 Disputes that are not resolved within 60 calendar days, or within the approved extension time, must be  
3536 escalated to the TO/CO. Any disputes escalated to the TO/CO will be resolved in accordance with  
3537 Federal Acquisition Regulation (FAR) 52.233-1 (Alternate I) (Disputes).  
3538

3539 **G.4.5 Right to Withhold Payment**

3540 The Government reserves the right to withhold a partial or entire payment of an invoice as provided for in  
3541 FAR clause 52.232-01 entitled, "Payments".  
3542

3543 **G.5 REPORTING REQUIREMENTS**

3544 Contractors are required to provide the requisite reports identified in this section as part of contract  
3545 administration. Contractors will not be compensated directly by the Government for the preparation and  
3546 delivery of the requisite reports for the duration of the contract, including the contract base period and all  
3547 option periods and extended performance periods if applicable.

3548

3549 **G.5.1 Sales Reports**

3550 The Contractor shall electronically report all sales under this contract. “Sales” means the dollar amount  
3551 invoiced under the task order. The Contractor shall accurately report the dollar value, in U. S. dollars and  
3552 rounded to the nearest whole dollar, by calendar quarter (January 1–March 31, April 1–June 30, July 1–  
3553 September 30, and October 1–December 31). Reports, including “zero” sales shall be submitted  
3554 electronically to an e-mail address provided by the ACO after contract award.

3555

3556 The report is due within thirty (30) calendar days following the end of the reporting quarter. The  
3557 Contractor shall continue to provide the report until final closeout of all task orders. Reporting will be by  
3558 contract at the task order level. Reports for multiple contracts shall not be consolidated.

3559

3560 Failure to submit required reports or the falsification of reports is sufficient cause for the Government to  
3561 terminate the contract for default under the termination provisions hereof.

3562

3563 **G.5.2 Task Status Reports**

3564 As directed by GSA or client representatives, these reports shall be defined in the Performance Work  
3565 Statement or work orders, and shall be prepared by task personnel and funded by the client.

3566

3567 **G.5.3 Reports on Special Hiring**

3568 The Special Hiring Report is a report that shows whether the Contractor is meeting the 5% minimum  
3569 special hiring objective required in Section H.8. The report shall be electronically submitted via e-mail to  
3570 an e-mail address specified by the ACO, using the GSA specified format (currently Microsoft Office  
3571 Excel 2003), by the tenth work day following the close of the calendar month. The report shall include  
3572 the Contract Number, Task Order Number, Ordering Agency, Client, Special Hire Organization, Quantity  
3573 of Total Contact Center Staff, Quantity of Special Hire Staff, and the percentage of Special Hire Staff of  
3574 Total for each reporting period. The report shall include monthly totals and cumulative totals for all tasks  
3575 performed under this contract. The report is required even when no tasks were performed during the  
3576 reporting period, and shall continue to be provided until all task orders are completed under the contract.

3577

3578 **G.5.4 Cost Recovery Report (CRR)**

3579 The CRR is a report of all invoices tendered under this contract, including the collection of all Contract  
3580 Access Fees. The CRR shall be electronically submitted via e-mail to an e-mail address specified by the  
3581 ACO, using the GSA specified format (currently Microsoft Office Excel 2003), by the tenth work day  
3582 following the close of the calendar month. The CRR shall include the Contract Number, Task Order  
3583 Number, Ordering Agency, Client, the Invoice Number, Date of Invoice, the Invoice Amount, and the  
3584 amount of the Contract Access Fee for each invoice of the reporting period. The report shall include the  
3585 total amount of the listed invoices and Contract Access Fees for both the reporting period, as well as  
3586 cumulative totals for the contract to date. A CRR is required even when no invoices are submitted during  
3587 the reporting period, and shall continue to be provided until all task orders are completed under the  
3588 contract.

3589

3590 The Government reserves the right to inspect without further notice such records of the Contractor as  
3591 pertain to orders under this contract. Willful failure or refusal to furnish the required reports, or  
3592 falsification thereof, shall constitute sufficient cause for terminating the contract for default under FAR  
3593 52.249-8, Default (Fixed-Priced Supply and Service).

3594

3595 **G.5.5 Utilization of Small Business Reporting**

3596 If required according to its business size, the Contractor shall submit the following Standard Forms (SF)  
3597 and Optional Form (OP) for compliance with FAR, Part 19.7. The Contractor shall provide  
3598 subcontracting information during the entire time that it is providing task order service under this  
3599 contract.

3600  
3601 The purpose of the forms is to collect subcontracting information on awards to: small business, small-  
3602 disadvantaged business, women-owned small business, veteran-owned small business, veteran-owned  
3603 small business, service-disabled veteran-owned small business and HUBZone small business concerns  
3604 under the Contractor's subcontracting plan.

3605  
3606 Each report shall be submitted to the GSA Contracting Officer, with a copy to the TO/CO, if reporting a  
3607 task order written by an Agency contracting officer. Reports are due 30 days after the close of a reporting  
3608 period.

3609  
3610 Subcontracting Report for Individual Contracts (SF 294): This report is required on every task order and  
3611 must be submitted semi-annually (for the six months ending March 31st and the twelve months ending  
3612 September 30<sup>th</sup>). A separate report must be submitted for each task order.

3613  
3614 Summary Subcontracting Report (SF 295): The report shall be submitted semi-annually (for the six  
3615 months ending March 31st and the twelve months ending September 30<sup>th</sup>, if the task order is a  
3616 Department of Defense requirement, and annually (for the twelve months ending September 30<sup>th</sup> for all  
3617 other Agencies).

3618  
3619 Small Disadvantaged Business Participation Report (OP 312): This report is prepared and submitted only  
3620 when the Contractor is submitting a report for the last performance period of a task order on a Standard  
3621 Form 294.

3622  
3623 **G.6 MARKETING**

3624 **G.6.1 Marketing Calls**

3625 The Contractor shall coordinate marketing efforts with the Director of USA Service at GSA to keep  
3626 him/her apprised of planned client visits. The current director of GSA's USA Services E-Gov Initiative is  
3627 Mr. Stuart Willoughby. His contact information is as follows:

3628  
3629           General Services Administration  
3630           Office of E-Gov Solutions Support (XCE)  
3631           1800 F Street, NW (Room G-132)  
3632           Washington D.C. 20405-0001

3633           Telephone Number: (202) 501-9121  
3634

3635 **G.6.2 Trade Shows/ Exhibitions**

3636 The Contractor shall report participation in trade shows/exhibitions prior to attendance. Information  
3637 provided shall consist of date, location, and name of conference. The Director of USA Service at GSA  
3638 shall be notified at least two (2) weeks prior to the show/exhibit.

3639

**SECTION H**

**SPECIAL CONTRACT REQUIREMENTS**

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**H.1 TERM OF CONTRACT**

3647 The term of this contract shall cover a Base Period of two (2) years, followed by four (4) two-year option  
3648 periods. The Government reserves the right to extend the term of this contract at the prices set forth in  
3649 Section B in accordance with the terms and conditions contained in the clause in Section I, "Option to  
3650 Extend the Term of the Contract".

3651  
3652 During the contract base period and any of the option periods exercised by the ACO, the Government  
3653 may issue task orders with performance periods, including options, of up to five (5) years in duration,  
3654 provided that the task orders do not extend beyond year 3 of the Extended Performance Period. The term  
3655 of such task orders can extend beyond the term of the contract under which it is written. If the situation  
3656 arises where the task order will extend beyond the maximum term of the contract (i.e., into years eleven  
3657 [11] through thirteen [13] after contract award) the prices set forth for Extended Performance Periods in  
3658 Section B shall apply for the respective periods.

3659  
3660

**H.1.1 Transition and Start-Up**

3661 The time period required to transition new requirements will be determined on a case-by-case basis, and  
3662 shall be stated in individual task orders. Transition shall begin at Notice-To-Proceed and continue for a  
3663 period as specified in the task order. During the transition period, the Contractor shall work with the  
3664 Government to develop a sound project implementation plan and to perform all preparatory work to  
3665 establish one or more fully functional multi-channel contact centers in support of the task. The  
3666 Government will transfer business and procedural data, including appropriate training material, to the  
3667 Contractor, and work with the Contractor to establish appropriate system feeds. The transition period will  
3668 provide the Contractor with the opportunity to prepare and staff its contact center; develop the support the  
3669 knowledge base and scripts for automated response in support of the project; establish a fully functional  
3670 contact center to handle the expected work volume; and complete all transition related activities to  
3671 migrate the service to the new center. Government personnel will closely monitor the Contractor's effort  
3672 to ensure a successful launch. Based on the Contractor's ability and expert advice on transitioning the  
3673 work volume, the Government reserves the right to coordinate with the Contractor to achieve a staffing  
3674 plan that minimizes disruption of the existing services and seamlessly transitions the customer base and  
3675 work volumes to the new center.

3676  
3677

**H.1.2 North American Industry Classifications System (NAICS) 519190**

3678 Effective October 1, 2000, Small Business size standards for all Federal Government Programs are those  
3679 that the U.S. Small Business Administration (SBA), in conjunction with the U.S. Census Bureau, has  
3680 established for industries as described in the NAICS. Size standard for industries described in Standard  
3681 Industrial Classification (SIC) have been replaced by the NAICS and no longer apply.

3682  
3683  
3684

For the purpose of this contract, NAICS Code 519190, Other Information Services, applies. The size standard is \$6,500,000.

3685

3686 **H.2 OVERALL CONTRACT MINIMUM AMOUNT**

3687 The Government guarantees that this Contractor will be awarded a minimum order amount of \$10,000.00  
3688 (ten thousand dollars) in aggregate task orders.

3689  
3690 Task orders involving any item listed under Section B of this contract, including any Other Direct Costs  
3691 associated with that item, will apply toward the calculation of the minimum order amount.

3692  
3693 **H.3 OVERALL CONTRACT MAXIMUM AMOUNT**

3694 The maximum aggregate value of all task orders awarded under “USA Contact” shall not exceed  
3695 \$2,500,000,000.00. USA Contact is defined as all contracts resulting from GSA solicitation  
3696 GSV07PD0003.

3697  
3698 Task orders involving any items listed under Section B of this contract, including any Other Direct Costs  
3699 associated with those items, will apply toward the calculation of the minimum order amount. The  
3700 maximum contract limitation shall be applied to the aggregate value of the base period and all option  
3701 periods of all USA Contact contracts.

3702  
3703 **H.4 SUPERVISION OF CONTRACTOR PERSONNEL**

3704 The Contractor’s employees shall remain under the Contractor’s direct supervision at all times. Although  
3705 the Government will coordinate direction within the scope of the contract, detailed instructions for the  
3706 Contractor’s employees’ performance and supervision shall remain the sole responsibility of the  
3707 Contractor.

3708  
3709 **H.5 STANDARDS OF CONDUCT AND RESTRICTIONS**

3710 The Contractor shall adhere to the same professional and ethical standards of conduct required of  
3711 Government personnel. The Contractor shall not:

- 3712
- 3713 ○ Discuss with unauthorized persons any information obtained in the performance of work under  
3714 this contract;
  - 3715
  - 3716 ○ Conduct business other than that which is covered by this contract during periods paid by the  
3717 Government;
  - 3718
  - 3719 ○ Conduct business not directly related to this contract on Government premises;
  - 3720
  - 3721 ○ Use computer systems and/or other Government facilities for company or personal business; or
  - 3722
  - 3723 ○ Recruit personnel on Government premises or otherwise act to disrupt official Government  
3724 business.

3725  
3726 **H.6 REMOVAL OF CONTRACTOR PERSONNEL**

3727 Transfer and/or assignment of Contractor personnel shall be the prerogative of the Contractor;  
3728 however, when the Task Order Contracting Officer (TO/CO) so directs, the Contractor shall  
3729 remove from performance on the contract any and all persons who identified by the TO/CO as  
3730 endangering life, property, or national security. The TO/CO’s decision is final and is not subject  
3731 to discussion or negotiation.

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**H.7 KEY PERSONNEL**

The Program Manager, Project Manager, or a designee who is capable of binding the Contractor contractually shall be considered key personnel for this contract. The Program Manager shall be the overall manager of the contract and single point-of-contact for resolution of contract-related issues.

The Contractor shall provide the following key personnel with assignment responsibilities as indicated:

H.7.1 *Program Manager* – responsible for managing and implementing the overall contract requirement and overseeing implementation of more complex tasks; organizes, directs, and coordinates planning, and implements all contract and/or task order support activities; interacts with high level program officials regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources; monitors and analyzes contract and performance data, and reports results to senior Government officials; coordinates recruitment and training activities to keep staff current on agency programs and performance objectives; manages the activities of subcontractors; and reviews contract, operations and management reports. The Government reserves the right to approve the selection of the Contractor-assigned Program Manager prior to his/her placement in supporting a task order issued under this contract.

H.7.2 *Project Manager* – responsible for managing and implementing the overall Project; organizes, directs, and coordinates planning, and implements all Project support activities; interacts with Government program officials regarding issues and status of Projects; coordinates financial and staffing resources; monitors and analyzes performance data and reports results to the Government; coordinates training activities to keep staff current on Government programs and customer service objectives; and manages the activities of subcontractors. The Government reserves the right to approve the selection of the Contractor-assigned Project Manager prior to his/her placement in support of the task.

H.7.3 *Site Manager* – responsible for overall daily operations and management of the contact center, including staffing, facility, training, service delivery, problem escalation and resolution, and performance monitoring; provides technical assistance for the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; ensures all functions and processes are implemented and operated properly.

H.7.4 *Information Systems Security Manager (ISSM)* – responsible for ensuring that information systems used in supporting task requirements comply with initial and ongoing information systems security requirements, in accordance with FIPS Publication 200, Minimum Security Requirements of Federal Information Systems. The ISSM shall ensure that information systems used to support a specific task meet the minimum security requirements as defined in FIPS Publication 200 through the use of security controls, in accordance with the NIST Special Publication 800 – 53, Recommended Security Controls for Federal Information Systems, As Amended. This includes preparing all required documentation for the compliance process, including a security plan, risk assessments, contingency and contingency test plans, a configuration management plan, system test and evaluation reports, security certifications, and an accreditation package.

The Contractor shall use all commercially reasonable efforts to ensure the continued availability of key personnel assigned to each task. Key personnel proposed and accepted for task orders issued under this contract are expected to be and remain dedicated to the task. Unless indicated otherwise in the Request for Quotation, key personnel will be dedicated to the task on a full-time basis. Substitutions will not be accepted unless specifically agreed upon in writing by the TO/CO. During the first one hundred eighty (180) days of the task order performance period, no key personnel substitutions will be permitted unless such substitutions are necessitated by an individual's sudden illness, death, or termination of employment,

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3782 or as otherwise approved by the TO/CO. In any of these events, the Contractor shall promptly notify the  
3783 TO/CO's Technical Representative (COTR) and provide the information required by Section G of this  
3784 contract. After the initial one hundred eighty (180) day period, all proposed substitutions of key  
3785 personnel must be submitted in writing, at least thirty (30) business days in advance of the proposed  
3786 substitution, to the TO/CO except as provided herein. This provision also applies to personnel engaged  
3787 by the Contractor's teaming partners and/or subcontractors if they are designated as key personnel.  
3788

### 3789 **H.8 SPECIAL HIRING REQUIREMENT**

3790 The Government is committed to using the services provided by individuals who are blind or severely  
3791 handicapped through organizations affiliated with the Committee for Purchase From People Who Are  
3792 Blind or Severely Disabled (National Industries for the Blind [NIB] and National Industries for the  
3793 Severely Handicapped [NISH]) to fulfill part of the staffing requirements for this contract. Contractor-  
3794 provided personnel shall consist of a minimum of five (5) percent of individuals employed through  
3795 organizations affiliated with NIB and/or NISH. The Contractor is responsible for working with NIB  
3796 and/or NISH affiliated agencies to recruit, hire, and train these individuals to ensure that performance  
3797 objectives are not compromised. The Contractor is responsible for compensating NIB/NISH affiliated  
3798 organizations for any work performed to recruit, hire, train, and retain these individuals for the  
3799 performance of each task.  
3800

### 3801 **H.9 INFORMATION SPECIALISTS HOURLY RATE**

3802 The unit of measure for the Hourly Information Specialist (IS) Rate is "HOUR" and refers to a "worked"  
3803 hour. "Worked" time is defined as all time expended by an IS:

- 3804
- 3805 ○ gathering, researching, composing, or delivering responses to customer inquiries;
  - 3806 ○ listening to, or actively communicating with, customers;
  - 3807 ○ in performance of post inquiry work (such as updating systems or conducting follow up  
3808 activities);
  - 3809 ○ in the available (to respond to a call or inquiry) mode \*;
  - 3810 ○ while receiving instruction or coaching \*;
  - 3811 ○ while on breaks \*; and
  - 3812 ○ while attending task-related meetings \*.

3813  
3814 Activities denoted with \* are not accounted for nor reimbursed as "work time" under Information  
3815 Specialist Hourly Rate for Shared or Non-Dedicated Response Services.  
3816

### 3817 **H.10 PLACE OF PERFORMANCE**

3818 The work to be performed by the Contractor can be categorized as follows:

- 3819 ○ Start-up and implementation;
- 3820 ○ Contact center operations and management; and
- 3821 ○ Project management

3822  
3823 Work performed during start-up can take place at the Contractor's facilities or on Government premises.  
3824 Work performed for contact center operations and management shall take place primarily at one or more

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3825 locations designated by the Contractor. Work performed for Project Management shall take place  
3826 primarily at the Contractor's premises.

3827

### 3828 **H.11 FEDERAL HOLIDAYS**

3829 The following days are considered Federal holidays and will be observed by the Contractor(s) in  
3830 performance of work under each task order:

3831

- 3832 ○ New Year's Day (January 1)
- 3833 ○ Martin Luther King, Jr., Day (3<sup>rd</sup> Monday in January)
- 3834 ○ Washington's Birthday (3<sup>rd</sup> Monday in February)
- 3835 ○ Memorial Day (Last Monday in May)
- 3836 ○ Independence Day (July 4<sup>th</sup>)
- 3837 ○ Labor Day (1<sup>st</sup> Monday in September)
- 3838 ○ Columbus Day (2<sup>nd</sup> Monday in October)
- 3839 ○ Veterans Day (November 11)
- 3840 ○ Thanksgiving Day (4<sup>th</sup> Thursday in November)
- 3841 ○ Christmas Day (December 25<sup>th</sup>)

3842

3843 If any of the above holidays falls on a Saturday, then the preceding Friday is the holiday. If any of the  
3844 above holidays falls on a Sunday, then the following Monday is the holiday.

3845

3846 In addition to the days designated above as holidays, the Government observes the following as non-  
3847 working days:

3848

- 3849 ○ Any other day designated by Federal Statute
- 3850 ○ Any day designated by Executive Order
- 3851 ○ Any other day designated by the President's Proclamation

3852

3853 Contractor personnel shall work in accordance with the Government's designated holiday schedule unless  
3854 otherwise stated specifically in the task order.

3855

3856 *NOTE:* Additional non-working days are sometimes authorized, but these are regional in nature (e.g.,  
3857 Inauguration Day in Washington, DC) and not included as Federal holidays for the purposes of this  
3858 contract.

3859

### 3860 **H.12 SYSTEMS REQUIREMENTS**

3861 The Contractor shall provide and maintain robust and scalable state-of-the-art multi-channel contact  
3862 center system hardware, software, and accessories to meet task order requirements. The Contractor shall  
3863 provide a commercial off-the-shelf (COTS) solution that meets the Government requirements. The  
3864 system shall be adequately sized and equipped to handle fluctuations in the volume of inquiries received.  
3865 The system shall be configured such that it can easily be expanded to accommodate growth in call  
3866 volume; electronic and written inquiries, electronic transactions, automated voice responses and FAQ  
3867 services; knowledge base; inquiry tracking; data storage and retrieval; automatic fax-back; and other

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3868 affected areas. The systems shall have adequate backup capability to maximize availability and reliability  
3869 of all services.

3870

3871 When Earned Value Management (EVM) is determined to be applicable to individual task orders issued  
3872 under this contract, the requirements of Federal Acquisition Regulation: 52.234-02 Notice of Earned  
3873 Value Management System Pre-Award; 52.234-03 Notice of Earned Value Management System; and  
3874 52.234-04 Earned Value Management System will apply.

3875

### **3876 H.13 PERMITS**

3877 The Contractor shall, without additional expense to the Government, be responsible for obtaining all  
3878 necessary licenses and permits in connection with the performance of this contract. The Contractor shall  
3879 also be responsible for complying with any applicable Federal, state, and municipal laws, codes, or  
3880 regulations.

3881

### **3882 H.14 TELECOMMUNICATIONS INTERFACE**

3883 The Government may provide its own telecommunication services to connect to the Contractor's  
3884 facilities. The type of telecommunications access provided shall be at the discretion of the Government.  
3885 After task order award, the Government will determine what solution is the most efficient and cost  
3886 effective and will decide at that time what type of telecommunications access to use. If the Government  
3887 requires an interface other than the one detailed by the Contractor in its Technical Proposal, the TO/CO  
3888 and the Contractor may negotiate an equitable adjustment to the task order amount.

3889

### **3890 H.15 TRAVEL**

#### **3891 H.15.1 Routine Travel**

3892 Neither Contractor nor subcontractor employees will not be reimbursed for commuter travel for  
3893 employees between their residences and their regular assigned duty stations, or for travel in support of  
3894 project start-up and the day-to-day performance of this contract. A regular assigned duty station is  
3895 defined as the Contractor employee's continuing place of duty, whether the assignment is permanent or  
3896 temporary.

3897

#### **3898 H.15.2 Non-Routine Travel**

3899 Non-routine travel directed by the Government will require the advance written approval of the TO/CO or  
3900 his/her designee, and will be reimbursed as ODC expense. Reimbursement shall not exceed the rates and  
3901 expenses allowed by Federal Travel Regulations (see <http://www.gsa.gov> "Federal Travel Regulation") to  
3902 a Government employee traveling under identical circumstances. The Contractor shall comply with the  
3903 more restrictive of its own internal policies or with the Government's policies for making reimbursable  
3904 travel and per-diem expenditures. The Government will supply the Contractor with a copy of its travel  
3905 policies upon award of each task order issued under this contract or they may be accessed online as noted  
3906 above. Note: if the task order is issued on a time and materials, or labor-hour basis, the provisions of  
3907 Federal Acquisition Regulation 16.601 apply.

3908

### **3909 H.16 CONTINGENCIES**

3910 The Contractor shall ensure continuity of call center operations, and shall be entirely responsible for  
3911 maintaining continuity of support for the assigned tasks. Contractor employment and staffing difficulties  
3912 will not be acceptable justification for failure to meet the requirements of the Performance Work  
3913 Statement, Section C of this contract.

3914

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3915 If required by the task order request for proposal, Contractor shall submit a contingency plan to the  
3916 TO/CO's Technical Representative (COTR) for approval by the task order start date. The plan shall  
3917 outline the Contractor's response to operational problems and its anticipated response to unusual events  
3918 that may occur during the life of the task order and disrupt operations (such as a structural fire, accident,  
3919 terrorist attack, personnel strike, extended power failure, etc.) which may require the Contractor to  
3920 proceed under altered work conditions at locations other than those originally established. The Contractor  
3921 shall continue to provide the services required by the contract, as directed by the COTR, for the duration  
3922 of such an emergency situation.  
3923

### **3924 H.17 COMPLIANCE WITH SECTION 508**

3925 The services requested under this contract are to be accessed by callers/users employing various  
3926 technologies, including, but not limited to: touch-tone and rotary/dial-pulse telephones, TDD/TTY  
3927 devices, mobile and wireless telephones, wireless communications devices, facsimile equipment, portable  
3928 and desktop computers, and Internet appliances. Callers/users may use these devices to access the  
3929 requested services via the telephone network, mobile and wireless network, the Internet, or other  
3930 communications media. The Government requires that the information and services provided by the  
3931 Contractor under this contract be made available in accessible formats.  
3932

3933 The Contractor shall ensure that the technology infrastructure and support services provided are fully  
3934 accessible by individuals with disabilities as required by Section 508 of the Rehabilitation Act  
3935 Amendments of 1998. All Electronic and Information Technology systems provided under this contract  
3936 must meet the applicable accessibility standards established in 36 CFR 1194, unless an agency exception  
3937 to this requirement exists. 36CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as  
3938 amended, and is viewable at <http://www.section508.gov> – E & IT Requirements.  
3939

### **3940 H.18 CONSTRUCTIVE CHANGE ORDERS**

3941 No order, statement, or conduct of the TO/CO, authorized representative(s) of the TO/CO, or any other  
3942 representative of the Government, whether or not the individual is acting within the limits of his/her  
3943 authority shall constitute a change under the "Changes" clause of this contract, or entitle the Contractor to  
3944 an equitable adjustment of the task order price or delivery schedule unless such change is issued in  
3945 writing and signed by the TO/CO. No representative of the TO/CO shall be authorized to issue a written  
3946 change order under the "Changes" clause of this contract. The Contractor shall be under no obligation to  
3947 comply with any orders or directions not issued in writing and signed by the TO/CO.  
3948

### **3949 H.19 GOVERNMENT OBSERVATIONS**

3950 Prior to the award of a task order, the TO/CO and the task order's COTR will develop a Quality  
3951 Assurance Evaluation (QAE) plan designed to evaluate the quality of service being provided to  
3952 Government. The QAE plan will be used in conjunction with the performance standards set forth in the  
3953 task order's statement of objectives. The QAE process will include such things as: sampling of services;  
3954 a method of inspecting the sample; the frequency of such inspections; documentation of the QAE  
3955 findings; feedback from customers; the minutes of meetings with the Contractor (periodic and ad hoc);  
3956 Contractor response to evaluation findings and the corrective action(s) instituted, if any. The process will  
3957 form the basis for determining the acceptability of services provided under the Inspection of Services  
3958 clause of the contract.  
3959

3960 In addition, Government safety officials and other agency officials reserve the right to conduct surveys  
3961 and inspections of operations and facilities. Other Government personnel, such as Inspector General's  
3962 staff, are authorized to observe Contractor performance and records. In addition, the Government may  
3963 use third-party Contractor personnel to provide various forms of service, such as audits or customer

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3964 surveys. Any such Contractor personnel will be required to sign non-disclosure agreements to protect  
3965 each contract holder's procurement-sensitive information. These personnel will not interfere with the  
3966 Contractor's performance, and the Contractor shall provide all such personnel with its full cooperation.  
3967 All comments concerning the Contractor's operations will be provided to the COTR. Findings from any  
3968 audit, report, survey, etc. may be provided to the TO/CO, as deemed appropriate by the COTR.  
3969

3970 **H.20 ADMINISTRATIVE IMPROVEMENTS/SERVICE ENHANCEMENTS**

3971 It is the intention of the Government to work with the Contractor to introduce administrative  
3972 improvements and service enhancements that would be advantageous to the Government and the  
3973 Contractor. The Contractor agrees to negotiate in good faith with the Government to implement any  
3974 suggested administrative improvements or service enhancements that are determined to be in the best  
3975 interests of both parties.  
3976

3977 **H.21 TASK ORDER PHASE-OUT PROCEDURES**

3978 At the conclusion of a task order, the Government may require the Contractor to participate in a task order  
3979 phase-out process. If the Government so directs, the following procedures will apply:  
3980

3981 After the Government's selection of a successor Contractor, but prior to the end of the expiring task order,  
3982 the current Contractor and the successor Contractor will jointly prepare a mutually agreeable detailed plan  
3983 for the transition to the successor Contractor.  
3984

3985 The current Contractor agrees to provide, if required in writing by the Government, transitional services  
3986 for a period of up to ninety (90) days after the expiration of the current task order at the then current task  
3987 order prices. Continuity for all operations required under the task order shall be maintained during that  
3988 period.  
3989

3990 **H.22 DISCLOSURE OF INFORMATION**

3991 Any Government information made available to the Contractor or gathered by the Contractor from  
3992 Government employees or customers shall be used only for the purpose of carrying out the provisions of  
3993 this contract, and shall not be divulged or made known in any manner to any person except as may be  
3994 necessary in the performance of task requirements. Furthermore, no article, book, pamphlet, recording,  
3995 broadcast, speech, television appearance, film, or photograph concerning any aspect of work performed  
3996 under this contract shall be published or disseminated through any medium without prior written  
3997 authorization from the Government. These obligations do not cease upon expiration or termination of this  
3998 contract. The Contractor shall include the substance of this provision in all contracts for employment and  
3999 subcontracting work performed under this contract.  
4000

4001 In performance of this contract, the Contractor agrees to assume responsibility for protecting the  
4002 confidentiality of Government information, and for ensuring that all work is performed under the  
4003 supervision of the Contractor or the Contractor's responsible employees. The Contractor shall keep  
4004 confidential information provided by inquirers consistent with Federal law, primarily the Privacy Act of  
4005 1974 and the Freedom of Information Act and their amendments. The Contractor shall not disclose  
4006 personal identification information (e.g. name, address, telephone number) or personal financial  
4007 information (e.g. credit card account number) of an inquirer without the verbal or written consent of the  
4008 inquirer, provided that such verbal consent is recorded.  
4009

4010 Inquirers who make threats against persons or property, either Government or private, may have already  
4011 forfeited their rights to privacy thereby. The Contractor shall work with the appropriate Government law  
4012 enforcement agency(ies) for the prevention of threatened crime on a case-by-case basis.

4013  
4014 Each employee of the Contractor to whom information may be made available or disclosed shall be  
4015 notified in writing by the Contractor that information disclosed to such employee can be used only for the  
4016 purpose and to the extent authorized herein. Use of such information for a purpose or to an extent not  
4017 authorized herein may subject the offender to criminal sanctions imposed by 18 United States Code  
4018 (U.S.C.) 641. The law provides, in pertinent part, that whoever knowingly converts to their use or to the  
4019 use of another, or without authority sells, conveys, or disposes of any record of the United States, or  
4020 whoever receives the same with intent to convert it to his/her use or gain, knowing it to have been  
4021 converted, shall be guilty of a crime punishable by a fine of up to \$10,000, or imprisonment up to 10  
4022 years, or both.

4023  
4024 The limitations noted in the preceding paragraphs do not apply to information which has been made  
4025 public by the Government. Further, this provision does not preclude the use of any information  
4026 independently acquired by the Contractor without such limitations, or prohibit an agreement, at no cost to  
4027 the Government, between the Contractor and the information owner, which provides for greater rights to  
4028 the Contractor.

4029  
4030 **H.23 LIABILITY**

4031 **H.23.1 Performance Liability**

4032 The Contractor will not be liable for any form of consideration when the failure to provide service or meet  
4033 contract requirements arises from causes beyond the control and without the fault or negligence of the  
4034 Contractor. Examples of such causes include:

- 4035  
4036     o Acts of God or of the public enemy  
4037     o Fires  
4038     o Floods  
4039     o Epidemics  
4040     o Quarantine restrictions  
4041     o Freight embargoes  
4042     o Unusually severe weather  
4043     o Denial of access by a third party

4044  
4045 **H.23.2 Information Liability**

4046 The Contractor shall be solely responsible for damages suffered by the public that result from the use  
4047 and/or dissemination of information not previously approved by the Government during the performance  
4048 of this contract. Information to be supplied by the Government, along with the approval process required  
4049 for adding new and/or updating existing information, will be specified in individual task orders.

4050  
4051 **H.24 HOLD HARMLESS AND INDENNIFICATION**

4052  
4053 The Contractor shall save, hold harmless, and indemnify the Government against any and all liability,  
4054 claims, and costs of whatever kind or nature for injury to or death of any person or persons, and for loss,  
4055 destruction, or damage to any property (including electronic storage areas), occurring in connection with  
4056 or in any way incident to or arising out of the occupancy, use, service, operations, or performance of work  
4057 under the terms of this contract, resulting in whole or in part from the willful, negligent, or careless acts or

4058 omissions of the Contractor, its subcontractors, or any employee, agent, or representative of the  
4059 Contractor or its subcontractors.

4060  
4061 **H.25 OWNERSHIP OF DATA**

4062  
4063 During the course of this contract, the Contractor will create and maintain databases that are used in  
4064 support of processing inquiries, and contain information such as scripted responses, topical information  
4065 entries, business rules, preformatted responses, personal information, transaction histories, and agency  
4066 contacts. The Contractor may also capture and store certain inquiry data in Contractor-provided and/or  
4067 Government-provided databases. All of this information is the property of the Government. At the  
4068 conclusion of each task order issued under this contract, or upon termination of this contract, all  
4069 information resources developed in support of the task(s), including any databases or associated formats  
4070 or call tools, shall be turned over to the Government in their entirety. Should a task order terminate for  
4071 any reason, the Contractor shall arrange for the timely transfer of such data records to the Government.  
4072 The Contractor may not keep any information resources or paper or electronic copies of information  
4073 without the express written consent of the Contracting Officer's Technical Representative. If the  
4074 supporting software systems are not commercially available at that time, the Contractor shall sell or  
4075 license the software to the agency at a good faith mutually agreed upon price. Failure on the part of the  
4076 Contractor to negotiate such pricing in good faith, or to provide such software on demand shall be subject  
4077 to the Disputes clause of this contract.

4078  
4079 **H.26 NEWS RELEASES**

4080 News releases pertaining to task orders issued under this contract shall not be made by the Contractor  
4081 without the prior written approval of the ACO or his/her designee. A minimum of 48 hours' notice is  
4082 required to respond to Contractor requests for approval to release contract-related information to the news  
4083 media. The Contractor's request shall contain a copy of the specific information for which the Contractor  
4084 is seeking approval to release, and a description of the intended form of release.

4085  
4086 **H.27 ELECTRONIC ACCESS TO THE CONTRACT**

4087 The Contractor is hereby advised that, in compliance with the Freedom of Information Act, a redacted  
4088 version of the contract and all modifications thereto will be made available on the Internet.

4089  
4090 The Contractor shall submit both a redacted version and a non-redacted version of the contract to the  
4091 ACO within fifteen (15) business days after contract award. Each version shall be submitted in both  
4092 "Adobe .pdf" format and in "Microsoft Word" format. The redacted version shall be prepared in  
4093 accordance with Freedom of Information Act guidance and will be approved by the ACO before release.

4094  
4095 This process shall be repeated each time a modification to the contract is awarded.

4096  
4097 **H.28 MARKETING EFFORTS**

4098 The Contractor is responsible for ongoing marketing efforts during the life of this contract as specified  
4099 below. Such efforts will commence not later than thirty (30) calendar days after contract award, subject  
4100 to the following:

- 4101
- 4102 ○ All marketing brochures shall conform to the requirements of the GSAR 552.203-70 and be  
4103 approved by the ACO prior to issuance
  - 4104
  - 4105 ○ Contractors shall not assist prospective client agencies in the development of future requirements,  
4106 or provide preliminary estimates, except as provided for in an existing task order

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- Contractors shall not include marketing expenses as a direct cost item
- Approval for marketing by the Contractor does not obligate GSA to undertake, under this contract, any potential work identified

**H.28.1 Marketing Calls**

The Contractor shall prepare and give formal or informal presentations to prospective GSA clients on the contract when requested by the Government. These presentations will be consistent with materials previously reviewed and approved for use by GSA.

**H.28.2 Marketing Materials**

The Contractor shall provide marketing materials which will enhance program and service visibility. The types of marketing materials provided shall be at the discretion of the Contractor, and may include the following: brochures, pamphlets, visual aids, newsletters, technology updates, white papers, news releases, training tools and seminars, work tools and materials such as quick reference estimating/measuring tools, folders, pens, mouse pads, rolodex cards, and literature. The Contractor shall provide sample marketing materials prior to distribution. GSA will have ten (10) working days to review and approve materials.

**PART II****SECTION I - CONTRACT CLAUSES**

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**I.1 52.252-2 Clauses Incorporated by Reference (FEB 1998)**

4133 This contract incorporates the following clauses by reference, with the same force and effect as if they  
4134 were given in full text. Upon request, the Contracting Officer will make a copy of the full text available.  
4135 Also, the full text of a clause may be accessed electronically at this/these address(es):  
4136 <http://www.arnet.gov/far>.

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**I.1.1 FEDERAL ACQUISITION REGULATION (48 CFR, APR 1984) CLAUSES**

| <b><u>Clause No.</u></b> | <b><u>Clause Title</u></b>  | <b><u>Date</u></b> |
|--------------------------|---|--------------------|
| 52.202-01                | Definitions   | DEC 2001           |
| 52.203-03                | Gratuities  | APR 1984           |
| 52.203-05                | Covenant Against Contingent Fees  | APR 1984           |
| 52.203-06                | Restrictions on Subcontractor Sales to the Government   | SEP 2006           |
| 52.203-07                | Anti-Kickback Procedures  | JUL 1995           |
| 52.203-08                | Cancellations, Restrictions and Recovery of Funds for Illegal or Improper Activity                                      | JAN 1997           |
| 52.203-10                | Price or Fee Adjustment for Illegal or Improper Activity  | JAN 1997           |
| 52.203-12                | Limitation on Payments to Influence Certain Federal Transactions  | SEP 2005           |
| 52.204-04                | Printed or Copied Double-Sided on Recycled Paper  | AUG 2000           |
| 52.209-06                | Protecting the Government's Interest When Subcontracting with Contractors Debarred, Suspended or Proposed for Debarment | SEP 2006           |
| 52.215-02                | Audit and Records—Negotiation   | JUN 1999           |
| 52.215-08                | Order of Precedence—Uniform Contract Format   | OCT 1997           |
| 52.215-17                | Waiver of Facilities Capital Cost of Money  | OCT 1997           |
| 52-215-21                | Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data—Modifications                      | OCT 1997           |
| 52-216-18                | Ordering  | OCT 1995           |

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**FEDERAL ACQUISITION REGULATION CLAUSES, continued**

| <b><u>Clause No.</u></b> | <b><u>Clause Title</u></b>  | <b><u>Date</u></b> |
|--------------------------|---|--------------------|
| 52.216-19                | Order Limitations   | OCT 1995           |
| 52-216-22                | Indefinite Quantity   | OCT 1995           |
| 52.217-08                | Option to Extend Services   | NOV 1999           |
| 52.217-09                | Option to Extend the Term of the Contract   | MAR 2000           |
| 52.219-04                | Notice of Price Evaluation Preference for HUB Zone Small Business Concerns                                | JUL 2005           |
| 52.219-08                | Utilization of Small Business Concerns  | MAY 2004           |
| 52-219-09                | Small Business Subcontracting Plan (Alternate II (JAN 2002))  | SEP 2006           |
| 52.219-16                | Liquidated Damages—Subcontracting Plan  | JAN 1999           |
| 52.222-01                | Notice to the Government of Labor Disputes  | FEB 1997           |
| 52.222-03                | Convict Labor   | JUN 2003           |
| 52.222-04                | Contract Work Hours and Safety Standards Act—Overtime Compensation  | JUL 2005           |
| 52.222-21                | Prohibition of Segregated Facilities  | FEB 1999           |
| 52.222-26                | Equal Opportunity   | APR 2002           |
| 52.222-29                | Notification of Visa Denial   | JUN 2003           |
| 52.222-35                | Equal Opportunity for Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans | SEP 2006           |
| 52.222-36                | Affirmation action for Workers with Disabilities  | JUN 1998           |
| 52.222-37                | Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans | SEP 2006           |
| 52.222-41                | Service Contract Act of 1965, As Amended  | JUL 2005           |
| 52.222-43                | Fair Labor Standards Act and Service Contract Act—Price Adjustment (Multiple Year and Option Contracts)   | NOV 2006           |
| 52.222-49                | Service Contract Act—Place of Performance Unknown   | MAY 1989           |

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**FEDERAL ACQUISITION REGULATION CLAUSES, *continued***

| <b><u>Clause No.</u></b> | <b><u>Clause Title</u></b>   | <b><u>Date</u></b> |
|--------------------------|--|--------------------|
| 52.223-06                | Drug-Free Workplace  | MAY 2001           |
| 52.223-13                | Certification of Toxic Chemical Release Reporting                  | AUG 2003           |
| 52.223-14                | Toxic Chemical Release Reporting                                   | AUG 2003           |
| 52.224-01                | Privacy Act Notification   | APR 1984           |
| 52.224-02                | Privacy Act  | APR 1984           |
| 52.225-13                | Restrictions on Certain Foreign Purchases                          | FEB 2006           |
| 52.227-01                | Authorization and Consent  | JUL 1995           |
| 52.227-03                | Patent Indemnity   | APR 1984           |
| 52.227-14                | Rights in Data—General (Alternate II (JUN 1987))                   | JUN 1987           |
| 52.227-23                | Rights to Proposal Data (Technical)                                | JUN 1987           |
| 52.232-01                | Payments   | APR 1984           |
| 52.232-07                | Payments – Time-And-Materials and Labor-Hours Contracts            | FEB 2007           |
| 52.232-08                | Discounts for Prompt Payments                                      | FEB 2002           |
| 52.232-09                | Limitation on Withholding of Payments                              | APR 1984           |
| 52.232-11                | Extras   | APR 1984           |
| 52.232-17                | Interest   | JUN 1996           |
| 52.232-18                | Availability of Funds  | APR 1984           |
| 52.232-23                | Assignment of Claims   | JAN 1986           |
| 52.232-33                | Payment by Electric Funds Transfer—Central Contractor Registration | OCT 2003           |
| 52.232-37                | Multiple Payment Arrangements                                      | MAY 1999           |
| 52.233-01                | Disputes (Alternate I (DEC 1991))                                  | JUL 2002           |
| 52.233-02                | Service of Protest   | SEP 2006           |
| 52.233-03                | Protest after Award  | AUG 1996           |
| 52.233-04                | Applicable Law for Breach of Contract Claim                        | OCT 2004           |
| 52.234-02                | Notice of Earned Value Management System Pre-Award                 | JUL 2006           |

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**FEDERAL ACQUISITION REGULATION CLAUSES, *continued***

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| <b><u>Clause No.</u></b> | <b><u>Clause Title</u></b>   | <b><u>Date</u></b> |
|--------------------------|--|--------------------|
| 52.234-03                | Notice of Earned Value Management System                                 | JUL 2006           |
| 52.234-04                | Earned Value Management System   | JUL 2006           |
| 52.237-03                | Continuity of Services   | JAN 1991           |
| 52.239-01                | Privacy or Security Safeguards   | AUG 1996           |
| 52.242-13                | Bankruptcy   | JUL 1995           |
| 52.243-01                | Changes—Fixed Price (Alternate II (AUG 1987))                            | AUG 1987           |
| 52.243-03                | Changes – Time-and-Materials or Labor-Hour                               | SEP 2000           |
| 52.244-05                | Competition in Subcontracting  | DEC 1996           |
| 52.244-06                | Subcontracts for Commercial Items  | SEP 2006           |
| 52.245-01                | Property Records   | APR 1984           |
| 52.245-02                | Government Property (Fixed-Price Contracts)                              | MAY 2004           |
| 52.245-04                | Government-Furnished Property (Short Form)                               | JUN 2003           |
| 52.246-25                | Limitation of Liability—Services   | FEB 1997           |
| 52.248-01                | Value Engineering  | FEB 2000           |
| 52.249-01                | Termination for Convenience of the Government (Fixed-Price) (Short Form) | APR 1984           |
| 52.249-08                | Default (Fixed-Price Supply and Service)                                 | APR 1984           |
| 52.252-06                | Authorized Deviations in Clauses   | APR 1984           |
| 52.253-01                | Computer Generated Forms   | JAN 1991           |

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**I.1.2 GENERAL SERVICES ADMINISTRATION MANUAL (GSAM) CLAUSES**

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**52.222-42 STATEMENT OF EQUIVALENT RATES FOR FEDERAL HIRES (MAY 1989)**

4163 In compliance with the Service Contract Act of 1965, as amended, and the regulations of the Secretary of  
4164 Labor (29 CFR Part 4), this clause identifies the classes of service employees expected to be employed  
4165 under the contract and states the wages and fringe benefits payable to each if they were employed by the  
4166 contracting agency subject to the provisions of 5 U.S.C. 5341 or 5332.

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*This Statement is for Information Only: It is not a Wage Determination*

| Employee Class             | Monetary Wage-Fringe Benefits |                                  |
|----------------------------|-------------------------------|----------------------------------|
| Library Technician         | Wage Rate: \$13.72 / hr.      | Health and Welfare: \$3.16 / hr. |
| Order Clerk I              | Wage Rate: \$9.71 / hr.       | Health and Welfare: \$3.16 / hr. |
| Computer Operator III      | Wage Rate: \$20.69 / hr.      | Health and Welfare: \$3.16 / hr. |
| Computer Programmer II     | Wage Rate: \$26.11 / hr.      | Health and Welfare: \$3.16 / hr. |
| Computer Systems Analyst I | Wage Rate: \$27.62 / hr.      | Health and Welfare: \$3.16 / hr. |
| Technical Writer II        | Wage Rate: \$15.23 / hr.      | Health and Welfare: \$3.16 / hr. |

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**4171 552.203-71 RESTRICTION ON ADVERTISING (SEP 1999)**

4172 The Contractor shall not refer to this contract in commercial advertising or similar promotions in such a  
4173 manner as to state or imply that the product or service provided is endorsed or preferred by the White  
4174 House, the Executive Office of the President, or any other element of the Federal Government, or is  
4175 considered by these entities to be superior to other products or services. Any advertisement by the  
4176 Contractor, including price-off coupons, that refers to a military resale activity shall contain the following  
4177 statement:

4178 "This advertisement is neither paid for nor sponsored, in whole or in part, by any element  
4179 of the United States Government."  
4180

**4181 552.215-70 EXAMINATION OF RECORDS BY GSA (FEB 1996)**

4182 The Contractor agrees that the Administrator of General Services or any duly authorized representatives  
4183 shall, until the expiration of 3 years after final payment under this contract, or of the time periods for the  
4184 particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever  
4185 expires earlier, have access to and the right to examine any books, documents, papers, and records of the  
4186 Contractor involving transactions related to this contract or compliance with any clauses thereunder. The  
4187 Contractor further agrees to include in all its subcontracts hereunder a provision to the effect that the  
4188 subcontractor agrees that the Administrator of General Services or any authorized representatives shall,  
4189 until the expiration of 3 years after final payment under the subcontract, or of the time periods for the  
4190 particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever  
4191 expires earlier, have access to and the right to examine any books, documents, papers, and records of such  
4192 subcontractor involving transactions related to the subcontract or compliance with any clauses there  
4193 under. The term "subcontract" as used in this clause excludes (a) purchase orders not exceeding \$100,000  
4194 and (b) subcontracts or purchase orders for public utility services at rates established for uniform  
4195 applicability to the general public.

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**552.232-1 PAYMENTS (APR 1984) (DEVIATION, FAR 52.232-1)**

- (a) The Government shall pay the Contractor, without submission of invoices or vouchers, 30 days after the service period, the prices stipulated in this contract for supplies delivered and accepted or services rendered and accepted, less any deductions provided in this contract.
- (b) Unless otherwise specified in this contract, the Government will make payment on partial deliveries accepted by the Government if either:
  - (1) The amount due on the deliveries warrants it.
  - (2) The Contractor requests it and the amount due on the deliveries is at least \$1,000 or 50 percent of the total contract price.
- (c) When processing payment, GSA's Finance Office will automatically generate the 12 digit invoice number using the ACT number assigned to the contract, followed by an abbreviated month and year of service (e.g., 84261554JUN7, for June 1997). The ACT number appears on the contract award document.

**552.232-25 PROMPT PAYMENT (JUL 1998) (DEVIATION FAR 52.232-25)**

Notwithstanding any other payment clause in this contract, the Government will make invoice payments and contract financing payments under the terms and conditions specified in this clause. Payment shall be considered as being made on the day a check is dated or the date of an electronic funds transfer. Definitions of pertinent terms are set forth in section 32.902 of the Federal Acquisition Regulation. All days referred to in this clause are calendar days, unless otherwise specified. (However, see subparagraph (a)(4) of this clause concerning payments due on Saturdays, Sundays, and legal holidays.)

- (a) Invoice payments.
  - (1) The due date for making invoice payments by the designated payment office is:
    - (i) For orders placed electronically by the General Services Administration (GSA) Federal Supply Service (FSS), and to be paid by GSA through electronic funds transfer (EFT), the later of the following two events:
      - (A) The 10th day after the designated billing office receives a proper invoice from the Contractor. If the designated billing office fails to annotate the invoice with the date of receipt at the time of receipt, the invoice payment due date shall be the 10th day after the date of the Contractor's invoice; provided the Contractor submitted a proper invoice and no disagreement exists over quantity, quality, or Contractor compliance with contract requirements.
      - (B) The 10th day after Government acceptance of supplies delivered or services performed by the Contractor.
    - (ii) For all other orders, the later of the following two events:
      - (A) The 30th day after the designated billing office receives a proper invoice from the Contractor. If the designated billing office fails to annotate the invoice with the date of receipt at the time of receipt, the invoice payment due date shall be the 30th day after the date of the Contractor's invoice; provided the Contractor submitted a proper

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- 4236 invoice and no disagreement exists over quantity, quality, or Contractor compliance  
4237 with contract requirements.
- 4238 (B) The 30th day after Government acceptance of supplies delivered or services  
4239 performed by the Contractor.
- 4240 (iii) On a final invoice, if the payment amount is subject to contract settlement actions, acceptance  
4241 occurs on the effective date of the contract settlement.
- 4242 (2) The General Services Administration will issue payment on the due date in (a)(1)(i) above if the  
4243 Contractor complies with full cycle electronic commerce. Full cycle electronic commerce  
4244 includes all the following elements:
- 4245 (i) The Contractor must receive and fulfill electronic data interchange (EDI) purchase orders  
4246 (transaction set 850).
- 4247 (ii) The Contractor must generate and submit to the Government valid EDI invoices (transaction  
4248 set 810) or submit invoices through the GSA Finance Center Internet-based invoice process.  
4249 Internet-based invoices must be submitted using procedures provided by GSA.
- 4250 (iii) The Contractor's financial institution must receive and process, on behalf of the Contractor,  
4251 EFT payments through the Automated Clearing House (ACH) system.
- 4252 (iv) The EDI transaction sets in (i) through (iii) above must adhere to implementation conventions  
4253 provided by GSA.
- 4254 (3) If any of the conditions in (a)(2) above do not occur, the 10 day payment due dates in (a)(1)  
4255 become 30 day payment due dates.
- 4256 (4) Certain food products and other payments.
- 4257 (i) Due dates on Contractor invoices for meat, meat food products, or fish; perishable  
4258 agricultural commodities; and dairy products, edible fats or oils, and food products prepared  
4259 from edible fats or oils are—
- 4260 (A) For meat or meat food products, as defined in section 2(a)(3) of the Packers and  
4261 Stockyard Act of 1921 (7 U.S.C. 182(3)), and as further defined in Pub. L. 98-181,  
4262 including any edible fresh or frozen poultry meat, any perishable poultry meat food  
4263 product, fresh eggs, and any perishable egg product, as close as possible to, but not  
4264 later than, the 7th day after product delivery.
- 4265 (B) For fresh or frozen fish, as defined in section 204(3) of the Fish and Seafood  
4266 Promotion Act of 1986 (16 U.S.C. 4003(3)), as close as possible to, but not later than,  
4267 the 7th day after product delivery.
- 4268 (C) For perishable agricultural commodities, as defined in section 1(4) of the Perishable  
4269 Agricultural Commodities Act of 1930 (7 U.S.C. 499a(4)), as close as possible to, but  
4270 not later than, the 10th day after product delivery, unless another date is specified in  
4271 the contract.

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- 4272 (D) For dairy products, as defined in section 111(e) of the Dairy Production Stabilization  
4273 Act of 1983 (7 U.S.C. 4502(e)), edible fats or oils, and food products prepared from  
4274 edible fats or oils, as close as possible to, but not later than, the 10th day after the  
4275 date on which a proper invoice has been received. Liquid milk, cheese, certain  
4276 processed cheese products, butter, yogurt, ice cream, mayonnaise, salad dressings,  
4277 and other similar products, fall within this classification. Nothing in the Act limits  
4278 this classification to refrigerated products. When questions arise regarding the proper  
4279 classification of a specific product, prevailing industry practices will be followed in  
4280 specifying a contract payment due date. The burden of proof that a classification of a  
4281 specific product is, in fact, prevailing industry practice is upon the Contractor making  
4282 the representation.
- 4283 (ii) If the contract does not require submission of an invoice for payment (e.g., periodic lease  
4284 payments), the due date will be as specified in the contract.
- 4285 (5) Contractor's invoice. The Contractor shall prepare and submit invoices to the designated billing  
4286 office specified in the contract. Notwithstanding paragraph (g) of the clause at FAR 52.212-4,  
4287 Contract Terms and Conditions—Commercial Items, if the Contractor submits hard-copy  
4288 invoices, submit only an original invoice. No copies of the invoice are required. A proper invoice  
4289 must include the items listed in subdivisions (a)(5)(i) through (a)(5)(viii) of this clause. If the  
4290 invoice does not comply with these requirements, it shall be returned within 7 days after the date  
4291 the designated billing office received the invoice (3 days for meat, meat food products, or fish; 5  
4292 days for perishable agricultural commodities, edible fats or oils, and food products prepared from  
4293 edible fats or oils), with a statement of the reasons why it is not a proper invoice. Untimely  
4294 notification will be taken into account in computing any interest penalty owed the Contractor in  
4295 the manner described in subparagraph (a)(5) of this clause.
- 4296 (i) Name and address of the Contractor.
- 4297 (ii) Invoice date. (The Contractor is encouraged to date invoices as close as possible to the date of  
4298 the mailing or transmission.)
- 4299 (iii) Contract number or other authorization for supplies delivered or services performed  
4300 (including order number and contract line item number).
- 4301 (iv) Description, quantity, unit of measure, unit price, and extended price of supplies delivered or  
4302 services performed.
- 4303 (v) Shipping and payment terms (e.g., shipment number and date of shipment, prompt  
4304 payment discount terms). Bill of lading number and weight of shipment will be shown for  
4305 shipments on Government bills of lading.
- 4306 (vi) Name and address of Contractor official to whom payment is to be sent (must be the same  
4307 as that in the contract or in a proper notice of assignment).
- 4308 (vii) Name (where practicable), title, phone number, and mailing address of person to be  
4309 notified in the event of a defective invoice.
- 4310 (viii) Any other information or documentation required by the contract (such as evidence of  
4311 shipment).

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4312 (ix) While not required, the Contractor is strongly encouraged to assign an identification  
4313 number to each invoice.

4314 (6) Interest penalty. An interest penalty shall be paid automatically by the designated payment office,  
4315 without request from the Contractor, if payment is not made by the due date and the conditions  
4316 listed in subdivisions (a)(6)(i) through (a)(6)(iii) of this clause are met, if applicable. However,  
4317 when the due date falls on a Saturday, Sunday, or legal holiday when Federal Government offices  
4318 are closed and Government business is not expected to be conducted, payment may be made on  
4319 the following business day without incurring a late payment interest penalty.

4320 (i) A proper invoice was received by the designated billing office.

4321 (ii) A receiving report or other Government documentation authorizing payment was processed,  
4322 and there was no disagreement over quantity, quality, or Contractor compliance with any  
4323 contract term or condition.

4324 (iii) In the case of a final invoice for any balance of funds due the Contractor for supplies  
4325 delivered or services performed, the amount was not subject to further contract settlement  
4326 actions between the Government and the Contractor.

4327 (7) Computing penalty amount. The interest penalty shall be at the rate established by the Secretary  
4328 of the Treasury under section 12 of the Contract Disputes Act of 1978 (41 U.S.C. 611) that is in  
4329 effect on the day after the due date, except where the interest penalty is prescribed by other  
4330 Governmental authority (e.g., tariffs). This rate is referred to as the "Renegotiation Board Interest  
4331 Rate," and it is published in the Federal Register semiannually on or about January 1 and July 1.  
4332 The interest penalty shall accrue daily on the invoice principal payment amount approved by the  
4333 Government until the payment date of such approved principal amount; and will be compounded  
4334 in 30-day increments inclusive from the first day after the due date through the payment date.  
4335 That is, interest accrued at the end of any 30-day period will be added to the approved invoice  
4336 principal payment amount and will be subject to interest penalties if not paid in the succeeding  
4337 30-day period. If the designated billing office failed to notify the Contractor of a defective invoice  
4338 within the periods prescribed in subparagraph (a)(5) of this clause, the due date on the corrected  
4339 invoice will be adjusted by subtracting from such date the number of days taken beyond the  
4340 prescribed notification of defects period. Any interest penalty owed the Contractor will be based  
4341 on this adjusted due date. Adjustments will be made by the designated payment office for errors  
4342 in calculating interest penalties.

4343 (i) For the sole purpose of computing an interest penalty that might be due the Contractor,  
4344 Government acceptance shall be deemed to have occurred constructively on the 7th day  
4345 (unless otherwise specified in this contract) after the Contractor delivered the supplies or  
4346 performed the services in accordance with the terms and conditions of the contract, unless  
4347 there is a disagreement over quantity, quality, or Contractor compliance with a contract  
4348 provision. In the event that actual acceptance occurs within the constructive acceptance  
4349 period, the determination of an interest penalty shall be based on the actual date of  
4350 acceptance. The constructive acceptance requirement does not, however, compel Government  
4351 officials to accept supplies or services, perform contract administration functions, or make  
4352 payment prior to fulfilling their responsibilities.

4353 (ii) The following periods of time will not be included in the determination of an interest penalty:  
4354 (A) The period taken to notify the Contractor of defects in invoices submitted to the  
4355 Government, but this may not exceed 7 days (3 days for meat, meat food products,

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- 4356 or fish; 5 days for perishable agricultural commodities, dairy products, edible fats or  
4357 oils, and food products prepared from edible fats or oils).
- 4358 (B) The period between the defects notice and resubmission of the corrected invoice by  
4359 the Contractor.
- 4360 (C) For incorrect electronic funds transfer (EFT) information, in accordance with the  
4361 EFT clause of this contract.
- 4362 (iii) Interest penalties will not continue to accrue after the filing of a claim for such penalties  
4363 under the clause at 52.233-1, Disputes, or for more than 1 year. Interest penalties of less  
4364 than \$1 need not be paid.
- 4365 (iv) Interest penalties are not required on payment delays due to disagreement between the  
4366 Government and the Contractor over the payment amount or other issues involving contract  
4367 compliance or on amounts temporarily withheld or retained in accordance with the terms of  
4368 the contract. Claims involving disputes, and any interest that may be payable, will be resolved  
4369 in accordance with the clause at 52.233-1, Disputes.
- 4370 (8) Prompt payment discounts. An interest penalty also shall be paid automatically by the designated  
4371 payment office, without request from the Contractor, if a discount for prompt payment is taken  
4372 improperly. The interest penalty will be calculated as described in subparagraph (a)(7) of this  
4373 clause on the amount of discount taken for the period beginning with the first day after the end of  
4374 the discount period through the date when the Contractor is paid.
- 4375 (9) Additional interest penalty.
- 4376 (i) If this contract was awarded on or after October 1, 1989, a penalty amount, calculated in  
4377 accordance with subdivision (a)(9)(iii) of this clause, shall be paid in addition to the interest  
4378 penalty amount if the Contractor--
- 4379 (A) Is owed an interest penalty of \$1 or more;
- 4380 (B) Is not paid the interest penalty within 10 days after the date the invoice amount is  
4381 paid; and
- 4382 (C) Makes a written demand to the designated payment office for additional penalty  
4383 payment, in accordance with subdivision (a)(9)(ii) of this clause, postmarked not later  
4384 than 40 days after the invoice amount is paid.
- 4385 (ii) (A) Contractors shall support written demands for additional penalty payments with the  
4386 following data. No additional data shall be required. Contractors shall—
- 4387 (1) Specifically assert that late payment interest is due under a specific invoice, and  
4388 request payment of all overdue late payment interest penalty and such additional  
4389 penalty as may be required;
- 4390 (2) Attach a copy of the invoice on which the unpaid late payment interest was due;  
4391 and
- 4392 (3) State that payment of the principal has been received, including the date of  
4393 receipt.
- 4394 (B) Demands must be postmarked on or before the 40th day after payment was made,  
4395 except that--

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- 4396 (1) If the postmark is illegible or nonexistent, the demand must have been received  
4397 and annotated with the date of receipt by the designated payment office on or  
4398 before the 40th day after payment was made; or
- 4399 (2) If the postmark is illegible or nonexistent and the designated payment office fails  
4400 to make the required annotation, the demand's validity will be determined by the  
4401 date the Contractor has placed on the demand; provided such date is no later than  
4402 the 40th day after payment was made.
- 4403 (iii) (A) The additional penalty shall be equal to 100 percent of any original late payment  
4404 interest penalty, except--
- 4405 (1) The additional penalty shall not exceed \$5,000;
- 4406 (2) The additional penalty shall never be less than \$25; and
- 4407 (3) No additional penalty is owed if the amount of the underlying interest penalty is  
4408 less than \$1.
- 4409 (B) If the interest penalty ceases to accrue in accordance with the limits stated in  
4410 subdivision (a)(5)(iii) of this clause, the amount of the additional penalty shall be  
4411 calculated on the amount of interest penalty that would have accrued in the absence  
4412 of these limits, subject to the overall limits on the additional penalty specified in  
4413 subdivision (a)(7)(iii)(A) of this clause.
- 4414 (C) For determining the maximum and minimum additional penalties, the test shall be the  
4415 interest penalty due on each separate payment made for each separate contract. The  
4416 maximum and minimum additional penalty shall not be based upon individual  
4417 invoices unless the invoices are paid separately. Where payments are consolidated for  
4418 disbursing purposes, the maximum and minimum additional penalty determination  
4419 shall be made separately for each contract therein.
- 4420 (D) The additional penalty does not apply to payments regulated by other Government  
4421 regulations (e.g., payments under utility contracts subject to tariffs and regulation).
- 4422 (b) Contract financing payments.
- 4423 (1) Due dates for recurring financing payments. If this contract provides for contract financing,  
4424 requests for payment shall be submitted to the designated billing office as specified in this  
4425 contract or as directed by the Contracting Officer. Contract financing payments shall be made  
4426 on the *[insert day as prescribed by Agency head; if not prescribed, insert 30th day]* day after  
4427 receipt of a proper contract financing request by the designated billing office. In the event that  
4428 an audit or other review of a specific financing request is required to ensure compliance with the  
4429 terms and conditions of the contract, the designated payment office is not compelled to make  
4430 payment by the due date specified.
- 4431 (2) Due dates for other contract financing. For advance payments, loans, or other arrangements  
4432 that do not involve recurring submissions of contract financing requests, payment shall be made  
4433 in accordance with the corresponding contract terms or as directed by the Contracting Officer.
- 4434 (3) Interest penalty not applicable. Contract financing payments shall not be assessed an interest  
4435 penalty for payment delays.
- 4436 (c) Fast payment procedure due dates. If this contract contains the clause at 52.213-1, Fast Payment  
4437 Procedure, payments will be made within 15 days after the date of receipt of the invoice.
- 4438

4439 **552.232-70 INVOICE REQUIREMENTS (SEP 1999)**

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4440 (a) Invoices shall be submitted in an original only, unless otherwise specified, to the designated billing  
4441 office specified in this contract or order.

4442 (b) Invoices must include the Accounting Control Transaction (ACT) number provided below or on the  
4443 order.

4444 ACT Number (*To be provided on each, individual Task Order*)

4445 (c) In addition to the requirements for a proper invoice specified in the Prompt Payment clause of this  
4446 contract or order, the following information or documentation must be submitted with each invoice:

4447 (*As may be required on individual Task Orders*).

4448

4449 **552.232-78 PAYMENT INFORMATION (JUL 2000)**

4450 The General Services Administration (GSA) makes information on contract payments available  
4451 electronically at <http://www.finance.gsa.gov>. The Contractor may register at the site and review its record  
4452 of payments. This site provides information only on payments made by GSA, not by other agencies.

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4454 **552.252-6 AUTHORIZED DEVIATIONS IN CLAUSES (DEVIATION FAR 52.252-6) (SEP 1999)**

4455 (a) Deviations to FAR clauses.

4456 (1) This solicitation or contract indicates any authorized deviation to a Federal Acquisition  
4457 Regulation (48 CFR Chapter 1) clause by the addition of “(DEVIATION)” after the date of  
4458 the clause, if the clause is not published in the General Services Administration Acquisition  
4459 Regulation (48 CFR Chapter 5).

4460 (2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation  
4461 (FAR) clause that is published in the General Services Administration Acquisition Regulation  
4462 by the addition of “(DEVIATION [FAR clause no.] )” after the date of the clause.

4463 (b) Deviations to GSAR clauses. This solicitation indicates any authorized deviation to a General  
4464 Services Administration Acquisition Regulation clause by the addition of “(DEVIATION)” after the  
4465 date of the clause.

4466 (c) “Substantially the same as clauses.” Changes in wording of clauses prescribed for use on a  
4467 “substantially the same as” basis are not considered deviations.

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**PART III – LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS**

**SECTION J –LIST OF ATTACHMENTS**

**ATTACHMENT 1: PAST PERFORMANCE SURVEY QUESTIONNAIRE**

Offerors shall forward the attached Past Performance Survey Questionnaire to customers(s) whom they have selected to complete the survey of their past performance. The offeror is responsible for communicating to the selected customer(s) the need to address the experience factors identified in Section L.7.2.1.3.1 in completing the questionnaire.

The offeror shall inform the selected customer(s) that the completed questionnaire must be received by the addressee listed on the questionnaire *no later than the proposal due date set forth in Standard Form 33, Solicitation, Offeror and Award.*

**ATTACHMENT 2: SMALL BUSINESS PLAN OUTLINE (MODEL)**

All offerors that do not qualify as small business under the North American Industry Classification System code 519190 shall submit, as part of their Business Proposal a Small Business Subcontracting Plan, using the model provided in this attachment.

If assistance is required in developing a source list of firms for any of the sub-categories please contact the following:

General Services Administration  
Office of Small Business Utilization  
1800 F Street, NW  
Washington, D.C. 20405

Telephone: (202) 501-1021

**ATTACHMENT 3: TECHNICAL PROPOSAL INDEX**

Offerors shall use the outline in Attachment 3 in preparing a proposal index referencing the page and paragraph numbers that contain their response on an item by item basis to all requirements of this solicitation.

**ATTACHMENT 4: ANSWERS TO QUESTIONS ON SOLICITATION GSV07PD0003**

The information contained in this attachment is provided as a historical reference to the evolution of this solicitation. The questions and answers provided were issued as amendments to Solicitation GSV07PD0003 as a result of questions raised by the vendor community on that solicitation. Where applicable, Solicitation GSV07PD0003 was amended to address issues raised by these questions. All of these changes have been incorporated into the new solicitation.





*Past Performance Questionnaire (page 2 of 4)*

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Performance Evaluation: On a scale of 1 to 5, with a rating of 3 being satisfactory and 5 being the highest attainable score and 1 being the lowest, please assign a rating to the Contractor’s project performance on each of the following elements. Provide a brief narrative to support any rating above or below 3.

| Performance Element   | Performance Rating (1-5) | Comments |
|---|--------------------------|----------|
| 1. Quality and timeliness of service                                |                          |          |
| 2. Ability to meet performance goals                                |                          |          |
| 3. Ability to manage content and keep data current                  |                          |          |
| 4. Accuracy, completeness, and timeliness of reports                |                          |          |
| 5. Competency of personnel employed                                 |                          |          |
| 6. Effectiveness of recruitment and employee retention program      |                          |          |
| 7. Effectiveness of training program                                |                          |          |
| 8. Ability to respond quickly in crisis or high priority situations |                          |          |



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*Past Performance Questionnaire (page 3 of 4)*

| Performance Element  | Performance Rating (1-5) | Comments |
|--|--------------------------|----------|
| 9. Ability to respond to work volume fluctuations                            |                          |          |
| 10. Speed of trouble and complaint resolution                                |                          |          |
| 11. Effectiveness of quality assurance and quality improvement programs      |                          |          |
| 12. Knowledge of Federal Information Systems Security Requirements           |                          |          |
| 13. Flexibility and responsiveness to accommodate changes                    |                          |          |
| 14. Adherence to industry best practices                                     |                          |          |
| 16. Effectiveness of management team, including management of subcontractors |                          |          |
| 17. Ability to identify and solve problems with minimal oversight            |                          |          |



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*Past Performance Questionnaire (page 4 of 4)*

| Performance Element  | Performance Rating (1-5) | Comments     |
|--|--------------------------|--------------|
| 18. Ability to display initiative in identifying and providing solutions |                          |              |
| 19. Overall customer satisfaction  |                          |              |
| <b>Signature:</b>  |                          | <b>Date:</b> |

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Survey Questionnaire Submission Instructions:

Please submit the completed Past Performance Survey Questionnaire to:

**General Services Administration**  
Office of Chief Acquisition Officer  
Operational Contracting Staff (VC)  
1800 F Street NW, Room G127  
Washington DC 20405

Attention: Robert H. Corey  
Contracting Officer

*Note:* Please mark the outside of the transmittal envelop with the following legend in red ink:

Solicitation GSV07PD0003 – Past Performance Survey Questionnaire  
Time Sensitive Information: Please Deliver As Soon As Possible



**Attachment 2: Small Business Subcontracting Plan Outline (Model)**

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***PLEASE NOTE:*** This model is provided as a tool. It does not establish minimum requirements for an acceptable plan. The model reflects objectives GSA encourages contractors to adopt. GSA expects offerors to thoroughly review the requirements set forth in FAR 19.704, Subcontracting plan requirements, and FAR clause 52.219-9, Small Business Subcontracting Plan, before submitting their contracting plans.

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The model is not intended to replace any existing corporate plan which is more extensive. If you need assistance to locate small business sources, contact the General Services Administration’s Office of Small Business Utilization on (202) 501-1021.

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**Identification Data:**

4564

Company Name: \_\_\_\_\_

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Address: \_\_\_\_\_

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Type of Plan: \_\_\_\_\_

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Date Prepared: \_\_\_\_\_ Solicitation Number: \_\_\_\_\_

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Item/Service: \_\_\_\_\_

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Period of Plan: \_\_\_\_\_

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**TYPE OF PLAN: (Check only one)**

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\_\_\_\_\_ **INDIVIDUAL PLAN:** In this type of plan, all elements are developed specifically for this contract and apply for the full term of this contract

\_\_\_\_\_ **MASTER PLAN:** In this type of plan, goals are separately developed for this contract in an individual plan; all other elements are standard. The master plan must be approved once every three years. Once incorporated into a contract with specific goals, it is valid for the life of the contract.

\_\_\_\_\_ **COMMERCIAL PLAN:** This type of plan is used when the contractor sells large quantities of off-the-shelf commodities to many Government agencies. Plans and goals are negotiated with the initial agency on a company-wide basis rather than for individual contracts. The plan is effective only during year approved. The contractor must provide a copy of the initial agency approval, and must submit an annual SF 295 to GSA with a breakout of subcontracting prorated for GSA Contractors must submit a new commercial plan on an annual basis. The subcontracting plan must be submitted at least 30 days prior to the expiration date of the currently in effect subcontracting plan.

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**I. GOALS ((percentage and dollars)**

State separate dollar and percentage goals for small business, HUBZone small, small disadvantaged business, women-owned small, veteran-owned-small, and service-disabled veteran-owned small business in the following format. For individual plans, goals for each option must be provided. Express all dollar goals as a percentage of total planned subcontracting dollars.

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a. Estimated dollar value of all planned subcontracting, i.e., to all types of business concerns under this contract is:

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| <i>Estimated Dollar Value of All Planned Subcontracting</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|---|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                                  | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$  | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| 100 percent   | 100 percent             | 100 percent             | 100 percent             | 100 percent             | 100 percent              | 100 percent              | 100 percent              | 100 percent              | 100 percent              |

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b. Estimated dollar value and percentage of total planned subcontracting to large business concerns (all business concerns classified as other than small):

| <i>Subcontracting to Large Business Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|--|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                       | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$   | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __ percent                                       | __ percent              | __ percent              | __ percent              | __ percent              | __ percent               | __ percent               | __ percent               | __ percent               | __ percent               |

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c. Estimated dollar value and percentage of total planned subcontracting to small business concerns is: (Include HUBZone Small, Small Disadvantaged, Women-owned Small, Veteran-Owned Small, and Service-Disabled Veteran-Owned Small Business)

| <i>Subcontracting to Small Business Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|--|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                       | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$   | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __ percent                                       | __ percent              | __ percent              | __ percent              | __ percent              | __ percent               | __ percent               | __ percent               | __ percent               | __ percent               |

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d. Estimated dollar value and percentage of total planned subcontracting to HUBZone small business concerns is:

| <i>Subcontracting to HUBZone Small Business Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|--|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                               | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$   | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __ percent   | __ percent              | __ percent              | __ percent              | __ percent              | __ percent               | __ percent               | __ percent               | __ percent               | __ percent               |

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e. Estimated dollar value and percentage of total planned subcontracting to small disadvantaged business concerns is:

| <i>Subcontracting to Small-Disadvantaged Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|---|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                            | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$  | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __ percent  | __ percent              | __ percent              | __ percent              | __ percent              | __ percent               | __ percent               | __ percent               | __ percent               | __ percent               |

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4602 f. Estimated dollar value and percentage of total planned subcontracting to women-owned small  
 4603 business concerns is:  
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| <i>Subcontracting to Women-Owned Small Business Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|--|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                                   | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$   | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __percent  | __percent               | __percent               | __percent               | __percent               | __percent                | __percent                | __percent                | __percent                | __percent                |

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 4606 g. Estimated dollar value and percentage of total planned subcontracting to veteran-owned small  
 4607 business concerns is:  
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| <i>Subcontracting to Veteran-Owned Small Business Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|--|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)                                     | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$   | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __percent  | __percent               | __percent               | __percent               | __percent               | __percent                | __percent                | __percent                | __percent                | __percent                |

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 4610 h. Estimated dollar value and percentage of total planned subcontracting service-disabled veteran-owned  
 4611 small business concerns is:  
 4612

| <i>Subcontracting to Service-Disabled, Veteran-Owned Small Business Concerns</i> |                         |                         |                         |                         |                          |                          |                          |                          |                          |
|--|-------------------------|-------------------------|-------------------------|-------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Base Period<br>(Two Years)   | Option 1<br>(Two Years) | Option 2<br>(Two Years) | Option 3<br>(Two Years) | Option 4<br>(Two Years) | Extended 1<br>(One Year) | Extended 2<br>(One Year) | Extended 3<br>(One Year) | Extended 4<br>(One Year) | Extended 5<br>(One Year) |
| \$   | \$                      | \$                      | \$                      | \$                      | \$                       | \$                       | \$                       | \$                       | \$                       |
| __percent  | __percent               | __percent               | __percent               | __percent               | __percent                | __percent                | __percent                | __percent                | __percent                |

4613  
 4614  
 4615 **II PRODUCTS AND/OR SERVICES TO BE SUBCONTRACTED UNDER THIS CONTRACT, AND THE**  
 4616 **TYPES OF BUSINESSES SUPPLYING THEM, ARE: (Check all that apply).**  
 4617

| <i>Business Category or Size</i> |       |       |       |           |     |      |      |        |
|----------------------------------|-------|-------|-------|-----------|-----|------|------|--------|
| Product Service                  | NAICS | Large | Small | HUB Small | SDB | WOSB | VOSB | SDVOSB |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |
|                                  |       |       |       |           |     |      |      |        |

4618 (Attach additional sheets if necessary.)

4619 **III DESCRIPTION OF METHOD USED TO DEVELOP THE SUBCONTRACTING GOALS AND**  
4620 **DESCRIPTION OF THE METHOD USED TO IDENTIFY POTENTIAL SOURCES**

- 4621
- 4622 a. Explain the methods used to develop the subcontracting goals for small, HUBZone small, small  
4623 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small  
4624 business concerns.
- 4625
- 4626 b. Explain how the product and service areas to be subcontracted were established, how the areas to be  
4627 subcontracted to small, HUBZone small, small disadvantaged, women-owned small, small-veteran-owned  
4628 small, and service-disabled veteran-owned small business concerns were determined.
- 4629
- 4630 c. How the capabilities of small, HUBZone small, small disadvantaged, women-owned small, veteran-  
4631 owned small, and service-disabled, veteran-owned small business concerns were determined.
- 4632
- 4633 d. Identify all source lists used in the determination process.
- 4634

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4637

4638 **IV STATEMENT OF INDIRECT AND OVERHEAD COSTS**

4639

- 4640 a. Indirect and overhead costs \_\_\_ *HAVE BEEN* or \_\_\_ *HAVE NOT BEEN* included in the dollar and  
4641 percentage subcontracting goals stated above. (Check one.)
- 4642
- 4643 b. If indirect and overhead costs *HAVE BEEN* included, explain the method used to determine the  
4644 proportionate share of such costs to be allocated as subcontracts to small, HUBZone small, small  
4645 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small  
4646 business concerns.
- 4647

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4650

4651 **V PROGRAM ADMINISTRATOR**

4652

4653 FAR 52.219-9(d)(7) requires information about the company employee who will administer the  
4654 subcontracting program. Please provide the name, title, address, phone number, position within the  
4655 corporate structure and the duties of that employee.

**Request for Proposal GSV07PD0007**

4656 Name: \_\_\_\_\_

4657 Title: \_\_\_\_\_

4658 Address: \_\_\_\_\_

4659 Telephone: \_\_\_\_\_

4660 E-mail \_\_\_\_\_ Address: \_\_\_\_\_

4661 \_\_\_\_\_

4662 Facsimile Number: \_\_\_\_\_

4663

4664 *Duties:* The Program Administrator’s general overall responsibility for the Contractor’s subcontracting  
4665 program, i.e., developing, preparing, and executing individual subcontracting plans and monitoring  
4666 performance relative to this particular plan. These duties may include, but are not limited to the following  
4667 activities.

4668

4669 a. Developing and promoting company/division policy statements that demonstrate the  
4670 company’s/division’s support for awarding contracts and subcontracts to small, HUBZone small, small  
4671 disadvantaged, and women-owned small business concerns.

4672

4673 b. Developing and maintaining bidders’ lists of small, HUBZone small, small disadvantaged, women-  
4674 owned small, veteran-owned small, and service-disabled veteran-owned small business concerns from all  
4675 possible sources.

4676

4677 c. Ensuring periodic rotation of potential subcontractors on bidders’ lists.

4678

4679 d. Assuring that small, HUBZone small, small disadvantaged, women-owned small, veteran-owned-  
4680 small, and service-disabled veteran-owned small business concerns are included on the bidders' list for  
4681 every subcontract solicitation for products and services they are capable of providing.

4682

4683 e. Ensuring that subcontract procurement “packages” are designed to permit the maximum possible  
4684 participation of small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small,  
4685 and service-disabled veteran-owned small business concerns.

4686

4687 f. Reviewing subcontract solicitations to remove statements, clauses, etc., which might tend to restrict  
4688 or prohibit small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and  
4689 service-disabled veteran-owned small business participation.

4690

4691 g. Ensuring that the subcontract bid proposal review board documents its reasons for not selecting any  
4692 low bids submitted by small, HUBZone small, small disadvantaged, women-owned small, veteran-owned  
4693 small, and service-disabled veteran-owned small business concerns.

4694

4695 h. Overseeing the establishment and maintenance of contract and subcontract award records.

4696

4697 i. Attending or arranging for the attendance of company counselors at Business Opportunity  
4698 Workshops, Minority Business Enterprise Seminars, Trade Fairs, etc.

4699

4700 j. Directly or indirectly counseling small, HUBZone small, small disadvantaged, women-owned small,  
4701 veteran-owned small, and service-disabled veteran-owned small business concerns on subcontracting  
4702 opportunities and how to prepare bids to the company

4703

**Request for Proposal GSV07PD0007**

4704 k. Providing notice to subcontractors concerning penalties for misrepresentations of business status as  
4705 small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, or service-  
4706 disabled veteran-owned small business for the purpose of obtaining a subcontract that is to be included as  
4707 part or all of a goal contained in the contractor's subcontracting plan.  
4708

4709 l. Conducting or arranging training for purchasing personnel regarding the intent and impact of Public  
4710 Law 95-907 on purchasing procedures.  
4711

4712 m. Developing and maintaining an incentive program for buyers which support the subcontracting  
4713 program.  
4714

4715 n. Monitoring the company's performance and making any adjustments necessary to achieve the  
4716 subcontract plan goals.  
4717

4718 o. Preparing and submitting timely reports.  
4719

4720 p. Coordinating the company's activities during compliance reviews by Federal agencies.  
4721

4722

4723 **VI EQUITABLE OPPORTUNITY**

4724

4725 FAR 52.219-9(d)(8) requires a description of the efforts your company will make to ensure that small,  
4726 HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled  
4727 veteran-owned small business concerns will have an equitable opportunity to compete for subcontracts.  
4728 These efforts may include, but are not limited to the following activities:  
4729

4730

a. Outreach efforts to obtain sources:

\_\_\_\_\_ Contacting minority and small business trade associations

\_\_\_\_\_ Contacting business development organizations

\_\_\_\_\_ Requesting sources from the CCR website at <http://www.ccr.gov/> "Dynamic Small Business Search"

\_\_\_\_\_ Attending small, minority, and women-owned business procurement conferences and trade fairs

4731

4732 b. Internal efforts to guide and encourage purchasing personnel:

\_\_\_\_\_ Presenting workshops, seminars and training programs

\_\_\_\_\_ Establishing, maintaining and using small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business source lists, guides and other data for soliciting subcontracts

\_\_\_\_\_ Monitoring activities to evaluate compliance with the subcontracting plan

4733

4734 c. Additional efforts: (Please describe.)

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**Request for Proposal GSV07PD0007**

4736 **VII CLAUSE INCLUSION AND FLOWDOWN**

4737  
4738 FAR 52.219-9(d)(9) requires that your company provide assurances that it will include the clause at  
4739 FAR 52.219-8, "Utilization of Small Business Concerns," in all subcontracts that offer further  
4740 subcontracting opportunities.

4741  
4742 FAR 52.219-9(d)(9) also requires that your company agrees in this plan that it will require all  
4743 subcontractors, except small business concerns, that receive subcontracts in excess of \$500,000  
4744 (\$1,000,000 for construction) to adopt a plan complies with the requirements of FAR 52.219-9, "Small  
4745 Business Subcontracting Plan."

4746  
4747 *[Insert company name]* agrees that the clause will be included and that the plans will be  
4748 reviewed against the minimum requirements for such plans. The acceptability of percentage  
4749 goals for small, HUBZone small, small disadvantaged, women-owned small, veteran-owned  
4750 small, and service-disabled veteran-owned small business concerns must be determined on a  
4751 case-by-case basis depending on the supplies and services involved, the availability of potential  
4752 small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and  
4753 service-disabled veteran-owned small business subcontractors and prior experience. Once the  
4754 plans are negotiated, approved, and implemented, the plans must be monitored through the  
4755 submission of periodic reports, including Standard Form (SF) 294 and SF 295 reports.

4756  
4757 In accordance with policy letters published by the Office of Federal Procurement Policy, such  
4758 assurance must describe the offer's procedures for the review, approval and monitoring for  
4759 compliance with such subcontracting plans.

4760  
4761  
4762 **VIII REPORTING AND COOPERATION**

4763  
4764 *FAR 52.219-9(d)(10) requires that your company (1) cooperate in any studies or surveys as may be*  
4765 *required, (2) submit periodic reports which show compliance with the subcontracting plan; (3) submit*  
4766 *Standard Form (SF) 294, "Subcontracting Reports for Individual Contracts," and SF 295,*

4767  
4768 *"Summary Subcontract Report," in accordance with the instructions on the forms; and (4) ensure that*  
4769 *subcontractors agree to submit SF 294 and SF 295.*

4770  
4771 *Both the Associate Administrator for the Office of Small Business Utilization and the Small Business*  
4772 *Technical Advisor must receive the report(s) within 30 days after the close of each calendar period. That*  
4773 *is:*

| Calendar Period | Report Due | Date Due | Send Report To   |
|-----------------|------------|----------|--|
| 10/01-03/31     | SF 294     | 04/30    | Contracting Officer/Small Business Technical Advisor                                 |
| 04/01-09/30     | SF 294     | 10/30    | Contracting Officer/Small Business Technical Advisor                                 |
| 10/01-09/30     | SF 295*    | 10/30    | Contracting Officer/Associate Administrator for Office of Small Business Utilization |

4774  
4775 SF 295 Must be submitted to SBA's Commercial Market Representative

|  |  |
|--|--|
| Small Business Technical Advisor address is:<br>(To be completed by Contracting Officer) | Associate Administrator for Office of Small Business Utilization<br>address is: (To be completed by Contracting Officer) |
|--|--|

4776 **IX RECORDKEEPING**

4777

4778 FAR 52.219-9(d)(11) requires a list of the types of records your company will maintain to demonstrate  
4779 the procedures adopted to comply with the requirements and goals in the subcontracting plan. These  
4780 records include, but are not limited to, the following:

4781

4782 a. Small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and  
4783 service-disabled veteran-owned small business concern source lists, guides, and other data identifying  
4784 such vendors.

4785

4786 b. Organizations contacted for small, HUBZone small, small disadvantaged, women-owned small,  
4787 veteran-owned-small, and service-disabled veteran-owned small business sources

4788

4789 c. On a contract-by-contract basis, records on all subcontract solicitations over \$100,000 which indicate  
4790 for each solicitation:

4791

4792 o Whether small business concerns were solicited, and if not, why not.

4793

o Whether HUBZone small business concerns were solicited, and if not, why not.

4794

o Whether small disadvantaged business concerns were solicited, and if not, why not.

4795

o Whether women-owned small business concerns were solicited, and if not, why not.

4796

o Whether veteran-owned small business concerns were solicited, and if not, why not.

4797

o Whether service-disabled veteran-owned small business concerns were solicited, and if not,  
4798 why not.

4799

o Reasons for the failure of solicited small, small disadvantaged, women-owned small business,  
4800 veteran-owned small business, service-disabled veteran-owned small business, and HUBZone  
4801 small business concerns to receive the subcontract award.

4802

4803 d. Records to support other outreach efforts, e.g., contacts with minority and small business trade  
4804 associations, attendance at small, HUBZone small, minority, women-owned small, veteran-owned small,  
4805 and service-disabled veteran-owned small business procurement conferences and trade fairs.

4806

4807 e. Records to support internal activities to (1) guide and encourage purchasing personnel,  
4808 e.g., workshops, seminars, training programs, incentive awards; and (2) monitor activities to evaluate  
4809 compliance.

4810

4811 f. On a contract-by-contract basis, records to support subcontract award data including the name,  
4812 address and business size of each subcontractor. (This item is not required for company or division-wide  
4813 commercial plans).

4814

4815 g. Other records to support your compliance with the subcontracting plan: (Please describe)

4816

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**Request for Proposal GSV07PD0007**

4817 **X TIMELY PAYMENTS TO SUBCONTRACTORS**

4818  
4819 FAR 52.219-8(a) requires your company to establish and use procedures to ensure the timely payment of  
4820 amounts due pursuant to the terms of your subcontracts with small, HUBZone small, small  
4821 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small  
4822 business concerns.

4823  
4824 [Insert company name] has established and uses such procedures:

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4825  
4826  
4827 **XI DESCRIPTION OF GOOD FAITH EFFORT**

4828  
4829 Maximum practicable utilization of small, HUBZone small, small disadvantaged, women-owned small,  
4830 veteran-owned small, and service-disabled veteran-owned small business concerns as subcontractors in  
4831 Government contracts is a matter of national interest with both social and economic benefits. When a  
4832 contractor fails to make a good faith effort to comply with a subcontracting plan, these objectives are not  
4833 achieved, and 15 U.S.C. 637(d)(4)(F) directs that the contractor must pay liquidated damages. In order to  
4834 demonstrate your compliance with a good faith effort to achieve the small, HUBZone small, small  
4835 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small  
4836 business subcontracting goals, outline the steps your company plans to take. These steps will be  
4837 negotiated with the contracting officer prior to approval of the plan.

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4839  
4840 *The offeror is advised that submission of the subcontracting plan and Standard Form 294 and/or*  
4841 *Standard Form 295 will be made a material part of the contract.*

4842  
4843  
4844 **XII SIGNATURES REQUIRED**

This subcontracting plan was submitted by: This subcontracting plan was accepted by:

|                    |                                   |
|--------------------|-----------------------------------|
| <u>Signature:</u>  | <u>Signature:</u>                 |
| <u>Typed Name:</u> | <u>Typed Name:</u>                |
| <u>Title:</u>      | <u>Title:</u> Contracting Officer |
| <u>Date:</u>       | <u>Date:</u>                      |

4846

### Attachment 3: Technical Proposal Index

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Offerors are required to submit, as part of their Technical Proposal, an Index referencing the page and paragraph numbers that contain their response/methodology/narrative, on an item by item basis to all requirements of this solicitation. Offerors shall complete Attachment 3 provided below by inserting a reference in the "Contractor Proposal Reference" column which indicates the section or page reference number from the offeror's proposal that describes its solution or approach for meeting the stated requirement. Offerors shall include a completed copy of Attachment 3 as part of their proposal submission package.

#### *Attachment 3: Technical Proposal Index*

| RFP Reference | Requirement                         | Contractor Proposal Reference |
|---------------|-------------------------------------|-------------------------------|
| L.7.2.1.2     | Executive Summary                   |                               |
| L.7.2.1.3     | Experience                          |                               |
| L.7.2.1.3.1   | Minimum Required Experience         |                               |
| L.7.2.1.3.2   | Documentation of Experience         |                               |
| L.7.2.1.4     | Past Performance                    |                               |
| L.7.2.1.5     | Technical Approach                  |                               |
| L.7.2.1.5.1   | Services to be Provided             |                               |
| C.3.1         | Automated Services                  |                               |
| C.3.1.1       | Automated Voice Response Services   |                               |
| C.3.1.2       | Facsimile Services                  |                               |
| C.3.1.3       | Voice Mail Service                  |                               |
| C.3.1.4       | Automated Callback (Telephone)      |                               |
| C.3.1.5       | Web Callback                        |                               |
| C.3.1.6       | Automated Outbound Dialing Campaign |                               |
| C.3.1.7       | Automated Facsimile Delivery        |                               |
| C.3.1.8       | Automated E-mail Delivery           |                               |
| C.3.1.9       | Hosted On-Line Ordering             |                               |
| C.3.1.10      | Hosted E-Mail Web Form              |                               |
| C.3.1.11      | Hosted FAQ Service                  |                               |
| C.3.2         | Attended Services                   |                               |
| C.3.2.1       | Responding to Telephone Inquiries   |                               |
| C.3.2.2       | Outbound Calling Services           |                               |
| C.3.2.3       | Responding to Postal Mail Inquiries |                               |
| C.3.2.4       | Responding to E-Mail Inquiries      |                               |
| C.3.2.5       | Responding to Facsimile Inquiries   |                               |
| C.3.2.6       | Interactive Web Services            |                               |
| C.3.3         | Other Support Services              |                               |
| C.3.3.1       | Fulfillment Services                |                               |
| C.3.3.2       | Transcription Service               |                               |
| C.3.3.3       | Language Translation Service        |                               |
| C.3.4         | Directory Listing Services          |                               |
| C.3.5         | Technical and Management Services   |                               |
| C.3.5.1       | Core Project Management Support     |                               |
| C.3.5.2       | Site Management                     |                               |
| C.3.5.3       | Program Management                  |                               |
| C.3.5.4       | Technology Management               |                               |

**Request for Proposal GSV07PD0007**

***Attachment 3: Technical Proposal Index***

| RFP Reference | Requirement   | Contractor Proposal Reference |
|---------------|---|-------------------------------|
| L.7.2.1.7     | Security Plan   |                               |
| C.3.5.5       | Information Systems Security                          |                               |
| C.3.5.5.1     | Personnel Security                                    |                               |
| C.3.5.5.2     | Information and Telecommunications Systems Security   |                               |
| C.3.5.5.3     | Facility Security                                     |                               |
| L.7.2.1.5.3   | Contingency/Disaster Recovery Planning                |                               |
| C.3.5.5.4     | Contingency/Disaster Recovery                         |                               |
| C.3.5.6       | Content and Knowledge Management                      |                               |
| C.3.5.7       | Contact/Case Management                               |                               |
| C.3.5.8       | Relationship Management                               |                               |
| C.3.5.9       | Customer Satisfaction Assessments                     |                               |
| C.3.6         | Special Project Support                               |                               |
| C.4           | Staff to be Provided                                  |                               |
| C.4.1         | Key Personnel   |                               |
| C.4.2         | Support Staff   |                               |
| C.4.3         | Information Specialist                                |                               |
| L.7.2.1.5.2   | Facilities and Technology Infrastructure              |                               |
| C.5           | Facilities to be Provided                             |                               |
| C.5.1         | General Requirements                                  |                               |
| C.5.2         | Facility Infrastructure                               |                               |
| C.5.3         | Site Selection and Facility Design Requirements       |                               |
| C.5.4         | Project Housing                                       |                               |
| C.5.4.1       | Exclusive-Use Space                                   |                               |
| C.5.5         | Facility and Systems Access                           |                               |
| C.6           | Technology Infrastructure to be Provided              |                               |
| C.6.1         | Call Processing Technology and Services               |                               |
| C.6.2         | E-Mail Routing and Management                         |                               |
| C.6.3         | FAQ System  |                               |
| C.6.4         | Knowledge Management                                  |                               |
| C.6.5         | Contact Management                                    |                               |
| C.6.6         | Workforce Management                                  |                               |
| C.6.7         | Customer Survey Automation                            |                               |
| C.6.8         | Compliment and Complaint Management                   |                               |
| C.6.9         | Service Monitoring and Quality Control                |                               |
| C.6.10        | Training  |                               |
| C.6.11        | Literature Fulfillment                                |                               |
| C.6.12        | Voice Mail and Electronic Mail                        |                               |
| C.6.13        | Online Ordering System                                |                               |
| C.6.14        | Web Chat System                                       |                               |
| C.6.15        | Power Supply  |                               |
| C.6.16        | Database Design                                       |                               |
| C.7           | Telecommunications Services to be Provided            |                               |
| C.7.1         | Local Telecommunications Services and Internet Access |                               |
| C.7.2         | Intercity Telecommunications Services                 |                               |

**Request for Proposal GSV07PD0007**

***Attachment 3: Technical Proposal Index***

| RFP Reference | Requirement                                 | Contractor Proposal Reference |
|---------------|---|-------------------------------|
| C.7.3         | Network Design                              |                               |
| C.7.4         | Network Termination Equipment               |                               |
| C.7.5         | Service Coordination                        |                               |
| C.7.6         | Telephone Number Ownership                  |                               |
| C.7.7         | Internet Domain Ownership                   |                               |
| L.7.2.1.5.4   | Emergency Response Capability               |                               |
| L.7.2.1.6     | Management Plan                             |                               |
| L.7.2.1.6.1   | Program Management Plan                     |                               |
| L.7.2.1.6.2   | Human Resources Management Plan             |                               |
| C.8           | Human Resources Management                  |                               |
| C.8.1         | Recruitment and Retention                   |                               |
| C.8.2         | Training                                    |                               |
| L.7.2.1.6.5   | Quality Assurance/Quality Improvement Plan  |                               |
| C.9           | Quality Assurance/Quality Improvement       |                               |
| C.9.1         | Service Monitoring and Calibration          |                               |
| C.9.2         | Effectiveness of Service Delivery           |                               |
| C.9.3         | Quality Improvement Program                 |                               |
| L.7.2.1.6.4   | Performance Management Plan                 |                               |
| C.10          | Performance Management                      |                               |
| C.11          | Management Reports                          |                               |
| C.11.1        | Weekly and Monthly Status Reports           |                               |
| C.11.2        | Operational Reports                         |                               |
| C.11.3        | Problem Resolutions Reports                 |                               |
| C.11.4        | Monitoring Reports                          |                               |
| C.11.5        | Compliment and Complaint Management Reports |                               |
| C.11.6        | Ad Hoc Reports                              |                               |
| L.7.2.1.8     | Plan for Special Hiring                     |                               |

4857

**Attachment 4 - Answers to Questions on Solicitation GSV07PD0003**

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**The following questions and answers were issued as part of Request for Proposal GSV07PD0003 – Amendment A-001**

Q.1.1 Reference: RFP Section B, P-4 - Price Tables – Will the Government allow offerors to further divide CLINS into Sub-CLINs in certain circumstances in order to accurately reflect the cost of specific services requested. As an example, under CLIN 7100 IVR Service, can Sub-CLINs be added to provide cost for each additional language that has been requested? This ability would allow offerors to propose CLIN prices that more accurately reflect the cost of providing that language, rather than simply using the cost of the highest-priced language.

**A.1.1 No. Offerors shall respond only to CLINS identified in Section B – Price Tables. Offerors should provide ceiling prices for the CLINS identified in the price tables. Offerors may offer discounts to the ceiling prices when responding to task requirements.**

Q.1.2 Reference: Section B.2.1.1, P-4 - Base Facility and Equipment – a) - Can GSA provide definition as to what they require around Enhanced Quality Monitoring Solution? b). Are the CLINS for Enhanced Quality Monitoring Solution cumulative with the prior CLIN (Phone, TTY, FAX and E-mail, Web Chat Services)? Or should the vendor price out the services for just this option?

**A.1.2 As part of the base service solution, contractors are required to provide a solution for Service Monitoring and Quality Control that meets the requirements specified in Section C.6.9 of the Performance Work Statement. The Enhanced Quality Monitoring Solution CLIN refers to solutions that provide additional capabilities that may be needed to meet more stringent service monitoring and quality control requirements that are task specific. b). The Enhanced Quality Monitoring Solution CLINS are incremental to the CLINS for Phone, TTY, FAX and E-Mail, Web Chat Services).**

Q.1.3 Reference: Section C.2.1.6, P-25 – Rapid Ramp-Up/Ramp-Down - Is the assumption that the 48 hour ramp-up requirement will only apply to those task orders issued in response to emergency? If yes, will the Government please provide the expected ramp-up period for normal task orders outside of these crisis situations?

**A.1.3 The 48 hour ramp-up requirement only applies to task orders issued in response to emergency or crisis situations. Ramp-up period for normal task order will vary depending on program requirements and will be specified on individual task order basis. Also see response to Q.3.2.**

Q.1.4 Reference: Section C.3.1.1, P-32 – Automated Voice Response Services - Is it the Government’s expectation that the IVR provides information using Speech Recognition menus and Text to Speech translation in all the languages listed? Can the IVR be used to route to individuals who will provide support using the language required?

**A.1.4 The Government expects that all automated voice response solutions, including IVR, Voice/Speech Recognition, and Text-to-Speech, support the languages identified in Section C.3.1.1. If support for specific language is required for the automated voice response service, that support has to be provided within the automated voice response service application, not via routing to an external language support service.**

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Q.1.5 Reference: Section C.4.3.3, P-58 - Skills Categories - Section C.4.3.3 provides IS agent requirements, but does not elaborate on IS supervisory requirements. Please provide the years of experience and educational requirements along with the level of responsibility for each of the five supervisory levels.

**A.1.5 A new Section C.4.3.3.5 is being added to identify the minimum qualification requirements for Supervisors.**

**“C.4.3.3.5 Minimum Qualifications Requirements for Supervisory Information Specialists**

**In addition to meeting minimum education and/or experience requirements specified for Information Specialists specified above for the respective skill category, Supervisory Information Specialists shall meet the following minimum requirements:**

- **Two or more years experience serving as an Information Specialist at the respective skill level, or one or more years of experience supervising Information Specialists at the respective skill level.**
- **Excellent oral and written communications skills**
- **Strong organizational skills**
- **Skilled at oral and written reviews as well as coaching to improve performance**
- **Must be positive and self-motivated with the ability to change priorities on demand**
- **Solid understanding of computer basics (Windows, Excel, Word, Operating Systems and Internet applications, such as web, email, chat).”**

Q.1.6 Reference: Section C.4.3.4, P-59 – Multi-language Support - Does the Government have a volume threshold to determine when staffing for a specific language is required and that training, QM, Supervisors and automated services must be provided in that language? For example, if the call volume for German is greater than 5% of the overall call volume, this will trigger the need for the contractor to provide support for this language.

**A.1.6 There is no pre-established volume threshold for triggering support for a specific language. Staffing requirements for specific languages will be task specific and will be identified at a task order level.**

Q.1.7 Reference: Section C.2.1.5 – This section states a language line may be used to support various language needs. Are we to assume that unless that threshold is reached, the language line option would be appropriate?

**A.1.7 Language support is task specific. Support for other languages, including the use of language line, if appropriate, will be specified at a task order level. Also see response to Q.1.6 above.**

Q.1.8 Reference: Sections H.8, L.7.2.1.8 and M 2.15 - Special Hiring Requirements – Will the Government provide a clarification regarding the Special Hiring Requirement in sections H.8, L.7.2.1.8, and M.2.15. The language in these sections refers to staffing as well as hiring. Hiring would define an employee/employer relationship whereas staffing could be either subcontracting and/or hiring of employees.

4957 **A.1.8 The Special Hiring Requirements can be met either by employing through a direct**  
4958 **employee/employer relationship or through a prime/subcontractor relationship. Also see response**  
4959 **to Q.2.3 below.**

4960  
4961 Q.1.9 Reference: Sections C.4.1, H.7 and L.7.2: Key Personnel - Are submission of key personnel  
4962 resumes (Program Manager, Project Manager, Site Manager and Information Systems Security Manager)  
4963 required at this Master Contract Level; or, when responding to RFQs at the Task Order level? Given the  
4964 uncertainty surrounding the exact scope and complexity of individual task orders, it would be a challenge  
4965 to ascertain the appropriate skill level and caliber of personnel to select and propose.

4966  
4967 **A.1.9 No. Submission of key personnel resumes is not required in response to this solicitation.**  
4968 **Submission of resumes of key personnel, if required, will be addressed in individual task orders.**

4969  
4970 Q.1.10 Reference: Section L.7.2, P154 - Technical Proposal Submission Requirements - In order that  
4971 all of the requested information and requirements are addressed to the level of detail required by the RFP,  
4972 will the Government consider increasing the maximum page limitation by an additional 100 pages for a  
4973 total maximum of 225 pages?

4974  
4975 **A.1.10 The 125-page limit will remain. However, the section ~~has been~~ is being amended to**  
4976 **permit the use of single-spacing for text.**

4977  
4978 Q.1.11 Reference: Section L.7.2, P-154 - Technical Proposal Submission Requirements. The RFP  
4979 requires using double-spacing. Recommend vendors are permitted to use single-spacing for text within  
4980 tables and graphics.

4981  
4982 **A.1.11 See response to Q.1.10 above.**

4983  
4984 Q.1.12 Upon review of GSA Solicitation Number GSV07PD0003, for the Contractor Operated and  
4985 Managed Multi-Channel Contact Center Services it is believed that this acquisition will be conducted  
4986 under the authority of FAR Part 8.4. Is this a correct assumption?

4987  
4988 **A.1.12 No. This acquisition is conducted under authority of FAR Part 15 – Contracting by**  
4989 **Negotiation.**

4990  
4991 Q.2.1 Will the Government provide Section B.2 Price Tables in Excel (preferably) or Word format?

4992  
4993 **A.2.1 No. Offerors are encouraged to provide their own price tables based on the format**  
4994 **identified in Section B of the solicitation.**

4995  
4996 Q.2.2 Will the Government provide Section K Representations and Certifications in Word format, or  
4997 will the Government accept a printout of those we have already completed on-line at  
4998 <https://orca.bpn.gov/>?

4999  
5000 **A.2.2 The Government will accept a printout as long as it provides, at a minimum, all of the**  
5001 **information required by this solicitation.**

5002  
5003 Q.2.3 a) Reference: Sections H.8 - Special Hiring Requirement, L.7.2.1.8 - Plan for Special Hiring,  
5004 and M.2.1.5 - Plan for Special Hiring (Factor 5) – a).If task order awardees subcontract to organizations  
5005 affiliated with NIB or NISH, will the labor hours charged to their subcontracts be applicable toward  
5006 achieving the 5 percent goal (Section L.7.2.1.8)?

5007

5008 b).If task order awardees directly hire employees through or from organizations affiliated with NIB or  
5009 NISH, will the labor hours charged by such employees be applicable toward achieving the 5 percent goal  
5010 (Section L.7.2.1.8)? c). Similarly, related to questions a and b above, if team members act accordingly in  
5011 their performance of contract tasks, will such labor hours charged to their subcontracts be applicable  
5012 toward achieving the 5 percent goal (Section L.7.2.1.8)?  
5013

5014 **A.2.3 Labor hours charged under all three of the above scenarios can be applied to satisfy the 5**  
5015 **percent Special Hiring goal.**  
5016

5017 Q.2.4 Reference: Section C.6.13, P-68 - What methods of payment are the online ordering system  
5018 required to support?  
5019

5020 **A.2.4 At a minimum, the online ordering system shall support payments by commercial credit**  
5021 **cards. Section C.6.13 is being amended to reflect this requirement.**  
5022

5023 Q.2.5 Reference: Section C.3.5.3.5, line 1385-88 – This section specifies key-code access as the only  
5024 acceptable physical security measure. Are security card readers (such as DataWatch) an acceptable  
5025 alternative to or considered key-code devices? If not, is there a list of approved key-code devices?  
5026

5027 **A.2.5 The correct reference is Section C.3.5.5.3. This section is being amended to permit the use**  
5028 **of equivalent access technology.**  
5029

5030 Q.3.1 Reference: Section B.2 - Price Tables, P-3-21, Section J, List of Attachments, P-123-139 - To  
5031 ensure standardization across all submitted proposals, will the Government provide the attachments in  
5032 Section B and Section J as Microsoft Word and/or Microsoft Excel as appropriate?. This will allow GSA  
5033 to receive similar documents from all offerors and negate any deviations that may occur as offerors try to  
5034 reconstruct the attachments that are currently in .pdf.  
5035

5036 **A.3.1 See response to Q.2.1.**  
5037

5038 Q.3.2 Reference: Section C.2.1.6 - Rapid Ramp-Up/Ramp-Down, P-25 - In an effort to provide a  
5039 solution that best meets GSA's requirements, we are interested in understanding the requirements  
5040 associated with rapid ramp-up described in Section C.2.1.6, Rapid Ramp-Up/Ramp-Down. Specifically,  
5041 to what volumes and interaction channels does GSA need in a 48-hour ramp-up (i.e., "what constitutes a  
5042 "fully operational status within forty-eight (48) hours?").  
5043

5044 **A.3.2 The 48-hour ramp-up requirement is for automated and attended telephone service only.**  
5045 **"Fully operational status within forty-eight (48) hours" means that the contractor must have the**  
5046 **required facility, technology, and staff in place to start taking calls within 48 hours of task award.**  
5047 **The 48-hour requirement is for solutions involving the provision of up to 250 seats. The RFP is**  
5048 **being amended to clarify this requirement. Also see response to Q.1.3.**  
5049

5050 Q.3.3 Reference: Section C.2.2 - Sample Workflow, P-26 – This section states "The Government  
5051 reserves the right to change the workflow requirements at any time after task order issuance to  
5052 accommodate changes in program requirements on an as-needed basis." Does a governmental change in  
5053 workflow requirements constitute a start-up clause?  
5054

5055 **A.3.3 No.**  
5056

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5057 Q.3.4 Reference: Section C.2.2.3 - Facsimile Inquiry Workflow, P-29-30 - Will the Government  
5058 define the security requirements for record keeping with regard to facsimile inquiry workflow described  
5059 in Section C.2.2.3?  
5060

5061 **A.3.4 The workflow descriptions provided in Section C are for illustration purposes only.**  
5062 **Actual workflow and associated security requirements will be identify in individual task orders.**  
5063

5064 Q.3.5 Reference: Section C.2.2.4 - Postal Mail Inquiry Workflow, P-30 – This section states “The  
5065 Contractor shall retain a copy of the original inquiries and all responses for record keeping. Is the  
5066 electronic copy created sufficient and if hardcopy mail storage is required, is there a retention period for  
5067 the destruction of those items?  
5068

5069 **A.3.5 The workflow descriptions provided in Section C are for illustration purposes only.**  
5070 **Actual workflow and record retention and storage requirements will be identified in individual task**  
5071 **orders.**  
5072

5073 Q.3.6 Reference: Section C.3.4 - Directory Listing Services, P-43-44 - Will GSA provide access to  
5074 the Government-wide Blue Pages project described in Section C.3.4, Directory Listing Services?  
5075

5076 **A.3.6 When a task requires access to the Government-wide Blue Pages project to satisfy the**  
5077 **performance of the Directory Listing Services requirement, the Government will provide such**  
5078 **access as part of the task requirement.**  
5079

5080 Q.3.7 Reference: Section C.4 - Staff to Be Provided, P-55 - Will the Government define what  
5081 constitutes a “satisfactory history of credit” as stated in Section C.4, Staff to be provided?  
5082

5083 **A.3.7 The Government will defer to the “satisfaction” definition used by the credit industry for**  
5084 **rating individuals’ credit history and the acceptance of such a rating by contact center service**  
5085 **industry for employment purposes.**  
5086

5087 Q.3.8 Reference: Section C.4.1 - Key Personnel, P-55-56 - Will the Government define the resumes  
5088 that are required to be submitted for the prime contract versus those for task orders. In addition, the  
5089 numbering skips from C.4.1.3 to C.4.1.5. Shall the offeror assume there is missing key personnel  
5090 (C.4.1.4) or that this was an inadvertent numbering issue?  
5091

5092 **A.3.8 See response to Q1.9 for resume requirements. Section C.4.1.5 is incorrectly numbered.**  
5093 **The correct number is C.4.1.4. The solicitation is being amended to reflect this correction.**  
5094

5095 Q.3.9 Reference: Section C.6 - Technology Infrastructure, P-62 - Will the Government define the  
5096 term “customization” as it appears in Section C.6, line 1951 of the Performance Work Statement (PWS)  
5097

5098 **A.3.9. This term is being removed from this section.**  
5099

5100 Q.3.10 Reference: Section C.6.1.4 - Accounting and Management, P-63 - In Section C.6.1.4,  
5101 Accounting and Management, what type of accounting and management capabilities are desired for the  
5102 multi-channel inquiries to be received?  
5103

5104 **A.3.10 The term “accounting and management capabilities” as used in this section refers to the**  
5105 **necessary capabilities of the contractor-provided call processing technology and services to account**  
5106 **for and manage the inquiry processes and workload for all inquiry types, and to provide operation**

5107 **and management information as required in Section C.11 of the Performance Work Statement**  
5108 **(PWS).**

5109  
5110 Q.3.11 Reference: C.8.2.3 - Instructor and Classroom Criteria, P-73 - Section C.8.2.3 indicates “the  
5111 contractor shall provide certified instructors to deliver all training.” Please describe the certifications  
5112 required of trainers for this contract.

5113  
5114 **A.3.11 Certification of instructors will be the responsibility of the contractor. The Contractor**  
5115 **will determine the type of certification that is required for its instructors.**

5116  
5117 Q.3.12 Reference: Section C.13.3.7 - Human Resources Management Plan, P-80-81 - The PWS  
5118 numbering and text in Section C.13.3.7, indicate the knowledge/case management plan, operations  
5119 management plan, performance management plan, phase-in plan, program management plan, project plan,  
5120 quality assurance plan, security plan, service level management plan, test and acceptance plan, and value  
5121 engineering/process improvement plan are components of the Human Resources Management Plan. We  
5122 believe these items are stand alone plans separate of the Human Resources Management Plan; please  
5123 confirm.

5124  
5125 **A.3.12 The plans identified above are not part of the Human Resources Management Plan. The**  
5126 **RFP sections associated with these plans are being renumbered to read as follows:**

- 5127  
5128 **C.13.3.8 Knowledge/Case Management Plan**  
5129 **C.13.3.9 Operations Management Plan**  
5130 **C.13.3.10 Performance Management Plan**  
5131 **C.13.3.11 Phase-In Plan**  
5132 **C.13.3.12 Project Management Plan**  
5133 **C.13.3.13 Project Plan**  
5134 **C.13.3.14 Quality Assurance/Quality Improvement Program Plan**  
5135 **C.13.3.15 Security Plan**  
5136 **C.13.3.16 Service Level Management Plan**  
5137 **C.13.3.17 Test and Acceptance Plan**  
5138 **C.13.3.18 Value Engineering/Process Improvement Plan**

5139  
5140 Q.3.13 Reference: Section G.2 - Service Ordering, P-90 - Section G.2, Service Ordering, can task  
5141 orders be other than Fixed Price or Time and Materials based on task requirements?

5142  
5143 **A.3.13. Only the following type of task orders will be allowable under the resultant contracts:**  
5144 **Fixed-Price, Time and Materials, and Labor Hour. Section G.2.7.2 is being amended to reflect the**  
5145 **addition of Labor Hour tasks.**

5146  
5147 Q.3.14 Reference: Section G.2 - Service Ordering, P-90 - In Section G.2, Service Ordering, does the  
5148 statement “Copies of all task orders shall be maintained by the Contractor for the duration of the contract  
5149 through final closeout” mean: a). All task orders awarded to said contractor or all task orders awarded to  
5150 all contractors? b). The duration of the base contract or all options periods including the additional 5 year  
5151 period?

5152  
5153 **A.3.14. Section G.2.2 requires each contractor to maintain copies of all task orders awarded to**  
5154 **that contractor for the duration of the contract through final closeout, including copies of task**  
5155 **order modifications issued in the extended performance period.**

5156

5157 Q.3.15 Reference: G.2.2, Task Order Request for Quotation, pp. 92-93 - In reference to Section G.2.2,  
5158 under a task order, describe how the user agency may be allowed to increase or remove any of the special  
5159 contract clauses created by the base contract vehicle (if at all)?  
5160

5161 **A.3.15. All task order requirements must remain within the framework of the contracts awarded**  
5162 **pursuant to this solicitation. User agencies will not be allowed to add to or remove any of the**  
5163 **special contract clauses contained in contracts awarded as a result of this solicitation, unless there**  
5164 **has been a subsequent modification to the underlying contracts.**  
5165

5166 Q.3.16 Reference: Section G.5.3 - Reports on Special Hiring, P-98 - How will contractors who have  
5167 not been awarded any task orders be compensated for developing and delivering the Special Hiring  
5168 Report as noted in Section G.5.3, Reports on Special Hiring.  
5169

5170 **A.3.16 The overall Contract Minimum Amount identified in Section H.2 of the solicitation serves**  
5171 **multiple purposes. It represents consideration from the Government to the contractor for entering**  
5172 **into an indefinite-delivery, indefinite-quantity contract (IDIQ), but it also serves as consideration**  
5173 **from the Government to the contractor for providing the reports identified herein. Text is being**  
5174 **added to Section G.5 to clarify this requirement.**  
5175

5176 Q.3.17 Reference: Section G.5.4 - Cost Recovery Report (CRR), P-98 - How will contractors who are  
5177 not performing on any awarded task orders be compensated for developing and delivering the Cost  
5178 Recovery Report as described in Section G.5.4, Cost Recovery Report (CRR).  
5179

5180 **A.3.17 See response to Q.3.1.6.**  
5181

5182 Q.3.18 Reference: Section G.6.1 - Marketing Calls, P-99 - Section G.6.1, Marketing Calls, states “the  
5183 contractor shall coordinate marketing efforts...to keep him/her apprised of planned client visits.” Is it  
5184 USA Service’s intent to coordinate interaction concerning planned visits for all opportunities or just those  
5185 that “may” possibly use the USA Contact vehicle?  
5186

5187 **A.3.18 USA Services will coordinate interaction concerning planned visits for those clients that**  
5188 **may use the USA Contact contract.**  
5189

5190 Q.3.19 Reference: Section G.6.1 - Marketing Calls, P-99 - As noted in Section G.6.1, Marketing  
5191 Calls, Will GSA define the scope of marketing efforts that shall be coordinated with the director of USA  
5192 Services, define the mechanism that will be used to accomplish this coordination, and the time frames  
5193 concerning this coordination.  
5194

5195 **A.3.19. The Government cannot provide the details of the marketing strategy and coordination at**  
5196 **this time. USA Services will conduct marketing meetings with the contractor(s) after contract**  
5197 **award.**  
5198

5199 Q.3.20 Reference: Section H.1 - Term of Contract, P-100 - Expanding upon Section H.1, Term of  
5200 Contract, when is the first task order anticipated for this contract?  
5201

5202 **A.3.20 Based on USA Services marketing activity, the Government anticipates task order**  
5203 **requirements shortly after award of the IDIQ contracts. However, the Government cannot provide**  
5204 **the exact timing of when the first task order will be issued at this time.**  
5205

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5206 Q.3.21 Reference: Section H.1.2 - North American Industry Classification System (NAICS) 519190,  
5207 P100 According to the chart of small business size standards published by the Small Business  
5208 Administration that became effective June 31, 2006 and found at  
5209 [http://www.sba.gov/idc/groups/public/documents/sba\\_homepage/serv\\_sstd\\_tablepdf.pdf](http://www.sba.gov/idc/groups/public/documents/sba_homepage/serv_sstd_tablepdf.pdf) the size standard  
5210 for NAICS Code 519190 is \$6.5 million. Please clarify if GSA prefers that the stated small business size  
5211 standard, as published, should apply or if the size standard from the RFP should apply as stated in Section  
5212 H.1.2.

5213  
5214 **A.3.21 \$6.5 million is the correct small business size standard for NAICS Code 519190. Section**  
5215 **H.1.2 is being amended to reflect this change.**  
5216

5217 Q.3.22 Reference: Section H.8 - Special Hiring Requirement, P-103 - Concerning Section H.8,  
5218 Special Hiring Requirement, how will the contractor be compensated for compensating the NIB/NISH  
5219 affiliated organizations for work performed to recruit, hire, train, and retain individuals? Is this  
5220 requirement based in law?  
5221

5222 **A.3.22. The Government is not required by law to compensate the contractor separately for work**  
5223 **performed under this contract by NIB/NISH affiliated organizations. The contractor is responsible**  
5224 **for directly compensating NIB/NISH affiliated organizations for any work performed under this**  
5225 **contract. The Offerors shall include the recovery of such compensation in their CLIN cost**  
5226 **structure where appropriate.**  
5227

5228 Q.3.23 Reference: Section H.12 - System Requirements, P-104-105 - It is understood that Earned  
5229 Value Management (EVM) is applicable at the task order levels as described in Section H.12, System  
5230 Requirements. Is an approved Earned Value Management System (EVMS) or experience with EVM a  
5231 requirement under USA Contract?  
5232

5233 **A.3.23. EVMS is generally not a requirement for service oriented tasks that utilize COTS**  
5234 **products and services. However, there may be instances when an agency may require the use of an**  
5235 **approved EVMS system and demonstrated experience associated with the use of such a system as**  
5236 **part of its requirements. Such requirements will be addressed and evaluated on a task order level.**  
5237

5238 Q.3.24 Reference: Section H.15.1 - Routine Travel, P-105 - Is the intent of the clause in Section  
5239 H.15.1 to state that Contractor and subcontractor employees will NOT be reimbursed for commuter travel  
5240 for either start-up or day-to-day performance?  
5241

5242 **A.3.24. Yes.**  
5243

5244 Q.3.25 Reference: Section H.28.1 - Marketing Calls, P-110 - How will contractors be compensated  
5245 for mandatory marketing calls as directed in Section H.28.1, Marketing Calls?  
5246

5247 **A.3.25 Contractors will not be compensated by the Government for marketing activities**  
5248 **performed under this contract, including the preparation and provision of marketing materials and**  
5249 **conducting presentations.**  
5250

5251 Q.3.26 Reference: L.7.2 - Technical Proposal Submission Requirements, P-154 - Throughout the RFP,  
5252 GSA asks for “comprehensive” or “detailed” descriptions of how the offeror will provide the services  
5253 required throughout the RFP. We understand that GSA wants to limit the size of the proposals being  
5254 submitted; however, given the length and detail of the PWS, we recommend GSA consider changing the  
5255 double space requirement in L.7.2 to single space. This will allow offerors more room to provide GSA  
5256 with a thorough description of how they will provide quality services to GSA’s customers.

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**A.3.26. See response to Q.1.10 above.**

Q.3.27 Reference: L.7.2 - Technical Proposal Submission Requirements, P-154 Section L.7.2 specifies that figures and tables may use 8-point font. May tables use single-space formatting, or do they also need to be double-spaced as the rest of the text is? Will 11 X 17 pages be allowed and if so will they count as two pages per side?

**A.3.27 See response to Q.1.10 above. The Government will allow the use of 11 x 17 pages for presenting diagrams and charts that are relevant to the offeror’s proposal. Each 11 x 17 page will be counted as two pages towards the 125 page limit.**

Q.3.28 Reference: Section L.7.2.1 - Technical Proposal, P-154 and Section J.3 - Technical Proposal Index, P-137-139 - Section L is typically the standard offerors use to structure their proposals. However, in the RFP, GSA has also provided a proposal index in Section J.3 which is to serve as the offerors’ “outline” for “preparing their technical proposal.” In mapping Section L proposal organization requirements to the Proposal Index, it appears there are minor discrepancies. To facilitate ease of proposal evaluation (standard organization among all proposals), we recommend the proposal index directly align with Section L, or vice versa.

**A.3.28 See response to Q.4.6 and Q.5.18 below.**

Q.3.29 Reference: Section L.7.3 - Business Proposal Submission Requirements, P-162 - Under Section L.7.3, the government requests the cover letter to stipulate the proposal shall remain in effect for 90 days. Does the government intend to award the ID/IQ contracts with in this period of time? If not, for pricing purpose what is the anticipated contract award date.

**A.3.29. The Government anticipates award of the contracts during the first or second quarters of FY08. The solicitation is being amended to reflect a proposal acceptance period of 270 days.**

Q.3.30 Reference: Section L.7.3 - Business Proposal Submission Requirements, P-162 - In Section L.7.3, the government states, “...all offered rates must be Wage Determination-compliant.” This means rates must meet the requirements of the Department of Labor Wage Determination in effect at the time the task quotation is prepared for the location (county and state) where the quoted services are to be performed. Under this definition, are contractors to assume the ceiling direct labor price will include an estimate for economic cost of living escalation built within each contract period price?

**A.3.30 Yes.**

Q.3.31 Reference: Section L.7.3 - Business Proposal Submission Requirements, P-162 - Under the Government’s definition of “fully burden” price, are contractors to assume the cost of IFF is not included in the development of our ceiling price but will be considered as an additional cost in the calculation of each task order proposal?

**A.3.31 Yes.**

Q.3.32 Reference: Section M.3.1 - Pricing Evaluation Tool, P-169 - Section M.3.1 Pricing Evaluation Tool, states “The Government will evaluate contract line item (CLINs) for all contract years (including Option Years and Extended Periods) in each responsive Business Proposal received. This will be accomplished by applying a uniform set of anticipated requirements to a standard USA Contract-

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5307 developed source selection pricing tool.” To ensure standardization across all submitted proposal, will  
5308 the Government identify the uniform set of anticipated requirements to be used in the evaluation?  
5309

5310 **A.3.32 No. The uniform set of anticipated requirements is part of the Government’s pricing**  
5311 **model and as such is Source Selection Sensitive. It should be noted that all proposals will be**  
5312 **evaluated using the same pricing model information.**  
5313

5314 Q.4.1 Reference: Sections L.7.3 and L.7.3.1, P162-163 - L.7.3.1 requests as part of the Business  
5315 Proposal submission “(iv) a completed copy of all terms and conditions of the solicitation, as called for  
5316 above” (lines 6022–23). Please clarify. Does this statement pertain only to Section K of the solicitation, or  
5317 is the offeror required to submit Sections B through K?  
5318

5319 **A.4.1 The Business Proposal will consist of: (i) a cover letter on company stationary**  
5320 **acknowledging and accepting all terms and conditions set forth in the solicitation and signed by an**  
5321 **individual authorized to financially commit the firm, (ii) a completed copy of the pricing tables in**  
5322 **Section B, and (iii) a completed copy of Section K. Also see response to Q.2.2 above.**  
5323

5324 Q.4.2 Reference: Sections L.7.3.1.2 and L.7.3.2, P164 - L.7.3.1.2, Pricing Tables, and L.7.3.2, Pricing  
5325 Support Documentation, present seemingly contradictory information. L.7.3.1.2 *requires* supporting  
5326 documentation: “Failure to provide supporting documentation may render the offerors proposal “non-  
5327 responsive” (lines 6076–77). However, L.7.3.2 implies supporting documentation *may be required*: “If  
5328 required by the Government, the offeror shall furnish detailed supporting documentation for any or all of  
5329 its prices” (lines 6095–96). What is the Government looking for in the way of “supporting  
5330 documentation”? Also, is “supporting documentation” required for subcontractors?  
5331

5332 **A.4.2 The intent of Section L.7.3.2 is to alert offerors that if the Government is unable to**  
5333 **determine prices to be fair and reasonable through price analysis, it may be necessary to conduct**  
5334 **cost analysis.**  
5335

5336 Q.4.3 Reference: Sections L.7.3, P162 – This section states that “all prices proposed shall be  
5337 considered to be ceiling rates.” However, L.7.3 subsequently states that “part of the Contractor’s strategy  
5338 may include offering services at a location(s) . . . different from the location used to prepare this  
5339 proposal” (lines 6008–10) and that “rates must meet the requirements of the Department of Labor Wage  
5340 Determination . . .” (lines 6011–13). Does this mean that ceiling rates developed in this proposal must  
5341 meet the WD requirements at the site we are proposing and that, should we move locations when  
5342 responding to a particular task order, the rates offered at the new location must meet the WD requirements  
5343 and stay below the proposed ceiling rates?  
5344

5345 **A.4.3 Yes.**  
5346

5347 Q.4.4 Reference: Section B.2, P-5-6 - There are two sections numbered B.2.1.2: Incremental Facility  
5348 and Equipment (p. 5) and Initial/Special Training (p. 6). Please clarify.  
5349

5350 **A.4.4 The RFP is being amended to correct the numbering for the Initial/Special Training**  
5351 **section and subsections and associated price tables.**  
5352

5353 Q.4.5 Reference: Section B.2, P-17 & P-20 - There are two sections numbered B.2.7: Shared or Non-  
5354 Dedicated Telephone Inquiry Response Solution—Information Specialist (IS) Hourly Rate (p. 17) and  
5355 Shared or Non-Dedicated E-Mail Inquiry Response Solution—Information Specialist (IS) Hourly Rate (p.  
5356 20). Will the Government clarify?.  
5357

5358 **A.4.5 The section and tables for Shared or Non-Dedicated E-Mail Response Solution are being**  
5359 **renumbered to B.2.8.**

5360  
5361 Q.4.6 Reference: Section J, P-123, and Section L.7.2, P-154-162 - Section J, Attachment 3: Outline  
5362 for Technical Proposals, line 4566, indicates that “offerors shall use the outline in Attachment 3 in  
5363 preparing their technical proposals.” However, the proposal organization presented in this outline differs  
5364 from that specified in Section L.7.2, Technical Proposal Submission Requirements. Please advise offerors  
5365 regarding which instruction to adhere to in organizing technical proposal responses.

5366  
5367 **A.4.6 Section J, Attachment 3 is being amended to read as follows:**

5368  
5369 **“Offerors shall use the outline in Attachment 3 in preparing a proposal index referencing the page**  
5370 **and paragraph numbers that contain their response on an item by item basis to all requirements of**  
5371 **this solicitation.”**

5372  
5373 Q.4.7 Reference: L.7.2.1.5.1, P-158-159 - As part of the proposal’s Technical Approach section  
5374 (L.7.2.1.5), the RFP states that the offeror “shall describe its proposed solution or approach for providing  
5375 each of the services and support specified in Sections C.3 through C.11 of the Performance Work  
5376 Statement . . . ” (lines 5815–16). Yet, PWS C.3 through C.11 entails several requirements that the  
5377 offeror’s proposal must address in other sections. For example, C.10, Performance Management, is to be  
5378 addressed in the Management Plan, per L.7.2.1.6.3; and C.3.5.5, Information Systems Security, is to be  
5379 addressed in the Security Plan, per L.2.1.6.4. Please clarify.

5380  
5381 **A.4.7 See response to Q.4.6 and Q.5.18.**

5382  
5383 Q.4.8 Reference: Sections L.7.2.1.5.3, P-159, L.7.2.1.6.2, P-160-161, L.7.2.1.6.3, P-161, L.7.2.1.6.4,  
5384 P-161 - The RFP specifies the inclusion of several plans that require detailed descriptions of proposed  
5385 processes, procedures, and methodologies. With the Government’s page-limit requirement of 125 double-  
5386 spaced pages, it will be difficult for offerors to provide fully responsive plans. Would it be acceptable for  
5387 offerors to provide an overview of each plan in the proposal, with the complete plan provided following  
5388 contract award? If not, would the Government allow offerors to include full plans as appendices to the  
5389 proposal and exclusive of the page count?

5390  
5391 **A.4.8 See response to A.1.10.**

5392  
5393 Q.4.9 Reference: Section L.7.2.1.3.1, P-155 - Minimum Experience Qualifications Criteria; Section J,  
5394 Attachment 1, P-123 - Past Performance Survey Questionnaire - The RFP sections cited above specify  
5395 four minimum qualifications an offeror must have gained during the past 5 years to be considered for  
5396 award of the USA Contact contract, and direct the offeror to communicate the requirements to its past  
5397 performance references. Will the Government clarify whether (1) the criteria can be met by  
5398 *aggregating* the minimums across more than one program—e.g., a total of “no less than 100,000  
5399 telephone inquiries and 7,500 e-mail inquiries” is handled each month across the three different contact  
5400 centers cited by the offeror—or (2) all four criteria must be met in each individual contact center program  
5401 cited by the offeror.

5402  
5403 **A.4.9 Offerors do not need to meet all four minimum experience qualification requirements**  
5404 **specified in Section L.7.2.1.3.1 for each of the projects selected. If the selected projects are**  
5405 **supported by more than one center, then the work volumes handled at each of the centers**  
5406 **supporting the project can be aggregated to meet the minimum experience requirements. However,**  
5407 **work volumes of different projects cannot be aggregated to meet the minimum experience**  
5408 **requirements.**

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Q.5.1 Reference: Section B.1.1.1 – Facility and Equipment, P-1 - Would the Government please clarify that the following definitions of the two components of Facilities and Equipment are correct? a). Base Facility and Equipment – Consists of the facilities, telecommunications infrastructure and network infrastructure that is required for project performance. b). Incremental Facility and Equipment – Consists of the individual workstations, telephones, etc., required by each employee to perform on the project.

**A.5.1 The Facility and Equipment CLIN is a one-time charge to be paid for all facility, equipment, software, supplies, and services needed at each center to support task requirements. The charge includes a fixed (Base Facility and Equipment) base component and an incremental (Incremental Facility and Equipment) component. It would be up to the offeror to distribute the costs of facility, equipment, software, supplies, and services between the base and incremental components to achieve the optimum price structure for the offeror’s solution for facility and equipment.**

Q.5.2 Reference: Section B.1.1.3, P-1, Section B.2.1.2, P-6 – Initial/Special Training - The description for this section explains that this is a one time charge; however, all of the CLINS in Section B.2.1.2 are hourly rates. Would the Government please clarify?

**A.5.2 The Initial/Special Training is a one-time charge to be paid for labor and supply costs incurred to develop training materials and train the initial complement of Information Specialists or any additional Information Specialists above the initial complement needed to support task requirements. This one-time charge is calculated using the labor rate CLINS identified in this section and the quantity of hours needed to satisfy the training requirements on an individual task order basis.**

Q.5.3 Reference: Section B.1.1.3, P-1, Section B.2.1.2.3, P-10 – Knowledge and Content Development - The description for this section explains that this is a one time charge; however, all of the CLINS in Section B.2.1.2.3 are hourly rates. Would the Government please clarify?

**A.5.3 The Knowledge and Content Development is a one-time charge to be paid for labor and supply costs incurred to develop the knowledgebase needed to support task requirements. This one-time charge is calculated using the labor rate CLINS identified in this section and the quantity of hours needed to develop the knowledgebase on an individual task order basis.**

Q.5.4 Reference: Section B.1.4, P-3, Section B.2.5, P-13 - The description states that supervisors are included in the fully burdened rate as support personnel, while there are also Supervisor tables in the rate tables in Section B.2.5. Should the supervisor be deleted from the description of the fully burdened rate?

**A.5.4 Sections B.1.4 is being amended to delete the reference to supervisors. There is currently no reference to supervisors in the description for Section B.2.5.**

Q.5.5 Reference: Section B.1.5, P-3 - Attended Services – Shared or Non-Dedicated Solution - The RFP states, “The minimum service charge is calculated based on the minimum daily call volume commitment multiplied by the number of days of the project...” Would the Government clarify that the following example is a correct interpretation of this statement.

Minimum daily volume commitment = 100 calls  
Number of project days = 30  
Pricing based on hourly rate of \$25  
Average Handling Time = 10 minutes

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5460  
5461 Therefore, the volume commitment is 30,000 minutes, or 500 hours.  
5462  
5463 If the commitment is for 500 hours at \$25/per hour, the minimum service charge should be  
5464 \$12,500.  
5465

5466 **A.5.5 In the above example, the volume commitment should be expressed in hours per day ((100**  
5467 **calls x 10 minutes each)/60 minutes or 16.6610007 hours per day). The nearest minimum volume**  
5468 **commitment level below the daily volume for the cited example is at 12 hours/day based on the**  
5469 **Section B price table for this service. This will be the logical minimum commitment level that the**  
5470 **agency will commit for the task. The hourly rate that is associated with the 12 hour/day minimum**  
5471 **volume commitment level will be used to calculate the actual usage charge for the service. The**  
5472 **minimum service charge for the cited example is 12 hours x 30 days x Hourly rate for the 12**  
5473 **hours/day commitment level. This sample calculation assumes that the same hourly rate applies for**  
5474 **all 30 days.**  
5475

5476 Q.5.6 Reference: Section B.1.5, P-3 - Would security clearances ever be required for the shared  
5477 solution?  
5478

5479 **A.5.6 Offerors shall assume no security clearances are required for shared or non-dedicated**  
5480 **solutions.**  
5481

5482 Q.5.7 Reference: Section B.1.5, P-3 - Based on the requirement for Shared or Non-Dedicated  
5483 Information Specialists to use prepared scripts, etc., are we to assume for pricing purposes that this is the  
5484 equivalent of an IS Level 1 from the Dedicated solution?  
5485

5486 **A.5.7 It will be the offerors' responsibility to determine the appropriate skill level of the**  
5487 **Information Specialists need to perform the work described for Shared or Non-Dedicated Response**  
5488 **Solutions.**  
5489

5490 Q.5.8 Reference: Section B.1.5, P-3 - It appears that in the shared solution there would be minimal or  
5491 no project management charges, since it is to be included in the burdened rate. Is this correct?  
5492

5493 **A.5.8 Yes.**  
5494

5495 Q.5.9 Reference: Section B.1.5, P-3 - According to Section B.1.5, the price for CLINs 99001 –  
5496 99079, CLINS 99101 – 99109, and CLINS 99201 - 99209 needs to include all program management,  
5497 supervisory, quality, and related labor costs. Does this mean there will not be a Core Project Management  
5498 Support price associated with a Shared or Non-Dedicated Solution?  
5499

5500 **A.5.9 Yes.**  
5501

5502 Q.5.10 Reference: Section B.1.5, P-3 - Is it the intent that with the Shared or Non-Dedicated solution  
5503 that all program costs are included in the price, or could there still be incremental project management  
5504 support and recurring costs for automated services?  
5505

5506 **A.5.10 Program support costs are to be included in the fully burdened rate for Shared or Non-**  
5507 **Dedicated response solutions. However, if other services are required to support the task,**  
5508 **applicable charges may apply.**  
5509

5510 Q.5.11 Reference: Section B.1.5, P3 – Would the Government clarify if the following example is a

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5511 proper interpretation of the minimum service charge and the regular billing of the Shared solution?  
5512

5513 *Shared or Non-Dedicated Solution (Example):*

5514 English only during Normal Business Hours

5515 Government Commitment - 48 hours per month (CLIN 99005)

5516

5517 Scenario #1

5518 If during the month, a total of 45 hours of handle time is expended on the program, the contractor  
5519 will still invoice for 48 times the CLIN 99005 per hour price.

5520

5521 Scenario #2

5522 If during the month, a total 58 hours of handle time is expended on the program, the contractor  
5523 will invoice for 58 hours times the CLIN 99005 per hour price.

5524

5525 Scenario #3

5526 If during the month, a total 128 hours of handle time is expended on the program, the contractor  
5527 will invoice for 128 hours times the CLIN 99005 per hour price. (The higher quantity CLINs will  
5528 not apply since the minimum commitment was based upon CLIN 99005.)

5529

5530 **A.5.11 The use of CLIN 99005 for the above example is not correct. CLIN 99005 is for minimum  
5531 commitment level of 48 hours/day, not 48 hours/month as stated in the example. Assuming the  
5532 intention is for a minimum commitment level of 48 hours/day and the example volumes are  
5533 adjusted to reflect that change, the above interpretation for all three scenarios is correct. Also see  
5534 response to Q.5.5.**

5535

5536 Q.5.12 Reference: Section B.2.1.1, Table B.2.1.1-1, P-4 – Will the Government define the Enhanced  
5537 Quality Monitoring Solutions and how it relates or differs from the Service Monitoring and Quality  
5538 Control (Section C.6.9) described on page 67 of the solicitation.

5539

5540 **A.5.12 See response to Q.1.2.**

5541

5542 Q.5.13 Reference: Section B.2.7, P-17 and P-20 - The solicitation has two sections (and their  
5543 associated tables) numbered B.2.7. a). Can we assume the second section numbered B.2.7 (and its two  
5544 tables) should actually be B.2.8 (and the tables should be B.2.8-1 and B.2.8-2)? b). There is no mention of  
5545 project management being included in the burdened hourly rate in Paragraph B.2.7 – Shared or Non-  
5546 Dedicated Email Inquiry Response Solution. Will the Government clarify the inconsistency between the  
5547 two paragraphs?

5548

5549 **A.5.13 a). See response to Q.4.5. b). This section is being amended to reflect the inclusion of  
5550 program and project management support.**

5551

5552 Q.5.14 Reference: Section B.2.7, Table B.2.7-1, P-18 – Will the Government explain the Service  
5553 Description for the Shared or Non-Dedicated Solution CLIN tables? Do the number of hours (e.g., “4  
5554 Hours/Day,” 192 Hours/Day”) represent quantity discounts as described below, or are they related to the  
5555 minimum service charge?

5556

5557 Example:

5558

5559 Month 1 – Handled seven hours of calls during month; therefore, would bill seven hours times the  
5560 hourly rate for CLIN 99002. (Since the number of handling time hours is greater than four, but  
5561 less than or equal to eight)

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5562  
 5563 Month 2 – Handled 14 hours of calls during month, therefore would bill 14 hours time the hourly  
 5564 rate for CLIN 99004 (Since the number of handling time hours is greater than 12, but less than or  
 5565 equal to 14 )  
 5566

5567 **A.5.14 The number of Hours/Day in the Service Description column of the price tables in Section**  
 5568 **B.2.7 represent the minimum daily volume commitment level that an agency would commit for the**  
 5569 **task. The minimum service charge for each day is calculated by the minimum daily volume**  
 5570 **commitment level by the hourly rate.**

5571  
 5572 Q.5.15 Reference: Section L.7.2, P-154 - Are the past performance profiles excluded from the page  
 5573 limitation?

5574  
 5575 **A.5.15 No.**

5576  
 5577 Q.5.16 Reference: Section L.7.2, P-154 - Given the double-spaced requirement in the  
 5578 solicitation, would the Government consider increasing the page limitation from 125 pages to 200?  
 5579

5580 **A.5.16 See response to Q.1.10.**

5581  
 5582 Q.5.17 Reference: Section L.7.2, P154 - Are graphics and tables excluded from the double-spacing  
 5583 requirement?  
 5584

5585 **A.5.17 See response to Q.1.10.**

5586  
 5587 Q.5.18 Reference: Section L.7.2.1.5.1 – Services to be Provided, P158 In Section L.7.2.1.5.1, Services  
 5588 to be Provided, the Government has requested we address Sections C.3 through C.11 of the SOW in our  
 5589 proposal response. Additionally, to adequately respond to all of Section L the vendor must repeat our  
 5590 solution to Sections C.4 through C.11 as shown below. As the technical proposal is page limited, and this  
 5591 creates redundant information within the proposal, would the Government modify the requirement for  
 5592 section L.7.2.1.5.1 to only require addressing Section C.3 of the SOW?  
 5593

| Section L   | Requirements  |
|-------------|---|
| L.7.2.1.5.1 | Services to be Provided (C.3)<br>Staff to be Provided (C.4)<br>Facilities to be Provided (C.5)<br>Technology Infrastructure to be Provided (C.6)<br>Telecommunications Services to be Provided (C.7)<br>Human Resources Management (C.8)<br>Quality Assurance/Quality Improvement (C.9)<br>Performance Management (C.10)<br>Management Reports (C.11) |
| L.7.2.1.6.1 | Program Management Plan<br>Staff to be Provided (C.4)   |
| L.7.2.1.5.2 | Facilities and Technology Infrastructure<br>Facilities to be Provided (C.5)<br>Technology Infrastructure to be Provided (C.6)<br>Telecommunications Services to be Provided (C.7)   |
| L.7.2.1.6.2 | Human Resources Management Plan<br>Human Resources Management (C.8)   |

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|             |   |
|-------------|---|
| L.7.2.1.6.4 | Quality Control/Quality Improvement Plan<br>Quality Assurance/Quality Improvement (C.9) |
| L.7.2.1.6.3 | Performance Management Plan<br>Performance Management (C.10)                            |
| L.7.2.1.6   | Management Plan<br>Management Reports (C.11)  |

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**A.5.18 Section L.7.2.1.5 is being amended to limit the response to Section C.3 only. In addition, Sections L.7.2.1.6.1, L.7.2.1.6.2, L.7.2.1.6.3, and L.2.1.6.4 are being revised to include references to the deleted sections in the respective plans. Also see response to Q.4.6.**

Q.6.1 Support for TTY is understood at the agent level. Is there a specific requirement to support TTY based self-service in the IVR?

**A.6.1 No.**

Q.6.2 What provisions exist for Teleworking agents? What specific security standards would apply?

**A.6.2 As stated in Section C.2.1.3, all inquiry response work shall be performed at contractor managed facilities within the United States unless specifically authorized by the Government. Such authority, as well as support and security requirements for performing the work outside of contractor-managed facility, will be addressed at a task order level.**

Q.6.3 What percentage of calls will be recorded? What is the normal retention period for call recordings? Can these be provided to the government for long-term storage? If so, what format is required?

**A.6.3 The percentage of calls to be recorded, the retention period and storage for call recordings, and format of such recordings will be identified on individual task orders.**

Q.7.1 Reference: Section B.2.1.1, Tables B.2.1.1-1 though B.2.1.1-5, P-4 - Is the GSA requesting one set of the six tables for each of the offeror's contact centers?

**A.7.1 Offerors are required to submit only one set of price tables. The price tables shall contain ceiling rates that cannot be exceeded regardless of where the contact centers are located for the duration of the contract. At the task order level, a contractor may chose to propose a location other than the one it used to develop its ceiling prices provided: (i) prices proposed for that alternate location do not exceed CLIN pricing in their IDIQ contract, and (ii) the pricing complies with wage determination requirements for the location in which the work will be performed.**

Q.7.2 Reference: Section B.2.1.2, Tables B.2.1.2-1 though B.2.1.2-5, P-5 - Is the GSA requesting one set of the six tables for each of the offeror's contact centers?

**A.7.2 See response to Q.7.1**

Q.7.3 Reference: Section B.2.2, Table B.2.2-2 - Incremental Project Management Support (Monthly), P-11 - Should the "Unit of Issue" in column 3 be "Each Month," rather than "Hour"?

**A.7.3 The correct "unit of Issue" for Incremental Project Management Support is "Hour". The Incremental Project Management Support cost for each task, if applicable, is calculated by multiplying the unit rate by the quantities of hours needed to support the task.**

5639  
5640 Q.7.4 Reference: Section C.9.2.4, P-75 - Does the term "employee" refer to an employee of the  
5641 offeror/contractor or to an employee of a Government agency receiving contracted services from a USA  
5642 Contact contractor?

5643  
5644 **A.7.4 The term "Employee", as used in Section C.9.2.4, refers to contractor employee.**  
5645

5646 Q.7.5 Reference: Section L.7.2.1.4, P-158 - Will the GSA clarify the response difference between--or  
5647 consider combining--the 4th bullet requirement ("two unanticipated challenges and the corresponding  
5648 remedial actions...") and the 7th bullet requirement ("any problems or issues that occurred, and the  
5649 corrective action taken, that may impact the offeror's past performance evaluation by its customer...")?

5650  
5651 **A.7.5 These are two distinct areas of information. The fourth bullet on page 158 relates to**  
5652 **unanticipated challenges encountered by the offeror and the corresponding remedial actions taken**  
5653 **to address the challenges. These are generally not actions to correct a performance problem but**  
5654 **rather actions to enhance or improve the operation and/or management of a project. The seventh**  
5655 **bullet on that page relates to problems and issues and the actions taken to correct contract non-**  
5656 **performance.**  
5657

5658 Q.8.1. Can GSA provide information as to what percentage of the task orders under the First Contact  
5659 procurement involved 1). Building a new physical call center 2). Using an existing vendor call center or  
5660 3) Using an existing government physical call center?

5661  
5662 **A.8.1 To the best of the Government's knowledge, all of the task orders issued under the**  
5663 **FirstContact contracts leveraged the use of existing contractor-provided centers.**  
5664

5665 Q.8.2 Will there be any additional opportunities to ask questions?  
5666

5667 **A.8.2 Hopefully, potential offerors have had sufficient time to ask all questions necessary to**  
5668 **provide a responsive proposal. From this point until receipt of proposals, the Government will**  
5669 **make a best effort to answer any additional questions received.**  
5670

5671 Q.9.1 Reference: Section C.2.1.7, P-25 - Dedicated and shared or non-dedicated service solution \*  
5672 Also on P 58 Section C 4.3.3 Skill categories - How many work groups are required for the program? If  
5673 more than one skill, is there opportunity to blend program and create universal agent?  
5674

5675 **A.9.1 The number of work groups and skill categories and the opportunity to blend programs**  
5676 **will, if applicable, be addressed at a task order level. The Government cannot predict how many**  
5677 **work groups and skill categories will be required to satisfy the requirements of the USA Contact**  
5678 **program.**  
5679

5680 Q.9.2 Reference: Section C.6.9, P-67 - Service Monitoring and Quality Control -: Is there any  
5681 dispositioning requirement?  
5682

5683 **A.9.2 Any inquiry dispositioning requirements, if required, will be addressed at a task order**  
5684 **level.**  
5685

5686 Q.9.3 Reference: Section C.6.9, P-67 -Service Monitoring and Quality Control - Will the  
5687 Government clarify how many quality monitors are expected to be completed per agent per week or  
5688 month?  
5689

5690 **A.9.3 The Government will decide the quantity of quality monitors per agent on a task order by**  
5691 **task order basis.**

5692  
5693 Q.9.4 Reference: Section C.6.9, P-67 -Service Monitoring and Quality Control - Will one group of  
5694 agents handle all call types (including all Client types) or will there be specialization?  
5695

5696 **A.9.4 Unless otherwise specified in individual task orders, the Government expects that**  
5697 **contractors will be required to provide unique solutions to meet the individual program**  
5698 **requirements as specified in the task orders.**

5699  
5700 Q.9.5 Reference: Section C.6.9, P-67 - Service Monitoring and Quality Control – Will the  
5701 Government clarify the expected shrinkage for uptraining & quality?  
5702

5703 **A.9.5 Contractors are responsible for providing qualified and trained personnel to meet the**  
5704 **performance requirements specified in individual task orders. It is the contractor’s responsibility**  
5705 **to assess the task requirements, including potential shrinkage of personnel due to uptraining and**  
5706 **quality processes, and develop an appropriate program for recruiting, training, and retaining**  
5707 **sufficient qualified personnel to perform the work.**

5708  
5709 Q.9.6 Reference: Section C.8.2, P-71 – Training - What is the language % volume breakdown for  
5710 each workgroup/project type?  
5711

5712 **A.9.6 Language support and volume breakdown for each workgroup/project are task**  
5713 **dependent and will be identified in individual task orders.**

5714  
5715 Q.9.7 Reference: Section C.2.1.5, P-25 - Language Support - What are the Service Level Agreements  
5716 that you required?  
5717

5718 **A.9.7 Applicable performance standards, including but not limited to Service Level**  
5719 **Agreements, Occupancy, Average Speed of Answer, and Abandonment Rate, are to be determined**  
5720 **at a task order level.**

5721  
5722 Q.9.8 Reference: Section C.2.1.5, P-25 - Language Support - What are the Occupancy, Average  
5723 Service Level, Average Speed of Answer and Abandonment Rate?  
5724

5725 **A.9.8 See response to Q.9.7.**

5726  
5727 Q.9.9 Reference: Section C.3.2.2, P-39 - Outbound Calling Services - How many outbound quality  
5728 monitors are required per agent per week or month?  
5729

5730 **A.9.9 See response to Q.9.3**

5731  
5732 Q.9.10 Reference: Section C.3.2.2, P-39 - Outbound Calling Services - Could you provide the  
5733 requirements for outbound call recording and storage?  
5734

5735 **A.9.10 Other than for quality and training purposes, which is the responsibility of the**  
5736 **contractors under this contract, the Government generally does not require the contractor to**  
5737 **record the inquiries as a business practice. However, if such recording and storage is a**  
5738 **requirement, it will be specified at a task order level.**  
5739

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5740 Q.9.11 Reference: Section C.3.2.2, P-39 - Outbound Calling Services - What are your outbound  
5741 reporting requirements?  
5742

5743 **A.9.11 The contractors are required to provide reports for services rendered under this contract.**  
5744 **Specific report requirements, including reports elements and format, and report frequency, will be**  
5745 **specified at a task order level.**  
5746

5747 Q.9.12 Reference: Section C.11, P-76 Management Reports – Will the Government provide any  
5748 restrictions in calling hours other than the standard regulatory hours?  
5749

5750 **A.9.12 The Government cannot find any references to restrictions in calling hours in the**  
5751 **referenced RFP section and page number. The Government assumes that the question relates to**  
5752 **restrictions in calling hours for outbound calling services. Outbound calling hour restrictions are**  
5753 **task specific and will be identified in individual task orders.**  
5754

5755 Q.9.13 Reference: Section C.11, Page 76 - Will the Government provide any specific dialing time  
5756 requirements (i.e. start at xxxx, end by yyyy).  
5757

5758 **A.9.13 The Government cannot find any references to restrictions in dialing time requirements**  
5759 **in the referenced RFP section and page number. The Government assumes that the question**  
5760 **relates to dialing time requirements for outbound dialing services. Dialing time requirements for**  
5761 **outbound dialing services are task specific and will be identified in individual task orders.**  
5762

5763 Q.9.14 Will GSA clarify its marketing strategy for the current First Contact customers to use this  
5764 vehicle?  
5765

5766 **A.9.14 This question appears to be a duplicate of Q.9.20. See response to Q.9.20.**  
5767

5768 Q.9.15 Reference: Section C.1.3, P-23 – Objectives - Can GSA clarify its requirements for promoting  
5769 opportunities to employ the blind or have severe disabilities with this vehicle?  
5770

5771 **A.9.15 See Section H.8 of the solicitation.**  
5772

5773 Q.9.16 Reference: Section C.1.3, P-23 – Objective - Will GSA clarify the term “emergency and crisis  
5774 situation”?  
5775

5776 **A.9.16 The term “emergency and crisis” refers to any situation in which the exception to full and**  
5777 **open competition based on urgent and compelling circumstances exists. This is defined in the**  
5778 **Federal Acquisition Regulation as: “When the agency’s need for the supplies or services is of such**  
5779 **an unusual and compelling urgency that the Government would be seriously injured unless the**  
5780 **agency is permitted to limit the number of sources from which it solicits bids or proposals, full and**  
5781 **open competition need not be provided for.”**  
5782

5783 Q.9.17 Reference: Section C.1.1, P-22 – Background - Will agencies using the FirstContact contracts  
5784 program chose not to provide an option year and instead re-procure thru the contract vehicle this new  
5785 IDIQ will provide?  
5786

5787 **A.9.17 The decision to exercise or not exercise an option is always based on the Government**  
5788 **assessment of what constitutes its best interest.**  
5789

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5790 Q.9.18 Reference: Section C.2.1.7, P-25-26 - Dedicated and Shared or Non-Dedicated Service  
5791 Solutions - Will GSA clarify the meaning of “complex projects” in this context?  
5792

5793 **A.9.18 See Section C.3.5.1 for descriptions on task complexity levels.**  
5794

5795 Q.9.19 Reference: Section C.2.2.2, P-27 - E-Mail Workflow (Normal) - No timeframes are provided  
5796 for email responses that are forwarded outside of the contact center and to a government agency. Will  
5797 GSA acknowledge that this is outside the contracts program vendor’s responsibility?  
5798

5799 **A.9.19 Unless follow-up actions are required and specified in the task requirements, the**  
5800 **contractor is not responsible for responding to email inquiries that have been forwarded to a**  
5801 **government agency or a designated individual or organization beyond the control of the contractor.**  
5802

5803 Q.9.20 Will GSA clarify its marketing strategy for the current First Contact customers to use this  
5804 vehicle?  
5805

5806 **A.9.20 GSA is already marketing USA Contact to current FirstContact customers.**  
5807

5808 Q.9.21 We cannot find anywhere stated the security requirements for the network the government  
5809 intends to employ for the work. See H.12 for some discussion of system. Can the government provide  
5810 clarification for network security?  
5811

5812 **A.9.21 Network security is not addressed as a separate requirement under this contract.**  
5813 **Contractor-provided solution under this contract, including the network that the contractor is**  
5814 **using to support the task, has to comply with the requirements set forth in Section C.3.5.5 –**  
5815 **Information Systems Security Management.**  
5816

5817 Q.10.1 Reference: Section 2.1.6 - Can the government further define their expectations with regard to  
5818 contractor's ability to stand up a contact center within 48 hours of notification from the government?  
5819 Specifically, what are the expectations with regard to the size of the operation - 100 seats, 200 seats, 500  
5820 seats, etc? Also, will the government accept a retainer fee to keep a Pseudo hot site available for this  
5821 purpose?  
5822

5823 **A.10.1 See response to Q.3.2 above for 48 hour ramp-up expectation. The Government will not**  
5824 **establish a Pseudo hot site for this purpose as part of the base contract. However, agencies may**  
5825 **issue tasks that require such an arrangement to respond to anticipated emergencies. Such**  
5826 **requirements will be addressed on a task order by task order basis.**  
5827

5828 Q.10.2 Since GSA has now awarded Networx that includes among its service offerings Contact Center  
5829 services, will GSA Public Buildings Service consider an offer based upon using Networx as the service  
5830 delivery mechanism?  
5831

5832 **A.10.2 Questions concerning agency acquisition plans at the task order level will not be**  
5833 **addressed in this forum.**  
5834

5835 Q.10.3 Please describe in detail, the different types of IVR application being utilized in your current  
5836 call center environment. Can you provide any supporting volumetric data specific to each IVR  
5837 application? Please describe the call routing strategies for different call types inbound into the call  
5838 center. Describe the requirements for specific feature by agent (for example, skills based routing or CTI  
5839 integration with data push to the agent desktop.)  
5840

5841 **A.10.3 IVR application, volume, features, and routing arrangements are all task dependent and**  
5842 **will be addressed at a task order level. Quotations provided by contract awardees must however**  
5843 **comply with terms and conditions, including price in their IDIQ contract, and must provide a fully**  
5844 **responsive technical solution in response to a task requirement’s Request for Quotation.**  
5845

5846 Q.11.1 Reference: Section B.1.1.1, P-1 – Project Startup - The government states that charges shall  
5847 include one or more of the following (a) Facility and Equipment (b) Initial Special Training (c)  
5848 Knowledge and Content Development (d) Project Implementation Support as related to Project Start Up.  
5849 It is assumed that the vendor will allocate costs for all as described in section B.2.1.1-1 in the pricing roll-  
5850 up and calculate alternative/lower pricing where applicable if only a few of the elements (a) – (d) are  
5851 used. Is this correct?  
5852

5853 **A.11.1 Offeror shall provide ceiling prices for each of the CLINS listed in Section B.2 – Price**  
5854 **Tables. When responding to specific task requirements upon receipt of a contract award, an**  
5855 **offeror may apply the applicable CLINS and quantities to calculate the prices in preparing the**  
5856 **price proposal.**  
5857

5858 Q.11.2 Reference: Section B.1.1.2, P-1 – Initial/Special Training - The one-time charge indicated in  
5859 this section is calculated on a task order by task order basis or is this to be a one time charge per facility.  
5860

5861 **A.11.2 See response to Q.5.2 above.**  
5862

5863 Q.11.3 Reference: Section B.1.5, P-3 – Attended Services – Shared or Non-Dedicated Solutions - The  
5864 RFP states the charges are to be based on actual handling time including call wrap up time. The vendor  
5865 assumes that actual handling time and wrap up is to be calculated based on a minute / hourly roll-up  
5866 inclusive of rounding to the nearest minute?  
5867

5868 **A.11.3 As stated in Section B.2.7, “For billing purposes, the actual handle time (including wrap-**  
5869 **up time) of all calls during the month shall be totaled and rounded up to the nearest hour.”**  
5870

5871 Q.11.4 Reference: Section B.2.1.2.2, P-5 – Incremental Facility and Equipment - The pricing tables  
5872 for IS support (training and Dedicated production) break down into IS and Supervisory components.  
5873 B.1.4 (Dedicated) and B.1.5 (Non-Dedicated) descriptions specify that the unit rate should be fully  
5874 burdened, including supervision. Should these components be priced separately or combined?  
5875

5876 **A.11.4 Section B.1.4 is being amended to remove the “supervisor” reference (see response to**  
5877 **Q.5.4). The descriptions in Sections B.1.4 and B.1.5 are for associated with work performed in**  
5878 **normal operation. The price tables referenced in the above question are charges for Information**  
5879 **Specialists and Supervisory Information Specialists while in training preparing for the task.**  
5880

5881 Q.11.5 Reference: Section B.2.3.3, P-11 – CLINS 72000 & 82002 - The RFP in general classifies  
5882 Language Translation services to cover all of the Over-the-Phone Interpretation, On-Demand Email  
5883 Translation, and Text Translation services we provide. In the pricing pages of the RFP p. 12, there’s a  
5884 category for Service Initiation/Change Order Charges for Support Services that requests Language  
5885 Translation Services per Unit, while on pg. 13 there’s a category for Recurring charges for Other Support  
5886 Services for Language Translation Services that requests price by the hour. Will the government clarify  
5887 what the difference is between the two?  
5888

5889 **A.11.5 The Service Initiation /Change Order Charge is the one time charge that the contractor**  
5890 **may impose for setting up the language translation service. The Recurring Charge is for the actual**  
5891 **use of the language translation service.**

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Q.11.6 Reference: Section B.2.4.2, P-12, Section C.3.3.3, P-43 – Language Translation Services - CLIN 82002: To avoid any misunderstanding may we suggest using separate CLINs for translation (written) and interpreting (oral). “Language Translation Services” should be used for any written requirements with the “unit of issue” WORD, and a separate CLIN

**A.11.6 The Service Description for CLIN 82002 is being revised to read “Language Translation Service – Telephone”. A new CLIN 82003 is being added for “Language Translation Service – Written” and the Unit of Issue is “Each Word”.**

Q.11.7 Reference: Section B.2.5, P-13 – Attended Services - The pricing tables for IS support (training and Dedicated production) break down into IS and Supervisory components. B.1.4 (Dedicated) and B.1.5 (Non-Dedicated) descriptions specify that the unit rate should be fully burdened, including supervision. Should these components be priced separately or combined?

**A.11.7 The Information Specialist Hourly Rates for Dedicated and Shared or Non-Dedicated Response solutions shall include all of the stated components.**

Q.11.8 Reference: Section B.2.6, P-17 – QA Personnel Multiplier - What is the average number expected by GSA for the ratio of IS to QA personnel?

**A.11.8 The average IS to QA Personnel ration is dependent on the offeror’s proposed solution. Offerors are expected to identify the average IS to QA Personnel ratios proposed for the average, high and low requirements.**

Q.11.9 Reference: B.2.6, P-17 – QA Personnel Multiplier - Please define and explain the QA Multiplier in greater detail. The vendor understands the potential need for additional or diminished QA resources but anticipates utilizing this calculation on a task order by task order basis.

**A.11.9 The QA Personnel Multiplier is intended to provide flexibility to offerors to adjust their solutions in response to specific tasks that may require a higher or lower IS to QA Personnel ratio. Offerors are requested to provide a maximum and minimum multiplier for this contract, which then can be discounted on a task order by task order basis.**

Q.11.10 Reference: Sections B.2.6 & B.2.7, P-17, Section H.9 – P-103 – Work Hour Descriptions - These four sections alternately describe the hourly unit rate as a "worked hour" or "actual handling time (including call wrap-up time)". Is H.9 the over-riding definition -- which would include payment for coaching, breaks and meeting time? Sections If so, B.1.5 and B.2.7 contradict this definition

**A.11.10 Section H.9 of the RFP is being amended to exclude the following activities from the calculation of “working time” for Information Specialists for Shared or Non-Dedicated Response Solutions:**

- **in the available (to respond to a call or inquiry) mode;**
- **while receiving instructions or coaching;**
- **while on breaks; and**
- **while attending task-related meetings.**

**Offerors shall account for these activities in establishing the Information Specialist Hourly Rates for Shared or Non-Dedicated Response Solutions.**

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5942  
5943 Q.11.11 Reference: Section B.2.7, P-17 - Is the specific daily work volume commitment a minimum  
5944 commitment? Is it in hours, calls or minutes?  
5945

5946 **A.11.11 The specific work volume commitment is the minimum commitment. The minimum**  
5947 **commitment is expressed in hours/day as defined in the price tables.**  
5948

5949 Q.11.12 Reference: Section C.2.1, p-26 – Dedicated and Shared or Non-Dedicated - When does the  
5950 “20 Seconds” begin to count? Does this include IVR time?  
5951

5952 **A.11.12 The count begins when the call is offered to the Information Specialists by the**  
5953 **contractor system. This does not include IVR time.**  
5954

5955 Q.11.13 Reference: Section C.2.1.2, P-24 – Hours of Operation - In providing interfaces to  
5956 Government Furnished IVR what connectivity elements will be provided by the government? The vendor  
5957 realizes that this may be configured on a task by task basis but in cognizant that if industry standard  
5958 elements are not mandated then there is a potential for connectivity “scope creep” and subsequent cost /  
5959 price issues.  
5960

5961 **A.11.13 In general, if the Government furnishes its own IVR solution, the Government will be**  
5962 **responsible for routing the calls to the contractor designated presence via the appropriate**  
5963 **telecommunications connectivity (e.g., contractor’s 800 number, contractor’s 800 or DID**  
5964 **telecommunication access circuits, or Government furnished telecommunications access circuits)**  
5965

5966 Q.11.14 Reference: Section C.2.1.2, P-24 – Hours of Operation - Are the said carriers (Verizon, Sprint,  
5967 AT&T) leveraged to handle network or cloud based routing for inter and/or intra  
5968 office/department/agency purposes.  
5969

5970 **A.11.14. If the Government elects to provide its own automated service via one of its**  
5971 **telecommunications service providers, the routing capabilities will be defined in the individual task**  
5972 **orders.**  
5973

5974 Q.11.15 Reference: Section C.2.1.2, P-24 – Hours of Operation - Holiday hours are defined as a 24  
5975 hour period beginning at 12:01 am ET of the day of the holiday, if the holiday event happens on a  
5976 weekend and is extended through to the first official business day how does the scheduling conform?  
5977

5978 **A.11.15 Federal holidays are defined in Section H.11. If any of the holidays falls on a Saturday,**  
5979 **then the preceding Friday is the holiday. If any of the holidays falls on a Sunday, then the following**  
5980 **Monday is the holiday. Also see response to Q.11.16.**  
5981

5982 Q.11.16 Reference: Section C.2.1.2, P-24 - Does the normal ending period for a holiday commence  
5983 exactly at 12:00 am ET or does the commencement for business begin at 7:00 am ET as part of the normal  
5984 business hours process?  
5985

5986 **A.11.16 “Eastern Time” is being replaced by “Local Time” in the definition of Normal Business**  
5987 **Hours, Nights, Saturdays, and Sundays to account for time zone differences. Holiday hours are**  
5988 **from 12:00 midnight to 12:00 midnight local time on the day of the holiday. Normal business hours**  
5989 **begins at 7:00 am local time.**  
5990

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5991 Q.11.17 Reference: Section C.2.1.6, P-25 – Ramp Up Ramp Down - Is the requirement to ramp-up to  
5992 fully operational status within 48 hours for dedicated service solutions or for share/non-dedicated  
5993 solutions or for both?  
5994

5995 **A.11.17 Both.**  
5996

5997 Q.11.18 Reference: Section C.2.1.6, P-25 - Ramp Up Ramp Down - Will the government have the  
5998 communications facilities in place to handle the traffic?  
5999

6000 **A.11.18 The Rapid Ramp-Up requires the Contractor to provide telecommunications solutions**  
6001 **as part of the ramp-up process.**  
6002

6003 Q.11.19 Reference: Section 2.1.6, P-25 – Ramp Up Ramp Down - In ramping down in 24 hours, the  
6004 contractor may incur obligations under employment law to pay employees in lieu of notice. Will the  
6005 government cover those costs?  
6006

6007 **A.11.19 Section C.2.1.6 is being amended to include such provision. Also see response to Q.3.2.**  
6008

6009 Q.11.20 Reference: Section C.2.1.7, P-26 – Dedicated and Shared or Non-Dedicated Service - The  
6010 stated service level is 70% in 20 seconds, what is the service level for abandonment rate for support calls?  
6011

6012 **A.11.20 For pricing purposes, offerors shall assume a 3% abandonment rate and a service level**  
6013 **of 70% with 20 seconds for Shared and Non-Dedicated Response Solutions. The RFP is being**  
6014 **amended to reflect this requirement.**  
6015

6016 Q.11.21 Reference: Section C.2.2.1, P-26 – Sample Call Flow - Define the term “system work”?  
6017

6018 **A.11.21 The term “system work” refers to the retrieval, review, and capture of information**  
6019 **during the inquiry response process.**  
6020

6021 Q.11.22 Reference: Section C.2.2.2.2, P-28 – Email Response Options - Where is the escalation  
6022 procedure for inter and intra agency escalations located?  
6023

6024 **A.11.22 As stated in Section C.2.2, the workflow descriptions provided are for illustrative**  
6025 **purposes only. Actual workflow, including escalation procedures for inter and intra agency**  
6026 **escalations, will be described in individual task orders.**  
6027

6028 Q.11.23 Reference: Section C.2.2.4, P-30 – Postal Mail Inquiry Workflow - The vendor has a great  
6029 deal of experience in handling postal mail inquiries and requests for information but is unclear within the  
6030 scope of this RFP if the government, under this contract will require standardized mail handling methods  
6031 currently deployed by a number of agencies that include biometric and chemical analysis of packages  
6032 entering a facility. If this level of mail support is expected by the government under the terms of this  
6033 contract can the vendor configure and price the mail handling activity on a task order by task order basis?  
6034

6035 **A.11.23 Yes, providing the system is priced using existing contract CLINs.**  
6036

6037 Q.11.24 Reference: Section C.3.1.1, P-33 – Automated Voice Response Services - The government  
6038 may elect to furnish their own automated voice response service. It is understood that the government  
6039 may contract with the vendor to provide a myriad of services in support of this government environment.  
6040 Will the vendor be responsible for language translation services for this government furnished solution

6041 and subsequently be permitted to access the various subsets required in order to accurately provide  
6042 complete translated services.

6043  
6044 **A.11.24 IVR Support requirements are task dependent. Specific support requirements will be**  
6045 **addressed in individual task orders.**

6046  
6047 Q.11.25 Reference: Section C.3.1.1.2, P-33 – Voice/Speech Recognition - Does the government  
6048 require voice-recognition in languages other than English?

6049  
6050 **A.11.25 The degree of consistency between services offered in different languages will be task**  
6051 **specific and will be specified in individual task orders. The technology supporting text-to-speech**  
6052 **and voice recognition must support the languages listed in Section C.3.1.1.**

6053  
6054 Q.11.26 Reference: Section C.3.1.1.3, P-33 – Text to Speech - Does the government require Text-to-  
6055 Speech in languages other than English?

6056  
6057 **A.11.26 See response to Q.11.25 above.**

6058  
6059 Q.11.27 Reference: Section C.3.1.11, P-36 – Hosted FAQ Services - It is assumed that the FAQ  
6060 service must be made available in all languages specified in Section 2.1.5. Is this a correct assumption?

6061  
6062 **A.11.27 Hosted FAQ Services must support multiple languages. At a minimum, the service shall**  
6063 **support English, Spanish and Chinese. Section C.3.11 is being amended to clarify this requirement.**

6064  
6065 Q.11.28 Reference: Section C.3.1.11, P-38 – Hosted FAQ Services - It is recognized by the vendor  
6066 that all interfaces must be Section 508 compliant, multilingual capable and XML compliant. It is also  
6067 understood that in order to display and integrate a number of rarer languages for display the user of the  
6068 FAQ environment must load a specific language pack to the user's browser. The vendor assumes that the  
6069 acquisition and loading of this pack is the responsibility of the end user. Is this a correct assumption?

6070  
6071 **A.11.28 Yes.**

6072  
6073 Q.11.29 Reference: Section C.3.2, P-38 – Attended Services - Does 'virtual solution' mean  
6074 shared/non-dedicated services?

6075  
6076 **A.11.29 Yes. The RFP is being amended to reflect "shared or non-dedicated solutions."**

6077  
6078 Q.11.30 Reference: Section C.3.2.2, P-39 – Outbound Calling Services - The vendor currently  
6079 provides a great deal of outbound calling services and would like clarification that the scope of the  
6080 outbound calling in this RFP is consistent with outbound call to US states and territories. Is this correct?

6081  
6082 **A.11.30 Yes, if the Outbound Calling Service requires the support of automated dialing**  
6083 **equipment. There is no such restriction if the service is performed manually.**

6084  
6085 Q.11.31 Reference: Section C.3.2.6, P-42 – Interactive Web-Based Services - Does the government  
6086 require on-line translation of web-chat into languages other than English?

6087  
6088 **A.11.31 No. Not at the present time. However, the Government may modify the contract to add**  
6089 **such a service at a later date if agency requirements for such a service become known.**

6090

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6091 Q.11.32 Reference: Section C.3.2.6, P-42 – Interactive Web-Based Services - Does the CLIN for  
6092 Start-Up also cover on-going services or is there a separate CLIN?  
6093

6094 **A.11.32 No. The CLIN for start-up covers only the one-time charge associated with setting up**  
6095 **the service. Charges for ongoing services are cover by the Recurring Charges for Automated**  
6096 **Services and Attended Services as provided for in the Section B price tables.**  
6097

6098 Q.11.33 Reference: Section C.3.3.3, P-43 – Language Translation Services - What data would be  
6099 collected by this tool?  
6100

6101 **A.11.33 Language translation requirements are task dependent. Specific data collection**  
6102 **requirements to facilitate the evaluation of the need and use of the service will be specified on a task**  
6103 **order level.**  
6104

6105 Q.11.34 Reference: Section C.3.5.5, P-47 – Information System Security Management - There are  
6106 references to both the FIPS Publications and later on to the FISMA compliance process. Most of the FIPS  
6107 requirements are addressed in the FISMA compliance issues, including the NIST publications. Is there  
6108 some special reason why FIPS is addressed separately when most, if not all of these issues are addressed  
6109 in the FISMA compliance regulations?  
6110

6111 **A.11.34 No.**  
6112

6113 Q.11.35 Reference: Section C.3.5.5.3, P-50 – Process Management. - Does the requirement for "a  
6114 physically secure facility for people..." preclude the utilization of a virtual IS solution e.g. visually  
6115 impaired or other disabled persons remotely housed?  
6116

6117 **A.11.35 See response to Q.6.2.**  
6118

6119 Q.11.36 Reference: Section C.3.5.6, P-53 – Content & Knowledge Management - If transition to a  
6120 new vendor(s) occurs, how will knowledge and/or systems be migrated into the new environment  
6121 (websites, FAQs, IVR, etc.)?  
6122

6123 **A.11.36 Migration of any knowledge and systems, if required, will be addressed at a task order**  
6124 **level.**  
6125

6126 Q.11.37 Reference: Section C.4, P-55 – Staff to be Provided - Does "All work performed shall be at  
6127 contractor-managed facilities" preclude virtual IS solutions? Similar to preceding question for C.3.5.5.3.  
6128

6129 **A.11.37 See response to Q.6.2**  
6130

6131 Q.11.38 Reference: Section C.4.3.1, P-57 – Information Specialists - Please further define English  
6132 language proficiency with reference to the ILR scale. What assessment methods of language proficiency  
6133 will be accepted as proof?  
6134

6135 **A.11.38 With reference to the Interagency Language Roundtable (ILR) scale, the language**  
6136 **proficiency requirement for information specialists would be equivalent to a ILR Level 5 or S-5 -**  
6137 **Native or bilingual proficiency. An individual at this level is described as follows:**

- 6138
- **has a speaking proficiency equivalent to that of an educated native speaker**

- 6139           •     **has complete fluency in the language, such that speech on all levels is fully accepted by**  
6140                     **educated native speakers in all of its features, including breadth of vocabulary and idiom,**  
6141                     **colloquialisms, and pertinent cultural references.**

6142     **Section C.4.3.1 of the RFP is being amended to reflect the inclusion of ILR Level-5 language**  
6143     **proficiency requirement.**

6144     Q.11.39     Reference: Section 4.3.4, P-59 – Multi-Language Support - Please further define language  
6145     proficiency with reference to the ILR scale. What assessment methods of language proficiency will be  
6146     accepted as proof?

6147     A.11.39     **See response to Q.11.38.**

6150     Q.11.40     Reference: Section C.7.3, P-70 – Network Design - Is there a minimum bandwidth  
6151     requirement for voice and data access?

6152     A.11.40     **Voice and data access requirements will be task dependent. It will be the contractor’s**  
6153     **responsibility to provide sufficient network and access bandwidth to satisfy the performance**  
6154     **requirements of the specific tasks to which it chooses to respond to.**

6157     Q.12.1     For purposes of completing the Minimum Experience Qualifications Criteria Section (Section  
6158     L.7.1.3.1) of the RFP, is it acceptable for a wholly owned subsidiary dedicated to the Government to use  
6159     the qualifications of its parent corporation? Thus can the subsidiary be the offeror and use its Parent’s  
6160     qualifications?

6161     A.12.1     **Yes, but only if the offeror clearly demonstrates that a symbiotic relationship has**  
6162     **existed in the past whereby the wholly owned subsidiary was fully involved in the services it**  
6163     **proposes to provide under a USA Contact contract; the parent corporation provided the subsidiary**  
6164     **with essential resources, skills and support; and that this relationship and level of commitment will**  
6165     **continue for the**  
6166     **duration of the USA Contact contract.**

6169     Q.13.1     Reference: P-100 of RFP – Will the Government clarify the Size standard for this  
6170     procurement? Page 100 of the RFP states it is \$6M with NAICS Code 519190. Is this right? If not, does  
6171     GSA plan to release a USA Contact Multichannel Contract Center Services Small Business?

6172     A.13.1     **See response to Q.3.21 above.**

6176     **The following questions and answers were issued as part of Request for Proposal GSV07PD0003 –**  
6177     **Amendment A-002**

6179     Q.1.1     Will GSA post all of the RFP Sections B through M forms to be completed as Word documents  
6180     as opposed to the current PDF versions?

6181     A.1.1     **No. The solicitation and any amendments issued will be posted in PDF format only. Also**  
6182     **see responses to Q.2.1 and Q.2.2 of Answers to Vendor Questions in Amendment-A001.**

6184     Q.1.2     Is the Government agreeable to a mutual confidentiality clause?

6185     A.1.2     **No.**

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Q.1.3 Is the Government agreeable to a reasonable limit on liability clause that excludes consequential, indirect, lost profit, etc., damages?

**A.1.3. No. Limited liability clauses are generally restricted to cost reimbursement contracts. Vendors will have to account for their perceived risk in their unit prices.**

Q.1.4 Reference: Section B – Which of the CLINs listed in Section B of the RFP is subject to the service Contract Act?

**A.1.4 The applicability of the Service Contract Act to the CLINS listed in Section B will depend on the offeror’s proposed solution to meet the requirements of the solicitation. Generally, the CLINS that are subject to the Service Contract Act are those associated with services performed by one or more classes of Service employees, as defined by the Act.**

Q.1.5 Reference: Section B.1.1.2, P-1 – *Initial/Special Training, states that “This charge does not apply to any ongoing or refresher training conducted by the contractor to ensure compliance of performance requirements or training of replacement ISs due to attrition or other causes.”* Where does GSA expect the training costs incurred by training new IS personnel to be included in the proposal? Is this charge expected to occur only once during the life of a task order contract?

**A.1.5 As stated in Section B.1.1.2, Initial/Special Training is a one-time charge to be paid for labor and supply costs incurred to develop training materials and train the initial complement of ISs or any additional ISs above the initial complement to support task requirements. The charges are to be calculated by using the CLINs listed in the Section B.2.1.3 price tables. The charges can be applied during project start-up to train the initial complement of ISs or for any subsequent activities that may require the contractor to train additional ISs above the initial complement or to train existing ISs for new tasks initiated by the Government. However, these charges cannot be applied to any ongoing or refresher training conducted by the contractor to ensure compliance of performance requirements or training of replacement ISs due to attrition or other causes.**

Q.1.6 Reference: Section C.3.1.1.3, P-32 – Are speech recognition and text-to-speech required for all languages noted?

**A.1.6 Yes. The Government expects that all automated voice response solutions, including IVR, Voice/Speech Recognition, and text-to-Speech, support the languages identified in Section C.3.1.1. Also see response to Q.1.4 of Answers to Vendors Questions issued in Amendment A001.**

Q.1.7 Reference: Section C.3.1.11, P-36 - Hosted FAQ Services states “[T]he Government intends to harvest some or all of the information contained in the Contractor’s FAQ knowledge base through the USA.gov. search service or other agency search services on a regular basis.” What does this means? Harvest for what? Who will the information be shared with?

**A.1.7 It means that the Government may use automated or manual tools to collect the content of the FAQ knowledgebase via the Internet or direct the contractor to produce the content in a suitable format on a regular basis to enable the Government to make the content accessible to users of selected government websites, such as USA.gov. The intent is to enable the Government to share the latest information with the general public to the broadest extent possible.**

Q.1.8 Reference: Section C.3.5.5, P-47 – Information Systems Security Management, Security Test and Evaluation Reports, states [T]he Security Test and Evaluation Reports shall be prepared by a third

6239 party vendor selected and paid for by the Contractor.” Can this third party vendor be a subcontractor on  
6240 the Contractor’s team for purposes of this RFP? If the Government selects its own third party vendor,  
6241 will said third party vendor be required to sign a nondisclosure agreement and not be a competitor of  
6242 Contractor?  
6243

6244 **A.1.8 To maintain impartiality of the findings, the third party cannot be a subcontractor or a**  
6245 **teaming member on the Contractor’s team. The Government may elect to use its own third party**  
6246 **vendor to prepare the above reports and/or to conduct any audits, surveys and inspections of**  
6247 **operations and facilities on behalf of the Government. If so, it will require the third party vendor**  
6248 **to sign a non-disclosure agreement to protect each contract holder’s procurement-sensitive**  
6249 **information as delineated in Section H.19. The Government however will not require the third**  
6250 **party vendor to sign a “no-compete” agreement with the contractor. Any such agreement will have**  
6251 **to be negotiated between the third party vendor and the contractor outside the purview of this**  
6252 **contract.**  
6253

6254 Q.1.9 Reference: Section C.3.5.5.1, P-49 – Pursuant to Section C.3.5.5.1 *Personnel Security*, how  
6255 many years should the Contractor go back for the credit and/or criminal history inquiry, employment  
6256 verification? What level of drug screening is required?  
6257

6258 **A.1.9 Personnel security requirements are task dependent. Specific personnel security**  
6259 **requirements, including credit and/or criminal history inquiry, employment verification, and drug**  
6260 **screening will be addressed in individual task orders.**  
6261

6262 Q.1.10 Reference: Section C.3.5.5.2, P-49 – Pursuant to Section C.3.5.5.2 Information and  
6263 Telecommunications Systems Security, audits, who will conduct these audits? The Government? Third  
6264 party vendors hired by the Government? If the Government uses a third party vendor to perform such  
6265 audit, will they be required to sign a nondisclosure agreement and not be a competitor of Contractor?  
6266

6267 **A.1.10 The audits may be performed by Government employees or by a third party vendor hired**  
6268 **by the Government. If the Government uses a third party vendor to perform the audit, it will**  
6269 **require the vendor to sign a non-disclosure agreement to protect each contract holder’s**  
6270 **procurement-sensitive information. Also see response to Q.1.8 above.**  
6271

6272 Q.1.11 Reference: Section C.3.5.5.3, P-50 – Does the Government require a dedicated facility or just  
6273 dedicated, secure space within the Contractor’s facility?  
6274

6275 **A.1.11. There is no requirement that a dedicated facility be established by the contractor for this**  
6276 **contract. However, there may be unique requirements at a task order level that may require such a**  
6277 **dedicated arrangement. Such requirements will be addressed at a task order level.**  
6278

6279 Q.1.12 Reference: Section C-4, P-55 – *Staff To Be Provided states that “no prospective employee has*  
6280 *a criminal misdemeanor or a felony record and has a satisfactory history of credit.”* Does this mean that  
6281 prospective employees cannot have any misdemeanor in their history? Or is there a timeframe on how far  
6282 said criminal history is reviewed (i.e., 10 years)? What is meant by “Satisfactory history of credit”?  
6283

6284 **A.1.12. Prospective employees with a criminal misdemeanor or a felony record are not eligible for**  
6285 **performance under this contract unless this requirement is waived by the Government at the task**  
6286 **order level. As stated in the response to Q.3.7 of the Answers to Vendor Questions issued in**  
6287 **Amendment-A001, the Government defers to the “Satisfactory” definition used by the credit**  
6288 **industry for rating individuals’ credit history and the acceptance of such a rating by the contact**  
6289 **center service industry for employment purposes.**

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Q.1.13 Reference: Section C.5.5, P-62 - Pursuant to Section C.5.5 *Facility and Systems Access*, do authorized representatives of Government potentially include third party vendors? If so, will said third party vendor be required to sign a nondisclosure agreement and not be competitor of Contractor?

**A.1.13 Authorized Government representatives may include third party vendors. Any such vendors will be required to sign a non-disclosure agreement to protect each contract holder’s procurement-sensitive information. Also see response to Q.1.8 above.**

Q.1.14 Reference: Section C.9.3.3, P-76 – Pursuant to Section C.9.3.3 *External Operation Assessments*, do authorized representatives of Government potentially include third party vendors? If so, will said third party vendor be required to sign nondisclosure agreement and not be a competitor of Contractor?

**A.1.14 See response to Q.1.8 above.**

Q.1.15 Reference: Section F.2, P-85 - *Period Of Contract states that the contract becomes effective on the Date of Award through September 30, 2008*; however, Section H.1 Term of Contract (pg 100) states that the Base Period is for two years from Date of Award. Which is correct?

**A.1.15 Section H.1 has been amended to reflect the contract term of a Base Period of two (2) years, followed by four (4) two-year option periods.**

Q.1.16 Reference: Section H.1.2, P-100 – *The RFP states that for the purposes of this contract, NAICS code 519190, Other Information Services, applies. The size standard is \$6,000,000. Will contractors be given small business subcontracting credit by working with firms that do not meet the \$6M standard, but that are otherwise credentialed by the SBA as small business enterprises?*

**A.1.16 Section H.1.2 has been amended to correct the size standard from \$6,000,000 to \$6,500,000. The \$6,500,000 size standard is used by the Government to determine whether the offeror is qualified as a small business for this solicitation. In its subcontracting plan for small businesses, the offeror may include SBA accredited small businesses that specialize in providing services in other service sectors. These other service sectors may have different size standards than NAICS Code 519190.**

Q.1.17 Reference: Section H.19, P-106 – Pursuant to Section H.19 Government Observations, can contractors participate in the selection of third party vendors to perform audits or customer surveys?

**A.1.17 See response to Q.1.8 above.**

Q.1.18 Reference: Section H.25 – What is the Government’s expectation of the right to license or purchase Contractor’s preexisting systems, software, databases, knowledgebases, phone system, methodologies, procedures, training materials, etc. that are created at Contractor’s sole expense (“IP”)? Pursuant to Section H.25, does the Government expect a license or sale to said preexisting IP at the end of the contract term?

**A.1.18 Upon completion of a specific task, the Government expects the contractor to turn over to the Government in its entirety, all information resources developed by the contractor and paid for by the Government in support of the task. Any requests from the Government to the contractor to turn over contractor-owned properties developed over the course of the task at the contractor’s expense will occur near or upon completion of the task. The terms and conditions of such a**

6341 **transaction will be negotiated between the Government and contractor at that time. Other than**  
6342 **these transactions, the Government does not expect to take ownership of the contractor owned**  
6343 **properties upon completion of this contract.**  
6344

6345 Q.1.19 Reference: Section J, Att 3, Section L.7.2.1, P-154 – **Technical Proposal Index** versus  
6346 **Technical Proposal Organization** – The outline/order in Attachment 3, (Section J) Table J.2 is different  
6347 than the detailed outline/order of the technical proposal beginning on page 154. Which response order are  
6348 we to follow? Also Table J.2 has incorrect corresponding numbers and titles than in the technical  
6349 proposal organization section. (i.e., L.7.2.1.6.4 in table is “Performance Management Plan” but should be  
6350 L.7.2.1.6.3. L.7.2.1.6.5 does not exist but is on Table J.2 as QA/QIP; should be L.7.2.1.6.4.)  
6351

6352 **A.1.19. Attachment 3 has been retitled to “Technical Proposal Index” (see response to Q.4.6 of**  
6353 **Answers to Vendor Questions issued in Amendment-A001. Offerors should follow the proposal**  
6354 **organization outlined in Section L.7.2.1 in submitting their proposals. Table J.2 has been renamed**  
6355 **as Attachment 3 and the reference section numbers are being renumbered to align with the**  
6356 **numbering scheme used in Section L.**  
6357

6358 Q.1.20 Reference: Section J, Att 3, Section L.7.2.1.1 – Are Attachment 3 (Section J) “Technical  
6359 Proposal Index” and L.7.2.1.1 “Proposal Index” the same thing? If so, Attachment 3 is missing several  
6360 requirements, how should those items be addressed?  
6361

6362 **A.1.20 The “Proposal Index” referenced in Section L.7.2.1.1 and Attachment 3 – Technical**  
6363 **Proposal Index are one and the same. Section L.7.2.1.1 is being renamed as Technical Proposal**  
6364 **Index to be consistent with Attachment 3. The Government assumes that the missing requirements**  
6365 **indicated above are Emergency Response Capability (Section L.7.2.1.5.4) and Human Resources**  
6366 **Management Plan (Section L.7.2.1.6.2). Attachment 3 is being amended to add the missing**  
6367 **requirements.**  
6368

6369 Q.1.21 Section L.7.2.1.3, Section L.7.2.1.4, Section J, Att 1 - For the purposes of completing the Past  
6370 Performance Section(s), can prime contractors use the past performance of a teaming partner as one of its  
6371 three listed references?  
6372

6373 **A.1.21 The Government holds the prime contractor responsible for satisfactory performance,**  
6374 **therefore, only past performance references submitted for work performed by the prime contractor**  
6375 **will be evaluated. Past performance references of teaming partners submitted will not be**  
6376 **evaluated.**  
6377

6378 Q.1.22 Section L.7.2, P-154 – We would like to clarify our understanding of the 125-page limitation on  
6379 the Technical Proposal. For good reasons, GSA has included in the RFP literally hundreds of individual  
6380 line item requirements, and we would like to offer commentary on our capabilities and solution for each  
6381 item. We understand that there is no value to GSA in our flipping “shall” statements into “will”  
6382 statements. Two specific recommendations to bring more value to this process – 1) remove the double-  
6383 spacing requirement, and 2) treat the “plan documents” as resumes and other content not counted against  
6384 the page limitation. This allows more focus on demonstrating the capabilities and solutions that are at the  
6385 core of this procurement. Can GSA consider these recommendations and respond on a fast track?  
6386

6387 **A.1.22. Section L.7.2 has been amended to allow the use of single-spaced text in the proposal.**  
6388 **However, all of the required plans will count toward the 125 page limit. Also see response to Q.1.10**  
6389 **of Answers to Vendor Questions of Amendment-A001.**  
6390

**Request for Proposal GSV07PD0007**

6391 Q.1.23 Reference: Section L.7.3, P-162 – Business Proposal Submission Requirements states that  
6392 Contractor proposals shall remain in effect for 90 days; however, Section K.6 (FAR 52.214-16 Minimum  
6393 Acceptance Period) states that the minimum acceptance of a proposal is 120 days. Which is correct?  
6394

6395 **A.1.23 Section L.7.3 has been amended to require proposals to remain in effect for two hundred**  
6396 **seventy (270) days. See Amendment-A001.**  
6397

6398 Q.1.24 Reference: Section L.7.3.1.1, P-163 – GSA requires vendors to provide a ‘completed  
6399 copy of all terms and conditions of the solicitation’ as part of the Business Proposal. Is the proper  
6400 interpretation of this that GSA is requesting that vendors provide a response to Section H of the RFP  
6401 (Special Contract Requirements)?  
6402

6403 **A.1.24 The correct reference is L.3.1. The solicitation has been changed to read, “...a completed**  
6404 **copy of the representations, certifications and other statements of offerors in Section K of this**  
6405 **solicitation.”**  
6406

6407 Q.1.25 Will GSA allow vendors to propose optional CLIN’s, in addition to those stipulated by  
6408 the RFP? There are services of high potential value to agencies that could be added as options, and  
6409 adding these with a proposal submission would give agencies access to these optional CLIN’s along with  
6410 the required services.  
6411

6412 **A.1.25 No. Offerors shall respond only to CLINS identified in Section B – Price Tables. Also see**  
6413 **response to Q.1.1 of Answers to Vendors Questions issued in Amendment-A001.**  
6414

6415 Q.2.1 Reference: Section H.24 – Hold harmless and Indemnification, P-109 – The RFP states that the  
6416 contractor “... Resulting in whole or in part from the willful, negligent, or careless acts or omissions of  
6417 the contractor...”. Request that this clause be removed from the RFP and addressed at the task order  
6418 level. With this being an IDIQ contract and the work not identified, it puts a financial burden on the  
6419 contractor to have insurance coverage for any and every type of possible event that may be covered under  
6420 the statement of work.  
6421

6422 **A.2.1 In order for a contract clause to be invoked at the task order level, it must be included in**  
6423 **the base contract. As stated in the response to Q.3.1.5 of Answers to Vendor Questions issued in**  
6424 **Amendment-A001, all task order requirements must remain within the framework of the contracts**  
6425 **awarded pursuant to this solicitation. User agencies will not be allowed to add to or remove any of**  
6426 **the special contract clauses contained in contracts awarded as a result of this solicitation, unless**  
6427 **there has been a subsequent modification to the underlying contract.**  
6428

6429 Q.3.1 Will the GSA be willing to accept, in lieu of the completed Past Performance Questionnaire, a  
6430 telephone conversation regarding the contractor’s performance with a customer that, as a national  
6431 government and as a matter of its internal government policy, does not complete and return such  
6432 questionnaires?  
6433

6434 **A.3.1 No. In order to ensure consistency of results and to document past performance**  
6435 **evaluations received, the past performance questionnaire must be used.**  
6436

6437 Q.3.2. Will the Government grant a seven (7) day extension to the proposal due date of the subject  
6438 solicitation?  
6439

6440 **A.3.2. Amendment A002 changes the date and time for receipt of proposals to: 3:00 pm local**  
6441 **time, June 27, 2007.**

**Request for Proposal GSV07PD0007**

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Q.4.1 Will the Government consider a 30-day extension to the due date for the subject solicitation? Such an extension would allow for a thorough review and analysis of the responses to the questions recently provided.

**A.4.1 See response to Q.3.2 above.**

Q.5.1 Will the Government clarify whether offerors are required to submit the management reports identified in Section C.11 in response to this solicitation?

**A.5.1 Section L.7.2.1.4 of the solicitation requires offerors to submit a sample package of the reports for each of the projects selected as reference in response to Past Performance. Section L.7.2.1.6.1 requires offerors to provide as part of their Program Management Plan a description on methodologies and approaches for providing timely operational and management reports to meet the requirements identified in Section C.11 of this solicitation.**

**The following questions and answers were issued as part of Request for Proposal GSV07PD0003 – Amendment A-003**

Q.1 Can we interpret “...100,000 telephone inquiries...” to include both inbound and outbound telephone contacts? There are requirements through out the solicitation for supporting inbound and outbound contacts.

**A.1 Your interpretation is incorrect. Only incoming calls will be accepted for this portion of the evaluation.**

Q.2 Why can a bidder not aggregate work volumes across “projects”? The term “project” is not well-defined in the solicitation. Will the Government reconsider this Q/A response to allow aggregation of telephone contacts? There do not appear to be any requirements in the solicitation (sections C or L) that address aggregation of work volumes of calls.

A.2 The answer to Question 4.9 on page 14 of 33 in the questions and answers (part of Amendment A001) will not be changed.

The Government needs the ability to assess a contractor’s capacity to process 100,000 telephone inquiries per month that are related to a particular project, accountable to a particular agency or activity.

It is not essential that all of these calls be processed at a single call center, but is essential that a single, unified management team, dedicated to that particular project, be accountable to the ordering agency or activity.

**PART IV – REPRESENTATIONS AND INSTRUCTIONS**

**SECTION K –**

**REPRESENTATIONS CERTIFICATIONS AND OTHER STATEMENTS OF OFFERORS**

**K.1 52.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

This contract incorporates the following clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make a copy of the full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): <http://www.arnet.gov/far>.

**Federal Acquisition Regulation (48 CFR, APR 1984) Clauses**

| Clause No. | Clause Title  | Date     |
|------------|---|----------|
| 52.203-11  | Certification and Disclosure Regarding Payments to Influence Certain Federal Transactions | SEP 2005 |

**K.2 52.203-02 CERTIFICATE OF INDEPENDENT PRICE DETERMINATION (Apr 1985)**

(a) The offeror certifies that-

(1) The prices in this offer have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other offeror or competitor relating to-

(i) Those prices;

(ii) The intention to submit an offer; or

(iii) The methods or factors used to calculate the prices offered.

(2) The prices in this offer have not been and will not be knowingly disclosed by the offeror, directly or indirectly, to any other offeror or competitor before bid opening (in the case of a sealed bid solicitation) or contract award (in the case of a negotiated solicitation) unless otherwise required by law; and

(3) No attempt has been made or will be made by the offeror to induce any other concern to submit or not to submit an offer for the purpose of restricting competition.

(b) Each signature on the offer is considered to be a certification by the signatory that the signatory-

(1) Is the person in the offeror's organization responsible for determining the prices being offered in this bid or proposal, and that the signatory has not participated and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision; or

(2) (i) Has been authorized, in writing, to act as agent for the following principals in certifying that those principals have not participated, and will not participate in any action contrary to paragraphs (a)(1) through (a)(3) of this provision \_\_\_\_\_ [insert full name of person(s) in the

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6532 offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of  
6533 his or her position in the offeror's organization];

6534  
6535 (ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i)  
6536 of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1)  
6537 through (a)(3) of this provision; and

6538 (iii) As an agent, has not personally participated, and will not participate, in any action contrary to  
6539 paragraphs (a)(1) through (a)(3) of this provision.

6540  
6541 (c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its  
6542 offer a signed statement setting forth in detail the circumstances of the disclosure.

6543

6544

6545 **K.3 52.204-03 TAXPAYER IDENTIFICATION (OCT 1998)**

6546 (a) Definitions. "Common parent," as used in this provision, means that corporate entity that owns or  
6547 controls an affiliated group of corporations that files its Federal income tax returns on a consolidated  
6548 basis, and of which the offeror is a member.

6549  
6550 "Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the  
6551 Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The  
6552 TIN may be either a Social Security Number or an Employer Identification Number.

6553  
6554 (b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to  
6555 comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26  
6556 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting  
6557 contract is subject to the payment reporting requirements described in Federal Acquisition Regulation  
6558 (FAR) 4.904, the failure or refusal by the offeror to furnish the information may result in a 31 percent  
6559 reduction of payments otherwise due under the contract.

6560  
6561 (c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out  
6562 of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is  
6563 subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may  
6564 be matched with IRS records to verify the accuracy of the offeror's TIN.

6565  
6566 (d) Taxpayer Identification Number (TIN).

6567 [ ] TIN: \_\_\_\_\_.

6568 [ ] TIN has been applied for.

6569 [ ] TIN is not required because:

6570 [ ] Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have  
6571 income effectively connected with the conduct of a trade or business in the United States and does  
6572 not have an office or place of business or a fiscal paying agent in the United States;

6573 [ ] Offeror is an agency or instrumentality of a foreign Government;

6574 [ ] Offeror is an agency or instrumentality of the Federal Government.

6575

6576 (e) Type of organization.

6577 [ ] Sole proprietorship;

6578 [ ] Partnership;

6579 [ ] Corporate entity (not tax-exempt);

6580 [ ] Corporate entity (tax-exempt);

6581 [ ] Government entity (Federal, State, or local);

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- 6582 [ ] Foreign Government;
- 6583 [ ] International organization per 26 CFR 1.6049-4;
- 6584 [ ] Other \_\_\_\_\_.

- 6585
- 6586 (f) Common parent.
- 6587 [ ] Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this
- 6588 provision.
- 6589 [ ] Name and TIN of common parent:
- 6590 Name \_\_\_\_\_
- 6591 TIN \_\_\_\_\_
- 6592
- 6593

6594 **K.4 52.204-05 WOMEN-OWNED BUSINESS (OTHER THAN SMALL BUSINESS) (MAY 1999)**

6595 (a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at  
6596 least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51  
6597 percent of its stock is owned by one or more women; and whose management and daily business  
6598 operations are controlled by one or more women.

6599 (b) Representation. [Complete only if the offeror is a women-owned business concern and has not  
6600 represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business  
6601 Program Representations, of this solicitation.] The offeror represents that it [ ] is [ ] is not a women-  
6602 owned business concern.  
6603  
6604

6605 **K.5 52.209-05 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED**  
6606 **DEBARMENT, AND OTHER RESPONSIBILITY MATTERS (DEC 2001)**

6607 (a)(1) The Offeror certifies, to the best of its knowledge and belief, that-

6608 (i) The Offeror and/or any of its Principals-

6609 (A) Are [ ] are not [ ] presently debarred, suspended, proposed for debarment, or declare  
6610 ineligible for the award of contracts by any Federal agency;

6611 (B) Have [ ] have not [ ], within a three-year period preceding this offer, been convicted  
6612 of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in  
6613 connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract  
6614 or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or  
6615 commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false  
6616 statements, tax evasion, or receiving stolen property; and

6617 (C) Are [ ] are not [ ] presently indicted for, or otherwise criminally or civilly charged  
6618 by a Governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of  
6619 this provision.

6620 (ii) The Offeror has [ ] has not [ ], within a three-year period preceding this offer, had one or  
6621 more contracts terminated for default by any Federal agency.

6622 (2) "Principals," for the purposes of this certification, means officers; directors; owners; partners;  
6623 and, persons having primary management or supervisory responsibilities within a business entity (e.g.,  
6624 general manager; plant manager; head of a subsidiary, division, or business segment, and similar  
6625 positions).

6626  
6627  
6628  
6629  
6630  
6631

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6632 This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the  
6633 Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution  
6634 Under Section 1001, Title 18, United States Code.

6635  
6636 (b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to  
6637 contract award, the Offeror learns that its certification was erroneous when submitted or has become  
6638 erroneous by reason of changed circumstances.

6639  
6640 (c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result  
6641 in withholding of an award under this solicitation. However, the certification will be considered in  
6642 connection with a determination of the Offeror's responsibility. Failure of  
6643 the Offeror to furnish a certification or provide such additional information as requested by the  
6644 Contracting Officer may render the Offeror non-responsible.

6645  
6646 (d) Nothing contained in the foregoing shall be construed to require establishment of a system of records  
6647 in order to render, in good faith, the certification required by paragraph (a) of this provision. The  
6648 knowledge and information of an Offeror is not required to exceed that which is  
6649 normally possessed by a prudent person in the ordinary course of business dealings.

6650  
6651 (e) The certification in paragraph (a) of this provision is a material representation of fact upon which  
6652 reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an  
6653 erroneous certification, in addition to other remedies available to the Government, the Contracting Officer  
6654 may terminate the contract resulting from this solicitation for default.

6655  
6656 **K.6 52.214-16 MINIMUM BID ACCEPTANCE PERIOD (APR 1984)**

6657 (a) "Acceptance period," as used in this provision, means the number of calendar days available to the  
6658 Government for awarding a contract from the date specified in this solicitation for receipt of bids.

6659  
6660 (b) This provision supersedes any language pertaining to the acceptance period that may appear elsewhere  
6661 in this solicitation.

6662  
6663 (c) The Government requires a minimum acceptance period of 270 calendar days

6664  
6665 (d) In the space provided immediately below, bidders may specify a longer acceptance period than the  
6666 Government's minimum requirement. The bidder allows the following acceptance period:  
6667 \_\_\_\_\_ calendar days.

6668  
6669 (e) A bid allowing less than the Government's minimum acceptance period will be rejected.

6670  
6671 (f) The bidder agrees to execute all that it has undertaken to do, in compliance with its bid, if that  
6672 bid is accepted in writing within-

6673  
6674 (1) The acceptance period stated in paragraph (c) of this clause; or

6675  
6676 (2) Any longer acceptance period stated in paragraph (d) of this clause.

6677  
6678 **K.7 52.215-06 PLACE OF PERFORMANCE (OCT 1997)**

6679  
6680 (a) The offeror or respondent, in the performance of any contract resulting from this solicitation, [ ]  
6681 intends, [ ] does not intend [check applicable block] to use one or more plants or facilities located at a

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6682 different address from the address of the offeror or respondent as indicated in this proposal or response to  
6683 request for information.

6684  
6685 (b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the  
6686 following spaces the required information:  
6687

| Place of Performance<br>(Street Address, City,<br>State, County, Zip Code) | Name and Address of Owner and Operator of the Plant or Facility if<br>Other than Offeror or Respondent |
|--|--|
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

6688  
6689

6690 **K.8 52.219-22 SMALL DISADVANTAGED BUSINESS STATUS (OCT 1999)**

6691 (a) General. This provision is used to assess an offeror's small disadvantaged business status for the  
6692 purpose of obtaining a benefit on this solicitation. Status as a small business and status as a small  
6693 disadvantaged business for general statistical purposes is covered by the provision at FAR 52.219-1,  
6694 Small Business Program Representation.  
6695

6696 (b) Representations.

6697 (1) General. The offeror represents, as part of its offer, that it is a small business under the size  
6698 standard applicable to this acquisition; and either-

6699  
6700 [ ] (i) It has received certification by the Small Business Administration as a small  
6701 disadvantaged business concern consistent with 13 CFR 124, Subpart B; and

6702  
6703 (A) No material change in disadvantaged ownership and control has occurred since  
6704 its certification;

6705  
6706 (B) Where the concern is owned by one or more disadvantaged individuals, the net  
6707 worth of each individual upon whom the certification is based does not exceed \$750,000 after taking into  
6708 account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and

6709  
6710 (C) It is identified, on the date of its representation, as a certified small disadvantaged  
6711 business concern in the database maintained by the Small Business Administration (PRO-Net); or  
6712

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6713 [ ] (ii) It has submitted a completed application to the Small Business Administration or a  
6714 Private Certifier to be certified as a small disadvantaged business concern in accordance with 13 CFR  
6715 124, Subpart B, and a decision on that application is pending, and that no material change in  
6716 disadvantaged ownership and control has occurred since its application was submitted.

6717  
6718 (2) [ ] For Joint Ventures. The offeror represents, as part of its offer, that it is a joint venture that  
6719 complies with the requirements at 13 CFR 124.1002(f) and that the representation in paragraph (b)(1) of  
6720 this provision is accurate for the small disadvantaged business concern that is participating in the joint  
6721 venture. [The offeror shall enter the name of the small disadvantaged business  
6722 concern that is participating in the joint venture:\_\_\_\_\_.]

6723 (c) Penalties and Remedies. Anyone who misrepresents any aspects of the disadvantaged status of a  
6724 concern for the purposes of securing a contract or subcontract shall-

6725 (1) Be punished by imposition of a fine, imprisonment, or both;

6726 (2) Be subject to administrative remedies, including suspension and debarment; and

6727 (3) Be ineligible for participation in programs conducted under the authority of the Small  
6728 Business Act.

6729

6730 **K.9 52.222-22 PREVIOUS CONTRACTS AND COMPLIANCE REPORTS (FEB 1999)**

6731 The offeror represents that-

6732 (a) It [ ] has, [ ] has not participated in a previous contract or subcontract subject the Equal Opportunity  
6733 clause of this solicitation;

6734 (b) It [ ] has, [ ] has not filed all required compliance reports; and

6735 (c) Representations indicating submission of required compliance reports, signed by proposed  
6736 subcontractors, will be obtained before subcontract awards.

6737

6738

6739

6740

6741 **K.10 52.222-25 AFFIRMATIVE ACTION COMPLIANCE (APR 1984)**

6742 The offeror represents that-

6743 (a) It [ ] has developed and has on file, [ ] has not developed and does not have on file, at each  
6744 establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor  
6745 (41 CFR 60-1 and 60-2); or

6746 (b) It [ ] has not previously had contracts subject to the written affirmative action programs requirement  
6747 of the rules and regulations of the Secretary of Labor.

6748

6749

6750

6751 **K.11 52.222-38 COMPLIANCE WITH VETERANS' EMPLOYMENT REPORTING REQUIREMENTS**  
6752 **(DEC 2001)**

6753 By submission of its offer, the offeror represents that, if it is subject to the reporting requirements of  
6754 38 U.S.C. 4212(d) (i.e., if it has any contract containing Federal Acquisition Regulation clause 52.222-37,  
6755 Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible  
6756 Veterans), it has submitted the most recent VETS-100 Report required by that clause.

6757

6758

6759

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6760 **K.12 52.223-13 CERTIFICATION OF TOXIC CHEMICAL RELEASE REPORTING (AUG 2003)**

6761 (a) Executive Order 13148, of April 21, 2000, Greening the Government through Leadership in  
6762 Environmental Management, requires submission of this certification as a prerequisite for contract award.  
6763

6764 (b) By signing this offer, the offeror certifies that-

6765 (1) As the owner or operator of facilities that will be used in the performance of this contract that  
6766 are subject to the filing and reporting requirements described in section 313 of the Emergency Planning  
6767 and Community Right-to-Know Act of 1986 (EPCRA) (42 U.S.C. 11023) and section 6607 of the  
6768 Pollution Prevention Act of 1990 (PPA) (42 U.S.C. 13106), the offeror will file and continue to file for  
6769 such facilities for the life of the contract the Toxic Chemical Release Inventory Form (Form R) as  
6770 described in sections 313(a) and (g) of EPCRA and section 6607 of PPA; or  
6771

6772 (2) None of its owned or operated facilities to be used in the performance of this contract is  
6773 subject to the Form R filing and reporting requirements because each such facility is exempt for at least  
6774 one of the following reasons: [Check each block that is applicable.]  
6775

6776 [ ] (i) The facility does not manufacture, process, or otherwise use any toxic chemicals listed  
6777 in 40 CFR 372.65;  
6778

6779 [ ] (ii) The facility does not have 10 or more full-time employees as specified in  
6780 section 313(b)(1)(A) of EPCRA, 42 U.S.C. 11023(b)(1)(A);  
6781

6782 [ ] (iii) The facility does not meet the reporting thresholds of toxic chemicals established  
6783 under section 313(f) of EPCRA, 42 U.S.C. 11023(f) (including the alternate thresholds at 40 CFR 372.27,  
6784 provided an appropriate certification form has been filed with EPA);  
6785

6786 [ ] (iv) The facility does not fall within the following Standard Industrial Classification (SIC)  
6787 codes or their corresponding North American Industry Classification System sectors:  
6788

(A) Major group code 10 (except 1011, 1081, and 1094).

(B) Major group code 12 (except 1241).

(C) Major group codes 20 through 39.

(D) Industry code 4911, 4931, or 4939 (limited to facilities that combust coal and/or oil  
6791 for the purpose of generating power for distribution in commerce)  
6792

(E) Industry code 4953 (limited to facilities regulated under the Resource Conservation and  
6794 Recovery Act, Subtitle C (42 U.S.C. 6921, et seq.), or 5169, or 5171, or 7389 (limited to facilities  
6795 primarily engaged in solvent recovery services on a contract or fee basis); or  
6796

[ ] (v) The facility is not located in the United States or its outlying areas..

6800 **K.13 52.227-15 REPRESENTATION OF LIMITED RIGHTS DATA AND RESTRICTED COMPUTER**  
6801 **SOFTWARE (MAY 1999)**  
6802

6803 (a) This solicitation sets forth the work to be performed if a contract award results, and the Government's  
6804 known delivery requirements for data (as defined in FAR 27.401). Any resulting contract may also  
6805 provide the Government the option to order additional data under the Additional Data Requirements  
6806 clause at 52.227-16 of the FAR, if included in the contract. Any data delivered under the resulting  
6807 contract will be subject to the Rights in Data-General clause at 52.227-14 that is to be included in this

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6808 contract. Under the latter clause, a Contractor may withhold from delivery data that qualify as limited  
6809 rights data or restricted computer software, and deliver form, fit, and function data in lieu thereof. The  
6810 latter clause also may be used with its Alternates II and/or III to obtain delivery of limited rights data or  
6811 restricted computer software, marked with limited rights or restricted rights notices, as appropriate. In  
6812 addition, use of Alternate V with this latter clause provides the Government the right to inspect such data  
6813 at the Contractor's facility.

6814  
6815 (b) As an aid in determining the Government's need to include Alternate II or Alternate III in the clause at  
6816 52.227-14, Rights in Data-General, the offeror shall complete paragraph (c) of this provision to either  
6817 state that none of the data qualify as limited rights data or restricted computer software, or identify, to the  
6818 extent feasible, which of the data qualifies as limited rights data or restricted computer software. Any  
6819 identification of limited rights data or restricted computer software in the offeror's response is not  
6820 determinative of the status of such data should a contract  
6821 be awarded to the offeror.

6822 (c) The offeror has reviewed the requirements for the delivery of data or software and state  
6823 [offeror check appropriate block]-

6824 [ ] None of the data proposed for fulfilling such requirements qualifies as limited rights data or  
6825 restricted computer software.

6826  
6827 [ ] Data proposed for fulfilling such requirements qualify as limited rights data or restricted  
6828 computer software and are identified as follows:

6829 \_\_\_\_\_  
6830 \_\_\_\_\_  
6831 \_\_\_\_\_  
6832 \_\_\_\_\_

6833 Note: "Limited rights data" and "Restricted computer software" are defined in the contract clause entitled  
6834 "Rights in Data-General.

6835  
6836  
6837 **K.14 552.252-05 AUTHORIZED DEVIATIONS IN PROVISIONS (DEVIATION FAR 52.252-5) (SEP**  
6838 **1999) (GSAM Clause)**

6839  
6840 (a) Deviations to FAR provisions.

6841  
6842 (1) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation (48  
6843 CFR Chapter 1) provision by the addition of "(DEVIATION)" after the date of the provision, if the  
6844 provision is not published in the General Services Administration Acquisition Regulation (48 CFR  
6845 Chapter 5).

6846  
6847 (2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation  
6848 (FAR) provision that is published in the General Services Administration Acquisition Regulation by the  
6849 addition of "(DEVIATION (FAR provision no.))" after the date of the provision.

6850 (b) Deviations to GSAR provisions. This solicitation indicates any authorized deviation to a General  
6851 Services Administration Acquisition Regulation provision by the addition of "(DEVIATION)" after the  
6852 date of the provision.

6853  
6854 (c) "Substantially the same as" provisions. Changes in wording of provisions prescribed for use on a  
6855 "substantially the same as" basis are not considered deviations.

6856 **SECTION L**  
6857 **INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS**  
6858  
6859

6860 **L.1 2.252-2 CLAUSES INCORPORATED BY REFERENCE (FEB 1998)**

6861 This contract incorporates the following clauses by reference, with the same force and effect as if they  
6862 were given in full text. Upon request, the Contracting Officer will make a copy of the full text available.  
6863 Also, the full text of a clause may be accessed electronically at this/these address(es):  
6864 <http://www.arnet.gov/far>.  
6865

6866  
6867 **L.1.1 Federal Acquisition Regulation (48 CFR, APR 1984) Clauses**  
6868

| 6869 | Clause No. | Clause Title  | Date     |
|------|------------|---|----------|
| 6870 | 52.211-01  | Availability of Specifications in the GSA Index of Federal            |          |
| 6871 |            | Specifications, Standards and Commercial Item Descriptions            | AUG 1998 |
| 6872 | 52.215-01  | Instructions to Offerors – Competitive Acquisition (Alt.I [Oct 1997]) | JAN 2004 |
| 6873 | 52.222-24  | Preaward On-Site Equal Opportunity Compliance Review                  | JUL 2005 |
| 6874 | 52.222-46  | Evaluation of Compensation for Professional Employees                 | FEB 1993 |

6875  
6876  
6877 **L.1.2 General Services Administration Acquisition Manual (GSAM) Clauses**

|      |            |   |          |
|------|------------|---|----------|
| 6878 | 552.219-72 | Preparation, Submission and Negotiation of Subcontracting Plans | JUN 2005 |
|------|------------|---|----------|

6879  
6880  
6881 **L.2 ELECTRONIC VERSION OF SOLICITATION**

6882 An electronic version of this solicitation is on the FedBizOpps website at [www.fedbizopps.gov](http://www.fedbizopps.gov). It will be  
6883 the responsibility of the Offeror to print copies for its use. No hard copy of the solicitation will be issued  
6884 by the Government.  
6885  
6886

6887 **L.3 52.216-01 TYPE OF CONTRACT (APR 1984)**

6888 The Government anticipates award of one or more indefinite-delivery, indefinite-quantity (IDIQ)  
6889 contracts from this solicitation for contractor operated and managed multi-channel contact center services.  
6890  
6891

6892 **L.4 52.216-27 SINGLE OR MULTIPLE AWARDS (OCT 1995)**

6893 The Government may elect to award a single delivery order contract or task order contract, or to award  
6894 multiple delivery order contracts or task order contracts, for the same or similar supplies or services to  
6895 two or more sources under this solicitation.  
6896  
6897

6898 **L.5 52.233-2 SERVICE OF PROTEST (SEP 2006)**

6899 a) Protests, as defined in section 33.101 of the Federal Acquisition Regulation, that are filed directly with  
6900 an agency, and copies of any protests that are filed with the Government Accountability Office (GAO),

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6901 shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated  
6902 acknowledgment of receipt from Mr. Robert H. Corey or Dr. Carol Barton:

6903  
6904 General Services Administration  
6905 Office of Chief Acquisition Officer  
6906 Operational Contracting Staff (VC)  
6907 1800 F Street NW, Room G127  
6908 Washington, DC 20405  
6909

6910 b) The copy of any protest shall be received in the office designated above within one day of filing a  
6911 protest with the GAO.  
6912

6913  
6914 **L.5 552.233-70 PROTESTS FILED DIRECTLY WITH THE GENERAL SERVICE ADMINISTRATION**  
6915 **(MAR 2000)**

6916 The following definitions apply in this provision:

6917  
6918 (a) “Agency Protest Official for GSA” means the official in the Office of Acquisition Policy  
6919 designated to review and decide procurement protests filed with GSA.  
6920

6921 “Deciding official” means the person chosen by the protester to decide the agency protest. The deciding  
6922 official may be either the Contracting Officer or the Agency Protest Official.  
6923

6924 (b) The filing time frames in FAR 33.103(e) apply. An agency protest is filed when the protest  
6925 complaint is received at the location the solicitation designates for serving protests. GSA’s hours of  
6926 operation are 8:00 a.m. to 4:30 p.m. Protests delivered after 4:30 p.m. will be considered received and  
6927 filed the following business day.  
6928

6929 (c) A protest filed directly with the General Services Administration (GSA) must:

6930  
6931 (1) Indicate that it is a protest to the agency.  
6932

6933 (2) Be filed with the Contracting Officer  
6934

6935 (3) State whether the protester chooses to have the Contracting Officer or the Agency Protest  
6936 Official for GSA decide the protest. If the protest is silent on this matter, the Contracting Officer will  
6937 decide the protest.  
6938

6939 (4) Indicate whether the protester prefers to make an oral presentation, a written presentation, or an  
6940 oral presentation confirmed in writing, of arguments in support of the protest to the deciding official.  
6941

6942 (5) Include the information required by FAR 33.103(d)(2):  
6943

6944 (i) Name, address, fax number, and telephone number of the protester.  
6945

6946 (ii) Solicitation or contract number.  
6947

6948 (iii) Detailed statement of the legal and factual grounds for the protest, to include a  
6949 description of resulting prejudice to the protester.  
6950

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- 6951 (iv) Copies of relevant documents.  
6952  
6953 (v) Request for a ruling by the agency.  
6954  
6955 (vi) Statement as to the form of relief requested.  
6956  
6957 (vii) All information establishing that the protester is an interested party for the purpose of  
6958 filing a protest.  
6959  
6960 (viii) All information establishing the timeliness of the protest (see paragraph (b) of this  
6961 provision).  
6962  
6963 (d) An interested party filing a protest with GSA has the choice of requesting either that the  
6964 Contracting Officer or the Agency Protest Official for GSA decide the protest.  
6965  
6966 (e) The decision by the Agency Protest Official for GSA is an alternative to a decision by the  
6967 Contracting Officer. The Agency Protest Official for GSA will not consider appeals from the Contracting  
6968 Officer's decision on an agency protest.  
6969  
6970 (f) The deciding official must conduct a scheduling conference with the protester within three days  
6971 after the protest is filed. The scheduling conference will establish deadlines for oral or written arguments  
6972 in support of the agency protest and for agency officials to present information in response to the protest  
6973 issues. The deciding official may hear oral arguments in support of the agency protest at the same time as  
6974 the scheduling conference, depending on availability of the necessary parties.  
6975  
6976 (g) Oral conferences may take place either by telephone or in person. Other parties (e.g.,  
6977 representatives of the program office) may attend at the discretion of the deciding official.  
6978  
6979 (h) The following procedures apply to information submitted in support of or in response to an agency  
6980 protest:  
6981  
6982 (1) The protester and the agency have only one opportunity to support or explain the substance of  
6983 the protest (either orally, in writing, or orally confirmed in writing).  
6984  
6985 (2) GSA procedures do not provide for any discovery.  
6986  
6987 (3) The deciding official has discretion to request additional information from either the agency or  
6988 the protester. However, the deciding official will normally decide protests on the basis of information  
6989 provided by the protester and the agency.  
6990  
6991 (4) Except as provided in paragraph (5)(ii) below, the parties are encouraged, but not required, to  
6992 exchange information submitted to the Agency Protest Official for GSA.  
6993  
6994 (5) If the agency makes a written response to the protest, the following filing requirements apply:  
6995  
6996 (i) The agency must file its response to the protest with the deciding official within five (5)  
6997 days after the filing of the protest.  
6998  
6999 (ii) The agency must also provide the protester with a copy of the response on the same day it  
7000 files the response with the deciding official. If the agency believes it needs to redact or withhold any  
7001 information in the response from the protester, it must obtain the approval of the deciding official.

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(i) The deciding official will resolve the protest through informal presentations or meetings to the maximum extent practicable.

(j) An interested party may represent itself or be represented by legal counsel. GSA will not reimburse the party for any legal fees related to the agency protest.

(k) GSA will stay award or suspend contract performance in accordance with FAR 33.103(f). The stay or suspension, unless over-ridden, remains in effect until the protest is decided, dismissed, or withdrawn.

(l) The deciding official will make a best effort to issue a decision on the protest within twenty-eight (28) days after the filing date. The decision may be oral or written. If the decision is communicated orally to the protester, the deciding official will confirm in writing within three (3) days after the decision.

(m) GSA may dismiss or stay proceedings on an agency protest if a protest on the same or similar basis is filed with a protest forum outside of GSA.

**L.6 552.219-72 Preparation, Submission, and Negotiation of Subcontracting Plans (JUN 2005)**

(a) An offeror, other than a small business concern, submitting an offer that exceeds \$500,000 (\$1,000,000 for construction) shall submit a subcontracting plan with its initial offer. The subcontracting plan will be negotiated concurrently with price and any required technical and management proposals, unless the offeror submits a previously-approved commercial plan.

(b) Maximum practicable utilization of small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns as subcontractors is a matter of national interest with both social and economic benefits. The General Services Administration (GSA) expects that an offeror's subcontracting plan will reflect a commitment to assuring that small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns are provided the maximum practicable opportunity, consistent with efficient contract performance, to participate as subcontractors in the performance of the resulting contract. An offeror submitting a commercial plan can reflect this commitment through subcontracting opportunities it provides that relate to the offeror's production generally; i.e., for both its commercial and Government business.

(c) GSA believes that this potential contract provides significant opportunities for the use of small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns as subcontractors. Consequently, in addressing the eleven elements described at FAR 52.219-9(d) of the clause in this contract entitled Small Business Subcontracting Plan, the offeror shall:

(1) Demonstrate that its subcontracting plan represents a creative and innovative program for involving small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business concerns in performing the contract.

(2) Include a description of the offeror's subcontracting strategies used in any previous contracts, significant achievements, and how this plan will build upon those earlier achievements.

(3) Demonstrate through its plan that it understands the small business subcontracting program's objectives and GSA's expectations, and it is committed to taking those actions necessary to meet these goals or objectives.

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7053 (d) In determining the acceptability of any subcontracting plan, the Contracting Officer will take each  
7054 of the following actions:

7055  
7056 (1) Review the plan to verify that the offeror demonstrates an understanding of the small business  
7057 subcontracting program's objectives and GSA's expectations with respect to the program and has  
7058 included all the information, goals, and assurances required by FAR 52.219-9.

7059  
7060 (2) Consider previous goals and achievements of contractors in the same industry.

7061  
7062 (3) Consider information and potential sources obtained from agencies administering national and  
7063 local preference programs and other advocacy groups in evaluating whether the goals stated in the plan  
7064 adequately reflect the anticipated potential for subcontracting to small, HUBZone small, small  
7065 disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business  
7066 concerns.

7067  
7068 (4) Review the offeror's description of its strategies, historical performance and significant  
7069 achievements in placing subcontracts for the same or similar products or services with small, HUBZone  
7070 small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small  
7071 business concerns. The offeror's description can apply to commercial as well as previous Government  
7072 contracts.

7073  
7074 (e) Failure to submit an acceptable subcontracting plan and/or correct deficiencies in a plan within the  
7075 time specified by the Contracting Officer shall make the offeror ineligible for award.

7076  
7077

7078 **L.7 GENERAL INSTRUCTIONS FOR PREPARATION OF PROPOSAL**

7079  
7080 **This solicitation, GSV07PD0007 (hereinafter referred to as "revised solicitation"), is a re-issuance**  
7081 **of solicitation GSV07PD0003 (hereinafter referred to as "original solicitation") which was cancelled**  
7082 **on 07/13/2003. The reason that the original solicitation was cancelled is because the Government**  
7083 **determined that the minimum experience requirements cited in Section L.7.2.1.3.1 of that**  
7084 **solicitation were overly restrictive. The action herein, cancellation of the original solicitation and**  
7085 **re-issuance of the revised solicitation is taken to comply with Federal Acquisition Regulation**  
7086 **15.206(e).**

7087  
7088 **The revised minimum experience requirements are provided in Section L.7.2.1.3.1 of this**  
7089 **document.**

7090  
7091 **Note: all potential offerors, including offerors who submitted a proposal under the original**  
7092 **solicitation, are expected to carefully review the complete set of General Instructions for**  
7093 **Preparation of a Proposal, Section L.7 of the revised solicitation, because changes, other than**  
7094 **changes to the minimum experience requirements, have been made.**

7095  
7096 **Offerors who provided a timely and otherwise responsive offer to the original solicitation, and**  
7097 **chose not to make any changes to their proposal in response to the revised solicitation, are not**  
7098 **required to submit a new proposal. They do, however, need to submit a letter on company**  
7099 **letterhead, signed by an individual who was authorized to submit the proposal in response to the**  
7100 **original solicitation, stipulating that the entire proposal submitted in response to the original**  
7101 **solicitation, represents their entire proposal in response to the revised solicitation, and the this**  
7102 **proposal remains in full force and effect.**

7103

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7104 **All offerors who submitted a proposal in response to the original solicitation, who's proposal is not**  
7105 **in accordance with General Instructions for Preparation of Proposal of the revised solicitation, or**  
7106 **offerors that chose to made changes to their proposal submitted in response to the original**  
7107 **solicitation must, as must all new offerors, submit a proposal in full accordance with instructions in**  
7108 **remainder of Section L.7 of the revised solicitation.**

7109  
7110 **Offerors who provided a proposal under the original solicitation and who are providing a new**  
7111 **proposal under the revised solicitation are requested to identify all changes with a vertical line in**  
7112 **the right hand margin of the page.**

7113  
7114 A Standard Form 33 "Solicitation, Offer, and Award", completed and signed by the offeror, constitutes  
7115 the vendor's acceptance of the terms and conditions of this solicitation document. Therefore, the form  
7116 must be executed by a representative of the offeror authorized to commit the offeror to contractual  
7117 obligations.

7118  
7119 The Government may award a contract based on the initial offers received, without discussion of such  
7120 offers. Offerors are cautioned to include all relevant information in their proposals, as the Government  
7121 may award without discussions, using only the information provided by the offerors in the initial proposal  
7122 submission and customer-provided/Government-obtained past performance information.

7123  
7124 Issuance of this solicitation does not commit the Government to pay any Bid and Proposal costs incurred  
7125 by offerors in the preparation and submission of proposals, nor does it commit the Government to procure  
7126 or contract for said services. The Contracting Officer is the only individual who can commit the  
7127 Government to the expenditure of public funds in connection with this proposed procurement, and he/she  
7128 will do so by means of formal award documents.

7129  
7130 Proposals shall set forth current, accurate, and complete information as required by this solicitation  
7131 document (including attachments). It is important to note that the penalties for making false statements in  
7132 proposals are prescribed in 18 U.S.C. 1001.

7133  
7134 Offerors submitting restricted data shall mark such data in accordance with Federal Acquisition  
7135 Regulation (FAR) provision 52.215-12, which is incorporated by reference. FAR 52.215-12 states that,  
7136 "Offerors or quoters who include in their proposals or quotations data that they do not want disclosed to  
7137 the public for any purpose or used by the Government except for evaluation purposes, shall – (i) Mark the  
7138 title page with the following legend: "This proposal or quotation includes data that shall not be disclosed -  
7139 - in whole or in part – for any purpose other than to evaluate this proposal or quotation. If, however, a  
7140 contract is awarded to this offeror or quoter as a result of – or in connection with – the submission of data,  
7141 the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the  
7142 resulting contract. This restriction does not limit the Government's right to use information contained in  
7143 this data if it is obtained from another source without restriction. The data subject to the restriction is  
7144 contained in sheets (insert numbers or other identification of sheets)"; and (ii) Mark each sheet of data it  
7145 wishes to restrict with the following legend: "Use or disclosure of data contained in this sheet is subject to  
7146 the restriction on the title page of this proposal or quotation".

7147  
7148 The Government assumes no liability for disclosure of unmarked data for any purpose. Unless restricted,  
7149 information submitted in response to this request may become subject to disclosure to the public pursuant  
7150 to the provisions of the Freedom of Information Act (5 U.S.C. 551).

7151

7152 **L.7.1 Submission of Proposals**

7153 A proposal submitted in response to this solicitation shall consist of two separate packages, placed in  
7154 separate sealed envelopes/containers, and identified and appropriately marked as “Technical Proposal”  
7155 and “Business Proposal”. Both packages shall then be placed in one sealed submission container. The  
7156 offeror shall enter the following information on the submission containers: (i) the deadline (hour and date)  
7157 for receipt of proposals; (ii) the solicitation by number and title; and (iii) the offeror’s name and address.  
7158 The submission shall be addressed as follows:

7159 General Services Administration  
7160 Operational Contracting Staff (VC)  
7161 1800 F Street NW, Room G127  
7162 Washington DC 20405  
7163 Attention: Robert H. Corey (Contracting Officer)

7164 Offerors shall submit an original and eight (8) paper copies of the Technical Proposal and an  
7165 original and two (2) paper copies of the Business Proposal. Each proposal shall also be provided  
7166 in electronic format using CD-ROM media in Microsoft Word or Microsoft Excel for Windows  
7167 XP format, as appropriate. Each disk shall be clearly identified with the name of the offeror, the  
7168 content of the CD-ROM, the solicitation number, and the date of the proposal.

7169 This method of submission shall be used throughout the solicitation process, from the initial proposal to  
7170 Final Proposal Revisions. After the initial proposals, each revision, if the determination has been not  
7171 been made to award on the basis of initial proposal(s) only, shall also include the revision number, e.g.,  
7172 Revision 01, Revision 02, etc. When submitting a revision the offeror shall submit a complete proposal.  
7173 The material added or changed in each revision shall be identified with a vertical line in the right hand  
7174 margin. *Identification lines from previous revisions shall be removed to ensure that only current  
7175 revision changes are identified. This process will also be used to identify any segment of in the  
7176 proposal that has been deleted. It is important to note that changes that are not provided in this  
7177 manner may not be evaluated by the Government.*

7178 Offerors are advised that hand-carried proposals must be received in the place designated on the Standard  
7179 Form 33, Solicitation, Offer and Award, before the time and date set for receipt of proposals. Hand-  
7180 carried proposals are subject to FAR provision 52.215-01 entitled, Instruction to Offerors – Competitive  
7181 Acquisition [Alternate I, Oct 1997]), dated May 2001, which is incorporated by reference.

7182 GSA’s hours of operation are 8:00 a.m. to 4:30 p.m. eastern time. Requests for preaward debriefings  
7183 postmarked or otherwise submitted after 4:30 p.m. will be considered to be received the following  
7184 business day. Requests for post-award debriefings delivered after 4:30 p.m. will be considered to have  
7185 been received and filed the following business day.

7186 **L.7.2 Technical Proposal Submission Requirements**

7187 An original and eight (8) paper copies of the Technical Proposal, together with one (1) electronic copy  
7188 using CD-ROM media as described in L.7.1 are required. No pricing information shall be included in the  
7189 Technical Proposal. A 125-page limitation has been set for the Technical Proposal. Excluded from this  
7190 limit are: the transmittal letter, title page, proposal index or table of contents, list of figures and  
7191 abbreviations, organizational charts, and sample reports. (This limitation is based on the number of pages  
7192 when printed single-spaced on 8 ½ x 11 inch paper with 1 inch margin in 12-point Times New Roman or  
7193 equivalent font size. Font size used in figures and tables can be 8-point or higher as long as the content is  
7194 legible.)

7200

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### 7201 **L.7.2.1 Technical Proposal**

7202 Offerors must submit a comprehensive Technical Proposal to provide a sound basis for evaluation by the  
7203 Government. Proposals that merely offer to provide the requirements as specified in the solicitation, or  
7204 “parrot back” the requirements of the solicitation without further elaboration, may be determined to be  
7205 technically unacceptable.

7206  
7207 The Technical Proposal shall be organized as follows:

- 7208
- 7209 ○ Proposal Index
- 7210 ○ Executive Summary
- 7211 ○ Experience and Past Performance
- 7212 ○ Technical Approach
- 7213 ○ Management Plan
- 7214 ○ Security Plan
- 7215 ○ Plan for Special Hiring
- 7216

#### 7217 **L.7.2.1.1 Technical Proposal Index**

7218 As part of their Technical Proposals, offerors are required to submit a compliance index, using the format  
7219 provided in Attachment 3, referencing the page and paragraph numbers that contain their  
7220 response/methodology/narrative, on an item-by-item basis to all requirements of this solicitation.

7221

#### 7222 **L.7.2.1.2 Executive Summary**

7223 The purpose of the executive summary is to present a brief introduction and overview of the proposal,  
7224 including a summary of the offeror’s capabilities and qualifications. The executive summary shall be  
7225 written so that a layperson can easily grasp the essence of the technical approach and plans being  
7226 proposed.

7227

#### 7228 **L.7.2.1.3 Experience and Past Performance**

7229 In additional to general background information, the offeror must provide specific information about its  
7230 experience in implementing, operating, and managing operations, services facilities, or contracts, and  
7231 associated contractual or budgetary arrangements, similar to the USA Contact requirement. The  
7232 Government reserves the right to contact individuals and firms for whom the offeror has performed such  
7233 services in the past to evaluate the offeror’s experience and past performance record.

7234

#### 7235 **L.7.2.1.3.1 Minimum Experience Qualifications Criteria**

7236 To be considered for an award under this solicitation, the offeror must have gained the following  
7237 minimum experience qualifications during the five (5) years immediately prior to the date of the  
7238 Government’s receipt of proposals for this solicitation:

7239

- 7240 ○ at least two (2) years’ general experience in providing information and referral services with  
7241 annual work volumes handled by agents of no less than 1,000,000 telephone inquiries and  
7242 75,000 e-mail inquiries;
- 7243
- 7244 ○ at least one (1) year of specialized experience in providing information services in a multi-  
7245 media environment, including the use of telephone, facsimile, e-mail, and web-based media;

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- 7246  
7247       ○ at least two (2) years experience in providing information services in a multi-language  
7248       environment; and  
7249  
7250       ○ at least two (2) years of specialized experience in handling case management in an information  
7251       and referral service environment.  
7252

### 7253 **L7.2.1.3.1.1 Offerors Without Minimum Experience Qualifications**

7254 Minimum experience qualifications will be evaluated on a pass/fail basis. To be considered acceptable,  
7255 an offeror's proposal must meet all of all of the minimum experience qualifications criteria set forth in  
7256 L.7.2.1.3.1. For:

7257  
7258       *Large business offerors* who do not meet all of the minimum experience qualifications criteria will be  
7259       evaluated as lacking the inherent experience necessary for performance, and their proposal will be  
7260       evaluated as unacceptable. At that point such firms will be eliminated from further competition for  
7261       award under this solicitation.

7262  
7263       *Small business offerors* who do not meet the minimum experience qualifications criteria will be  
7264       referred to the United States Small Business Administration (SBA) for a Certificate of Competency  
7265       under the procedures outlined in FAR Subpart 19-602. Based on evaluation by the SBA, such firms  
7266       will either be evaluated as having sufficient experience for performance under this solicitation, or  
7267       eliminated from further competition for award under this solicitation.  
7268

### 7269 **L.7.2.1.3.2 Documentation of Experience**

7270 The offeror shall provide the following information in its response to the relevant experience requirements of  
7271 this solicitation:

7272  
7273 A narrative describing its financial strength; core business lines; number of years of experience designing,  
7274 implementing, operating and managing multi-channel contact centers; the number and location(s) of centers  
7275 currently in operation, and their capacity for expansion; the type of services and business sectors the center(s)  
7276 support; the total number of full-time and part-time employees working in those centers; the size and depth of  
7277 the technical and management staff dedicated to supporting contact center services; and the offeror's  
7278 experience in managing teaming partners and/or subcontractors.

7279  
7280 A narrative describing the offeror's experiences in the following key disciplines:

- 7281       ○ recruiting, training, and retaining contact center personnel;  
7282  
7283       ○ supporting projects that have diverse language and skill requirements;  
7284  
7285       ○ evaluating and implementing integrated knowledge and case management solutions that support  
7286       multiple access channels;  
7287  
7288       ○ developing and implementing quality assurance and improvement programs in support of contact  
7289       center services including tools used to support the programs;  
7290  
7291       ○ supporting projects with stringent systems and information security requirements, similar to those  
7292       required for Federal information systems;  
7293  
7294       ○ implementing electronic services to support automated self-help applications;  
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- short-notice ramping up operations to support crisis and/or high priority situations, including the provision of support 24 hours a day, 7 days a week;
- preparedness for and recovery from disasters and/or major service disruptions; and
- evaluating and implementing new technology.

A narrative describing the operational and management processes and programs (e.g. Quality Assurance/Quality Improvement, Training, Disaster Recovery/Contingency Planning, Information Systems Security) implemented by the offeror that demonstrate a high commitment to service excellence and consistent and repeatable results. (Identify any processes that are certified by industry organizations, and indicate why such certifications may enhance the offeror's ability to meet or exceed project requirements.)

A narrative describing any specialized expertise and/or capabilities, including those offered by teaming partners and/or subcontractors, that may enhance the offeror's ability to meet or exceed project requirements. Describe any successful current and/or past associations with such teaming partners/subcontractors, and explain why they were effective.

### **L.7.2.1.4 Past Performance**

The offeror shall provide the information identified below in its response to past performance. The offeror is cautioned to include all relevant past performance information (including corrective actions taken) in its proposal, as the Government may award without discussions, using only the information provided by the offeror in the initial proposal submission and customer-provided/Government-obtained past performance information. The offeror may be given the opportunity to address adverse past performance information; however, this exchange of information is for clarification only, and not for purposes of discussion.

A project profile identifying no more than three (3) contact center projects performed within the past five years that were similar in scope and complexity to the work required by the USA Contact Performance Work Statement. For each of the projects, the offeror shall provide the following information:

- contract number, task order number, and/or other identification;
- project title or name;
- name of client/contracting entity with contact information;
- role (prime or subcontractor);
- period of performance (including the original completion date established at contract/task order award, and the actual completion date, with an explanation of any variance). If the referenced contract is no longer in effect, provide a brief explanation on why that is the case;
- geographic location(s) where contract work was performed;
- names, the phone numbers, and e-mail addresses (if available) of the Contracting Officer and Contracting Officer's Technical Representative and/or Commercial Buyer and Project Manager;
- total dollar value of contract (including value at initial contract/task order award, and the actual final price, with an explanation of any variance); and

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- annual work volumes by work type (e.g. inbound calls, e-mail, chat, facsimiles, fulfillment, etc.) and languages supported.

For each of the projects listed in Section L.7.2.1.4, the offeror shall provide a narrative describing the scope and complexity of the project, including:

- technical objectives of the project and the scope of work;
- relevancy of the selected project to the nature of the work to be performed under the USA Contact program;
- complexity and duration of the phase-in (start-up) and phase-out (transition) processes. Describe any innovative approaches that were used to minimize disruption or degradation of service to customers during the phase-in and/or phase-out process;
- complexity of the contact center inquiries, type of end-users served, operating hours, language proficiency requirements and length of Information Specialist (IS) training;
- complexity of area knowledge and case-management requirements;
- complexity of information systems security requirements; and
- frequency and complexity of reporting requirements. (Provide a sample report package for the project.)

For each of the above projects, the offeror shall provide a narrative describing overall project performance, including:

- project objectives and performance goals and whether they were achieved;
- a summary of the financial benefits the project delivered to the customer, including any return on investment calculation that qualifies the financial benefits;
- major deliverables produced;
- variations in work volumes and how they were managed, including unforeseen volume spikes in crisis and high-priority situations;
- two unanticipated challenges and the corresponding remedial actions;
- any innovative technologies and/or re-engineered business processes proposed and adopted by the customer that resulted in service improvement and/or cost reduction;
- any performance awards and/or special recognition received during the performance period of the project for superior achievement and/or significant cost savings; and
- any problems or issues that occurred, and the corrective action taken, that may impact the offeror's past performance evaluation by its customer.

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7397 For the selected project(s), the offeror shall provide the name of the individual to whom the Past  
7398 Performance Survey Questionnaire (Attachment J.1) is to be sent. The contact information shall include  
7399 the individual's name and position; the name of the company; the project title; the point of contact's  
7400 address; the phone and fax number; and, where available, his/her e-mail address. The offeror shall direct  
7401 the individual(s) who will be completing the Questionnaire to submit the completed document directly to:

7402  
7403 General Services Administration  
7404 1800 F Street NW, Room G127  
7405 Washington DC, 20405  
7406 Attention: Robert H. Corey

7407 Questions may also be sent as a “.pdf” file via e-mail to: bob.corey@gsa.gov.  
7408

7409 The offeror is responsible for informing the selected customers of the need to address the experience  
7410 factors identified in Section L.7.2.1.3.1 in completing the questionnaire, as well as for alerting them that  
7411 the completed questionnaire must be received by the Contracting Officer no later than the proposal due  
7412 date set forth in the Standard Form 33 issued with the solicitation.  
7413

### 7414 **L.7.2.1.5 Technical Approach**

7415 The offeror shall describe how it intends to meet the requirements specified in Section C - Performance  
7416 Work Statement. The description shall include the following:  
7417

#### 7418 **L.7.2.1.5.1 Services to be Provided**

7419 The offeror shall describe its proposed solution or approach for providing each of the services and support  
7420 specified in Sections C.3 of the Performance Work Statement, including any authentication process used  
7421 to validate users/systems access to these services. Descriptions should demonstrate an in-depth  
7422 understanding of the nature of the services and support to be provided; how the offeror will fulfill the  
7423 requirements; what technology and tools will be used to support the services; and the industry best  
7424 practices that will be employed by the offeror to accomplish task objectives and performance goals. The  
7425 offeror shall describe plans and approaches detailing the methods by which proposed services and support  
7426 will be implemented. The proposal shall not merely offer to conduct an investigation or perform work in  
7427 accordance with the stated requirements, but shall outline the actual approach and/or methodology  
7428 proposed. Insightful responses that describe proven state-of-the-art methods, and solutions that  
7429 demonstrate the offeror's ability to quickly undertake and successfully complete the required contract  
7430 tasks are preferred.  
7431

#### 7432 **L.7.2.1.5.2 Facilities and Technology Infrastructure**

7433 The offeror shall provide a detailed description of the proposed facilities and technology infrastructure  
7434 that will be used in support of this contract, including the following:  
7435

7436 ○ proposed contact center site(s) for supporting tasks to be performed under this contract, with an  
7437 explanation on why the site(s) were selected. Provide a description of how the offeror intends  
7438 to utilize scalable solutions to meet a diverse range of agency requirements, and the criteria and  
7439 processes that it will use to evaluate and select new contact center sites to ensure compliance  
7440 with the requirements set forth in Section C.5 of this solicitation;  
7441

7442 ○ proposed systems architecture in block diagram form with appropriate explanation and  
7443 identification of site location(s), hardware, network devices, etc., including those used for  
7444 primary and backup operations. (Identify system capacity and scalability where applicable);  
7445

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- 7446 ○ the proposed technology solution for each of the requirements listed in Sections C.6, and C.7 of  
7447 this solicitation, including the proposed technology and any special capabilities that are unique  
7448 to the solution;
- 7449
- 7450 ○ proposed technology solutions and facilities for training;
- 7451
- 7452 ○ proposed technology solutions to support an effective quality assurance program; and
- 7453
- 7454 ○ a stipulation that the proposed technology solutions will be fully accessible by individuals with  
7455 disabilities as required by Section 508 of the Rehabilitation Act Amendments of 1998 with an  
7456 explanation of how then technology supports the stipulation.
- 7457

### L.7.2.1.5.3 Contingency/Disaster Recovery Planning

7459 The offeror shall submit a plan that describes its approaches for contingency/disaster recovery planning  
7460 and implementation. The plan shall identify potential risks as well as the safeguards necessary to prevent  
7461 them from occurring. The plan shall include, at a minimum, the following:

- 7462
- 7463 ○ an alternative set of steps to minimize the impact should risk prevention fail;
- 7464
- 7465 ○ a definition of the backup and restoration processes that will be implemented and the precise  
7466 steps necessary to recover as quickly as possible, including recovery procedures for physical  
7467 facility; voice, data, and desktop systems and applications; communications networks; electrical  
7468 service; customer access points; partners and procedures; and staff;
- 7469
- 7470 ○ a definition of the roles and responsibilities of Contractor and Government personnel during  
7471 contingent and disaster events, including provisions for training to prepare them to respond to  
7472 such events; and
- 7473
- 7474 ○ implementation procedures to test and execute the plan on a regular basis to ensure  
7475 preparedness for such events. Provide a sample of such a contingency test plan.
- 7476

### L.7.2.1.5.4 Emergency Response Capability

7478 The offeror shall provide a description of its capability and procedures for short-notice ramping up and  
7479 ramping down of its contact center operations in crisis or high priority situations including any past  
7480 experience with such contingency operations. The offeror shall quantify its capacity to provide  
7481 emergency contact center services in terms of capacity, operating hours, staffing, language support, and  
7482 estimated ramp-up and ramp-down time. This section of the proposal will describe the following:

- 7483
- 7484 ○ use of excess capability versus additional infrastructure;
- 7485
- 7486 ○ plans for rapid addition of qualified information specialists;
- 7487
- 7488 ○ plans for processing security clearances for, and training of, newly hired information agents;  
7489 and
- 7490
- 7491 ○ method of accounting for all information specialist hours in a rapidly changing, volume surge  
7492 environment.
- 7493

7494 **L.7.2.1.6 Management Plan**

7495 The offeror shall submit a Management Plan for accomplishing the work specified in this solicitation.  
7496 The plan shall include, at a minimum, sections and structure described as follows:

7497  
7498 **L.7.2.1.6.1 Program Management Plan**

7499 The offeror shall provide a detailed description of the program management structure and the support  
7500 resources that it will provide to fulfill project requirements. This includes providing the staff identified in  
7501 Section C.4 of this solicitation and support for project and site management, technology, security, human  
7502 resources (including recruiting and training), finance, and quality assurance. Identify key positions within  
7503 the management structure that are considered essential to successful project execution, and list the  
7504 experience and educational criteria to be used to qualify candidates for these positions. Identify any  
7505 operational and management processes and programs (e.g. Quality Assurance/Quality Improvement,  
7506 Training, Disaster Recovery/Contingency Planning) implemented that demonstrate the offeror's high  
7507 commitment to service excellence and consistent, repeatable results.  
7508

7509 The Plan shall include an organization chart that identifies the entire chain of command in the organization;  
7510 the chain of command for managing this contract; and the organizational components that will support this  
7511 contract. In relation to the organizational structure, the offeror shall describe the management, technical,  
7512 administrative and contractual delegations of authority within the organization. The offeror shall further  
7513 describe the lines of authority and roles and responsibilities of all corporate entities (including subcontractors  
7514 and/or teaming partners, if any) together with the escalation procedures for problem/dispute resolution.  
7515 Provide a description of how the offeror's teaming partners and/or subcontractors (if any) will be managed to  
7516 ensure that performance objectives are met.  
7517

7518 The Plan shall also include a description on methodologies and approaches for providing timely  
7519 operational and management reports to meet the requirements identified in Section C.11 of this  
7520 solicitation.

7521  
7522 **L.7.2.1.6.2 Human Resources Management Plan**

7523 The offeror shall provide a draft Human Resources Management Plan, which shall include relevant details  
7524 of its plans for and approaches to recruiting, staffing, training, and retaining employees identified in  
7525 Section C.8 of this solicitation. In addition, the offeror shall provide a description of its methods,  
7526 procedures, and qualification requirements for recruiting qualified and competent contact center  
7527 personnel, including: those required to provide foreign language support; staffing during start-up and  
7528 contract performance periods; and personnel necessary to perform the tasks required by the contract,  
7529 together with contingency plans for human resource acquisition during surge operations. The offeror  
7530 shall identify the corresponding wage rate category as defined by the Department of Labor's wage  
7531 determinations that will be used to compensate each level of contact center staff covered under the  
7532 Service Contract Act. Provide a description of the processes and methodologies that will be used in the  
7533 recruiting process for personnel screening and to ensure compliance with Homeland Security Presidential  
7534 Directive 12 (HSPD-12).  
7535

7536 **L.7.2.1.6.3 Performance Management Plan**

7537 The offeror shall provide a detailed description of the processes and methodologies to be implemented to  
7538 ensure effective performance management, including service-level monitoring; workload forecasting;  
7539 scheduling; service recovery (from system failures, disasters, etc.); problem identification and resolution;  
7540 problem notification; and contingency planning and escalation. The offeror shall describe the processes  
7541 and methodologies that it will follow in projecting and monitoring workload, performance objectives, and

7542 expenditure of the authorized funding level for the project, as well as for keeping the Government  
7543 appraised of the situation in the event of an adverse program event. The offeror shall describe corrective  
7544 actions and contingent plans that it will take to balance workload and performance objectives with  
7545 funding allocations on an ongoing basis until the problem is corrected.

7546

7547 **L.7.2.1.6.4 Quality Control/Quality Improvement Plan**

7548 The offeror shall provide a detailed description of the processes and methodologies it will utilize for  
7549 effective quality assurance, including the offeror's plan for developing, operating, and maintaining a  
7550 quality control program to effectively address the following areas: staffing; training; operations; contract  
7551 deliverables; performance management; process engineering; service delivery; service improvements; and  
7552 customer satisfaction. The Contractor shall describe the processes and methodologies that it intends to  
7553 follow in conducting performance assessment evaluations.

7554

7555 **L.7.2.1.7 Security Plan**

7556 The offeror shall provide a detailed description of its methodology for complying with the information  
7557 systems security requirements set forth in Section C.3.5.5 of the Performance Work Statement. The  
7558 description shall address existing and planned security controls (management, operational, and technical)  
7559 that it will use to protect the confidentiality, integrity, and availability of information, and to ensure  
7560 thereby that IT systems are protected. It shall also indicate whether these controls are in compliance with  
7561 the recommended security controls for Federal information systems set forth in NIST Special Publication  
7562 800-53. The offeror shall describe how it plans to achieve certification and accreditation of its  
7563 information systems prior to award of any initial task order hereunder. Identify any previous experience  
7564 with the certification and accreditation process that may enhance the ability of the offeror to successfully  
7565 obtain certification and accreditation for information systems to be used to support task requirements  
7566 under this contract. The offeror shall provide documented evidence of the existing policies and  
7567 procedures that will be used to conduct periodic assessments of the security controls to ensure their  
7568 effectiveness on an ongoing basis. Identify any existing and planned arrangements within the offeror's  
7569 organization, or with third party vendors, to conduct and document these assessments on an ongoing  
7570 basis. Identify methodologies and approaches for the development and implementation of plans of action  
7571 designed to correct deficiencies in and reduce or eliminate vulnerabilities of information systems.

7572

7573 **L.7.2.1.8 Plan for Special Hiring**

7574 The offeror shall describe how it plans to meet the minimum five (5) percent human resource recruitment  
7575 goal for the services of blind or severely disabled individuals through organizations that are affiliated with  
7576 the Committee for Purchase from People Who Are Blind or Severely Disabled (National Industries for the  
7577 Blind [NIB] and National Industries for the Severely Handicapped [NISH]). The offeror shall identify the  
7578 qualified organization(s) through which these individuals will be hired, and describe any current and past  
7579 association with such organizations in supporting similar projects. The offeror shall clearly describe its  
7580 recruitment, hiring, training, and retention processes, and the roles and responsibilities of the NIB and  
7581 NISH organization(s) within those processes, as well as any compensation arrangements between the  
7582 offeror and the associated organizations.

7583

7584 **L.7.3 Business Proposal Submission Requirements**

7585 An original and two (2) copies of the Business Proposal and one (1) electronic copy using CD-ROM  
7586 media (in Microsoft Word or Excel Windows XP format, (as appropriate) are required. Business  
7587 Proposals shall consist of:

7588

- 7589 ○ a cover letter on company letterhead stipulating that the proposal shall remain in effect for two  
7590 hundred seventy (270) days;

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- 7591
- 7592       ○ a signed Standard Form 33 (Solicitation, Offer and Award);
- 7593
- 7594       ○ a list of company officials by name and title who are authorized to negotiate and financially and
- 7595       legally commit the offeror;
- 7596
- 7597       ○ a copy of Section B, Schedule of Supplies or Services with unit pricing for **all** CLINs;
- 7598
- 7599       ○ a fully prepared Small Business Subcontracting Plan (*large businesses only*);
- 7600
- 7601       ○ a fully executed copy of Section K, Representations, Certifications, and Acknowledgments; and
- 7602
- 7603       ○ an itemized statement of any exception(s) taken to any portion of the solicitation with a complete
- 7604       explanation for such exception(s), or a statement that no exceptions are being taken.
- 7605

7606 Offerors shall insert “fully burdened” prices in the spaces provided in Section B, Schedule of Supplies or

7607 Services, of this solicitation. For the purposes of this solicitation, the term “*fully burdened*” is defined as

7608 *Wage Determination-compliant direct labor rates, direct material (if applicable), plus overhead costs*

7609 *from all applicable overhead pools, plus general and administrative expenses, plus proposed profit*

7610 *margin for this program.*

7611

7612 A direct labor rate that is “*Wage Determination-compliant*” is one that meets the Federal minimum wage

7613 requirements in addition to the Health, Welfare and other benefit requirements of the Occupation Code

7614 for each employee being proposed pursuant to the United States Department of Labor Wage

7615 Determination currently in effect for the location (county and state) where the services are to be

7616 performed. As part of the Business Proposal, the offeror shall cite the applicable Department of Labor

7617 Wage Determination, including revision number and date that he/she used in preparing the proposal.

7618

7619 All prices proposed shall be considered to be ceiling rates that can not be exceeded when preparing a

7620 quotation for a task order under an awarded contract. If awarded a contract pursuant to this solicitation,

7621 the Contractor may propose a lower rate for any or all CLINs on a task-by-task basis. Part of the

7622 Contractor’s strategy may include offering services at a location(s) in the United States that is different

7623 from the location used to prepare this proposal. Offerors are cautioned that, at the task order level all

7624 offered rates must be *Wage Determination-compliant*. This means that rates must meet the requirements

7625 of the Department of Labor Wage Determination in effect at the time the task quotation is prepared for the

7626 location (county and state) where the quoted services are to be performed.

7627

7628 Prices shall be provided for each contract period (the two-year base period, each of the four [4] two-year

7629 option periods, and each of the three [3] one-year extended periods).

7630

### 7631 **L.7.3.1 Business Proposal**

7632 The Business Proposal shall be organized as follows: (i) Cover letter and Standard Form 33 signed by a

7633 company official who is authorized to financially and contractually bind the company for the full amount

7634 of the proposal; (ii) Pricing Tables and an itemized list of all assumptions, and the rationale for each

7635 assumption, used in preparation of the pricing tables; (iii) Small Business Subcontracting Plan; and (iv) a

7636 completed copy the representations, certifications and other statements of offerors in Section K of this

7637 solicitation,

7638

7639 Subcontracting Plans shall be prepared using the format provided for in Section J, Attachment 2 of this

7640 solicitation entitled, “Small Business Subcontracting Plan Outline (Model)”. A Small Business

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7641 Subcontracting Plan is required as part of your proposal if your firm *does not* qualify as a small business  
7642 under the North American Industry Classification System code of 519190.

7643  
7644 The Government will evaluate all Business Proposals received. The purpose of this price analysis will be  
7645 to develop a negotiation position that permits the Contracting Officer and the offeror the opportunity to  
7646 reach agreement as to a fair and reasonable price. A fair and reasonable price does not require that  
7647 agreement be reached on every element of cost, nor is it mandatory that the agreed-to price be within the  
7648 contracting officer's initial negotiation position. Technical information submitted in the Business  
7649 Proposal will not be evaluated as part of the Government's evaluation of the Technical Proposal.

### 7650 7651 **L.7.3.1.1 Pricing Structure**

7652 The offeror shall include as part of its Business Proposal completed Price Tables for the contract base  
7653 period, and for each of the option periods, for each Category of Services" described in the Section B,  
7654 Schedule of Supplies or Services. In addition, the offeror shall include completed price tables for each of  
7655 the Extended Performance Periods.

7656  
7657 **Note: failure on the part of an offeror to provide a unit price for each and every Contract Line**  
7658 **Item Number (CLIN), in each and every contract period will render that offeror's price proposal**  
7659 **"non-responsive."**

7660  
7661 The price schedule in Section B is comprised of four (4) main service categories, each of which must  
7662 reflect *fully-burdened* prices:

7663  
7664 L.7.3.1.1.1 *Project Start-Up* – identify one-time charges associated with project start-up for Facility  
7665 and Equipment, Initial Training, Knowledge and Content Development, and Project Implementation  
7666 Support.

7667  
7668 L.7.3.1.1.2 *Project Management* – identify monthly recurring charges associated with the performance  
7669 of all technical and management services as defined in Section C.3.5, Technical and Management  
7670 Services. This service category includes a Core Project Management Support component and an  
7671 Incremental Project Management Support component.

7672  
7673 L.7.3.1.1.3 *Automated and Other Support Services* – identify recurring charges for providing  
7674 Automated and Other Support services as defined in Sections C.3.1 and C.3.3. This service category  
7675 includes a service initiation component and a recurring monthly or usage sensitive component.

7676  
7677 L.7.3.1.1.4 *Attended Services* – identify the recurring charges for providing Attended Services based  
7678 on the requisite skill levels as defined in Sections C.3.2 and C.4, respectively. The "Information  
7679 Specialist (IS) Hourly Rate" is the fully burdened fixed hourly rate to be paid by the Government to the  
7680 Contractor for each hour of work performed as defined in Section H.8. ***The fixed hourly rate shall include***  
7681 ***the cost for all contact center IS staff and support personnel (e.g. quality monitoring personnel, trainers, etc.)***  
7682 ***required to support those ISs in their performance of the Project. The IS Hourly Rate shall not include any***  
7683 ***billable categories included in the Project Management fee described in Section 7.3.1.1 b above.*** The offeror  
7684 shall identify the wage rate category and wage rate used to develop the fully burdened IS hourly rate for  
7685 each skill level. The applicable Department of Labor Wage Determination will also be identified by  
7686 number, revision and date. **Failure to include the wage category and rate information or an explanation as**  
7687 **to why such information was not provided may render the offeror's proposal "non- responsive".** The offeror  
7688 shall include the multiplication factors for accommodating tasks that require above/below average IS-to-  
7689 QA personnel ratios.

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**L.7.3.1.2 Pricing Tables**

The offeror shall include, as part of its Business Proposal, completed Price Tables for the contract base period and each of the option periods for each “category of services” described in the Section B Schedule of Supplies or Services. In addition, the offeror shall include completed price tables for each of the Extended Performance Periods. The offeror shall include prices for supporting each of the services requested using the pricing tables provided in Section B.2. Failure to provide supporting documentation may render the offeror’s proposal “non-responsive”.

*Note:* Extended-period pricing will only be used in task orders awarded before the end of the contract term if the task order’s period of performance will extend beyond the end of the contract term.

The offeror’s Pricing Tables must demonstrate both cost realism and balance. The following information is a guide to what each of the terms mean:

*Cost realism* exists when the estimated proposed cost elements are realistic for the work to be performed, reflect a clear understanding of the requirements; and are consistent with the unique methods of performance and materials described in the offeror’s technical proposal.

*Balanced pricing* can best be defined by describing its opposite: unbalanced pricing. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly over or understated as indicated by the application of cost or price analysis techniques.

**L.7.3.2 Pricing Support Documentation**

If required by the Government, the offeror shall furnish detailed supporting documentation for any or all of its prices. This may involve all information up to and including a complete breakdown of each element of cost. The Government will only ask for this documentation if it is necessary to reach a determination on the fairness and reasonableness of pricing. Failure to provide supporting documentation when requested to do so may render the offeror’s proposal “non-responsive”.

**L.7.4 Oral Presentations**

a. At the option of the Government, offerors may be required to provide oral presentations to the proposal evaluation team at a Government site. If the Government requires an oral presentation, it will occur after competitive range is established. Offerors will receive a minimum of five (5) business days notice prior to the requested time for presentation. The total duration of the oral presentation shall be limited to one (1) hour or less. A question and answer period following the presentation will be limited to 45 minutes. The presentation shall include, but need not be limited to:

- o Experience and Past Performance
- o Technical Approach
- o Management Plans
- o Security
- o Plan for Special Hiring

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7738 The Government will allow up to four (4) representatives from each offeror's team to attend the oral  
7739 presentation. Information presented during the oral presentation, and any subsequent written discussion  
7740 items, may be used by the Government to augment the offeror's written proposal for the purposes of  
7741 evaluation hereunder.  
7742

7743 **L.7.5 Technical Assistance in Evaluation of Proposals**

7744 Offerors are hereby notified that the Government may contract with a private company whose lines of  
7745 business do not extend to the services called for herein to assist in the evaluation of the entirety or  
7746 portions of the technical and/or Business Proposals submitted by offerors in response to this solicitation.  
7747 This shall include, but not be limited to, data marked as proprietary by offerors.  
7748

7749 Such third-party contractor involvement may include one or more of the following activities: preparing  
7750 responses to vendor questions; participating as a member of technical and/or price evaluation panel(s);  
7751 attending oral presentations; conducting oral discussions with members of the Government's evaluation  
7752 panel(s); and preparing written evaluation report(s).  
7753

7754 Any such third-party contractor will only play an advisory role and their employees will not be voting  
7755 members of either evaluation panel.  
7756

7757 All third-party contractor personnel assisting in the review and/or evaluation of technical and/or Business  
7758 Proposals submitted by offerors in response to this solicitation as described herein will be required to sign  
7759 non-disclosure agreements to protect the offerors' propriety information.  
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**SECTION M**  
**EVALUATION CRITERIA**

**M.1 BASIS FOR AWARD**

The Government intends to evaluate proposals and award contract(s) without discussions with offerors, except that offerors may be given an opportunity to clarify minor irregularities or apparent clerical mistakes in their submissions. Therefore, the offeror's initial proposal should contain the offeror's best terms from a price and technical standpoint.

However, the Government reserves the right to conduct discussions if the Contracting Officer later determines them to be necessary. If the Contracting Officer determines that the number of proposals that would otherwise be in the competitive range exceeds the number at which an efficient competition can be conducted, the Contracting Officer may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly-rated proposals.

This solicitation will result in the award of one or more indefinite delivery, indefinite quantity (IDIQ) contracts for complete managed multi-channel contact center services. Award(s) will be made to the responsive, responsible offeror(s) whose proposal(s) provide the best-value solution to the Government.

The first award will be made to the responsive, responsible offeror which provides the best-value solution. The next award will be made to the responsive, responsible offeror which provides the second best-value solution. Additional awards will follow the same procedure, up to a maximum of ten (10) awards. In determining best-value, technical approach is significantly more important than price.

**M.2 EVALUATION PROCESS**

Technical Proposals will initially be evaluated against the minimum experience requirements in Section L.7.2.1.3.1 of this solicitation. This evaluation will be conducted on a pass/fail basis. In order to pass, an offeror must demonstrate that it meets all of the minimum experience qualifications set forth in Section L.7.2.1.3.1, and that all of that experience has occurred within the five (5) years immediately prior to the deadline for receipt of proposals.

Offers that have not demonstrated that the offerors meet the minimum experience qualifications will be processed as follows:

- If the proposal from a large business firm, as defined by NAICS 519190, it will be evaluated as unacceptable and that offeror will not be considered for the award of a contract hereunder.
- If the proposal is from a small business firm, as defined by NAICS 519190, it will be referred to the United States Small Business Administration (SBA) for a Certificate of Competency under the procedures are outlined in Federal Acquisition Regulation 19-602. Based on evaluation by the SBA, such firms will either be evaluated as having met the minimum experience requirement for performance under this solicitation, or will be evaluated as unacceptable. Small business offerors evaluated as unacceptable will not be considered for the award of a contract hereunder.

Technical Proposals that pass the minimum experience requirements evaluation will then be reviewed for compliance with the solicitation requirements, in accordance with the evaluation factors set forth below. Evaluation of an offeror's Technical Proposal will be conducted independently of the evaluation of its

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7811 Business Proposal. Technical sub-factors will be rated individually using a numerical rating scale. A  
7812 weighting factor will be applied to the numerical rating to calculate the weighted rating for each sub-  
7813 factor. The weighted numerical rating of each technical sub-factor will be combined to derive an overall  
7814 rating for the relevant technical evaluation factor.

7815  
7816 The numerical ratings in Table M.2-1 will be used by the Government to rate the evaluation sub-factor  
7817 elements of an offeror's Technical Proposal.

7818

7819

**Table M.2-1 Sub-Factor Rating Scale for Technical Proposals**

| Rating | General Description   |
|--------|---|
| 5      | The sub-factor clearly meets and consistently exceeds the Government's stated requirements in all areas. The information provided suggests a very low risk to the Government of less than satisfactory performance on the part of the offeror.  |
| 4      | The sub-factor meets the Government's stated requirements in all areas, and in some areas the offeror exceeds the Government's stated requirements. The information provided suggests a low risk to the Government of less than satisfactory performance on the part of the offeror.      |
| 3      | The sub-factor meets the Government's stated requirements in all areas. The information provided suggests a moderate risk to the Government of less than satisfactory performance on the part of the offeror.   |
| 2      | The sub-factor meets the Government's stated requirements in all areas, but in some areas, it barely meets the Government's stated requirements. The information provided suggests a substantial risk to the Government of less than satisfactory performance on the part of the offeror. |
| 1      | The sub-factor fails to meet any of the Government's stated requirements. The information provided suggests a very substantial risk to the Government of less than satisfactory on part of the offeror  |

7820

### 7821 **M.2.1 Evaluation of Technical Proposals**

7822 The Government will evaluate the offeror's proposed solutions and approaches for meeting or exceeding  
7823 contract requirements based on the following considerations, among others that may be deemed relevant  
7824 by the Government.

7825

7826 Technical proposals will be evaluated using a weighted numbering system. The purpose of weighting the  
7827 factors and sub-factors is to ensure the achievement of program objectives by emphasizing the more  
7828 important technical evaluation criteria.

7829

7830 *Sub-factors:* The rating that each sub-factor is awarded (based on the criteria in Table M.2.1) will be  
7831 multiplied by a predetermined weighting factor. The sum of the weighting for all sub-factors within a  
7832 technical factor will equal 100 percent. The aggregate value of all weighted sub-factors will become the  
7833 score for that technical factor.

7834

7835 Technical Factors: Once the score each technical factor is known, those scores will be weighted by  
7836 multiplying each of the scores by predetermined weighting factor. As with sub-factors, the weighting for  
7837 all technical factors will equal 100 percent. The technical evaluation score for the proposal will be the  
7838 sum of all weighted technical factor scores.

7839

7840 The following technical evaluation factors are listed in descending order of importance:

7841

7842 ○ Experience and Past Performance

7843

7844 ○ Technical Approach

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7845

7846     o Management Plans and Processes

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7848     o Security

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7850     o Special Hiring

7851

### 7852 **M.2.1.1 Experience and Past Performance (Factor 1)**

7853 The Government will evaluate the offeror's experience and past performance based on the information to  
7854 be provided in accordance with Sections L.7.2.1.3 and L.7.2.1.4 of this solicitation. The following sub-  
7855 factors are applicable to this technical evaluation factor and are listed in descending order of importance:

7856

7857     o Demonstration of past performance

7858     o Relevancy of corporate experience and core competencies

7859     o Soundness of Operational and Management Plans and processes

7860     o Demonstration of experience in key disciplines

7861     o Documented successes with teaming partners and/or subcontractors

7862

### 7863 **M.2.1.2 Technical Approach (Factor 2)**

7864 The Government will evaluate the offeror's Technical Approach based on the information to be provided  
7865 in accordance with Section L.7.2.1.5 of this solicitation. The following sub-factors are applicable to this  
7866 technical evaluation factor and are listed in descending order of importance:

7867

7868     o Understanding of services to be provided

7869     o Adequacy facilities and technology infrastructure

7870     o Preparedness for disaster recovery/contingency planning

7871     o Documented emergency response capability

7872

### 7873 **M.2.1.3 Management Plan (Factor 3)**

7874 The Government will evaluate the offeror's Management Plan based on the information to be provided in  
7875 accordance with Section L.7.2.1.6 of this solicitation. The following sub-factors are applicable to this  
7876 technical evaluation factor and are listed in descending order of importance:

7877

7878     o Soundness of the Program Management Plan

7879     o Soundness of the Human Resources Management Plan

7880     o Soundness of the Performance Management Plan

7881     o Soundness of the Quality/Assurance/Quality Improvement Plan

7882

### 7883 **M.2.1.4 Security Plan (Factor 4)**

7884 The Government will evaluate the offeror's Security Plan based on the information to be provided in  
7885 accordance with Section L.7.2.1.7 of this solicitation. The following sub-factors are applicable to this  
7886 technical evaluation factor and are listed in descending order of importance:

7887

7888     o Knowledge of Federal information systems security requirements

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- 7889 ○ Appropriateness and effectiveness of security controls
- 7890 ○ Soundness of offeror's plan to attain certification and accreditation
- 7891 ○ Soundness of policies and procedures for conducting on-going risk assessments
- 7892

### 7893 **M.2.1.5 Plan for Special Hiring (Factor 5)**

7894 The Government will evaluate the offeror's Special Hiring based on the information to be provided in  
7895 accordance with Section L.7.2.1.8 of this solicitation. The following sub-factors are applicable to this  
7896 technical evaluation factor and are listed in descending order of importance:

- 7897
- 7898 ○ Soundness of the recruitment, hiring, training and retention processes
- 7899 ○ Clarity of the proposal regarding the roles and responsibilities between the offeror and partner  
7900 organization(s)
- 7901 ○ Documented historical successes in the employing blind and/or severely disabled individuals for  
7902 similar work
- 7903

## 7904 **M.3 BUSINESS PROPOSAL EVALUATION**

### 7905 **M.3.1 Pricing Evaluation Tool**

7906 The Government will evaluate contract line item (CLINs) for all contract years (including Option Years  
7907 and Extended Periods) in each responsive Business Proposal received. This will be accomplished by  
7908 applying a uniform set of anticipated requirements to a standard USA Contract-developed source selection  
7909 pricing tool. The CLINs and quantities will provide the price evaluators with comparable representative  
7910 samplings of services that may be required throughout the term of the contract.

7911

7912 The Government understands that there is significant risk in providing ceiling prices over a thirteen year  
7913 period. On the one hand, the offeror must have sufficient escalation in its pricing model to ensure that the  
7914 ceiling prices are high enough to allow it to bid on requirements in the later years of the contract. On the  
7915 other hand, the offeror must make sure that the escalation factor is not so steep that it prevents the  
7916 company from receiving a contract award in the first place. It is obvious that the farther you go into the  
7917 future, the harder the analysis becomes, and the greater the risk of over-or-under estimating. For this  
7918 reason, the pricing tool will contain weighting factors. Weighting, for the purposes of the price  
7919 evaluation, will be accomplished as follows:

- 7920
- 7921 ○ Base Period and Option Periods 1 and 2 (Years 1 through 6): Pricing is rated "Very Important"
- 7922 ○ Option Periods 3 and 4 (Years 7 through 10): Pricing is rated "Moderately Important"
- 7923 ○ Extended Periods (Years 11 through 13): Pricing is rated "Least Important"
- 7924

### 7925 **M.3.2 Basis for Evaluation**

7926 Business Proposals will be evaluated based on the following factors: price realism, price reasonableness,  
7927 and total evaluated price.

7928

7929 **Price Realism** - Price realism will be evaluated to ensure that the proposed prices reflect a clear  
7930 understanding of the work and skills required for contract performance. Business Proposals determined  
7931 to be unrealistic in terms of technical commitment, or that appear to be unrealistically low in price, will be  
7932 deemed reflective either of an inherent lack of technical competence, or of failure to comprehend the  
7933 complexity of and risks inherent in the contract requirements.

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**Price Reasonableness** - Business Proposals will be evaluated to ensure that proposed prices are consistent with industry standards for similar requirements, and are not excessive in comparison with such standards. Proposed prices that are determined to be unreasonable will be rejected.

Price realism and price reasonableness will be evaluated on a pass/fail basis. If an offer does not demonstrate both price realism and price reasonableness, it will be evaluated as unacceptable and the offeror will be eliminated from consideration for the award of a contract

**Total Price** – The Government will apply estimated quantities for each Contract Line Item Number (CLIN) in evaluating the total price of each proposal. The estimated quantities that will be used for evaluation purposes are based on the Government’s best estimate of current and future requirements. These estimated quantities will be applied consistently to all proposals to obtain the total evaluated price for the base and all option and extended performance periods. Total pricing that is evaluated as lacking balance (see Section L.7.3.1.2) may be rejected if it is determined that the lack of balance poses an unacceptable risk to the Government.