

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.

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

Request for Proposal GSV07PD0003
Amendment-A001

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., ~~supervisors~~, 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.

Request for Proposal GSV07PD0003
Amendment-A001

B.2.1 Project Start-Up

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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
14000	Phone & TTY Services	Each										
14001	Phone, TTY, Fax, & E-mail Service	Each										
14002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each										

Request for Proposal GSV07PD0003
Amendment-A001

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	Extended Period 4	Extended Period 5
14003	Add Enhanced Quality Monitoring Solution	Each										

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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
24000	Phone & TTY Services	Each Equivalent Workstation										

**Request for Proposal GSV07PD0003
Amendment-A001**

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	Extended Period 4	Extended Period 5
24001	Phone, TTY, Fax, & E-mail Services	Each Equivalent Workstation										
24002	Phone, TTY, Fax, E-Mail, Web Chat Services	Each Equivalent Workstation										
24003	Add Enhanced Quality Monitoring Solution	Each Equivalent Workstation										

B.2.1.23 Initial/Special Training

B.2.1.23.1 Course Development and Training

Table B.2.1.23-1 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	Extended Period 4	Extended Period 5
30000	Level 1	Hour										
30001	Level 2	Hour										
30002	Level 3	Hour										
30003	Level 4	Hour										

B.2.1.23.2 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 ~~eastern~~ local time, Monday through Friday, except designated federal holidays.

Nights are defined as the time period between 12:01 am and 7:00 am ~~eastern~~ local time on Monday, and between 9:00 pm and 7:00 am ~~eastern~~ 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 ~~eastern~~ local time respectively.

Holiday hours are defined as the 24 hour period beginning at ~~12:01 am~~ 12:00 midnight local time ~~of~~ on the day of the holiday.

Table B.2.1.23.2-1 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	Extended Period 4	Extended Period 5
31000	Level 1	Hour										
31001	Level 2	Hour										
31002	Level 3	Hour										
31003	Level 4	Hour										
31004	Level 5	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

Table B.2.1.23.2-1.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	Extended Period 4	Extended Period 5
31010	Level 1	Hour										
31011	Level 2	Hour										
31012	Level 3	Hour										
31013	Level 4	Hour										
31014	Level 5	Hour										

Table B.2.1.23.2-1.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	Extended Period 4	Extended Period 5
31020	Level 1	Hour										
31021	Level 2	Hour										
31022	Level 3	Hour										
31023	Level 4	Hour										
31024	Level 5	Hour										

Table B.2.1.23.2-1.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	Extended Period 4	Extended Period 5
31030	Level 1	Hour										
31031	Level 2	Hour										
31032	Level 3	Hour										
31033	Level 4	Hour										
31034	Level 5	Hour										

Table B.2.1.23.2-2 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	Extended Period 4	Extended Period 5
32000	Level 1	Hour										
32001	Level 2	Hour										
32002	Level 3	Hour										
32003	Level 4	Hour										
32004	Level 5	Hour										

Table B.2.1.23.2-2.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	Extended Period 4	Extended Period 5
32010	Level 1	Hour										
32011	Level 2	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

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	Extended Period 4	Extended Period 5
32012	Level 3	Hour										
32013	Level 4	Hour										
32014	Level 5	Hour										

Table B.2.1.23.2-2.b Supervisory 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	Extended Period 4	Extended Period 5
32020	Level 1	Hour										
32021	Level 2	Hour										
32022	Level 3	Hour										
32023	Level 4	Hour										
32024	Level 5	Hour										

Table B.2.1.23.2-2.c Supervisory 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	Extended Period 4	Extended Period 5
32030	Level 1	Hour										
32031	Level 2	Hour										
32032	Level 3	Hour										
32033	Level 4	Hour										
32034	Level 5	Hour										

Table B.2.1.23.2-3 Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – 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	Extended Period 4	Extended Period 5
33000	Level 1	Hour										
33001	Level 2	Hour										
33002	Level 3	Hour										
33003	Level 4	Hour										
33004	Level 5	Hour										

Table B.2.1.23.2-3.a Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – 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	Extended Period 4	Extended Period 5
33010	Level 1	Hour										
33011	Level 2	Hour										
33012	Level 3	Hour										
33013	Level 4	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

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	Extended Period 4	Extended Period 5
33014	Level 5	Hour										

Table B.2.1.23.2-3 .b Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Saturday and Sunday

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	Extended Period 4	Extended Period 5
33020	Level 1	Hour										
33021	Level 2	Hour										
33022	Level 3	Hour										
33023	Level 4	Hour										
33024	Level 5	Hour										

Table B.2.1.23.2-3.c Information Specialist (IS) Hourly Rate (In Training) – 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	Extended Period 4	Extended Period 5
33030	Level 1	Hour										
33031	Level 2	Hour										
33032	Level 3	Hour										
33033	Level 4	Hour										
33034	Level 5	Hour										

Table B.2.1.23.2-4 Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – 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	Extended Period 4	Extended Period 5
34000	Level 1	Hour										
34001	Level 2	Hour										
34002	Level 3	Hour										
34003	Level 4	Hour										
34004	Level 5	Hour										

Table B.2.1.23.2-4.a Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – 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	Extended Period 4	Extended Period 5
34010	Level 1	Hour										
34011	Level 2	Hour										
34012	Level 3	Hour										
34013	Level 4	Hour										
34014	Level 5	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

Table B.2.1.23.2-4.b Supervisory Information Specialist (IS) Hourly Rate (In Training) – Bi-Lingual – Saturday and Sunday

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	Extended Period 4	Extended Period 5
34020	Level 1	Hour										
34021	Level 2	Hour										
34022	Level 3	Hour										
34023	Level 4	Hour										
34024	Level 5	Hour										

Table B.2.1.23.2-4.c Supervisory Information Specialist (IS) Hourly Rate (In Training) – 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	Extended Period 4	Extended Period 5
34030	Level 1	Hour										
34031	Level 2	Hour										
34032	Level 3	Hour										
34033	Level 4	Hour										
34034	Level 5	Hour										

B.2.1.23.3 Knowledge and Content Development

Table B.2.1.23.3 Knowledge and Content Development Charge

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	Extended Period 4	Extended Period 5
40000	Level 1	Hour										
40001	Level 2	Hour										
40002	Level 3	Hour										
40003	Level 4	Hour										

B.2.1.23.4 Project Implementation Support

Table B.2.1.23.4 Project Implementation Support

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	Extended Period 4	Extended Period 5
50000	Site Management	Hour										
50001	Program Management	Hour										
50002	Technology Management	Hour										
50003	Information Systems Security	Hour										
50004	Content and Knowledge Management	Hour										
50005	Contact/Case Management	Hour										
50006	Relationship Management	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
71000	Interactive Voice Response (IVR) Service	Hour										
71001	Voice/Speech Recognition	Hour										
71002	Text-to-Speech	Hour										

**Request for Proposal GSV07PD0003
Amendment-A001**

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	Extended Period 4	Extended Period 5
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	Extended Period 4	Extended Period 5
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	Extended Period 4	Extended Period 5
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	Extended Period 4	Extended Period 5
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										

Request for Proposal GSV07PD0003
Amendment-A001

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	Extended Period 4	Extended Period 5
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.2.4-2-3 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	Extended Period 4	Extended Period 5
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	Extended Period 4	Extended Period 5
90001	Level 1	Hour										
90002	Level 2	Hour										
90003	Level 3	Hour										
90004	Level 4	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

90005	Level 5	Hour											
-------	---------	------	--	--	--	--	--	--	--	--	--	--	--

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

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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5

Request for Proposal GSV07PD0003
Amendment-A001

92011	Level 1	Hour										
92012	Level 2	Hour										
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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
94011	Level 1	Hour										
94012	Level 2	Hour										

Request for Proposal GSV07PD0003
Amendment-A001

94013	Level 3	Hour											
94014	Level 4	Hour											
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	Extended Period 4	Extended Period 5	
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
96011	Level 1	Hour										
96012	Level 2	Hour										
96013	Level 3	Hour										
96014	Level 4	Hour										
96015	Level 5	Hour										

**Request for Proposal GSV07PD0003
Amendment-A001**

Table B.2.5.8-1 Supervisory IS Hourly Rate – Holidays (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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
98001	Low	X Factor										
98002	Average	X Factor	1.00	1.00	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

Request for Proposal GSV07PD0003
Amendment-A001

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))

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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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										

Request for Proposal GSV07PD0003
Amendment-A001

99027	192 Hours/Day	Each Hour											
99028	384 Hours/Day	Each Hour											
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	Extended Period 4	Extended Period 5	
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
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 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	Extended Period 4	Extended Period 5
99051	4 Hours/Day	Each Hour										
99052	8 Hours/Day	Each Hour										
99053	12 Hours/Day	Each Hour										
99054	24 Hours/Day	Each Hour										

Request for Proposal GSV07PD0003
Amendment-A001

99055	48 Hours/Day	Each Hour											
99056	96 Hours/Day	Each Hour											
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	Extended Period 4	Extended Period 5	
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	Extended Period 4	Extended Period 5
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	Extended Period 4	Extended Period 5
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.2.78 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

Request for Proposal GSV07PD0003
Amendment-A001

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.

Table B.2.78-1 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution) - 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	Extended Period 4	Extended Period 5
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.2.78-1 IS Hourly Rate (Shared or Non-Dedicated E-Mail Inquiry Response Solution) - Bi-Lingual

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	Extended Period 4	Extended Period 5
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

50 information and services through the use of various communications media, including telephones,
51 telecommunications devices for the deaf (TDD/TTY), e-mail, postal mail, facsimile, the Internet, and
52 other media as appropriate.

53
54

55 **C.1.3 Objectives**

56 Through the services offered under this contract, the Government expects to realize the following
57 objectives:

58
59
60
61
62

- Position the Government’s public information services on par with or exceeding private industry standards by providing customers with easily accessible, accurate, timely, and professional responses to their inquiries via their preferred method of communication.

- Provide capability to respond quickly to provide fully managed multi-channel inquiry response and management solutions to meet the needs of Federal agencies and programs in emergency and crisis situations.

- Provide increased capability to measure and control the delivery of information services to meet the evolving needs of citizens.

- Provide solutions that comply with federal information systems security requirements.

- Gain and sustain access to commercial off-the-shelf, state-of-the-art technology that is secure and scalable to meet current and future requirements.

- Control information dissemination costs.

- Promote job opportunities for individuals who are blind or with severe disability.

79
80

80 **C.2 PROGRAM REQUIREMENTS**

81
82

82 **C.2.1 General Requirements**

83
84

84 **C.2.1.1 Contact Center Location**

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

90

91 **C.2.1.2 Hours of Operation**

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

96
97 Normal Business Hours are defined as the time period between 7:00 am to 9:00 pm ~~eastern~~ local time,
98 Monday through Friday, except designated federal holidays.

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

103
104 Saturdays and Sundays are defined as the time period between 12:01 am Saturday and 12:01 am Sunday,
105 and between 12:01 am Sunday and 12:01 am Monday ~~eastern~~ local time respectively.

106
107 Holiday hours are defined as the 24 hour period beginning at ~~12:01 am~~ 12:00 midnight ~~of~~ on the day of
108 the holiday.

109
110 Specific operating hours, including coverage for normal business hours, nights, Saturdays and Sundays,
111 and holidays, and emergency notification requirements, if any, will be determined on a case-by-case basis
112 and be included in task orders issued by the Government.

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

119
120 **C.2.1.3 Place of Performance**

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

123
124 **C.2.1.4 Work Types**

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

- 129
- 130 ○ Referrals
 - 131 ○ General information inquiries
 - 132 ○ Inquiries on specific programs, applications, and services
 - 133 ○ Fulfillment requests
 - 134 ○ Order intakes
 - 135 ○ Congressional inquiries
 - 136 ○ Emergency inquiries

- 137 ○ Contingency-related inquiries (e.g., inquiries resulting from the activation of an agency’s
- 138 Contingency Of Operations Plan [COOP])
- 139 ○ Service inquiries
- 140 ○ Scheduling of appointments
- 141 ○ Complaint inquiries
- 142 ○ Public comments
- 143 ○ Customer surveys/feedback
- 144 ○ Transcription services
- 145 ○ Information delivery/collection via outbound service
- 146 ○ Eligibility screening
- 147 ○ Inquiries on news and current events

148

149 **C.2.1.5 Language Support**

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

155

- 156 ○ English
- 157 ○ Spanish
- 158 ○ Mandarin
- 159 ○ Cantonese
- 160 ○ French
- 161 ○ German
- 162 ○ Japanese
- 163 ○ Korean
- 164 ○ Vietnamese

165

166 **C.2.1.6 Rapid Ramp-Up/Ramp-Down**

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

176

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

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

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

193
194
195 **C.2.2 Sample Workflow**

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

203
204 **C.2.2.1 Sample Call Flow**

205 A sample call flow process is provided below.

206
207 The caller dials a direct-dial or toll-free telephone number terminating at or routed to the Contractor
208 provided contact center for Government information and assistance.

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

220
221 After the caller is routed to an IS, the IS responds to the caller's initial request and any other additional
222 requests the caller makes. The IS retrieves data from a knowledge base to respond to customer requests
223 and/or records the required information needed to complete any fulfillment actions. The Contractor shall
224 provide an inquiry tracking tool whereby the IS shall have the capability to initiate actions or check the

225 status of previous actions initiated on behalf of the caller. When possible, all systems work shall be
226 performed while the IS is engaged with the caller during the phone call.

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

237
238 The nature of the caller's request may require that information be sent to the caller. If the requested
239 information is available and can be sent by facsimile, the IS shall complete the facsimile transmission. If
240 printed information is requested, the IS will record the required information needed to complete the
241 fulfillment action. The fulfillment action may be completed by the Contractor or by the Government.

242
243 The IS records caller/case profile information for the contact/case management system.

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

251
252 **C.2.2.2 E-Mail Workflow (Normal)**

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

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

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

268
269 Upon receipt of the inquiry at the center, the Contractor-provided e-mail distribution and management
270 system will time-stamp, sort, categorize, and prioritize the inquiry based on agency specified business
271 rules, and assign a tracking number that will be used throughout the process to track the status of the
272 inquiry. Upon receipt of the inquiry by the contractor's e-mail system, the Contractor may be asked to
273 immediately forward a copy of the original inquiry to a Government-furnished e-mail address for
274 informational purposes. The system will capture all relevant information about the inquiry and present it

275 for use by the IS during the response process. As a first step in the response process, a Government
276 approved auto-response will be sent immediately to the e-mail address provided by the inquirer to
277 acknowledge receipt, provide the tracking number for any future communication, and provide an
278 estimated response time. Over time, as the Contractor develops preformatted responses to frequently
279 asked subjects, the Contractor may include preformatted responses as part of the auto-response.
280

281 After the initial acknowledgment, the inquiry will be routed to an IS with the appropriate skills for
282 responding to the inquiry. Depending on the nature of the inquiry, the IS will either respond directly or
283 will refer the inquiry to the appropriate contractor or agency personnel for direct response. If the IS
284 decides to refer the inquiry to an agency (or agencies) for response, the IS will send a notice to inform the
285 inquirer of this decision and to provide relevant information on the responding office(s), the expected
286 response time as determined by the agency (if applicable), and contact information. The status log for
287 this inquiry will then be updated. In either case, the Government may require the Contractor to provide a
288 copy of the response to a Government-furnished e-mail address for agency monitoring and quality control
289 purposes.
290

291 Upon completion of the response to an e-mail message forwarded by the Contractor, the responding
292 agency may send a completion notice to the Contractor contact center for status update. The completion
293 notice may be in the form of a batch listing containing all referred e-mails handled by that agency
294 organized by tracking number and including a date and time, or a cc or bcc copy of each e-mail response,
295 which then can be used by the Contractor to close out the case. With consensus of all parties, an
296 alternative method of updating the status can be used. The Contractor shall work with the agency to
297 develop a method that meets the needs of both parties. If the responding agency elects, as part of its
298 business rules, not to send a completion notice to the Contractor, the inquiry will be considered closed
299 and no further action will be required.
300

301 **C.2.2.2.1 E-Mail Workflow (Misdirected)**

302 The Contractor may receive e-mail inquiries from other agency(ies) who have determined that they are
303 not the appropriate agent for responding to these inquiries. One of the goals of the USA Services
304 initiative is to reroute these misdirected inquiries to the appropriate agencies for direct response. These
305 misdirected inquiries may be routed to the Contractor via a central forwarding mail box established by
306 each agency or from one or more individual mail boxes. Once received, the inquiries are processed in a
307 manner similar to that described in Section C.2.2.2. The Contractor shall work with the agencies to
308 develop the appropriate protocols and procedures for responding to and managing the disposition status of
309 the misdirected inquiries.
310

311 **C.2.2.2.2 E-Mail Response Options**

312 E-mail response options may vary from one agency to another. When responding to e-mail inquiries, the
313 IS shall analyze the message content to determine the nature of each inquiry. The IS shall evaluate the
314 available response options to determine which is the most appropriate for the inquiry and, if necessary,
315 query the appropriate database(s) for relevant information to be included in the response, and then record
316 aspects of the inquiry in a contact/case management status log. For example:
317

318 No response - If the inquiry does not require a response (some examples are pranks, spam, duplicate
319 messages, and incomprehensible submissions), the IS records the type of message in the status log and
320 notes that no further action is required.
321

322 Comment or opinion - If the inquiry is a comment or opinion not requiring a customized response, the IS
323 forwards the inquiry to the appropriate agency and sends an acknowledgment to the inquirer thanking
324 them for the input, and identifying agency to which it has been transmitted. The IS records the topic of

325 the question using specific categories provided through the system for in reporting such data to agencies
326 and updates the status log for this inquiry.

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

332
333 Inquiry to be forwarded to a single agency - If the inquiry requires a customized response and must be
334 forwarded to an agency, the IS forwards the inquiry to the appropriate agency. The IS also sends a
335 response to inform the inquirer of this action as to what type of response time to expect, and how to
336 follow up with the responding agency. The IS records the topic of the question using specific categories
337 provided through the system for reporting such data to agencies and updates the status log for this inquiry.
338 Both the forwarding and response action are accomplished simultaneously with one automated action.

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

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

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

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

367
368 Removal of extraneous data – To the extent practicable, the Contractor shall employ automated means to
369 remove the extraneous routing and other data from the response (rather than relying on manual agent
370 action).

371
372 Undeliverable responses - The Contractor shall track all undeliverable e-mail responses addressed to
373 inquirers and perform analyses, as required, to determine the causes of non-delivery. If the IS determines
374 that non-delivery was caused by an erroneous e-mail address, the Contractor shall make a reasonable

375 attempt to identify and correct the error and to attempt redelivery of the message. The Contractor shall
376 record any non-delivery in the case management database.

377

378 **C.2.2.3 Facsimile Inquiry Workflow**

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

380

381 The inquirer sends an inquiry via facsimile to a direct-dial or toll-free telephone number for Government
382 information and assistance. The Government may direct the contractor to respond to facsimile inquiries
383 via telephone, facsimile, e-mail, or other communications media, whichever is the most efficient and
384 satisfies the inquirer. The Contractor-provided system receives the facsimile inquiry and, if necessary,
385 converts and stores the facsimile inquiry in a commonly used format and distributes the inquiry to a
386 qualified IS for response. The Contractor shall be responsible for tracking the status of facsimile
387 inquiries in a manner similar to e-mail inquiries. Facsimile inquiries referred to other federal agencies for
388 direct response shall be transmitted as e-mail attachments. The Contractor shall note in the e-mail that the
389 original inquiry was received as a fax document. Responses to facsimile inquiries may be via telephone,
390 facsimile, e-mail, or other communications media, whichever is the most efficient and satisfies the
391 inquirer. The Contractor shall retain a copy of all responses for recordkeeping.

392

393 **C.2.2.4 Postal Mail Inquiry Workflow**

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

395

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

399

- 400 ○ forwarded by postal mail and/or courier service by the Government to an address maintained by
401 the Contractor;
- 402
- 403 ○ picked up by the Contractor from a Government location; or
- 404
- 405 ○ converted documents forwarded to the Contractor by electronic means (e.g. e-mail, facsimile).
- 406

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

418

419

420 **C.2.3 Response Protocols**

421 The Contractor shall respond to information requests generally through the use of one or a combination of
422 the following methods:

423

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

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

434
435 *TDD/TTY response* – The Contractor shall ensure that TDD/TTY users are offered similar levels of
436 service similar to that received by telephone users supported by this contract.

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

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

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

463
464 *Form letter response* – The Contractor may develop and prepare form letters for dissemination in
465 response to telephone, electronic, and written inquiries. The Government shall approve all such form
466 letters before they are used to fulfill information requests.

467
468 *Interim response* - In cases where the Contractor cannot provide an immediate response because further
469 research is necessary, the Contractor shall provide the requestor with an interim response within the
470 timeframe specified by the Government. The interim response shall indicate when the inquirer will
471 receive a complete response.

472
473 *Coordinated response* - Any inquiry, especially one involving legal matters, policy interpretation, and/or
474 a highly technical response that cannot be answered readily from approved materials in the knowledge

475 database shall be referred to the appropriate authority for direct response. Telephone inquiries of such
476 nature shall be forwarded immediately after identification. Electronic, facsimile and written inquiries
477 identified as requiring special support from appropriate authority shall be forwarded in the timeframe
478 specified by the Government, but no later than two (2) business days after receipt.

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

487
488

489 **C.3 SERVICES TO BE PROVIDED**

490
491 The Contractor shall provide all of the services identified in this SOW. Specific service requirements will
492 be identified on a case-by-case basis and be included in individual Task Orders to be issued by the
493 Government. The Contractor shall ensure that services delivered employ technology that is effective and
494 scalable to meet the evolving needs of the Government and adhere to business processes that conform to
495 industry best practices.

496
497 The Government reserves the right to add additional services required to meet the evolving needs of the
498 citizens and agency programs at any time during the life of the contract. Any additions will be subject to
499 written mutual agreement between the Government and Contractor.

500
501

502 **C.3.1 Automated Services**

503 The Contractor shall provide automated services to enable the Government to deliver unattended service
504 24 hours a day, 7 days a week (24 x 7). The Contractor is responsible for the provision, maintenance,
505 design, implementation, operation, and management of these services.

506 **C.3.1.1 Automated Voice Response Services**

507
508 Automated voice response services are intended to provide unattended service to telephone callers on a 24
509 x 7 basis. These services include the traditional interactive voice response (IVR) service, which uses the
510 telephone touch-tone pad or simple voice commands to access pre-recorded information. They also
511 include advanced services that make use of speech recognition and text-to-speech technologies to enhance
512 efficiency and customer service. At a minimum, the Contractor-provided automated voice response
513 services shall support the following languages:

- 514
- 515 ○ Cantonese
 - 516 ○ English
 - 517 ○ French
 - 518 ○ German
 - 519 ○ Japanese
 - 520 ○ Korean

- 521 ○ Mandarin
- 522 ○ Spanish
- 523 ○ Vietnamese

524

525 Specific language support requirements will be identified in task orders issued by the Government.

526

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

535

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

544

545 **C.3.1.1.1 Interactive Voice Response (IVR) Service**

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

554

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

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

565

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

567 The Contractor shall provide text-to-speech service to augment and/or replace the traditional IVR service.
568 The service shall convert textual information into speech that closely resembles natural voice over any

569 telephone. The service shall provide an intuitive, convenient, customer friendly, and natural-sounding
570 speech interface that serves callers quickly, efficiently, accurately, and consistently. The service shall be
571 able to distinguish between homophones (words with identical spellings but different pronunciations) and
572 understand word context as they appear in a sentence. The service shall provide word, phoneme, and
573 bookmarks support. The service shall provide the capability for authorized personnel to update
574 dictionaries remotely to improve accuracy. The caller shall not experience any noticeable latency during
575 the processing of long text strings. The service shall support speech synthesis mark-up language (SSML)
576 and other industry standards for text-to-speech applications.

577
578 **C.3.1.2 Facsimile Services**

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

585
586 **C.3.1.2.1 Automatic Fax-Back Service**

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

593
594 **C.3.1.2.2 Fax-On-Demand Service**

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

602
603 **C.3.1.3 Voice Mail Service**

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

611
612 **C.3.1.4 Automated Callback (Telephone)**

613 The Contractor shall provide an automated callback service that allows a telephone caller the option of
614 leaving callback information for Contractor call-back at a later time, instead of waiting in queue for an
615 available Information Specialist. The service shall prompt the caller to provide the callback information
616 and provide an estimated callback time to the caller. The service shall automatically contact the caller at

617 the estimated callback time, and connect the caller to an available Information Specialist for assistance. If
618 the callback encounters a busy or no-answer condition, the service shall repeat the callback for up to 3
619 additional attempts within an appropriate time interval (as specified in individual task orders) before
620 aborting. If the callback encounters a voicemail or answering service, the service shall leave a brief
621 message indicating the purpose and time of the callback and instructions for calling back, if any, as
622 provided by the Government. For billing purposes, each group of six callback attempts encountering a
623 busy and/or no-answer condition will be counted as a completed call.

624
625 **C.3.1.5 Web Callback**

626 The Contractor shall provide a fully managed hosted web callback service to allow a visitor to a
627 Government website to access the service and leave callback information for the Contractor to call back at
628 a later time. The service shall prompt the caller to provide the callback information, including the subject
629 of the inquiry, and provide an estimated callback time to the caller. The service shall automatically
630 contact the caller at the estimated callback time and connect the caller to an available Information
631 Specialist for assistance. If the callback encounters a busy or no-answer condition, the service shall
632 repeat the call back for up to 3 additional attempts within an appropriate time interval as specified in
633 individual task orders before aborting. If the callback encounters a voice mail or answering service, the
634 service shall leave a brief message indicating the purpose and time of the callback and instructions for
635 calling back, if any, as provided by the Government. For billing purposes, each group of six callback
636 attempts encountering a busy and/or no-answer condition will be counted as a completed call.

637
638 **C.3.1.6 Automated Outbound Dialing Campaign**

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

648
649 **C.3.1.7 Automated Fax Delivery**

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

659
660 **C.3.1.8 Automated E-Mail Delivery**

661 The Contractor shall provide a fully automated solution to transmit e-mail messages via the Internet to
662 individuals/organizations on a listing provided by the Government. The service shall have the capacity to
663 accommodate text messages of up to 15K bytes in length for each e-mail message. The contractor shall
664 identify all unsuccessful transmission attempts and determine the cause of such failures. If the

665 unsuccessful attempts were caused by contractor errors, the Contractor shall correct the errors and
666 retransmit the message within 24 hours of the corrections.

667

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

669 The Contractor shall provide a fully managed secure, scalable, hosted service to allow visitors to a
670 Government and/or Contractor-provided website to access an on-line ordering service to order free and/or
671 paid Government publications on a 24 x 7 basis. The ordering interface must be designed to
672 accommodate multiple browsers, including at a minimum: AOL 6.0 and higher; MS Internet Explorer 5.0
673 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and
674 higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of
675 1998. The service shall capture the required information and either provides the recorded information to
676 the Government in electronic format, or uses the captured information to complete fulfillment requests.

677

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

679 The Contractor shall provide a fully managed hosted service to allow visitors to a Government website to
680 access a contractor-developed and maintained web form for submitting e-mail inquiries to a designated e-
681 mail address. The web form interface must be designed to accommodate multiple browsers, including at
682 minimum: AOL 6.0 and higher; MS Internet Explorer 5.0 and higher; Netscape 4.7 and higher; Opera 5.0
683 and higher; Safari 5.0 and higher; and Firefox, 1.0 and higher. The interface must also be compliant with
684 Section 508 of the Rehabilitation Act Amendments of 1998. The web form shall allow users to associate
685 the topics of their inquiries with a list of frequently requested topics identified by the Government. The
686 service shall capture all relevant information regarding the inquiry for transmission to the designated e-
687 mail system.

688

689 **C.3.1.11 Hosted FAQ Service**

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

696

697 The Contractor shall provide a secure, highly available and scalable hosted solution to enable visitors to
698 subscribing Government websites to access answers to FAQs on a 24 x 7 basis. The service must
699 accommodate multiple browsers, including at minimum: AOL 6.0 and higher; MS Internet Explorer 5.0
700 and higher; Netscape 4.7 and higher; Opera 5.0 and higher; Safari 5.0 and higher; and Firefox, 1.0 and
701 higher. The interface must also be compliant with Section 508 of the Rehabilitation Act Amendments of
702 1998. The service must be able to be implemented within 45 calendar days from the date of the service
703 request and:

704

705 ○ Provide a user/administrator-friendly and intuitive interface that is easily configurable to match a
706 website's look and feel.

707

708 ○ Allow the content of the FAQ knowledge base to be published to multiple web sites, each with a
709 customizable "look and feel" for different audiences, or for multiple audiences on a single site.

710

711 | ○ Support multiple languages, including at a minimum, English, Spanish, and Chinese.

712

713 ○ Meet federal information systems security requirements.

- 714
- 715 ○ Allow both browse and search of FAQs answers from a single or multiple knowledge bases by
- 716 subject and response categories, with results automatically ranked by relevancy, usefulness, or
- 717 other appropriate methods selected by the Government, including manual ranking to increase or
- 718 decrease a particular FAQ's prominence relative to others.
- 719
- 720 ○ Have the capability for a user to submit an inquiry to either the Contractor or the subscribing
- 721 agency for response. Allow Government and/or contractor personnel to review and/or respond to
- 722 user inquiries in real time
- 723
- 724 ○ Have the capability to collect user feedback on the effectiveness, usefulness, and customer
- 725 satisfaction of the service
- 726
- 727 ○ Allow users to subscribe to automatic notification of FAQ updates.
- 728
- 729 ○ Provide both remote and onsite access to authorized personnel to all administrative functions, as
- 730 appropriate
- 731
- 732 ○ Store each FAQ and its corresponding answer as a separate record with a unique ID number; and
- 733 allow information to be posted and modified in real time; enable each FAQ to be tagged with
- 734 meta-data, which might include subject keywords, ownership, last updated date, expiration date,
- 735 and other information.
- 736
- 737 ○ Display last update for each FAQ, if required.
- 738
- 739 ○ Allow content managers to automate content management tasks, which might include reviewing,
- 740 archiving, and purging of data. Provides automatic notification on expiring or outdated content
- 741 based on specified review schedule
- 742
- 743 ○ Be capable of presenting FAQs and their corresponding answers in a format that can be indexed
- 744 by search engines (internal or external) without affecting performance metrics
- 745
- 746 ○ Search, select, and sort FAQ answers from within separate knowledge bases. Provide capability
- 747 to select which knowledge bases will be included in each topic query
- 748
- 749 ○ Provide management reports on a scheduled or on-demand basis. Reports can be accessed via the
- 750 web or by e-mail.
- 751
- 752 ○ Provide time/date stamping and user-friendly tracking numbers for all information requests.
- 753 Allow multiple sub-tracking numbers to be assigned to a single request if required for internal or
- 754 external purposes
- 755
- 756 ○ Include an automated query acknowledgement mechanism with a choice of customizable
- 757 response messages.
- 758
- 759 ○ Have the capability to automatically verify the validity of internal and/or external links contained
- 760 in the FAQ system on a daily basis and notifying the Contractor of any invalid links. The link
- 761 verification process shall not disrupt availability of the hosted FAQ service to end users.
- 762

763 The Government intends to harvest some or all of the information contained in the Contractor's FAQ
764 knowledge bases through the USAgov.gov search service or other agency search services on a regular

765 basis. The Contractor shall allow these Government search services to access and retrieve relevant
766 content of the FAQ knowledge bases and/or provide the capability to publish the data in Extensible
767 Markup Language (XML) code to a designated Government or contractor system using standards and
768 access/replication schedules that are mutually acceptable to the Contractor and Government.

769
770 **C.3.1.11.1 FAQ Guidelines**

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

- 774
775 ○ All answers to FAQ prepared by the Contractor shall be self contained and written in easy to read
776 and understand language.
- 777
778 ○ All acronyms/abbreviations used and associated descriptions must be included within each
779 answer
- 780 ○ URLs in all FAQ answers shall be written out in answer text (not embedded)
- 781 ○ Limit screen to 1 per answer (break content into usable chunks)
- 782 ○ Link to other answers rather than refer to a number or position on the page
- 783 ○ Last review/update date included with each answer
- 784 ○ Include an identification number for each FAQ
- 785 ○ Include identifiers for like FAQs (e.g., agency jurisdiction) for grouping and subsequent
786 extraction
- 787
- 788

789 **C.3.2 Attended Services**

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

794
795 **C.3.2.1 Responding to Telephone Inquiries**

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

- 800
801 ○ Accurately responding to inquiries in a professional and courteous manner. These inquiries may
802 be in the form of telephone and TDD/TTY calls. When necessary, transfer or referral the
803 inquiries to the appropriate agency for response.
- 804
805 ○ Conducting research of Government-approved sources of information to prepare responses to
806 inbound inquiries and developing appropriate responses accordingly.
- 807
808 ○ Capturing and tracking information related to inbound inquiries including date and time of
809 receipt, nature of inquiry, source of inquiry if multiple telephone numbers are involved, customer
810 identity when appropriate, information requested, disposition, response date, and any fulfillment

811 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided
812 case management tool.

- 813
- 814 ○ When necessary, forwarding recorded information via telephone, facsimile, or e-mail or other
815 electronic transmission to the appropriate authority for further processing.
- 816
- 817 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile,
818 whichever is the most efficient delivery method and satisfies the customer.
- 819
- 820 ○ Recognizing new trends of inquiries for referral to management for development of common
821 responses and reporting to the agency regarding sudden new lines of inquiry.
- 822

823 **C.3.2.2 Outbound Calling Services**

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

- 828
- 829 ○ Performing outbound callbacks in response to user requests for callback service.
- 830
- 831 ○ Performing outbound callbacks to selected customers in order to follow up on questions or issues
832 that could not be resolved during the initial contact, to verify problem resolution, or to measure
833 customer satisfaction as directed by the Government.
- 834
- 835 ○ Launching outbound calls to Government agencies for the purposes of relaying customer
836 information, obtaining information in response to customer questions and/or issues that could not
837 be resolved during the initial contact, or verifying problem resolution.
- 838
- 839 ○ Performing outbound calls in support of customer surveys, program and/or product promotions,
840 product recalls, sales and marketing, and special events.
- 841
- 842 ○ Performing outbound calls in response to inquiries from callers using TDD/TTY devices.
- 843

844 **C.3.2.3 Responding to Postal Mail Inquiries**

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

- 849
- 850 ○ Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
851 more efficient and satisfies the inquirer. When necessary, sending the requested information to a
852 customer through the postal services, E-mail or facsimile whichever is more efficient and satisfies
853 the inquirer
- 854
- 855 ○ When requested by the Government, converting the inquiry documents to electronic format to
856 facilitate routing, and response, and records management.
- 857
- 858 ○ Conducting research of Government-approved sources of information to prepare responses to
859 written inquiries, and developing appropriate responses accordingly.
- 860

- 861 ○ Recording and tracking data/information related to the inquiries, including date and time of
862 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment
863 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided
864 case management tool.
- 865
- 866 ○ When necessary, forwarding the inquiries to the appropriate authority for further processing.
- 867
- 868 ○ Reviewing to ensure that outgoing responses are accurate and complete in accordance with
869 business rules and guidelines established by the Government.
- 870

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

879
880 **C.3.2.4 Responding to E-Mail Inquiries**

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

- 885
- 886 ○ Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
887 more efficient and satisfies the inquirer.
- 888
- 889 ○ Conducting research of Government-approved sources of information to prepare responses to
890 written inquiries, and developing appropriate responses accordingly.
- 891
- 892 ○ Recording and tracking data/information related to the inquiries including date and time of
893 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment
894 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided
895 case management tool.
- 896
- 897 ○ When necessary, forwarding the inquiries to the appropriate authority for further processing.
- 898
- 899 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile,
900 whichever is more efficient and satisfies the inquirer.
- 901
- 902 ○ Reviewing to ensure that outgoing responses are accurate and complete in accordance with
903 business rules and guidelines established by the Government. If the initial response is found to be
904 erroneous by the Contractor and/or the Government and further action is needed to inform the
905 inquirer, the Contractor shall send a corrected response to the inquirer immediately.
- 906

907 The Contractor shall respond to e-mail inquiries within the designated time frame specified by the
908 Government. The Contractor shall prepare the responses in accordance with business rules it has
909 developed in conjunction with the Government, and/or with other guidelines provided by the

910 Government. A preformatted response or telephone response, if such is the most efficient and satisfies
911 the inquirer, is acceptable.

912
913 The Contractor shall provide the required support to identify, record, and track the nature and volume of
914 e-mail inquiries, and to measure the quality and timeliness of the response process from time of receipt to
915 completed response. The Contractor shall accomplish this goal by tracking all incoming and outgoing e-
916 mail messages and monitor the processing activities to determine the volume, nature and disposition of
917 the inquiries. The Contractor shall benchmark the response process in its entirety to determine processing
918 time of various types of e-mail inquiries and the skill sets required for responding to different types of
919 inquiries and include the benchmark results in the requisite management reports. The Contractor shall
920 monitor the performance of its personnel to ensure that productivity and quality standards, as specified in
921 individual task orders, are met.

922
923 The Contractor shall provide ongoing support to refine business rules and prepare preformatted responses
924 for use in responding to public inquiries in the most efficient and effective manner. The Contractor shall
925 retain a history of agency contacts, including agency name and address, contact name, address, phone
926 number, fax number, e-mail address, agency web site URL(s), and dates of previous contacts and nature
927 of communications, and updates the information regularly.

928
929 The Contractor shall utilize auto-filtering, auto-response, and auto-suggestions where appropriate to
930 identify and populate appropriate e-mail responses to customers. The Contractor shall ensure that all
931 outgoing e-mail responses are accurate and complete.

932
933 The Contractor shall on its own initiative recognize and quantify new lines of inquiry, sometimes
934 developing suddenly in response to a recent social/political/news event, and prepare (with the support of
935 the Government) appropriate responses. The Contractor shall quickly apprise the Government of any
936 new topical trend in inquiries in a timely fashion.

937
938 If a direct response to an e-mail inquiry cannot be provided, the Contractor shall forward the e-mail
939 message to the appropriate Federal agency(ies) for direct response based on guidelines provided by the
940 Government. The Contractor shall maintain a system to track the status of all inquiries directed to other
941 agencies for response, including updates on final disposition of inquiries.

942
943 **C.3.2.5 Responding to Facsimile Inquiries**

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

- 948
- 949 ○ Responding to inquiries by telephone, facsimile, postal mail, or electronic mail, whichever is
950 more efficient and satisfies the inquirer.
 - 951
 - 952 ○ Conducting research of Government-approved sources of information to prepare responses to
953 facsimile inquiries, and developing appropriate responses accordingly.
 - 954
 - 955 ○ Recording and tracking data/information related to the inquiries, including date and time of
956 receipt, nature of inquiry, information requested, disposition, response date, and any fulfillment
957 actions for tracking, quality control, analysis, and/or follow up action in the Contractor-provided
958 case management tool.
 - 959

- 960 ○ When necessary, forwarding the inquiries to the appropriate authority for further processing.
- 961
- 962 ○ Sending the requested information to a customer through the postal services, E-mail or facsimile
- 963 whichever is more efficient and satisfies the inquirer.
- 964
- 965 ○ Reviewing to ensure that outgoing responses are accurate and complete in accordance with
- 966 business rules and guidelines established by the Government.
- 967

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

979

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

987

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

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

992

993

994 **C.3.3 Other Support Services**

995

996 **C.3.3.1 Fulfillment Services**

997 Some Government agencies utilize fulfillment services provided by a Government entity, such as the
998 Government Printing Office's Pueblo operations. However, there will be instances when an agency may
999 require fulfillment services that can be performed more efficiently by the Contractor. When requested by
1000 the Government, the Contractor shall provide a complete fulfillment solution for purposes of providing
1001 customers with printed information. This information may be downloaded from sources including the
1002 Internet and/or other appropriate database applications (e.g., agency web site, Contractor-provided
1003 knowledge database). The tasks to be performed include, but are not limited to the following:

- 1004
- 1005 ○ Retrieving the document from appropriate sources and, if necessary, printing the document for
- 1006 distribution.
- 1007
- 1008 ○ Developing and/or implementing application(s) to track the print fulfillment status of all required
- 1009 records and files as specified.

- 1010
- 1011 ○ Ensuring that tracking information is recorded and made available upon request as part of the
- 1012 Contractor-provided case management tool.
- 1013
- 1014 ○ Ensuring the system can accept multiple requests from a customer made during any one phone
- 1015 call or written inquiry.
- 1016
- 1017 ○ Providing relevant documents to customers through the postal services, E-mail or facsimile,
- 1018 whichever is the most efficient and satisfies the inquirer.
- 1019

1020 The Contractor shall be responsible for supplying all printing equipment and supplies, mailing supplies,
1021 including envelopes and postage, and performing all fulfillment functions, such as addressing, insertion,
1022 and posting. The Government will provide the materials to be mailed or provide the sources where the
1023 materials can be obtained. Unless otherwise directed by the Government, all materials are to be sent via
1024 the least expensive class of U.S. Mail it can qualify for. Postage incurred by the Contractor for
1025 fulfillments will be reimbursed by the Government as Other Direct Charges (ODC).

1026

1027 **C.3.3.2 Transcription Service**

1028 The Contractor shall provide qualified staff and equipment to transcribe messages recorded on voice mail
1029 and other recorded services. The Contractor shall perform transcription service on an as needed basis as
1030 specified in individual task orders (e.g., daily, weekly, monthly)

1031

1032 **C.3.3.3 Language Translation Services**

1033 The Contractor shall provide language translation services on an as-needed basis to allow non-English
1034 speaking customers the ability to communicate their needs to the Government. This capability shall
1035 include, but not be limited to:

- 1036
- 1037 ○ Supporting over-the-phone, e-mail, and fax language translation capabilities.
- 1038
- 1039 ○ Supporting for multiple languages, including English and Spanish. (Note: Agency language
- 1040 requirements may be extensive and will vary widely from agency to agency. The specific
- 1041 languages to be supported by the Contractor will be identified in task orders issued by the
- 1042 Government.)
- 1043
- 1044 ○ Providing a data collection tool to evaluate the need and usage of language translation services.
- 1045
- 1046

1047 **C.3.4 Directory Listing Services**

1048 The Contractor shall arrange for the listing of public contact numbers (both voice and TTY) and website
1049 URLs to appear in selected telephone directories, as specified in task orders issued by the Government.
1050 The Contractor shall ensure that contact numbers and web site URL appear in the “U.S. Government”
1051 sections of the Blue or White Pages, as appropriate. The contact numbers and web site URL shall be in
1052 bold type where that is available.

1053

1054 The Contractor is hereby advised that GSA currently manages a Government-wide Blue Pages project to
1055 provide a more centralized and citizen friendly approach of listing Government agency telephone
1056 numbers in certain Blue and Yellow Pages directories. For those directories that are not covered under
1057 the Blue Pages project, the Contractor shall provide for the listing of the telephone number, the associated
1058 web site URL, and the location address of each agency that serves the area covered by the applicable Blue

1059 and Yellow Pages directories. The Contractor shall coordinate with designated Government
1060 representatives to avoid duplication of listing. The costs of these listing shall be borne by the Contractor.
1061 The Contractor shall report these costs to the Government for reimbursement as Other Direct Costs
1062 (ODC).

1063
1064 **C.3.5 Technical and Management Services**

1065 The Contractor shall provide all required technical and management services as part of the citizen inquiry
1066 response and management solution. The functions to be performed include the following:

- 1067
- 1068 ○ Site Management
- 1069 ○ Program Management
- 1070 ○ Technology Management
- 1071 ○ Information Systems Security Management
- 1072 ○ Content and Knowledge Management
- 1073 ○ Contact/Case Management
- 1074 ○ Relationship Management
- 1075 ○ Customer Satisfaction Survey
- 1076

1077 The above functions are further described in Sections C.3.5.2 through C.3.5.9 of this SOW. The
1078 Contractor shall provide a tiered pricing structure for providing technical and management services
1079 commensurate with the complexity of the requirements identified in task orders issued by the
1080 Government. The tiered structure shall include a core support component and an incremental support
1081 component.

1082
1083 **C.3.5.1 Core Project Management Support**

1084 The core support component shall include, at a minimum, a project management staff (e.g., Contractor's
1085 Project Manager, site manager, technical personnel, human resources and quality assurance personnel,
1086 administrative personnel, content specialists, security personnel) and support services required to meet
1087 task requirements for a single site solution that involves information and information systems that are
1088 categorized as low impact in accordance with FIPS Publications 800-199, Standards for Security
1089 Categorization for Federal Information and Information Systems. The level of support required will be
1090 dependent on complexity of task requirements, as described below. For multi site solutions or more
1091 complex implementations and for information and information systems that are categorized as “moderate”
1092 or “high” impact, the Contractor may augment the core project management support with an incremental
1093 project management support component.

1094
1095 C.3.5.1.1 *Level 1* - encompasses tasks that involve work that is low complexity in scope. These tasks
1096 generally require the development and maintenance of simple scripts for automated voice response
1097 service and knowledge and/or customer databases. Training requirement of new employees is generally
1098 limited to 40 hours or less. Knowledge base and content development and maintenance, inquiry tracking
1099 and contact management, requirements are generally low. Reporting requirements are generally limited
1100 to system generated reports and periodic program summaries.

1101
1102 C.3.5.1.2 *Level 2* – encompasses tasks that involve work that is low to moderate complexity in scope.
1103 These tasks general require the development and maintenance of moderately complex scripts for
1104 automated voice response service and knowledge and/or customer databases. Training requirement of

1105 new employees is generally limited to between 40 and 80 hours. Knowledge base and content
1106 development and maintenance, inquiry tracking and contact management, and reporting requirements are
1107 low to moderate.

1108
1109 C.3.5.1.3 *Level 3* – encompasses tasks that involve work that is high complexity in scope. These tasks
1110 generally require the development and maintenance of highly complex scripts for automated voice
1111 response service and knowledge and/or customer databases. Training requirement of new employees is
1112 generally between 80 to 120 hours. Knowledge base and content development and maintenance, inquiry
1113 tracking and contact management, and reporting requirements are high.

1114
1115 C.3.5.1.4 *Level 4* – encompasses tasks that involve work that is very high complexity in scope. These
1116 tasks generally require the recruitment and training of 100 or fewer new employees and the development
1117 and maintenance of extremely complex scripts for automated voice response service and knowledge
1118 and/or customer databases. Training requirement of new employees is generally between 120 to 160
1119 hours. Knowledge base and content development and maintenance, inquiry tracking and contact
1120 management, and reporting requirements are very high.

1121
1122 **C.3.5.1.1 Incremental Support**

1123 The Contractor shall provide incremental support to accommodate multi-site solutions and/or to support
1124 projects involving more complex implementations, and/or for projects that involve information and
1125 information systems that are categorized as “moderate” or “high” impact, and/or to support new
1126 requirements added subsequent to initial project implementation.

1127
1128 **C.3.5.2 Site Management**

1129 The Contractor shall provide qualified personnel to manage and operate the contact center(s) to ensure
1130 optimum performance of systems and personnel. The Contractor shall analyze historical work volume,
1131 employee availability and schedule preferences, and trends to accurately forecast and schedule staffing
1132 resources to meet fluctuating workload requirements for all communications channels. The Contract shall
1133 employ proven best practices management approaches to ensure optimum utilization of available staffing
1134 resources to meet service objectives.

1135
1136 **C.3.5.3 Program Management**

1137 The Contractor shall provide program management, oversight, and quality control of contact center
1138 services, systems, and components, including, but not limited to the following tasks:

1139
1140 C.3.5.3.1 *Project management* - Ensure the successful implementation, operation, and management of
1141 the inquiry response and management solution as prescribed in this Statement of Work and task orders
1142 issued by the Government.

1143
1144 C.3.5.3.2 *Oversight* - Serve as the single point of contact to: assist in engineering, planning, and
1145 administrative functions as needed to meet task order requirements; coordinate activities among
1146 Government offices, business partners, contractors, and other relevant organizations; resolve questions or
1147 issues related to hardware, software, communications, applications, and programs, including dispute
1148 resolution with service providers; escalate irresolvable technical issues to the appropriate Government
1149 official for final resolution; and develop resolution mechanisms to resolve technical issues and problems
1150 among contractors to minimize conflict and delay of services.

1151
1152 C.3.5.3.3 *Process Management* - Develop, document, and maintain work processes and business rules
1153 used to support task requirements.

1154
1155 C.3.5.3.4 *Recruitment and Retention* - Develop and implement plans for the recruitment and retention
1156 of qualified personnel needed to meet task requirements.

1157
1158 C.3.5.3.5 *Workforce Management* – Analyze historical work volume, employee availability and
1159 schedule preferences, and trends to accurately forecast and schedule staffing resources to meet fluctuating
1160 workload requirements for all communications channels. The Contractor shall employ proven best
1161 practices management approaches to ensure optimum utilization of available staffing resources to meet
1162 service objectives.

1163
1164 C.3.5.3.6 *Performance Management* - Develop and implement the required plans, procedures,
1165 methodologies, and tools, and perform the planning, oversight, and management functions to ensure that
1166 all service delivery performance standards and program deliverables specified in the task order are met.

1167
1168 C.3.5.3.7 *Training* – Develop and implement a comprehensive Training Plan to ensure that contact
1169 center staff provides superior levels of customer service across all customer access channels.

1170
1171 C.3.5.3.8 *Quality Assurance/Quality Improvement* - Develop, implement, and manage a Quality
1172 Assurance/Quality Improvement Plan to ensure that services delivered comply with the performance
1173 standards specified by the Government.

1174
1175 C.3.5.3.9 *Continuous Process Improvement* - Develop and implement action plans based on analysis of
1176 performance results and customer feedback. These plans shall be available to the Government for review
1177 upon request.

1178
1179 C.3.5.3.10 *Information Systems Security Compliance Oversight* – Serve as a single point of coordination
1180 to ensure compliance with minimum federal information systems security requirements, including
1181 keeping abreast of and distribution of Federal security requirements, and preparation and submission of
1182 required documentations and deliverables pertaining to compliance with these requirements. Maintain
1183 Contingency/Disaster Recovery Plan and activate and oversee emergency/disaster recovery activities in
1184 accordance with the Plan.

1185
1186 C.3.5.3.11 *Management Reports* – Develop and deliver all requisite management reports and ensure all
1187 reports are accurate and provided in a timely basis.

1188
1189 C.3.5.3.12 *Value Engineering* – Develop and implement action plans to identify opportunities to
1190 improve service offerings, reduce costs, and increase customer satisfaction.

1191
1192 C.3.5.3.13 *Topic Trend and Reporting* – Collect information and provide reports on topics introduced by
1193 the public, often in response to social/political issues of the day, and to work with the Government to
1194 prepare appropriate responses.

1195
1196 **C.3.5.4 Technology Management**

1197 The Contractor shall provide all required technology management services to effectively plan, implement,
1198 operate and manage the contact center solution, including, but not limited to the following:

1199
1200 C.3.5.4.1 *Infrastructure and Network Management* - Plan, design, implement, operate, maintain, and
1201 manage the contact center site and technology infrastructure and related networks, including, but not
1202 limited to: information and telecommunications systems hardware, software, and services.

1203

1204 C.3.5.4.2 *Coordination* - Recommend, process, coordinate, and monitor telecommunications orders,
1205 serving as a liaison with telecommunications vendors.

1206
1207 C.3.5.4.3 *Monitoring* - Perform real-time monitoring of call delivery. Monitor network and system
1208 performance and identify problems and outages; compile and maintain a log of problems, outages, service
1209 interruptions, and unauthorized access; notify designated Government personnel promptly of any
1210 problems, service disruptions, and unauthorized access.

1211
1212 C.3.5.4.4 *Traffic Analysis* - Analyze traffic and usage data to determine network performance levels.
1213 Recommend improvements in network design in accordance with customer service standards and cost
1214 efficiencies.

1215
1216 C.3.5.4.5 *Optimization* - Provide optimized call routing design based on availability of network-based
1217 or systems-based call routing capabilities. Provide optimized automated announcement system design
1218 based on availability of network-based and systems-based automated announcement capabilities.

1219
1220 C.3.5.4.6 *Contingency/Disaster Recovery* – Perform all functions in support of implementing the
1221 Contingency/Disaster Recovery Plan.

1222
1223 **C.3.5.5 Information Systems Security Management**

1224 The E-Government Act (Public Law 107-347) recognizes the importance of information security to the
1225 economic and national security interests of the United States. Title III of the E-Government Act, entitled
1226 the Federal Information Security Management Act (FISMA) requires each federal agency to develop,
1227 document, and implement an agency-wide program to provide information security for the information
1228 and information systems that support the operations and assets of the agency, including those provided or
1229 managed by another agency, contractor, or other source.

1230
1231 The Office of Management and Budget (OMB) through Circular A-130, *Management of Federal*
1232 *Information Resources*, requires federal agencies to: plan for security; ensure that appropriate officials are
1233 assigned security responsibility; periodically review the security controls in their information systems;
1234 and authorize system processing prior to operations and, periodically, thereafter. This authorization by
1235 senior agency officials, often referred to as the Designated Approving Authorities (DAA), is sometimes
1236 referred to as accreditation. The technical and non-technical evaluation of an IT system that produces the
1237 necessary information required by the authorizing official to make a creditable, risk-based decision on
1238 whether to place the system into operation is known as certification. The individual responsible for
1239 making a technical judgment of the IT system's compliance with stated security requirements,
1240 identifying, assessing, and documenting the risks associated with operating the systems, coordinating the
1241 certification activities, and consolidating the certification and accreditation documents, is referred to as
1242 the certification agent or certifier. For additional information on Federal information systems security
1243 requirements, the Contractor should consult and become familiar the publications and guidance found at
1244 the National Institute of Standards and Technology Computer Science Resources Center website at
1245 <http://csrc.nist.gov/publications/nistpubs/index.html>. Publications of special interest include but are not
1246 limited to the following:

- 1247
1248 ○ FIPS Publication 200, Minimum Security Requirements of Federal Information Systems
1249 ○ FIPS Publication 199, Standards for Security Categorization of Federal Information and
1250 Information Systems
1251 ○ NIST Special Publication 800 – 53 - Recommended Security Controls for Federal Information
1252 Systems

Request for Proposal GSV07PD0003
Amendment-A001

- 1253 ○ NIST Draft Special Publication 800-53A – Guide for Assessing the Security Controls in Federal
1254 Information Systems
- 1255 ○ NIST Special Publication 800 – 30 – Risk Management Guide for Federal Information
1256 Technology Systems
- 1257 ○ NIST Publication 800-18, Guide for Developing Security Plans for Information Technology
1258 Systems
- 1259 ○ NIST Publication 800-34, Contingency Planning Guide for Information Technology Systems
- 1260 ○ NIST Publication 800-37, Guide for Security Certification and Accreditation of Federal
1261 Information Systems
- 1262

1263 In additional to the above documents, the contractor is expected to adhere to agency security guidelines
1264 that provide further guidance on information systems security requirements for individual task orders.
1265

1266 Unless stated otherwise in the task order, the contractor is responsible for preparing, managing and
1267 maintaining all required documentation and fulfilling agency reporting requirements for the FISMA
1268 compliance process, including e-authentication risk assessment, system categorization, security plan, risk
1269 assessments, contingency and contingency test plans, configuration management plan, POA&M, system
1270 test and evaluation reports, security certification and accreditation package.
1271

1272 The Contractor shall develop, implement, and maintain a security plan that ensures the confidentiality,
1273 integrity, and availability of information and systems for the duration of this contract. The security plan
1274 shall contain, at a minimum, the information outlined in Special NIST Publication 800-18, Guide for
1275 Developing Security Plans for Information Technology Systems. Additional information may be required
1276 at the discretion of agency DAAs in accordance with agency policies or directives as specified in task
1277 orders. The Contractor shall be responsible for preparing all required documentation needed for the
1278 compliance process. The Contractor shall assign a technically qualified Information Systems Security
1279 Manager (ISSM) who will be responsible for ensuring compliance with all Federal information systems
1280 security requirements, including the preparation and submission of the following:
1281

1282 *Security Plan* – provides an overview of the security requirements for the information and IT systems and
1283 describes the existing or planned controls (management, operational, and technical) for meeting those
1284 requirements. The Plan also describes the systems and delineates responsibilities and expected behavior
1285 of individuals who access the systems.
1286

1287 *Security Test and Evaluation Reports* – determines the systems’ compliance with security requirements
1288 documented in the Security Plan and verifies that the security controls identified in the Plan are correctly
1289 implemented and effective. The Security Test and Evaluation Reports shall be prepared by a third party
1290 vendor selected and paid for by the Contractor. All work performed by the third party vendor shall be
1291 submitted, reviewed, and approved directly by the Government. The Government reserves the right to
1292 have the Security Tests and Evaluation Reports done by its own contractor. The contractor shall
1293 cooperate fully with the third party vendor or the Government’s contractor in the preparation of such
1294 reports.
1295

1296 *Risk Assessment Report* – determines the degree of risk associated with the confidentiality, integrity, and
1297 availability of the IT systems and the information they process, store, and transmit.
1298

1299 *Certifier’s Statement* – documents that the security controls are correctly implemented and effective in
1300 their applications. The statement provides an overview of the security status of the system, and brings
1301 together, all of the information necessary for the DAA to make an informed, risk-based decision. The

1302 contractor ISSM shall prepare all certification and accreditation (C&A) documents for submission to an
1303 agency-designated ISSM. The agency ISSM will coordinate the submission of the C&A documents to
1304 the DAA for approval.

1305
1306 The Contractor shall correct any deficiencies identified in the certification and accreditation process until
1307 full accreditation from the DAA is obtained. The Contractor shall implement procedures for
1308 communicating to the Contracting Officer and/or designated key personnel security-related issues that
1309 impact Contractor performance under this contract. Such procedures shall include an escalation process
1310 defining various stages of issue severity and the notification level appropriate to each.

1311
1312 **C.3.5.5.1 Personnel Security**

1313 The Contractor shall perform appropriate personnel screening in accordance with their administrative
1314 hiring policies and agency requirements, including compliance with Homeland Security Presidential
1315 Directive 12 (HSPD-12). Such policies may or may not include collecting and reviewing any or all of the
1316 following information for each prospective candidate to determine if the applicant is a potential candidate
1317 for employment:

- 1318 ○ credit and/or criminal history inquiry
- 1319 ○ employment verification
- 1320 ○ drug screening
- 1321 ○ drug screening

1322
1323 All information collected and actions taken shall be done in accordance with applicable Federal, state and
1324 local laws and statutes.

1325
1326 **C.3.5.5.2 Information and Telecommunications Systems Security**

1327 The Government requires that all contractor-provided information and telecommunications systems be
1328 made secure from unauthorized access and use. Access to the required filing system, including but not
1329 limited to written correspondence, shall be limited to only those personnel who are authorized to support
1330 a given task. The Contractor shall maintain a listing of those employees with authorized access. When
1331 designing system security, Contractor shall address factors including, but not limited to:

1332
1333 *Information systems* - Ensure that all information handled by computer systems is protected against
1334 unauthorized access, misuse, fraud, misappropriation, espionage, sabotage, and inadvertent or deliberate
1335 compromise.

1336
1337 *Telecommunications systems* - Provision of telecommunications security is sufficient to protect all
1338 incoming and outgoing calls and electronic inquiries/responses, and all data collected from these
1339 activities, from unauthorized access or loss.

1340
1341 *Software applications and databases* - Access to software applications and databases is limited to only
1342 those personnel who are authorized to support a given task. Such restriction is accomplished through the
1343 use of customized menus, user log-on identification codes, operator-defined password protection, and or
1344 automatic timeout values. The Contractor shall use expiration dating as a method of password security
1345 maintenance.

1346
1347 *Internet and E-mail usage policy* – Guidelines regarding to appropriate Internet access and usage is
1348 implemented and enforced. Policies addressing access to and disclosure of electronic mail messages sent
1349 or received by employees using Contractor’s corporate E-mail system shall also be implemented and

1350 enforced. Such guidelines will inform employees that their privacy does not extend to their use of
1351 Contractor-provided equipment or supplies.

1352
1353 *System testing* - System testing is performed on a regular basis to monitor adherence to, and compliance
1354 with, stated security measures.

1355
1356 *Audits* - Contractor shall be subject to periodic system audits in the same manner and fashion as
1357 conducted by the Government. Such audits shall relate to both Contractor-provided systems and
1358 Contractor's use of Government-provided data under this contract. Examples of such audits include IG
1359 and security audits, generation of active employee listings to verify user identification maintenance
1360 practices, retrieval of user activity reports and archived security information, and demonstration of
1361 Contractor's ability to monitor, collect, store, and control access to usage data.

1362
1363 *Proper Notification* - Contractor shall report all attempts made, whether successful or not, to breach the
1364 physical security of the facilities or primary data centers where the work is performed, or any related
1365 telecommunications and information systems that support each task. The Contractor shall adhere to
1366 applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation
1367 to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the
1368 Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the
1369 incident. In rare instances, the Contractor may receive calls that threaten the well being of the
1370 Government and/or other personnel or property. The Contractor shall ensure that procedures are in place
1371 to report the calls immediately to the appropriate law enforcement agency(ies).

1372
1373 **C.3.5.5.3 Facility Security**

1374 Contractor is responsible for providing a physically secure facility for people, equipment, and
1375 documentation. All security requirements apply to the Contractor facility, alternative facility, or any
1376 subcontractor facilities. When designing physical security measures, Contractor shall address factors
1377 including, but not limited to:

1378
1379 *Controlled access* - All personnel who enter the facility shall be issued a badge or identification card.
1380 Employees have a permanent badge and approved visitors receive a temporary badge. In general, facility
1381 access is limited to: Contractor personnel performing work under contract; authorized Government
1382 personnel; maintenance personnel or suppliers performing upkeep or repair of facilities or equipment;
1383 customer personnel visiting the site on official business; and personnel as approved jointly by Contractor
1384 and the Government. Contractor must obtain Government approval prior to granting either current or
1385 potential customers access to areas where Government work is performed. Terminated employees shall
1386 have their badges removed and their accounts deactivated and/or deleted from any system access
1387 immediately upon termination. Proof of such removal shall be documented by Contractor and made
1388 available to the Government upon request.

1389
1390 *Data and telecommunications center* - The primary data and telecommunications center is secured
1391 through the use of key-code access or equivalent technology with entrance granted only to those requiring
1392 access to this area on a regular basis to perform their normal job functions or who are escorted as in the
1393 case of visitors or technicians.

1394
1395 *Confidential information* - Subsequent to the award of each task order, the Government will provide
1396 Contractor with a listing of items it deems proprietary and confidential in nature. Examples of such data
1397 include, but are not limited to, customer names, addresses, and social security numbers. Contractor shall
1398 implement appropriate security measures to ensure such data is safeguarded in a manner consistent with

1399 those employed by the Government. Examples of data security include locked file storage, confidentiality
1400 stamping, restricted system access, data encryption, restricted print options, and disposal by shredding.

1401
1402 *Proper notification* - Contractor shall report all attempts made, whether successful or not, to breach the
1403 physical security of the facilities or primary data centers where the work is performed, or any related
1404 telecommunications and information systems that support each task. The Contractor shall adhere to
1405 applicable agency IT Incidence Handling Procedures for reporting these intrusions, including escalation
1406 to Department of Homeland Security FedCIRC if necessary. Such reports shall be made to the
1407 Government as soon as possible and in no event more than twenty-four (24) hours after discovery of the
1408 incident. In rare instances, the Contractor may receive communications such as calls or e-mail that
1409 threaten the well being of the Government and/or other personnel or property. The Contractor shall
1410 ensure that procedures are in place to report the threatening communications immediately to the
1411 appropriate law enforcement agency(ies).

1412
1413 **C.3.5.5.4 Contingency/Disaster Recovery**

1414 The Contractor shall develop and implement, as part of the Security Plan, contingency/disaster recovery
1415 plans and procedures addressing operations in the event of a shutdown or lapse in service for any reason.
1416 This is to minimize service disruption to Government customers. The plan shall identify risks as well as
1417 steps necessary to prevent it from happening in the first place. The plan shall include an alternate set of
1418 steps to minimize the impact should prevention fails. The plan must define the precise steps to be taken
1419 to recover as quickly as possible, including recovery procedures for physical facility, data systems,
1420 contact center systems and applications, communications networks, electrical service, customer access
1421 points, partners and procedures, and staff. The Contractor shall develop and implement procedures to test
1422 the plan on an annual basis, at a minimum. The plan shall be developed in accordance with
1423 Contingency/Disaster Recovery requirements specified in individual task orders and applicable agency IT
1424 Security Policy and NIST Special Publication 800-34, Contingency Planning Guide for Information
1425 Technology Systems.

1426
1427 **C.3.5.5.4.1 Program Operations Recovery**

1428 In the event of periodic or catastrophic failures that restrict or terminate program operations, the design of
1429 both the contact center infrastructure and the communications network servicing the Government
1430 requirements shall include sufficient redundancy to allow normal business operations to continue with
1431 minimal disruption and inconvenience to customers for all access channels.

1432
1433 **C.3.5.5.4.2 Voice Recovery**

1434 When designing disaster recovery plans for the communications network, Contractor shall address factors
1435 including, but not limited to:

- 1436
- 1437 ○ Network routing - If an individual facility should become inaccessible, a sufficient
1438 communications network shall be in place to allow for forwarding of customer calls to one or
1439 more alternate facilities. If the outage is brief, the network shall resume normal call routing as
1440 soon as the primary facility is operational again.
 - 1441
 - 1442 ○ Operational impact - Documented policies shall exist for assuming workload from an
1443 incapacitated facility for immediate, short-term, and long-term relief.
 - 1444
 - 1445 ○ Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of
1446 preparing the staff and assessing the plan's viability.
 - 1447

1448 **C.3.5.5.4.3 Data Recovery**

1449 When designing disaster recovery plans for data recovery, Contractor shall address factors including, but
1450 not limited to:

- 1451
- 1452 ○ Backup routines - The ease and frequency of which backup routines are conducted and the ability
1453 to backup data on remote servers/processors.
- 1454
- 1455 ○ Effectiveness - The degree to which data can be compressed for backup purposes and the ability
1456 to perform unattended backups on high-density/high-capacity storage devices.
- 1457
- 1458 ○ Operational impact - The time that is required to complete backups and the need to remove users
1459 from the system to conduct backup routines.
- 1460
- 1461 ○ Data integrity - The methods of maintaining data integrity so that completed transactions are not
1462 lost due to outages, system failures, etc. In long-running transactions, such as when a IS needs to
1463 navigate several screens of data entry, there should be interim checkpoints that save the
1464 transaction so that it may be re-entered from the last checkpoint if the transaction wasn't
1465 completed prior to the failure.
- 1466
- 1467 ○ Data recovery - The methods of restoring data from backup in the event of a failure (e.g.,
1468 commercial power failure, system or hardware failures).
- 1469
- 1470 ○ Simulated tests - Regularly scheduled simulated tests shall be conducted for purposes of
1471 preparing the staff and assessing the plan's viability.
- 1472

1473 **C.3.5.5.4.4 Notification Process**

1474 Contractor shall implement procedures for communicating to the Government primary point of contact
1475 and/or designated key personnel disaster-related issues that inhibit contact center operations. Such
1476 procedure shall include an escalation process defining various stages of issue severity and the notification
1477 level appropriate to each.

1478

1479 **C.3.5.6 Content and Knowledge Management**

1480 The Contractor shall perform all content and knowledge management functions including the following:

1481

1482 *Automated Voice Response Development and Maintenance* - The Contractor shall be responsible for call
1483 flow design and development and maintenance of the information content and audio messages used for all
1484 automated voice response services, such as IVR, voice recognition, and text-to-speech services. The
1485 Contractor shall provide analysis and ongoing support for script design and optimization, call flow
1486 analyses, service request processing and coordination, if required, and script management. The
1487 Contractor shall develop and regularly maintain messages for the automated voice response services in
1488 keeping with the current informational needs of the callers. The Contractor shall work closely with the
1489 Government to develop the automated responses. The Government shall approve all automated responses
1490 before they are implemented. The Contractor shall ensure timely updates of all automated messaging in
1491 accordance with the turnaround timeframes established by the Government. At a minimum, Contractor
1492 shall post changes within 24-hours of receipt for all non-emergency information and within 2-hours of
1493 receipt for emergency notices. Support for emergency postings and updates, as determined by the
1494 requesting agency, is required on a 24 hour a day, 7 day a week basis.

1495

1496 *Knowledge Management* - The Contractor shall develop, implement, administer and manage the required
1497 knowledge management system to effectively meet task order requirements. The Contractor shall update,
1498 revise, and otherwise maintain currency and accuracy of the knowledge base as new information becomes
1499 available. The Contractor shall incorporate best practices in system design to minimize the burden of
1500 maintaining the required knowledge base and maximize its effectiveness. The Contractor shall develop
1501 systematic approaches to finding, understanding, and using relevant knowledge to achieve task objectives,
1502 including, but not limited to, reviewing newspapers, the Internet, publications, and other information
1503 resources. The knowledge management system shall be accessible to all Contractor personnel. The
1504 Contractor shall also provide access to the system via the Internet to designated Government employees at
1505 remote locations. The number of individuals to be provided access will be specified in individual task
1506 orders. Access to the knowledge databases shall be limited based on the individual user's program
1507 support needs and level of authority, and shall be restricted only to authorized personnel. The
1508 Government will brief the Contractor on the relevant programs and services and current business
1509 processes, and provide the initial content data to be recorded in the knowledge management system.
1510 Subsequent to the initial effort, the Contractor shall provide services, including, but not limited to the
1511 following:

- 1512
- 1513 ○ Collect, organize, select, record, verify, update, and present relevant information in the
1514 knowledge management system on an ongoing basis.
- 1515
- 1516 ○ Update and manage the content of the knowledge management system on an on-going basis.
- 1517
- 1518 ○ Develop a procedure to ensure agency concurrence on all updates and information dissemination
1519 from the knowledge management system to any other media.
- 1520
- 1521 ○ Conduct research of agency-approved sources of information and develop appropriate responses
1522 to customer inquiries.
- 1523
- 1524 ○ Organize information into suitable means for easy access by all contact center employees,
1525 Government employees, and/or customers.
- 1526
- 1527 ○ Analyze usage data of the knowledge management system to determine trends and patterns.
- 1528
- 1529 ○ Analyze new inquiries and inquiry trends to develop responses based on research.
- 1530
- 1531 ○ Collect, organize, and prepare information and answers to frequently asked questions for
1532 dissemination using automated systems, such as interactive voice response, automatic fax-back,
1533 information search and retrieval systems, and web-based systems.
- 1534
- 1535 ○ Where new and topical inquiries arrive, have a mechanism for collection (from IS to
1536 management), quick preparation of response, and a means of advising the Government of these
1537 sudden unexpected influxes of question categories
- 1538
- 1539 ○ Ensure that, where applicable, additions, changes, or deletions of materials from the knowledge
1540 database are carried over to corresponding IS training and support materials.
- 1541
- 1542 ○ Website Content Coordination - The Contractor shall share relevant inquiry data and trends with
1543 agency web support team to ensure that information provided at the agency websites and the
1544 contact center is accurate, up-to-date, and meets the needs of agency customers.
- 1545 ○ Filing System - The Contractor shall establish and maintain a filing system that shall allow
1546 Government oversight of, at a minimum, written and electronic correspondence, employee (but

1547 not individual) performance, work stoppages, agency liaison, hardware and software
1548 maintenance, database maintenance, call data, and contract reports.

1549

1550 **C.3.5.7 Contact/Case Management**

1551 The Contractor shall develop, implement, administer and manage the required contact/case management
1552 system to effectively track the status and disposition of all customer contacts as required in individual task
1553 orders. The Contractor shall incorporate best practices in system design to minimize, to the extent
1554 possible, keystrokes or data entry required for recording inquiry tracking and management data (i.e., use
1555 of preformatted data entry forms with pull-down and/or multiple choice selection items). This system
1556 shall be accessible to authorized contractor personnel and Government employees onsite and via Internet
1557 access from remote locations. Access to the contact/case management shall be limited based on the
1558 individual agency program support needs and level of authority, and shall be restricted only to authorized
1559 personnel. The Contractor shall obtain Government approval to ensure usefulness and efficiency in the
1560 design of any screens related to inquiry tracking and management.

1561

1562 **C.3.5.8 Relationship Management**

1563 The Contractor shall provide required customer coordination support to meet task order requirements,
1564 including, but not limited to the following tasks:

1565

1566 ○ Coordinate with Government agency representatives, business partners, contractors, and other
1567 relevant individuals or organizations to discuss implementation, operational, and programmatic
1568 issues.

1569

1570 ○ Provide planning and coordination support to implement and manage the Directory Listing
1571 Service.

1572

1573 **C.3.5.9 Customer Satisfaction Assessments**

1574 The Contractor shall provide support to design, develop, and implement customer satisfaction surveys in
1575 conjunction with Government personnel to measure the performance level of the Contractor-provided
1576 services. The Government will obtain all appropriate approvals in compliance with Federal regulations
1577 and statutes prior to initiating any survey activities. The Contractor shall analyze the results of the
1578 customer satisfaction assessment to determine customer perceptions about the quality of the service
1579 delivery. Contractor shall use these results to develop and implement action plans to continually improve
1580 customer satisfaction, and shall provide the results of both the survey and action plans to the Government
1581 for review upon request.

1582

1583

1584 **C.3.6 Special Project Support**

1585 The Contractor shall provide technical and management support needed to analyze, plan, design,
1586 implement, operate, and manage special services that may be needed to meet the diverse needs of the
1587 Government. These special services (e.g. web hosting, prototyping of new capabilities, special
1588 applications and systems interconnectivity) will be priced on a task order-by-task order basis utilizing the
1589 support functions identified in Section C.3.5 of this SOW, as deemed appropriate by the Contractor. The
1590 Contractor shall provide all necessary personnel, facilities, equipment and services needed to support
1591 special services as identified in task orders issued by the Government. Equipment, software, and services
1592 not otherwise priced in Section B may be priced as Other Direct Costs (OCD).

1593

1594
1595
1596
1597
1598
1599
1600
1601
1602
1603
1604
1605
1606
1607
1608
1609
1610
1611
1612
1613
1614
1615
1616
1617
1618
1619
1620
1621
1622
1623
1624
1625
1626
1627
1628
1629
1630
1631
1632
1633
1634
1635
1636
1637
1638
1639
1640
1641
1642
1643

C.4 STAFF TO BE PROVIDED

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

The Contractor shall perform background checks on all prospective employees in accordance with applicable agency Personnel Security Handbook prior to providing them for service under the contract. At a minimum, this check shall ensure that no prospective employee has a criminal misdemeanor or a felony record and has a satisfactory history of credit. Additional background checks or security clearances may be required as specified in individual task orders.

C.4.1 Key Personnel

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

C.4.1.1 *Program Manager* - responsible for managing and implementing the overall contract requirement and oversee implementation of more complex tasks; organizes, directs, 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 the task if such assignment is warranted.

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

C.4.1.3 *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 to the planning, design, installation, modification, and operation of telecommunications and information systems capabilities; ensures all functions and processes are implemented and operated properly.

1644 C.4.1.54 *Information Systems Security Manager (ISSM)* – responsible for ensuring that information
1645 systems used in supporting task requirements meet initial and ongoing compliance of information systems
1646 security requirements in accordance with FIPS Publication 200, Minimum Security Requirements of
1647 Federal Information Systems. The ISSM shall ensure that information systems used to support a specific
1648 task meet the minimum security requirements as defined in FIPS Publication 200 through the use of
1649 security controls in accordance with the NIST Special Publication 800 – 53, Recommended Security
1650 Controls for Federal Information Systems, As Amended. This includes preparing all required
1651 documentations for the compliance process, including security plan, risk assessments, contingency and
1652 contingency test plans, configuration management plan, system test and evaluation reports, security
1653 certification and accreditation package.
1654

1655 To meet specific task requirements, the Government may require the assignment of one or more key
1656 personnel in support of a task. The Government may also identify additional key personnel requirements
1657 in individual task orders.
1658

1659

1660 **C.4.2 Support Staff**

1661
1662 The Contractor shall provide sufficient qualified support staff to perform functions including, but not
1663 limited to:
1664

1665 C.4.2.1 *Human Resources Management* - ensure the placement of qualified candidates into open
1666 positions by participating in employment-related activities such as recruiting, screening, testing,
1667 evaluating, behavioral interviewing, and hiring for a wide variety of positions; prepares employment-
1668 related reports; conduct new employee orientation sessions; experienced in employee relations, legal
1669 compliance, and compensation matters.
1670

1671 C.4.2.2 *Supervision* - supervise and coordinate the daily workflow to ensure productivity and quality
1672 standards are met and customer service efforts are consistently achieved; assist the manager in the
1673 administration of the unit; provide leadership, guidance, training, and work direction to assigned
1674 personnel to ensure goals and objectives are met; foster a work environment that respects individuals,
1675 promotes teamwork, and encourages innovation and creativity.
1676

1677 C.4.2.3 *Quality Assurance* - assess the quality of service provided by ISs through monitoring
1678 incoming calls and other work types while focusing on the quality of customer service, accuracy of
1679 information provided, and adherence to departmental policies and procedures; analyze operational
1680 performance against company and customer expectations and identifies areas of competency and areas of
1681 needed improvement; establish and maintain systems for capturing, analyzing and reporting quality
1682 measures; interface with other operational and cross-functional areas to ensure consistency in reporting
1683 practices and to help determine quality needs; provide recommendations on continual process
1684 improvement.
1685

1686 C.4.2.4 *Training* - design, develop, evaluate, and deliver training programs for all levels of staff;
1687 evaluate the applicability and quality of training programs offered by outside vendors; complete needs
1688 assessments to identify future training needs and provide guidance to staff on matters related to
1689 continuing education; design course manuals, support materials and tools; perform administrative duties
1690 related to employee training such as scheduling classes, ordering/maintaining supplies, maintaining
1691 training records and a library/database of training materials and subject matter experts; conduct surveys of
1692 training and equipment needs; conduct follow up studies to determine overall training effectiveness;
1693 prepare formal reports and correspondence. Where appropriate, effective, and efficient, arrange for
1694 training, initial or refresher, by Government staff if the Government agrees.

1695
1696 C.4.2.5 *Service Level Management* - manage overall forecasting and staffing processes to ensure
1697 efficient, cost-effective overall IS utilization; creates, execute and oversee effective plan (annual, weekly,
1698 daily); work closely with Project and Site Managers to assist in determining future staffing requirements,
1699 optimize site scheduling, balance workload across the network, maximize performance and meet overall
1700 objectives; review on an on-going basis, existing technologies and software recommending changes as
1701 needed to ensure maximum utilization of resources; manage actual performance feedback against targets,
1702 identify shortfalls, take corrective action and make adjustments accordingly; conduct need assessment to
1703 ensure continual improvement of overall forecasting and staffing performance.

1704
1705 C.4.2.6 *Knowledge/Content Management* - research and resolve open issues by thorough and efficient
1706 investigation; create, index, and maintain knowledge database records and answers to FAQs; ensure the
1707 accuracy and clarity of information recorded; purge outdated records from the system in accordance with
1708 records management guidelines provided by the agency; communicate record additions or changes to all
1709 staff on a timely basis.

1710
1711 C.4.2.7 *Inquiry tracking* – capture and track all relevant information and disposition of all inquiries;
1712 ensure inquiries are completed on a timely basis.

1713
1714 C.4.2.8 *Technical support* - ensure all areas of systems architecture, security, design, development,
1715 analysis, installation, programming, testing, maintenance, administration, and ongoing support for contact
1716 center hardware, software, network, telecommunications, and Internet equipment and services.

1717
1718 This is not a complete list of all responsibilities, duties, efforts, or skills associated with these positions,
1719 but is intended to serve as an overview of the functions that the Contractor is expected to perform.

1720
1721

1722 C.4.3 Information Specialists (IS)

1723
1724 The Contractor shall provide sufficient contact center IS staff to perform the functions specified in
1725 individual task orders. The Contractor shall ensure that ISs possess the appropriate qualifications and
1726 skills required to perform the task. Unless specifically authorized in the task orders, all ISs shall be
1727 situated in contractor-provided facilities with restricted access.

1728
1729 C.4.3.1 Qualifications - Each member of the Contractor-provided IS staff shall meet the following
1730 minimum requirements:

- 1731
1732
- High school diploma or General Educational Development (GED) Certificate
 - ~~English language~~ 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.

1733
1734
1735
1736
1737
1738
1739
1740 C.4.3.2 Competencies - The Contractor-provided IS staff shall demonstrate the requisite skills and
1741 knowledge to perform the following functions, at a minimum:

- 1742
- Oral and written communication skills sufficient to facilitate clear and accurate information exchanges with customers.
- 1743
1744

- 1745
- 1746 ○ Ability to control the pace and flow of the inquiry/request and manage call time effectively.
- 1747
- 1748 ○ Ability to handle inquiries and requests in a courteous and professional manner, including calls
- 1749 received in crisis situations, and/or from abusive callers.
- 1750
- 1751 ○ Ability to listen to and empathize with customers and acknowledge their concerns.
- 1752
- 1753 ○ Ability to follow protocol and to apply sensitivity and discretion in handling confidential
- 1754 information.
- 1755
- 1756 ○ Ability to gather information to determine a customer's needs, apply problem-solving skills, and
- 1757 resolve the inquiry/request effectively.
- 1758
- 1759 ○ Computer and keyboarding skills sufficient to record information from the inquirer in an accurate
- 1760 and efficient manner.
- 1761
- 1762 ○ Ability to use the web to search and retrieve information.
- 1763
- 1764 ○ Ability to receive inquiries from the hearing, speech, and visually impaired, as well as other
- 1765 physically impaired callers and route them to the appropriate IS or queue for response.
- 1766
- 1767 ○ Ability to take direction within a team setting and complete team-related work promptly.
- 1768
- 1769 ○ For IS assigned specifically to support TTY callers, ability to effectively respond to inquiries
- 1770 using appropriate equipment.
- 1771

1772 **C.4.3.3 Skills Categories**

1773 The Contractor shall provide qualified personnel in sufficient quantities to perform the functions
1774 identified in task orders issued by the Government. The Contractor is expected to support the diverse
1775 needs of Government programs. The skills categories identified below are those that the Government
1776 anticipates may be required to satisfy the diverse needs of agency programs. The specific skills
1777 category(ies) required will depend on the complexity of work to be performed, as identified in individual
1778 task orders. The Government reserves the right to add other skills categories to meet agency requirements
1779 at any time during the effective period of this contract.

1780

1781 C.4.3.3.1 *Level 1* - Handles telephone and e-mail inquiries that are routine and transactional in nature.
1782 Captures or disseminates basic information, utilizing a prepared script. Little or no deviation from script
1783 is permitted in responding to inquiries. Proficient in using automated tools, search and information
1784 retrieval systems, and knowledge and contact management systems. Requires High School diploma, or
1785 GED.

1786

1787 C.4.3.3.2 *Level 2* – Handles inquiries received via multiple communication channels (e.g., phone, e-
1788 mail). Nature of inquiries involves subjects that are moderate in complexity. Responses are generally
1789 scripted but may require probing of callers for specific information. Proficient in using automated tools,
1790 search and information retrieval systems, and knowledge and contact management systems. Requires
1791 High School diploma, or GED and some college, or equivalent combination of education and prior
1792 customer service experience. Requires general knowledge of Government programs.

1793

1794 C.4.3.3.3 *Level 3* - Handles inquiries via multiple communication channels. Nature of inquiries
1795 involves subjects that are high in complexity. Responses are not scripted and require frequent probing of
1796 callers for specific information. Proficient in using automated tools, search and information retrieval
1797 systems, and knowledge and contact management systems. Requires Associate degree and prior
1798 experience in one or more specialized areas. Requires specialized knowledge of Government programs
1799 and/or subject matters.

1800
1801 C.4.3.3.4 *Level 4* - Handles inquiries via multiple communication channels. Nature of inquiries
1802 involves subjects that are very high in complexity and requires subject matter experience. Responses are
1803 not scripted and require extensive probing of callers for specific information. Proficient in using
1804 automated tools, search and information retrieval systems, knowledge and contact management systems,
1805 and other specialized systems. Requires Bachelors degree or equivalent work experience and subject
1806 matter experience.

1807
1808 C.4.3.3.4 *Level 5* - Handles inquiries via multiple communication channels. Nature of inquiries
1809 involves subjects that are highly specialized and requires subject matter expertise. Responses are not
1810 scripted and require extensive probing of callers for specific information. Proficient in using automated
1811 tools, search and information retrieval systems, and knowledge and contact management systems, and
1812 other specialized systems. Requires advanced degree or equivalent work experience and subject matter
1813 expertise.

1814

1815 **C.4.3.3.5 Minimum Qualifications Requirements for Supervisory Information Specialists**

1816

1817 **In addition to meeting minimum education and/or experience requirements specified for Information**
1818 **Specialists specified above for the respective skill category, Supervisory Information Specialists shall**
1819 **meet the following minimum requirements:**

1820

- 1821 • Two or more years experience serving as an Information Specialist at the respective skill level, or
1822 one or more years of experience supervising Information Specialists at the respective skill level.
- 1823 • Excellent oral and written communications skills
- 1824 • Strong organizational skills
- 1825 • Skilled at oral and written reviews as well as coaching to improve performance
- 1826 • Must be positive and self-motivated with the ability to change priorities on demand
- 1827 • Solid understanding of computer basics (Windows, Excel, Word, Operating Systems and Internet
1828 applications such as web, email, and chat).

1829

1830 **C.4.3.4 Multi-language Support**

1831 The Contractor shall provide qualified personnel in sufficient quantities to meet the language
1832 requirements specified in individual task orders. At a minimum, the Contractor must have the capability
1833 to supply ISs who are proficient the following languages:

1834

1835 ○ English

1836 ○ Spanish

1837 ○ Mandarin

1838 ○ Cantonese

1839 ○ French

1840 ○ German

1840

- 1841 ○ Japanese
- 1842 ○ Korean
- 1843 ○ Vietnamese
- 1844

1845 The specific language requirement and associated work volumes will be specified in individual task
1846 orders issued by the Government. The Contractor shall incorporate all appropriate considerations for
1847 multi-language requirement into the support for each task including, but not limited to, areas such as
1848 training, quality monitoring, supervision, and automated services.

1849
1850

1851 **C.5 FACILITIES TO BE PROVIDED**

1852

1853 **C.5.1 General**

1854

1855 The Contractor shall provide adequate facilities to support the contact center operations, including, but
1856 not limited to the following:

1857

- 1858 ○ Work areas,
- 1859 ○ Employee lounge areas,
- 1860 ○ Storage areas,
- 1861 ○ Training and conference facilities with supporting audio and visual equipment,
- 1862 ○ Telecommunications and computer facilities,
- 1863 ○ IS work stations, including modular and/or other furniture and chairs,
- 1864 ○ File cabinets and file storage systems,
- 1865 ○ Lighting and office appliances, and
- 1866 ○ Other required office furnishings.

1867

1868 The Contractor is responsible for the ongoing maintenance, upkeep, and management of the contact
1869 center facilities. For security purposes, the Contractor shall generally be prohibited from identifying the
1870 facility(ies) as supporting Government business on either the exterior building walls or signage. Specific
1871 approval to do so can only be granted by the Contracting Officer.

1872

1873

1874 **C.5.2 Facility Infrastructure**

1875

1876 The Contractor shall be responsible for the acquisition, installation, and maintenance of all cable, wiring
1877 and support infrastructure required to operate the facility, including, but not limited to: cable distribution
1878 systems; conduits; terminals and connectors; raised flooring; and other equipment needed to interconnect
1879 and support the contact center systems and operations.

1880

1881

1882 **C.5.3 Site Selection and Facility Design Requirements**

1883

1884 When selecting and/or designing contact center site, the Contractor shall factor in the following:

1885

- 1886 ○ The site selected shall provide a geographic location chosen to minimize the effect of catastrophic
1887 weather conditions on customer contact center operations. For multi-site solutions, the sites shall
1888 be spaced located in different geographic locations to minimize the possibility of adverse weather
1889 conditions affecting the operations
- 1890
- 1891 ○ The site shall be located at a safe location deemed appropriate for contact center operations.
1892
- 1893 ○ The site shall be easy to access in terms of relative proximity to local air transportation and major
1894 air carrier services.
- 1895
- 1896 | ○ The site shall be located within the ~~contiguous 48 states~~ United States unless specifically
1897 approved by the Government.
- 1898
- 1899 ○ The site shall be designed and built to comply with all applicable state, local, and Federal
1900 Government standards and regulations, such as the Occupational Safety and Health Act (OHSA)
1901 of 1970, as revised, and the Americans with Disabilities Act of 1990. The site shall remain in
1902 compliance with such standards and regulations throughout the term of the contract.
- 1903
- 1904 ○ The site shall be situated in a location where the local labor market can support the contact center
1905 size and the skill sets of the labor pool required to support the task requirements, including
1906 foreign language, subject matter expertise, and other special requirements that the programs may
1907 present. Considerations should include the degree of competition for the labor pool from other
1908 contact centers and related industries and its impact on recruiting and retaining contact center
1909 personnel.
- 1910
- 1911 ○ The site shall be designed to provide an office environment that is conducive to providing
1912 customer support, supporting private conversations, and facilitating communication among staff.
- 1913
- 1914 ○ The site shall be designed to provide space, furnishing, acoustic, lighting, and temperature
1915 environment that meets or exceeds contact center industry standards.
- 1916
- 1917 ○ The site shall be designed to accommodate modern telecommunications and computer systems
1918 and contact center furnishing.
- 1919
- 1920 ○ The site shall be designed to meet other environmental control standards that are in compliance
1921 with Federal, state, local, and industry standards.
- 1922
- 1923 ○ The site shall be supported by an appropriately sized backup generator and a non-interruptible
1924 power supply.
- 1925
- 1926 ○ The site shall be designed to provide redundant, high bandwidth, high availability connections to
1927 the telephone network and the Internet.
- 1928

1930 **C.5.4 Project Housing**

1931 The Contractor-provided workspace assigned to support specific tasks shall meet the following criteria:

- 1932
- 1933
- 1934 ○ Contiguous workspace shall be provided for the entire complement of IS staff supporting a
1935 specific task within a given site.
- 1936

- 1937 ○ Security of information is a key concern of the Government. The Contractor shall provide a
- 1938 secure facility with restrictive access to only those Contractor employees and authorized
- 1939 Government representatives who support specific tasks.
- 1940
- 1941 ○ Unless specifically authorized by the Government on an individual task order basis, hoteling of IS
- 1942 seats, whereby no specified grouping of seats is assigned to the task on a permanent basis, is not
- 1943 permitted.
- 1944
- 1945 ○ Contractor shall designate at no additional cost to the Government a non-exclusive space for an
- 1946 authorized Government representative, to work when onsite. The space shall include enclosed
- 1947 office space and workstation, computer and Internet access, telephone and modem lines,
- 1948 administrative support and services, and security. Transitory Government personnel shall be
- 1949 provided workspace if available.
- 1950

1951 **C.5.4.1 Exclusive-Use Space**

1952 To meet specific program requirements, the Contractor may be requested to provide space for the

1953 exclusive use of one or more authorized Government representatives. Specific space requirements, if

1954 required, will be included in individual task orders.

1955

1956

1957 **C.5.5 Facility and Systems Access**

1958

1959 The Contractor-provided facilities and systems shall be designed to provide physical and information

1960 access security with security monitoring and access restriction at all times. Access to the contractor-

1961 provided facilities shall be provided to authorized Government personnel at anytime during the normal

1962 operation of the contact center. Access to contractor provided systems, including remote access by

1963 Contractor employees and authorized Government employees, shall be restricted to authorized personnel

1964 at all time.

1965

1966 Designated Government employees, and/or their authorized representatives may visit any contact center

1967 facility used to support its programs without prior notice for the purpose of conducting on-site reviews,

1968 information gathering, or program observation.

1969

1970

1971 **C.6 TECHNOLOGY INFRASTRUCTURE TO BE PROVIDED**

1972

1973 The contractor shall provide and maintain robust and scalable, state-of-the-art multi-channel contact

1974 center system hardware, software, and accessories to meet task order requirements. The Contractor shall

1975 provide a commercial off-the-shelf (COTS) solution that meets the Government requirements ~~with the~~

1976 ~~least amount of customization required~~. The systems shall be adequately sized and equipped to handle

1977 fluctuations in the volume of inquiries received. The systems shall be configured such that they can be

1978 easily expanded to accommodate growth in work volume. The systems shall have adequate backup

1979 capability to maximize availability and reliability of all services. At a minimum, the system shall be

1980 Section 508 compliant and meet the requirements specified in Sections C.6.1 through C.6.15 below. Call

1981 processing and E-mail routing and management systems provided by the contractor shall incorporate

1982 automated capabilities to perform periodic checks on the systems to verify operational status of the

1983 contractor systems and alert contractor's system maintenance personnel and/or the Government if there is

1984 a failure.

1985

1986 Contact center staff shall be provided desktop workstations, including computers, telephones and
1987 headsets, and other equipment, software, and accessories required to sustain contact center operations.
1988 Unless specified by the Government, all workstations shall be equipped with telecommunications, e-mail
1989 and Internet access.

1990
1991

1992 **C.6.1 Call Processing Technology and Services**

1993
1994
1995
1996

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

1997 C.6.1.1 *Call Routing and Distribution* – The system shall provide routing/distribution of incoming
1998 calls based on sequence of arrival/origination, inquiry type, IS availability and skills, contact center
1999 availability, or other predefined routing instructions, as specified by the Government. The system shall
2000 provide at a minimum:

2001
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012

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

2013
2014
2015
2016

C.6.1.2 *Automated Fax-Back/Fax on Demand* – The system shall have the capability to allow customers to generate a request for a document to be automatically sent to their fax machine. This function can also be activated internally by a IS to send documents to a customer's fax machine.

2017
2018
2019
2020
2021
2022
2023

C.6.1.3 *Automatic Numbering Identification (ANI)* - Certain caller information, such as the caller's telephone number, may be used to identify the caller and access caller information to facilitate customer service and/or to support the compilation of caller demographic information. Numeric area code information shall be translated to reflect its corresponding geographic location (e.g., area code 202 would be reflected as Washington, DC) for reporting purposes. The contact center system shall be ANI-enabled and possess any additional software required to support such functionality.

2024
2025
2026

C.6.1.4 *Accounting and Management* – The system shall provide accounting and management capabilities for all inquiry types.

2027
2028
2029
2030
2031
2032

C.6.1.5 *Call Queuing* – The system shall queue incoming calls and provide callers with an estimated wait time in queue and other recorded messages. The system shall provide the caller with an option to stay in queue or leave a message for callback based upon response to prompts. During or upon completion of the callback message, callers shall have the option of returning to the queue without losing his or her place in the queue.

2033 C.6.1.6 *Call Transfer* – The system shall be capable of transferring calls to a different workgroup
2034 within the contact center and/or to a workgroup located in a different contact center via blind or attended
2035 transfer, as specified by the Government. The call transfer function may be activated automatically by the
2036 caller or manually through the IS. The Contractor shall provide the most efficient and cost effective way
2037 of transferring the calls unless otherwise directed by the Government. The system shall be capable of
2038 tracking the quantity and duration of calls transferred from one program to another program within the
2039 Contractor’s system.

2041 C.6.1.7 *Computer Telephony Integration (CTI)* – The system shall be capable of displaying caller-
2042 relevant information at the IS workstations (e.g., via screen pop technology). The displayed information
2043 may be triggered by DNIS, and/or ANI information, and/or through information entered by the caller or
2044 IS, and/or through data gathered by the IVR service.

2046 C.6.1.8 *Dialed Number Identification Service (DNIS)* – The system shall be DNIS-enabled, in order
2047 to distinguish incoming calls by the called number and route them to the appropriate response system
2048 and/or IS. The system shall be capable of providing the appropriate program identification (e.g., via
2049 whisper announcement) at the IS workstation.

2051 C.6.1.9 *Automated Voice Response* – The system shall be equipped with innovative and effective
2052 automated voice response solutions that enables the callers to obtain answers to frequently asked
2053 questions quickly and in a customer friendly manner. The solutions include the use of IVR, voice
2054 recognition and text-to-speech technologies. The system shall have the ability to quantify (aggregate by
2055 menu and message) the selections of callers by business and non-business hours and days for reporting
2056 purposes. The system shall accommodate callers with touch-tone and rotary telephones/dial pulse
2057 telephones who seek information via self service and/or assistance.

2059 C.6.1.10 *TDD/TTY Calls* – The system shall be equipped with Telephone Device for the Deaf (TDD)
2060 or TTY (ASCII) terminals for responding to inquiries from individuals who are hearing and visually
2061 impaired.

2063 C.6.1.11 *System Capacity* – The Government requires that Contractor provides sufficient capacity on
2064 the system to support projected call volumes, workload estimates, and call routing in accordance with
2065 service level goals (e.g., blockage). The Contractor shall provide sufficient expansion capability to
2066 accommodate call pattern variations.

2069 **C.6.2 E-Mail Routing and Management**

2071 The contractor-provided e-mail routing and management system shall be integrated with the inquiry
2072 processing system described in Section C.6.1 to ensure efficient staff utilization. At a minimum, the
2073 system shall provide the following:

2075 C.6.2.1 *Time/Date Stamping of Receipt* – automatically stamps the time and date of receipt of e-mail
2076 messages.

2078 C.6.2.2 *Auto Copy of Messages Upon Receipt* – automatically forwards a copy of the e-mail
2079 messages to up to 3 Government-designated e-mail addresses immediately upon receipt.

2081 C.6.2.3 *Automated Inquiry Tracking Number Assignment* – automatically assigns a tracking number
2082 to each incoming e-mail message; provides a capability to automatically assign sub-tracking number(s),
2083 when prompted, for tracking e-mail messages forwarded to multiple agencies.

2084
2085 C.6.2.4 *Auto-Message Processing* – monitors incoming mailboxes for incoming mail; automatically
2086 scans, filters, analyzes, sorts, categorizes, prioritizes, routes, queues, and responds to e-mail messages
2087 based on predefined rules; includes spam control, auto-acknowledgement, content-driven auto-response,
2088 and external notification capabilities. The auto-acknowledgement and auto-respond features must be able
2089 to retrieve the e-mail address of the inquirer from a web e-mail form, an auto-forwarding e-mailbox,
2090 and/or free form e-mail and use it for responding to the inquiry. To the extent practicable, the e-mail
2091 system shall employ automated means to remove extraneous routing and other information from the
2092 response (rather than relying on manual action by the IS) before its transmission.

2093
2094 C.6.2.5 *Automated Response Aids* – provides storage and retrieval of customized and preformatted
2095 messages, automated response suggestions, spell-check, and auto-text insertion of commonly used words,
2096 phrases, and responses to enhance response efficiency.

2097
2098 C.6.2.6 *Attachments/Web Links* – provides the ability to receive e-mail attachments and send
2099 attachments and/or embedded web links with the outgoing e-mail message.

2100
2101 C.6.2.7 *Monitoring* – allows customer support supervisors, managers, and up to 5 designated
2102 Government representatives from remote locations, to closely monitor message queues, agent activity,
2103 and performance levels; provides automatic escalation of messages that are past performance level
2104 thresholds.

2105
2106 C.6.2.8 *Mail Tracking* – allows off-site respondents to receive and respond to messages via their
2107 existing e-mail client, while maintaining full message tracking.

2108
2109 C.6.2.9 *Inquiry Tracking* – records and tracks all relevant information and disposition of all e-mail
2110 inquiries; provides problem-tracking functionality and is capable of recording and generating records of
2111 problems reported, tracking the problem through to resolution, and maintaining historical data on
2112 problems by the inquirer and by problem category and frequency. Case tracking database information
2113 shall be available to ISs for inquiry and real-time update as appropriate.

2114
2115 C.6.2.10 *Management Reports* – provides a full array of scheduled and ad hoc management reports in
2116 a commonly used electronic format that track e-mail volume statistics, category and agency breakouts,
2117 historical data, trends, case tracking, productivity and performance measurements. The reports shall
2118 include both summary and detailed data. The Contractor shall assure that the information on the reports
2119 can be grouped and sorted by the fields in the inquiry tracking database. Reports shall be accessible via a
2120 secure web site. The preferred delivery method will be through the use of XML.

2121
2122 C.6.2.11 *Interoperability* – The systems shall be able to exchange e-mail with Government e-mail
2123 systems.

2124
2125 C.6.2.12 *Security* – security all required measures to ensure that the security of the e-mail and
2126 associated systems are not compromised (e.g. content checking, anti-virus, e-mail exploit detection and
2127 defense, and threats analysis).

2128
2129 C.6.2.13 *Storage* – provides sufficient capacity to store all incoming and outgoing e-mail messages,
2130 case tracking data, and other relevant information - at a minimum - for the current fiscal year and the
2131 previous fiscal year.

2132
2133 C.6.2.14 *Mass Mailing* – provides the ability to transmit information via e-mail to lists of recipients
2134 stored within the system in accordance to pre-established schedule and/or as directed in the task orders.

2135
2136 C.6.2.15 *Message Blocking* – provides the capability to automatically block e-mail inquiries sent from
2137 other than web form(s) designated by the Government from reaching the e-mail messaging system. This
2138 includes replies to the Contractor’s responses sent by the inquirers using the “reply to” function.
2139

2140 C.6.2.16 *Auto Copy of Responses* – provides the capability to send a copy of the responses via bcc to
2141 up to 5 e-mail addresses at the time of the response.
2142

2143 2144 **C.6.3 FAQ System** 2145

2146 The Contractor shall provide a reliable, scalable, and secure FAQ solution that provides the capabilities
2147 specified in Section C.3.1.11 of this SOW.
2148

2149 2150 **C.6.4 Knowledge Management System** 2151

2152 The Contractor shall provide an integrated knowledge management system to store, organize, search and
2153 retrieve knowledge needed to respond to inquiries received via all communications channels, including
2154 those received through the hosted FAQ service. The service shall incorporate innovative self-learning or
2155 equivalent technology to analyze, organize, and present information to enhance the user’s ability to
2156 effectively find information. At a minimum, the system shall have the following capabilities:
2157

2158 6.4.1 Real-time access to knowledge base via an easy-to-use secure web or equivalent interface for
2159 posting, updating, searching and retrieving information, including management reports by authorized
2160 personnel. Capability of sharing FAQ answers and information in the knowledge base with other systems
2161 and/or services through the use of XML.
2162

2163 6.4.2 Real-time and historical insight in the usage pattern and usefulness of the stored knowledge.
2164

2165 6.4.3 Real-time access to search and retrieve information via the Internet by the general public.
2166

2167 6.4.4 Capability of automatically verifying the validity of internal and external links contained in the
2168 knowledgebase on a daily basis and notifying the Contractor of any invalid links. The link verification
2169 process shall not disrupt availability of the knowledgebase to end users.
2170

2171 2172 **C.6.5 Contact Management System** 2173

2174 The Contractor shall provide a contact management system for capturing, tracking, assigning and
2175 managing all inquiries from initial contact through resolution, regardless of the access channel. The
2176 system shall include problem-tracking functionality and be capable of recording and generating records of
2177 problems reported via any channel, tracking the problem through to resolution, and maintaining historical
2178 data on problems by caller, tracking identification number, and by problem category and frequency. The
2179 system shall have the capability to capture blended channel communications in a single customer record.
2180 The system shall be available to all ISs for inquiry and real-time update as appropriate. The Contractor
2181 shall provide summary and detailed system and management data via secure web access. The system
2182 shall be capable of automatically extracting the relevant information from electronic inquiries populating
2183 the corresponding database fields via the use of XML.
2184

2185 The Contractor-provided contact management system must have the capability to track a wide range of
2186 data and activities, including personal data and customer demographic, contact logging and interaction,
2187 nature of inquiry and disposition, and inquiry tracking information. Specific requirements to be
2188 supported will be identified in individual task orders.

2189
2190 The Contractor-provided inquiry tracking and management system shall provide functionality including,
2191 but not limited to the ability to:

2192
2193 6.5.1 Capture, record, and document all customer inquiries and responses made to those inquiries
2194 whether via telephone, facsimile, E-mail, written correspondence, or any other communication channels
2195 supported. This includes date and time of receipt, nature of inquiry, information requested, disposition,
2196 response date, and any fulfillment actions for tracking, quality control, analysis, and/or follow up action.
2197 The system shall also identify whether the inquiries are resolved by the Contractor or forwarded to
2198 Government personnel for resolution.

2199
2200 6.5.2 Retain a history of customer inquiries, interactions, and responses.

2201
2202 6.5.3 Support reporting requirements that include data and management information analysis.
2203 Incorporate multiple sorting and reporting alternatives including, but not limited to: by case number, by
2204 caller name, by applicant name, by date, by disposition code, by inquiry type, by program, by method of
2205 inquiry receipt, by method of inquiry response, by frequently asked question (FAQ).

2206
2207 6.5.4 Provide the Government with the capability and support required to ensure uninterrupted access
2208 to the application outside of scheduled system maintenance periods.

2209
2210
2211 **C.6.6 Workforce Management System**

2212
2213 The Contractor shall provide a multi-channel workforce management system that will enable management
2214 personnel to analyze historical work volume, employee availability and schedule preferences, and trends
2215 to accurately forecast and schedule staffing resources to meet work volume requirements. The system
2216 shall be able to generate staff shift schedules based on traffic, staff availability, and service objectives.
2217 The system shall have the capability to optimize the schedule for skill-based routing.

2218
2219
2220 **C.6.7 Customer Survey Automation**

2221
2222 The Contractor shall provide the capability to survey callers in an automated fashion for purposes of
2223 customer satisfaction assessment. The system shall provide the means to capture and transcribe the
2224 comments for analyses. The system shall be capable of capturing, storing, aggregating, and reporting
2225 survey results. All surveys shall be conducted in accordance with rules prescribed by the Government as
2226 defined in individual task orders (e.g. no surveying of calls placed for emergency purposes, surveys not
2227 offered to the same caller more than x times in x months).

2228
2229
2230 **C.6.8 Compliment and Complaint Management**

2231
2232 The Contractor shall provide an automated capability to gather and report on customer complaints,
2233 compliments, and other service related comments/suggestions. The system shall provide the means to
2234 capture and transcribe the comments for analyses

2235

2236
2237
2238
2239
2240
2241
2242
2243
2244
2245
2246
2247
2248
2249
2250
2251
2252
2253
2254
2255
2256
2257
2258
2259
2260
2261
2262
2263
2264
2265
2266
2267
2268
2269
2270
2271
2272
2273
2274
2275
2276
2277
2278
2279
2280
2281
2282
2283
2284
2285
2286

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

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

C.6.13 Online Ordering System

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

- 2287 ○ Ability to capture and store user-entered data in Government-specified formats and deliver batch
- 2288 orders to Government-specified location via secure protocol on a scheduled basis.
- 2289 ○ Ability to post orders/reports via a secure FTP site.
- 2290 ○ Provides a shopping cart feature to enable user to review order information, delete items and/or
- 2291 change quantities before submitting the order.
- 2292 ○ Ability for user to easily print order receipt.
- 2293 ○ Provides address verification and can automatically correct addressing mistakes made by the user.
- 2294 ○ Ability to assigns unique order ID to each order.
- 2295 ○ Allows inventory reports to be generated at any time
- 2296 ○ **Accepts payments through commercial credit cards in a secure manner**

2297
2298
2299 **C.6.14 Web Chat System**

2300
2301 The Contractor shall provide a reliable, scalable, and secure Web Chat solution that the Government can
2302 link to from subscribing websites to access real-time web chat service.

2303
2304 The user interface shall be user friendly, be configurable to provide similar look and feel as the
2305 subscribing website, be compatible with commonly used browsers, and be Section 508 compliant. The
2306 services shall enable an IS to provide near real-time assistance to multiple users at the same time span. At
2307 a minimum, the contractor web chat system shall have the following capabilities:

- 2308
- 2309 ○ Ability to route inquiries to specific queue based on agent skills.
- 2310 ○ Ability to push active web pages to end users
- 2311 ○ Allows IS to guide end users through a website or application.
- 2312 ○ Provides access to knowledgebase and preformatted responses to facilitate inquiry response
- 2313 ○ Allows users access to knowledgebases to enable them to find answers while waiting in queue
- 2314 ○ Provides automated greetings and responses
- 2315 ○ Provides real-time monitoring capability
- 2316 ○ Ability to track response and transaction time for each session and exchange
- 2317 ○ Provides real-time and historical management reports on chat sessions and activities
- 2318 ○ Ability to send copy of the session transcription via e-mail to the user and/or the Government
- 2319 ○ Ability to enable users of the chat service to copy and/or print the content of the entire chat
- 2320 session onto an electronic or print media.

2321
2322
2323 **C.6.15 Power Supply**

2324
2325 The Contractor shall provide emergency electrical power generation capability, as well as an
2326 uninterruptible power supply (UPS) to ensure continuity of contact center operations. The UPS shall be
2327 capable of protecting systems from voltage lags, over-voltage conditions, line frequency fluctuations, and
2328 power blackouts. It shall be capable of sustaining operations in the event of loss of normal sources of

2329 power until the backup generators can come online. The backup generator shall be capable of sustaining
2330 full contact center operation for a minimum of 24 hours. The transition from normal to emergency to
2331 backup power shall occur without loss of power to systems and without the disconnection of calls in
2332 process, loss of data, or customer calls queued for service.
2333

2334 **C.6.16 Database Design**

2335 All database design shall conform to industry standards and conventions and shall be capable of sharing
2336 data with other Government/contractor systems through the use of XML. Any such databases shall be
2337 capable of sustaining a heavy query transaction load without impacting required system response
2338 requirements. These databases shall be designed and implemented to provide continuous read/write
2339 access during the Project required availability times. Maintenance cycles may restrict access as long as
2340 they are of short duration, scheduled outside of normal business hours and coordinated and approved by
2341 the Government.
2342
2343

2344 **C.7 TELECOMMUNICATIONS SERVICES TO BE PROVIDED**

2345 **C.7.1 Local Telecommunications Services and Internet Access**

2346 The Contractor shall provide the required local exchange carrier (LEC) and Internet access services to
2347 meet task requirements.
2348

2349 **C.7.2 Intercity Telecommunications Services**

2350 The Government may provide its own intercity telecommunications services as Government Furnished
2351 Equipment or request the Contractor to provide the services as part of the overall solution.
2352

2353 Government furnished intercity telecommunications services may include domestic and international toll-
2354 free services and outbound intercity telecommunications and dedicated transmission services (between
2355 the contractor facility and Government location(s)) furnished through the Federal Government's long
2356 distance carrier and other contracts. Dedicated transmission services between contractor facilities shall be
2357 provided by the Contractor. Intercity telecommunications services provided by the Government may
2358 include the following features:

- 2359 ○ Domestic and international toll-free services with nation-wide single number coverage and call
2360 routing features (e.g. area code routing, time of day and day of week routing, percent allocation
2361 routing, area code routing, allocation routing, alternative routing)
- 2362 ○ Call termination features (e.g. network call transfer, dialed number identification service (DNIS))
- 2363 ○ Automatic number identification (ANI)
- 2364 ○ Automated voice response service (e.g. IVR, voice recognition)
- 2365 ○ Outbound long distance service
- 2366 ○ Management reports

2367 When requested, the Contractor shall provide the necessary intercity telecommunications services to meet
2368 the needs of the Government. At a minimum, the Contractor shall provide services and features
2369
2370
2371
2372
2373
2374
2375
2376

2377 equivalent to those described in this section. The Contractor shall price telecommunications services
2378 separately in Section B to enable the Government to select the optimum solution. The Government may
2379 change service provider at any time during the effective period of a task order if such a change is in the
2380 best interest of the Government. The Contractor will be notified in writing if such a change is to occur.

2381
2382

C.7.3 Network Design

2384

2385 The Contractor shall be responsible for the overall network design, traffic engineering, and meeting the
2386 interface requirements of all telecommunications and Internet access services needed to sustain both the
2387 voice and data requirements of the contact center operations. This requirement includes supporting data
2388 transmission between the Contractor and Government systems and appropriate security mechanisms to
2389 protect sensitive data.

2390
2391

C.7.4 Network Termination Equipment

2392

2393
2394 The Contractor shall provide any equipment necessary to terminate the telecommunications and Internet
2395 access services to the contact center, including any inside wiring and connectors between the network
2396 service demarcation point and the contact center system.

2397
2398

C.7.5 Service Coordination

2400

2401
2402 The Contractor shall be responsible for coordinating with the Government's telecommunications
2403 contractors and/or other telecommunications service provider(s) for service provisioning, trouble
2404 resolution, and service restoration.

2405
2406

C.7.6 Telephone Number Ownership

2407

2408
2409 The Government may furnish its own toll-free telephone number(s) for use by the Contractor or request
2410 the Contractor to provide the toll-free telephone number as part of the solution. The Contractor shall
2411 expedite transfer of all toll-free telephone number(s) used to support tasks issued under this contract to the
2412 Government at the conclusion of each task.

2413
2414

C.7.7 Internet Domain Ownership

2415

2416
2417 The Government may furnish its own Internet domain(s) for use by the Contractor or request the
2418 Contractor to provide the Internet domain(s) as part of the solution. The Contractor shall expedite
2419 transfer of all Internet domain(s) used to support tasks issued under this contract to the Government at the
2420 conclusion of each task.

2421
2422

C.8 Human Resources Management

2423

2424
2425 The Contractor shall develop and implement an effective Human Resources Management program to
2426 support recruitment, training, and retention of qualified personnel needed to meet task requirements. The

2427 Contractor shall schedule and manage the contact center workforce to ensure adequate staffing is
2428 available to meet workload requirements.

2429
2430

2431 **C.8.1 Recruitment and Retention**

2432

2433 The Contractor shall develop and implement an effective program to ensure timely recruitment and long
2434 term retention of qualified personnel to support task order requirements. At a minimum, the program
2435 shall address corporate human resources support, recruitment sources, testing and qualification processes,
2436 retention techniques and incentives, and employee satisfaction.

2437
2438

2439 **C.8.2 Training**

2440

2441 The Contractor shall develop and implement a comprehensive training program that shall ensure that
2442 contact center staff provides superior levels of customer service across all customer access channels.
2443 Training courses shall provide participants the opportunity to develop skill levels in comprehensive
2444 customer contact and subject knowledge, and shall be provided through both classroom instruction and
2445 technical on-the-job training.

2446

2447 On a task order basis, the Government and the Contractor shall work together to jointly develop initial
2448 training. The Government will provide content-unique and organization-specific material as part of initial
2449 training. The Contractor shall provide customer service skills, equipment, database(s), and
2450 policy/procedure training. The duration of the training will vary depending on the task requirements. The
2451 training shall be both classroom and hands-on, computer-based and should include, at a minimum,
2452 working with databases and applicable Government furnished systems. The training shall be conducted at
2453 the Contractor's facility, and the Contractor shall bear all related costs.

2454

2455 **C.8.2.1 Training Curriculum**

2456 Contractor shall construct training coursework and materials to address specific learning objectives of
2457 various groups. All training coursework and materials are to be approved by the Government prior to
2458 presentation to contractor personnel. The training curriculum shall include the following minimum
2459 components:

2460

2461 C.8.2.1.1 *Information Specialists* –Training programs shall be developed from the premise that all new
2462 staff has little or no contact center experience. The courses shall provide participants the opportunity to
2463 develop skill levels in telephone etiquette, listening, problem-solving, verbal and written communication,
2464 managing stress, working in teams, and other course modules related to foundational customer contact
2465 and human interaction skills. The Contractor shall ensure that ISs are adequately trained in the handling
2466 of calls from: non-English speaking individuals; individuals who are hearing, speech, or visually
2467 impaired; individuals with low literacy ability; irate and/or abusive callers; callers in crisis situations; and
2468 any other caller diversity issues that may be identified. In addition, training shall be developed to
2469 educate ISs in the terminology, services, laws and regulations (e.g., Privacy Act), systems, and protocols
2470 specific to the task requirements.

2471

2472 C.8.2.1.2 *Leadership* – Courses shall provide participants with an overview of project goals and
2473 objectives, performance goals (e.g., quality, and productivity) and contact center management (e.g.,
2474 operations, and service level). Participants shall be provided the opportunity to develop skills in
2475 coaching, team-building, time management, problem solving, and other course modules related to human

2476 performance management. In addition, training shall be developed to educate the leadership team in the
2477 terminology, services, systems, and protocols specific to the task requirements.

2478
2479 **C.8.2.1.3 Support Personnel** – Courses shall provide participants with an overview of project goals and
2480 objectives. Participants shall be provided the opportunity to develop specific skills relating to their areas
2481 of expertise including, but not limited to, supervision, training, quality, service level management, and
2482 technical support. In addition, training shall be developed to educate support personnel in the
2483 terminology, services, and protocols specific to the task requirements.

2484
2485 Contractor shall also include enhanced training modules to inform staff of Government organizational
2486 structure and agency missions, applicable laws and regulations, new or modified programs and/or service
2487 offerings specific to the task requirements.

2488
2489 **C.8.2.2 Training Facilities**

2490 Contractor shall provide all training facilities, computer terminals (including desktop content,
2491 functionality, and connectivity), audio and visual equipment, and other materials/supplies necessary for
2492 training as well as appropriate workspace for students. The Contractor shall design the training facilities
2493 to provide training in an effective and efficient manner. The Contractor shall provide the storage space
2494 for all course materials and references.

2495
2496 **C.8.2.3 Instructor and Classroom Criteria**

2497 The Contractor shall provide certified instructors to deliver all training provided under this contract. The
2498 training is to be provided at Contractor-provided facilities that are designed for optimum learning with
2499 effective student-to-instructor ratio and class size limits.

2500
2501 Government personnel will be available during start-up to provide content knowledge training for the
2502 start-up ISs and/or conduct train-the-trainer style learning sessions with Contractor's training instructions
2503 for course modules. Additionally, the Government may make personnel available to provide initial and/or
2504 regularly scheduled (e.g., biannual) task-specific training sessions with Contractor's staff.

2505
2506 **C.8.2.4 Course and Reference Materials**

2507 The Contractor shall develop the course materials based on relevant information and materials provided
2508 by the Government, including but not limited to, program background, laws and regulations (e.g., Privacy
2509 Act), services, work types, policies and procedures, and related systems. Specific materials to be provided
2510 will be included in individual task orders. Contractor shall develop or revise training materials as
2511 necessary to accommodate such changes, keeping all training materials up-to-date for the duration of the
2512 contract. All training coursework and materials are to be approved by the Government prior to
2513 presentation to contractor personnel.

2514
2515 Contractor shall ensure that updates to training materials are carried over to applicable ancillary reference
2516 materials, job aides and supporting processes inclusive of contact center operations, quality assurance,
2517 and information systems (e.g., Contractor-provided knowledge database).

2518
2519 Prior to task implementation, Contractor must provide the Government with a copy of task-specific
2520 training materials for review and approval and with a copy of all other training materials to be delivered
2521 under a specific task order for review only. Contractor shall provide a copy of the most recent training
2522 materials upon request by the Government at any time during the performance of the task.

2523

2524 **C.8.2.5 Reporting and Recordkeeping**

2525 The Contractor shall maintain a comprehensive list of contact center employees who have received
2526 training and/or obtained certification, including the frequency of training, types of training, and results of
2527 training. The Contractor shall maintain copies of all training records and reports for the duration of the
2528 contract.

2530 **C.8.2.6 Training Metrics and Analysis**

2531 The Contractor shall provide training metrics and analysis, including, but not limited to the following
2532 tasks:

- 2533
- 2534 ○ Measure IS classroom training performance by a combination of written tests and job-simulated
2535 exercises at the level of baseline performance goals for new ISs and target performance goals for
2536 experienced ISs.
- 2537
- 2538 ○ Analyze the results of IS training performance measures.
- 2539
- 2540 ○ Measure training effectiveness and performance of the instructor(s) by third party analysis or
2541 student survey.
- 2542
- 2543 ○ Revise the training program based on the results of IS and instructor performance metrics,
2544 focusing on those ISs for whom additional/modified training may be indicated.
- 2545

2546 **C.9 QUALITY ASSURANCE/QUALITY IMPROVEMENT**

2547

2548 The Contractor shall develop, implement, and manage a Quality Assurance/Quality Improvement
2549 Program to ensure that services delivered comply with the performance standards specified by the
2550 Government. The program shall include on-site and remote service monitoring capabilities and
2551 performance analysis to support planning and operation of the contact center on an ongoing basis. The
2552 program shall also include regular call calibration sessions to ensure all its quality professionals define
2553 and perceive customer interactions in the same way. Calibrated quality professionals shall monitor each
2554 full time IS assigned to specific programs a mutually agreed upon number of times and shall prorate
2555 monitoring sessions for part time employees so that they receive the same level of monitoring as do full-
2556 time employees. For each IS, quality professionals shall schedule monitoring sessions at various times of
2557 the day and various days of the week to ensure a fair representation of IS performance (e.g., monitoring
2558 back-to-back calls for a single IS would not be acceptable). The Contractor and the Government will
2559 mutually agree upon the criterion for calibration. Upon task order award, the Government and Contractor
2560 shall schedule and conduct calibration sessions to reach the acceptable criterion for calibration.
2561 Evaluations conducted by quality professionals shall be available to the Government both in an individual
2562 and an approved consolidated report format. The Government requires that Contractor documents in
2563 detail the data, results, conclusions, recommendations, action plans, and improvement priorities identified
2564 as a result of quality monitoring. Contractor shall ensure legal and regulatory compliance concerning
2565 notification and consent when monitoring calls for quality purposes and shall verify that call monitoring
2566 complies with all applicable Federal, State, and local laws and statutes.

2567

2568

2569 **C.9.1 Service Monitoring and Calibration**

2570

2571 The Contractor shall provide on-site and remote service monitoring and performance analysis to support
2572 planning and operation of the contact center. Contractor shall develop a comprehensive service
2573 monitoring plan, including, but not limited to, the following components:

2574
2575 Monitoring processes - Contractor shall develop and implement a continuous performance-monitoring
2576 program to ensure that ISs are performing in accordance with the performance standards defined by the
2577 Government as specified in individual task orders for all communications channels. Contractor shall
2578 devise methods for: capturing time, date, application name, and comments for the inquiries monitored;
2579 tracking and trending by IS, supervisor, manager, and application; reporting for training need, individual
2580 and operational performance issues, and hiring considerations; and communicating monitoring results to
2581 ISs and other operational areas within the contact center to ensure continual performance and process
2582 improvement. At the request of the Government, monitoring sessions may be held jointly.

2583
2584 Monitoring system - Contractor shall utilize an automated inquiry monitoring and recording system with
2585 remote access. The Contractor shall have the capability to monitor both voice and data capabilities.
2586 Should data capabilities not be available, a description will be required to explain how the Contractor
2587 monitors and evaluates the accuracy of information both provided and recorded by the ISs. The
2588 Government reserves the right to remotely monitor Contractor's ISs at anytime without pre-arrangement
2589 and to contract with a third party to remotely monitor Contractor's ISs. The Government will provide
2590 input to the Contractor concerning remotely monitored inquiries.

2591
2592 Calibration - Contractor shall ensure all its quality professionals define and perceive customer interactions
2593 in the same way. Calibrated quality professionals shall monitor each full time IS assigned to specific
2594 programs a mutually agreed upon number of times and shall prorate monitoring sessions for part time
2595 employees so that they receive the same level of monitoring as do full-time employees. For each IS,
2596 quality professionals shall schedule monitoring sessions at various times of the day and various days of
2597 the week to ensure a fair representation of IS performance (e.g., monitoring back-to-back calls for a single
2598 IS would not be acceptable). The Contractor and the Government will mutually agree upon the criterion
2599 for calibration. Upon task order award, the Government and Contractor shall schedule and conduct
2600 calibration sessions to reach the acceptable criterion for calibration.

2601
2602 Continual process improvement - To improve operations, Contractor shall develop and implement action
2603 plans based on analysis of monitoring results. These plans shall be available to the Government for
2604 review upon request. In addition, evaluations conducted by quality professionals shall be available to the
2605 Government both in an individual and an approved consolidated report format. The Government requires
2606 that Contractor documents in detail the data, results, conclusions, recommendations, action plans, and
2607 improvement priorities identified as a result of quality monitoring.

2608
2609 The Government will work closely with the Contractor to determine which customer calls shall be
2610 recorded for monitoring purposes.

2611
2612

2613 **C.9.2 Effectiveness of Service Delivery**

2614
2615 The Contractor shall provide measurements and analysis of the effectiveness of service delivery
2616 including, but not limited to:

2617
2618 C.9.2.1 *Accuracy of information provided* – Perform regular assessments of the accuracy of
2619 information provided by ISs to the inquirers. Such assessments shall be conducted through regularly-
2620 scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments
2621 to the Government in accordance with task order reporting requirements.

2622
2623 C.9.2.2 *Accuracy of information recorded* – Perform regular assessments of the accuracy of data and
2624 information collected and recorded by ISs. Such assessments shall be conducted through regular-

2625 scheduled call and other work-type monitoring. The Contractor shall report the results of the assessments
2626 to the Government in accordance with task order reporting requirements.

2627
2628 C.9.2.3 *Customer satisfaction assessments* – Design develop, and implement customer satisfaction
2629 surveys in conjunction with Government personnel to measure the performance level of the Contractor-
2630 provided services. Obtain all appropriate approvals in compliance with Federal regulations and statutes
2631 prior to initiating any survey activities. The Contractor shall use the results of the customer satisfaction
2632 assessment to determine customer perceptions about the quality of the service delivery, IS system
2633 performance, and the overall process of service fulfillment. Contractor shall use these results to develop
2634 and implement action plans to continually improve customer satisfaction, and shall provide the results of
2635 both the survey and action plans to the Government for review upon request.

2636
2637 C.9.2.4 *Employee satisfaction assessments* – Develop and implement a continuous program both to
2638 monitor employee satisfaction, assess employee job needs, and to determine employee perceptions about
2639 the quality of the support provided by Contractor and the operational environment. Provide the results of
2640 the assessments (including prioritized recommendations) to the Government for review upon request and
2641 cooperate with the Government to devise action plan to target any suggested improvements, including
2642 required actions, responsibilities, and timeframes.

2643
2644
2645

2646 **C.9.3 Quality Improvement Program**

2647
2648 The Contractor shall develop, implement, and manage a Quality Improvement Plan that incorporates
2649 customer-focused initiatives into the contact center solution, including, but not limited to:

2650
2651 C.9.3.1 *Compliment and complaint management* – Contractor shall have an automated Compliment
2652 and Complaint Management process to capture customer service information regarding areas of service
2653 issues and customer need. Contractor shall compile and analyze such data, identifying market
2654 opportunities or opportunities for improvement where appropriate, and reporting such information to the
2655 Government on a monthly basis.

2656
2657 C.9.3.2 *Employee suggestions* – Contractor shall conduct regular surveys to collect ideas from ISs for
2658 improving customer satisfaction. This input shall be provided to the Government on a monthly basis.
2659 The Government will use this information in their efforts to improve customer satisfaction. For those
2660 areas related to Contractor’s performance, Contractor shall develop and implement action plans to
2661 continually improve customer satisfaction and shall make these plans available to the Government upon
2662 request.

2663
2664 C.9.3.3 *External operational assessments* – Contractor shall permit the Government, and/or a
2665 Government authorized third party, to conduct, at the Government’s expense, operational assessments of
2666 Contractor’s operations to determine the quality of service delivery, the quality of IS system performance,
2667 and the efficiencies of the operations. Operational assessment includes a validation and an audit of the
2668 contact center. It may include organizational and training assessments as well as other task-related
2669 activities performed by the Contractor. The purpose of these assessments is to gain information
2670 concerning the operation, identify opportunities to support improvements of contact center operations,
2671 and opportunities for the Government to support Contractor. The Contractor shall cooperate fully in any
2672 such review, provide the Government (or designated third party) with information, and explain
2673 Contractor’s procedures and operations to the Government, if necessary. The Government will provide
2674 Contractor feedback on the results of any operational assessments. The Government and Contractor shall

2675 identify high-priority recommendations, and cooperate to develop and implement action plans that target
2676 high-priority improvements.

2677
2678

2679 **C.10 PERFORMANCE MANAGEMENT**

2680

2681 The Government intends to establish performance standards that will be used to measure contractor
2682 performance and a methodology for calculating incentive awards for superior performance on a task
2683 order-by-task order basis. The Government will consult the Citizen Services Level Committee (CSLIC)
2684 report "Proposed Performance Measures, Practices and Approaches for Government-wide Citizen Contact
2685 Activities when developing individual task order performance standards. Specific performance standards,
2686 incentive award schedule, and methodology for calculating incentive award amount will be identified in
2687 individual task orders issued by the Government. The Contractor is expected to work with the
2688 Government to develop plans and procedures for implementing new or revised performance standards.

2689

2690

2691 **C.11 MANAGEMENT REPORTS**

2692

2693 The Contractor shall provide for the automatic generation of comprehensive, accurate, easy to understand,
2694 and timely reports. The Government intends to request and receive only those reports that provide insight
2695 to the Contractor's level of performance in meeting contractual requirements and satisfying customer
2696 needs. The Government may also request the Contractor to provide management and operational reports
2697 on an ad hoc basis for purposes of gaining insight to specific program and customer service needs. The
2698 Contractor shall provide management reports via e-mail or a secure web site for remote access and
2699 download via the Internet. Access to these reports shall be controlled via User Identification Code and
2700 Unique Password. When requested by the Government, the Contractor shall provide these reports in
2701 electronic and/or hard copy format. Specific report formats, content, frequency, and delivery methods of
2702 all reports shall be coordinated with and approved by the Government on an individual task order basis.

2703 ~~The preferred delivery method will be through the use of XML.~~

2704

2705 **C.11.1 Weekly and Monthly Status Reports**

2706

2707 At a minimum, the Contractor shall provide weekly and monthly status reports. These reports shall be
2708 brief, factual, and shall include, but not be limited to:

2709

2710 Management summary - shall document major events or problems and progress in their resolution.

2711

2712 Continual improvement opportunities - shall document input received from Contractor's ISs concerning
2713 ideas for improving customer satisfaction.

2714

2715 Narrative - shall describe work performed during the reporting period and work expected to be performed
2716 in the next reporting period, including assessment of Project status against schedule/plan, discussions of
2717 any problems, issues, change requests, recommendations for correction, and variances between
2718 Contractor billed versus proposed pricing where applicable.

2719

2720 **C.11.2 Operational Reports**

2721 The Contractor shall provide operation reports that provide a recap of key contact center activities in
2722 support of each task. Reports shall provide information by individual programs and in aggregate.

2723

2724 Such reports shall provide detail sufficient to reflect the level of effort provided. The reports shall be
2725 supported with measurements occurring by second, minute, hour, or day, as appropriate. Activity reports

2726 shall include hourly, daily, weekly, monthly, and annual trending of key data elements in both tabular and
2727 graphic formats.

2728
2729 Specific data elements appropriate to each work type including responses handled via automated services,
2730 inbound and outbound calls, incoming and outgoing facsimiles, incoming and outgoing E-mail messages,
2731 incoming and outgoing written correspondence, volume of escalated inquiries, and hosted FAQ services
2732 activities shall be included. At a minimum, the reports shall provide all relevant information on volume
2733 and disposition of inquiries by work type, call origin by area code and/or geographic area if available,
2734 performance statistics (e.g., call attempts, blockage, speed of answer, abandonment rate, holding and call
2735 wrap-up time, etc.), and IS occupancy rate. Specific data elements, formats, and data collection and
2736 reporting intervals shall be coordinated and approved by the Government.
2737

2738 The Government reserves the right, during and for a 3 month period immediately after the Start-Up Phase
2739 of each task, or in cases of special circumstances/crisis situations, or non-performance, to request more
2740 detailed and more frequent reporting at no additional cost to the Government. In cases of non-
2741 performance, the Government may request such reports until such time as Contractor performance levels
2742 have stabilized and are in full compliance of contract requirements.
2743

2744 **C.11.3 Problem Resolution Reports**

2745
2746 In support of each task, the Contractor shall collect and compile a list of customer requests for
2747 information, services, or fulfillment literature that the Contractor is unable to answer or provide given the
2748 tools and data at its disposal. Such reports shall include both detailed and consolidated data and reference
2749 the specific information or item requested. The reports shall provide an explanation of how these
2750 inquiries were handled and/or resolved.
2751

2752 **C.11.4 Monitoring Reports**

2753
2754 In support of each task, the Contractor shall compile the results of call and work monitoring efforts
2755 including monitoring results, conclusions, recommendations, action plans, and improvement priorities.
2756 Such results should include both accuracy of information provided and accuracy of information recorded.
2757 These results shall be available in both individual and consolidated report formats.
2758

2759 **C.11.5 Compliment and Complaint Management Reports**

2760
2761 In support of each task, the Contractor shall gather and report customer comments to the Government on a
2762 monthly basis. At a minimum, this report shall include a categorization and tally of comments received
2763 according to predefined disposition codes, verbatim customer comments as captured by the automated
2764 survey equipment or IS, or the actual document from which they were received, and an analysis and
2765 trending of the type and quantity of comments recorded over the life of each task.
2766

2767 **C.11.6 Ad Hoc Reports**

2768
2769 In support of each task, the Contractor shall provide up to twelve (12) ad hoc reports annually at no
2770 additional cost to the Government. Such requests will be initiated and approved by the Contracting
2771 Officer or his/her duly authorized representative. The Government reserves the right, during initial
2772 project implementation or in cases of non-performance, to request more detailed and more frequent
2773 reporting at no additional cost to the Government until the need for such reports subside or Contractor
2774 performance levels have stabilized and are in full compliance of contract requirements.

2775
2776
2777
2778
2779
2780
2781
2782
2783
2784
2785
2786
2787
2788
2789
2790
2791
2792
2793
2794
2795
2796
2797
2798
2799
2800
2801
2802
2803
2804
2805
2806
2807
2808
2809
2810
2811
2812
2813
2814
2815
2816

C.12 GOVERNMENT FURNISHED PROPERTY

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

- Privacy Act guidelines
- Escalation procedures and guidelines
- Business rules and/or response formats and guidelines
- General Government and program specific training materials
- Existing methods and procedures manuals
- Government agency contact listing
- Government travel guidelines
- Contact listing for Congressional and Diplomatic offices
- Existing script or call guides as presently used to support current agency programs
- Federal information systems security guidelines
- Screen layout and file structure for data transmitted by agencies
- Access to Government databases where applicable
- Public distribution materials (e.g., publications, applications, forms, brochures) where applicable.
- Initial content for knowledge database
- Conflict of interest guidelines
- Relevant laws, regulations, policies and procedures
- Reference materials
- Database files
- Envelopes and mailing supplies

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

C.13 DOCUMENTATION TO BE PROVIDED

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

2817 C.13.1 *Conflict of Interest Compliance Plan* – identifies plans and procedures to identify, evaluate,
2818 and mitigate all actual, apparent, and potential conflicts of interest that preclude or would appear to
2819 preclude the Contractor from rendering impartial assistance or advice.

2820
2821 C.13.2 *Customer Satisfaction Plan* – identifies plans and procedures to survey customers to
2822 determine the degree of customer satisfaction on the services rendered. The plan shall include details on
2823 the processes and methodologies that the Contractor will use to identify problems and implement
2824 corrective actions.

2825
2826 C.13.3 *Design, Engineering, Implementation and Management Plan* – includes the following:
2827

2828 C.13.3.1 *Site Selection* – identifies processes, methodologies, and criteria used for site selection,
2829 including those that affect staffing, foreign language support, and emergency/disaster recovery.

2830
2831 C.13.3.2 *Facilities* – identifies and defines the contact center design, including work and office space
2832 and training facilities.

2833
2834 C.13.3.3 *Technology* – identifies and defines the system architecture and configurations for both
2835 primary operation and backup systems, including those supporting automated and manual inquiry
2836 processing, workforce management systems, knowledge/inquiry tracking databases, quality monitoring
2837 and training systems, management reports and other support tools used to support the contact center
2838 operations. Defines the use of XML within the system architecture to maximize data sharing with other
2839 Government/contractor systems.

2840
2841 C.13.3.4 *Networks* - identifies and defines the telecommunications/Internet services and most cost
2842 effective network design for supporting the contact center operations.

2843
2844 C.13.3.5 *Operations* - identifies processes and procedures for managing automated and attended
2845 functions, automated voice response script design and maintenance, call routing design and management,
2846 workforce scheduling and management, and service delivery strategies.

2847
2848 C.13.3.6 *Disaster Recovery/Contingency Plan* – identifies every risk as well as the steps necessary to
2849 prevent it from happening in the first place. The plan shall include an alternate set of steps to minimize
2850 the impact should prevention fail. The plan must define backup and restoration processes and the precise
2851 steps to take to recover as quickly as possible, including recovery procedures for physical facility, voice,
2852 data, and desktop systems and applications, communications networks, electrical service, customer access
2853 points, partners and procedures and staff. The Plan shall define the roles and responsibilities of contractor
2854 personnel during contingent and disaster events, including plans for training the personnel to prepare
2855 them to respond to such events. The plan shall include implementation procedures to test and execute the
2856 plan on a regular basis to ensure preparedness for such events. The plan shall be developed in accordance
2857 with applicable agency IT Security Policy and NISI Special Publication 800-34, Contingency Planning
2858 Guide for Information Technology Systems.

2859
2860 C.13.3.7 *Human Resources Management Plan* – includes the following:
2861

2862 C.13.3.7.1 *Staffing* – identifies staffing resources for contact center operation and project
2863 management. The plan shall include a staffing chart that identifies the allocated resources (expertise and
2864 staff hours) needed to perform each of the required functions to support the project. The plan shall
2865 include relevant details on recruiting and retaining employees, workforce scheduling and workload
2866 management, supervision and quality monitoring practices. The Plan shall also address roles and

Request for Proposal GSV07PD0003
Amendment-A001

2867 responsibilities of project and contact center staff by title and define supervisor and Quality Assurance
2868 (QA) monitor to IS ratios that will be used in support of the task.

2869
2870 C.13.3.7.2 *Training* – identifies plans, procedures, and methodologies for training contact center
2871 employees, including the types and schedule of training to be provided, and criteria for selecting
2872 instructors and training evaluation assessment methods.

2873
2874 C.13.3.7.3 *Dismissal Procedures* – identifies procedures that the Contractor shall follow in the event
2875 of a Federal Government closure or other emergency affecting the area in which the contact center is
2876 located.

2877
2878 | C.13.3.7.48 *Knowledge/Case Management Plan* – identifies methodologies, processes and procedures
2879 for effective knowledge management, including those required for developing, operating, and maintaining
2880 the required knowledge and case management databases to support the contact center operations. Where
2881 appropriate, the plan shall include methodologies and procedures for effective management of distributed
2882 knowledge databases and sharing of knowledge/case management data with other Government and/or
2883 contractor systems.

2884
2885 | C.13.3.7.59 *Operations Management Plan* – identifies plans and procedures for managing staff,
2886 facilities, equipment and processes effectively; includes procedures that the Contractor shall follow in the
2887 event of a service outage, an unexpected surge in call volume, a Federal Government closure or other
2888 emergency affecting the area in which the contact centers is located.

2889
2890 | C.13.3.7.610 *Performance Management Plan* – identifies plans and procedures to measure any
2891 customer service performance standards deemed appropriate.

2892
2893 | C.13.3.7.711 *Phase-In Plan* – identifies plans and approaches for implementing the proposed
2894 solution, including required tasks, schedule and milestones, and deliverables. The plan shall include
2895 methodologies and procedures for minimizing disruption of service to current customers.

2896
2897 | C.13.3.7.812 *Program Management Plan* – identifies and defines the Contractor’s organization,
2898 roles and responsibilities, and lines of authority, management procedures/policies/plans, plans and
2899 programs for managing team partners and subcontractors, escalation procedures for problem/dispute
2900 resolution, and reporting requirements for the tasks and services to be performed under this contract.

2901
2902 | C.13.3.7.913 *Project Plan* – provides a comprehensive plan for implementing the project, which
2903 addresses all strategies, objectives, required actions, roles and responsibilities and target dates for
2904 implementation of tasks. Identifies critical paths and task dependencies.

2905
2906 | C.13.3.7.4014 *Quality Assurance/Quality Improvement Program Plan* – identifies plans,
2907 methodologies, and procedures for maintaining effective quality assurance and service improvement
2908 programs, including monitoring and assessing performance and service activities to ensure quality
2909 services are provided to customers. Included in the program shall be a Quality Improvement Plan to
2910 identify and document performance assessment and improvement opportunities and procedures for
2911 implementing the service improvements. The Plan shall address all areas, including, staffing, training,
2912 operations, contract deliverables, performance management, process engineering, service delivery, service
2913 improvements, and customer satisfaction.

2914
2915 | C.13.3.7.4115 *Security Plan* – provides an overview of the security requirements for the information
2916 and IT systems and describes the existing or planned controls (management, operational, and technical)
2917 for meeting those requirements. The Plan also describes the systems and delineates responsibilities and

Request for Proposal GSV07PD0003
Amendment-A001

2918 expected behavior of individuals who access the systems. The plan shall be developed in accordance with
2919 applicable agency IT Security Policy and NIST Special Publication 800-18, Guide for Developing
2920 Security Plans for Federal Information Technology Systems and other relevant publications.

2921
2922 | C.13.3.7.~~4216~~ *Service Level Management Plan* – identifies processes and methodologies for
2923 effective service level management, including workload forecasting, IS scheduling, service recovery
2924 (from system failures, disasters, etc.), problem identification and resolution, problem notification, and
2925 contingency planning and escalation.

2926
2927 | C.13.3.7.~~4317~~ *Test and Acceptance Plan* – identifies plans and procedures that the contractor shall
2928 use to ensure that the full range of services to be provided are successfully tested prior to actual
2929 implementation.

2930
2931 | C.13.3.7.~~4418~~ *Value Engineering/Process Improvement Plan* – identifies plans and procedures to
2932 evaluate new and emerging technologies and/or reengineering business processes to improve program
2933 efficiency and customer service.

2934
2935 Additionally, the Contractor shall obtain and provide all permits, contracts, copyrights, licenses, etc.,
2936 necessary for its performance of any tasks issued under this contract and shall provide copies of such
2937 information to the Government upon request.

2938
2939
2940
2941
2942
2943
2944
2945
2946
2947
2948
2949
2950
2951
2952
2953
2954
2955
2956
2957
2958
2959
2960
2961
2962
2963

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.

2964
2965
2966
2967
2968
2969
2970
2971
2972
2973
2974
2975
2976
2977
2978
2979
2980
2981
2982
2983
2984
2985
2986
2987
2988
2989
2990
2991
2992
2993
2994
2995
2996
2997
2998
2999
3000
3001
3002
3003
3004
3005
3006
3007
3008
3009
3010
3011
3012

SECTION E
INSPECTION AND ACCEPTANCE

E.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
52.246-02	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

E.2 QUALITY CONTROL RESPONSIBILITIES

E.2.1 General

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.

E.2.2 Contractor Quality Control Responsibility

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.

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:

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

- 3013
3014 ○ preparation of system of on-site records of all inspections conducted by the Contractor and the
3015 corrective action(s) taken.
3016

3017 This documentation shall be available to the Government at all times during the term of the contract. The
3018 Contractor shall provide to the COTR a detailed monthly summary of all quality control actions,
3019 including descriptions of events which require quality control activity, and the corrective action taken.
3020

3021 **E.2.3 Government Quality Assurance Responsibilities**

3022 The Government will monitor the Contractor's performance using predetermined quality assurance
3023 surveillance procedures to examine and determine compliance with contract performance requirements. A
3024 copy of these procedures will be provided to the Contractor prior to the start of contract performance. In
3025 keeping with the Government's responsibility for quality assurance, the Government reserves the right to
3026 review all administrative, managerial, and statistical reports; telecommunications services; publicity
3027 materials and resource library materials using the Performance Requirements Summary. A copy of the
3028 Performance Requirements Summary will be provided to the Contractor prior to the start of contract
3029 performance. Final determination that reports, resource and publicity materials, and services rendered
3030 meet the requirements is solely the responsibility of the Government. All surveillance observations will
3031 be recorded by the Government. When an observation indicates defective performance, the Quality
3032 Assurance Evaluator (QAE) will request that the Contract Manager or designee initial the observation
3033 record. The Contractor shall, within 48 hours, notify the Contracting Officer, or his/her technical
3034 representative if so directed by the Contracting Officer, of the corrective action(s) taken in accordance
3035 with methods and techniques specified by the Contractor in its quality control plan. If the Contractor
3036 disputes any part of the QAE's observation, he/she shall request that the Contracting Officer hold a
3037 Performance Evaluation Meeting.
3038

3039 **E.2.3.1 Performance Evaluation Meetings**

3040 The Contract Manager may be required to meet with the COTR, the QAE, and the Contracting Officer
3041 whether by telephone or at a designated Contractor-operated location on at least a weekly basis during the
3042 first month after the issuance of a Task Order under this contract. Meetings will be held as often as
3043 necessary thereafter at the discretion of the Contracting Officer or the COTR. However, a meeting will
3044 be held whenever a contract discrepancy report is issued. A mutual good faith effort will be made to
3045 resolve all problems identified.
3046

3047 The COTR will write the minutes of these meetings, and the minutes will be signed by the Contract
3048 Manager and the COTR. The attendee will, within three (3) business days, identify any areas wherein
3049 he/she does not agree by providing written notice to the COTR.
3050

SECTION F

DELIVERIES OR PERFORMANCE

F.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
52.242-15	Stop-Work Order	AUG 1989

F.2 PERIOD OF CONTRACT

The contract becomes effective on Date of Award and continues in effect ~~through September 30, 2008 for a 2-year base period.~~ In addition, the period of the contract is subject to ~~the options provision specified in Section F.3~~ four (4) two-year option periods at the prices provided for in Section B.

F.3 OPTION TO EXTEND THE TERM OF THE CONTRACT

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

F.4 SCHEDULE OF DELIVERABLES

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

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

3093

3094 **F.5 CONTRACT DELIVERABLE ACCEPTANCE**

3095 Any contract documentation deliverable produced under this contract will be accepted or rejected in
3096 writing by the Government. Unless otherwise specified in the task order, the Government will have up
3097 to ten (10) working days to review the deliverable and provide comments. During this review period, the
3098 Government will have the right to reject or require correction of any deficiencies found in the deliverable
3099 that are contrary to the information contained in the Contractor's accepted proposal. After receiving the
3100 comments, the Contractor shall incorporate the changes into the deliverable and resubmit the final
3101 deliverable to the Government for approval. After final submission, the Government will have ten (10)
3102 working days to approve the final submission.

3103

3104 If the Government fails to complete the review within ten (10) working days after receiving the
3105 deliverable, the deliverable will become acceptable on an interim basis. If deficiencies are discovered
3106 after this period, the Government will provide in writing a description of all discrepancies to be corrected
3107 by the Contractor. After receiving the description of the discrepancies, the Contractor shall incorporate
3108 the changes into the deliverable and resubmit the deliverable to the Government. If the Government fails
3109 to respond within ten (10) working days of the final submission, the submission will be considered
3110 accepted.

SECTION G

CONTRACT ADMINISTRATION DATA

3111
3112
3113
3114
3115
3116
3117
3118
3119
3120
3121
3122
3123
3124
3125
3126
3127
3128
3129
3130
3131
3132
3133
3134
3135
3136
3137
3138
3139
3140
3141
3142
3143
3144
3145
3146
3147
3148
3149
3150
3151
3152
3153
3154
3155
3156

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:

- Serve as liaison between the Contractor and Using Agencies

- 3157 ○ Assist in expediting orders
- 3158 ○ Ensure compliance with contract requirements
- 3159 ○ Issue final decisions and handle all disputes under the Contract Dispute Act
- 3160 ○ Delegate contracting authority to a Federal Department, Agency, or Other Authorized Entity
- 3161 (“Using Activity”) Contracting Officer for the purposes of requesting quotes and awarding task
- 3162 orders and subsequent task order modifications under this contract.
- 3163
- 3164

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

3165 Subsequent to contract award, task order requests will be issued primarily by the ACO. GSA may,
3166 however, delegate contracting authority to a Using Activity’s contracting officer to request quotations
3167 directly from USA Contact Contractors, and to award task orders and modifications to task orders under
3168 the appropriate indefinite-delivery, indefinite-quantity contract. The Contracting Officer who is
3169 responsible for issuing a Request for Quotation (either the ACO or a Using Activity Contracting Officer)
3170 becomes the cognizant Contracting Officer for that requirement, and, therefore assumes the title of Task
3171 Order Contracting Officer (TO/CO). The TO/CO is the Government’s single point of contact for each
3172 task order issued by that TC/CO. The TO/CO is responsible for administration of the task order, issuance
3173 of task order modifications, authorizing changes in terms and conditions of the task order, terminating the
3174 task order, exercising option renewals, and approval of subcontractors.

3175
3176 The Activity Contracting Officer will be appointed as a TO/CO in writing by the ACO. A copy of each
3177 appointment letter will be provided to all USA Contact Contractors. Contractors are cautioned that,
3178 unless they are in receipt of an appointment letter signed by the ACO, they should take no action in
3179 response to a Request for Quotation which has been identified as a requirement under the USA Contact
3180 program. Instead, the Contractor shall immediately notify the ACO, and provide him/her with the details
3181 of the request.

3182
3183 Communications pertaining to task order administration matters shall be addressed to the TO/CO. The
3184 TO/CO will be the only person authorized to make or approve any changes in any of the requirements of
3185 the task order for which he/she is responsible. In the event that the Contractor makes any changes at the
3186 direction of any person other than the TO/CO, such change shall be considered to have been made
3187 without authority, and no adjustment shall be made in the task order price to cover any increase in costs
3188 incurred as a result thereof. When necessary, the TO/CO will:

- 3189 ○ Serve as liaison between the Contractor and Using Agencies
- 3190 ○ Assist in expediting orders
- 3191 ○ Ensure compliance with task requirements
- 3192 ○ Issue final decisions and handle all task order disputes under the Contract Dispute Act
- 3193
- 3194

G.1.4 Contracting Officer’s Technical Representative

3196 The TO/CO will appoint a Contracting Officer’s Technical Representative (COTR) to ensure orderly
3197 performance of this contract and subsequent task orders. Appointment of the COTR will be made in
3198 writing upon contract/task order award. A copy of the appointment letter will provided to the task order
3199 Contractor.

3200

3201 The COTR is authorized to be the technical point of contact under this contract; however, the Contractor
3202 shall direct all inquiries of either a technical or a non-technical nature through the TO/CO.
3203

3204 The types of actions within the purview of the COTR's authority include:

- 3205
- 3206 ○ Ensuring that the Contractor performs the technical requirements of the contract;
- 3207
- 3208 ○ Conducting or causing to be conducted inspections necessary in connection with performance of
- 3209 the contract;
- 3210
- 3211 ○ Monitoring the Contractor's performance under the contract, and notifying the Contractor and
- 3212 TO/CO of any deficiencies observed;
- 3213
- 3214 ○ Coordinating Government-furnished property availability (if required); and
- 3215
- 3216 ○ Providing for site entry of Contractor personnel if required.
- 3217

3218 The COTR may provide technical direction and general performance-related guidance to the Contractor.
3219 As used herein, "technical direction" means direction to the Contractor that fills in details, suggests
3220 possible lines of inquiry, or otherwise completes the general scope of the work. "Technical direction"
3221 must be within the terms of this contract; shall not change or modify the contract/task order in any way;
3222 and shall not constitute changes, as described in contract clause 53.243-1, Changes -Fixed Price or
3223 52.243-3 Changes - Time and Materials or Labor Hour, which may only be accomplished by the TO/CO.
3224

3225 The COTR will provide no supervisory or instructional assistance to Contractor personnel. The COTR's
3226 responsibility is to provide Contractor access to working data, and to clarify technical requirements as
3227 necessary to ensure useful expenditure of Contractor effort. The COTR is not empowered to make any
3228 commitments or changes which affect the contract/task order price, other terms and conditions, or
3229 delivery provisions. Any such proposed changes must be brought to the immediate attention of the
3230 TO/CO for action. The acceptance of any changes by the Contractor without the specific approval and
3231 written consent of the TO/CO shall be at the Contractor's risk.
3232

3233 If in the Contractor's opinion, the COTR requests or indicates an expectation of effort which would justify
3234 or require an equitable adjustment to the contract/task order, the Contractor shall promptly notify the
3235 TO/CO in writing; however the Contractor shall take no other action on that request or effort until the
3236 TO/CO has issued a change or otherwise resolved the issue.
3237

3238 **G.1.5 Contractor's Points of Contact**

3239 The Contractor shall provide an organizational structure for the management and administration of task
3240 orders under this program. The organizational structure shall include personnel to perform the following
3241 functions:

- 3242
- 3243 ○ Serve as the point of contact to interface with the Government (GSA and Using Agencies) on
- 3244 issues related to program administration
- 3245
- 3246 ○ Oversee the overall management and operations of services provided under each task order
- 3247

- 3248 ○ Serve as the point of contact to interface with the Government (GSA and Using Agencies) on
3249 major issues related to operational support and implementation
3250
- 3251 ○ Coordinate as necessary with the COTR, Using Agencies, and subcontractors in providing
3252 services under a task order
3253
- 3254 ○ Serve as the single point of contact to interface with the CO/COTR and meet with the
3255 Government (GSA and Using Agencies) on planning and operational issues related to classified
3256 requirements and/or problems, in the event of national security threats and/or disaster situations.
3257
- 3258 ○ All key personnel assigned by the Contractor to fulfill contract management and administrative
3259 functions shall be accessible to the Government (GSA and Using Agencies) 24 hours a day, 7
3260 days a week by telephone, cellular telephone, Blackberry-type device, or pager. Lists of all
3261 Contractor points of contact shall be provided, including telephone, cellular telephone, and pager
3262 numbers and e-mail addresses. The Contractor shall provide the TO/CO with an updated list of
3263 all points of contact within five (5) calendar days after changes to the list.
3264
3265

3266 **G.2 SERVICE ORDERING**

3267 This contract will be used by the Government to provide complete managed multi-channel inquiry
3268 response and management solutions to support the USA Services project, including support for other E-
3269 Gov initiatives, and other Using Agency programs. Section C, the Performance Work Statement,
3270 establishes the overall scope of work that may be performed under this contract.
3271

3272 The Government will order services under this contract by means of task orders with specifically defined
3273 work requirements, deliverable products, performance standards, and schedules. The Contractor shall
3274 perform work under this contract only as directed in task orders issued by the TO/CO.
3275

3276 The Contractor shall provide the services and, if required, incidental supplies specified on each task order
3277 at the price set forth on each task order. Orders may be issued under this contract from date of each IDIQ
3278 contract award through the life of the contract. All task orders issued under this contract are subject to the
3279 terms and conditions of the contract. If there is a conflict between the terms and conditions of the
3280 contract and those of the task order, the terms and conditions of the contract shall prevail. All task orders
3281 issued prior to the end of the contract shall be honored and performed by the Contractor according to all
3282 terms and conditions of the contract, subject to the Government's rights and remedies thereunder. Copies
3283 of all task orders shall be maintained by the Contractor for the duration of the contract through final
3284 closeout.
3285

3286 **G.2.1 Fair Consideration Process**

3287 When a requirement is identified by a Government agency, the TO/CO will issue a Request for Quotation.
3288 Requirements will be grouped together to the extent that it is practical to do so. All contract holders will
3289 be provided a fair opportunity to propose on all requirements in excess of \$2,500.
3290

3291 Contract holders need not be given an opportunity to be considered for a particular order in excess of
3292 \$2,500 when the TO/CO determines that:

- 3293
- 3294 ○ The need for services is of such urgency that providing a fair opportunity to all Contractors would
3295 result in unacceptable delays
3296

Request for Proposal GSV07PD0003
Amendment-A001

- 3297 ○ Only one such contract holder is capable of providing the services at the level of quality required
- 3298 because the services ordered are unique or highly specialized
- 3299
- 3300 ○ The order should be issued on a sole-source basis in the interest of economy and efficiency as a
- 3301 logical follow-on to a task already issued under the contract
- 3302
- 3303 ○ It is necessary to place an order to satisfy a minimum guarantee
- 3304

3305 Examples of exceptions include, but are not limited to, those described in the following table. These
 3306 examples are provided only for purposes of illustration.

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

3309
 3310
 3311 The TO/CO's source selection decision on each task order is final, and is not subject to the protest or
 3312 disputes provisions of the contract, except for a protest asserting that the task order increases the scope,
 3313 period, or maximum value of the contract. Disputes related to other matters affecting the task order
 3314 award may be directed to the Ombudsman designated for this contract. The Ombudsman will be
 3315 responsible for those duties described in FAR §16.505(b)(5). The Ombudsman for GSA is:

3316
 3317 Name: George N. Barclay
 3318 Title: GSA Service Order Ombudsman
 3319 Address: 1800 F Street, NW
 3320 Washington, D.C. 20405
 3321
 3322 Phone: (202) 501-2200

3323 The Government reserves the right to modify this fair consideration process, and will notify the
 3324 Contractors of any such modifications in advance of any task orders being placed using such a modified
 3325 process.

3326
3327
3328
3329
3330
3331
3332
3333
3334
3335
3336
3337
3338
3339
3340
3341
3342
3343
3344
3345
3346
3347
3348
3349
3350
3351
3352
3353
3354
3355
3356
3357
3358
3359
3360
3361
3362
3363
3364
3365
3366
3367
3368
3369
3370
3371

G.2.2 Task Order Request for Quotation

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

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

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

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

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

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

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

- 3372 ○ Detailed discussion of any other overtime or other-than-normal work schedule hours that the
3373 Contractor may propose, or a Work Breakdown Structure for Fixed Price Task Orders.
3374
- 3375 ○ A detailed work breakdown structure for accomplishing the task requirements identified above,
3376 showing the skill level, number of people, and labor hours shall be applied to each milestone and
3377 deliverable product. The proposed staffing and work hours must be consistent with the
3378 Contractor's staffing plan, including a detailed rationale of how the skill level and number of
3379 people were determined, and how they will be utilized
3380
- 3381 ○ An affirmation that the fully burdened rates contained in Section B of this contract are ceiling
3382 price rates. However, the Contractor may, at its discretion, elect to propose lower rates on a task-
3383 by-task basis.
3384

3385 Each ODC (Other Direct Costs) entry must be accompanied by a breakdown by element of its
3386 composition, and an estimate for each element, together with a total estimated ODC cost. The Contractor
3387 will also provide an explanation of why the ODC is required. All travel requirements in the Request for
3388 Quotation's PWS must be included. Any additional travel the Contractor considers necessary for
3389 performance under the task order must be described, justified, and included in the cost estimate. If
3390 required by the task request, the Contractor will use the rates in the then-current Federal Travel
3391 Regulation for estimating the cost of travel and per diem.
3392

3393 Quotations shall be submitted in accordance with the instructions provided in each Request for Quotation.
3394 All staffing, staffing hours and costs, ODCs by principal category, and totals shall be shown.
3395

3396 The Contractor shall submit a quotation that conforms to the requirements of a Request for Quotation's
3397 PWS. In addition to that quotation, the Contractor may submit a separate alternative quotation, if the
3398 Contractor feels that another technical approach or pricing structure more economically or efficiently
3399 accommodates the Government's requirements. The alternative quotation must be identified as such and
3400 include a clear explanation of the differences in approach the perceived benefits to the Government.
3401

3402 Once quotations have been received, the TO/CO need not contact each of the contract holders under the
3403 contract before selecting an awardee, if the TO/CO has ensured that each contract holder was provided a
3404 fair opportunity to be considered for the order. Award will be made to the successful Contractor based on
3405 the evaluation criteria established in the task request.
3406

3407 **G.2.3 Discussions and Final Quotation**

3408 When required, discussions will take place at a place and time designated by the TO/CO. After each
3409 round of discussions, each offeror will be given the opportunity to revise its quotation, making whatever
3410 changes it feels necessary to enhance the possibility of an award. When the TO/CO feels there is a clear
3411 meeting of the minds with all offerors, he/she will conclude discussions and call for a Final Quotation
3412 Revision. The final revised quotation shall reflect all agreements reached during discussions.
3413

3414 **G.2.4 Award of a Task Order**

3415 A task order specifies work to be accomplished by the Contractor to satisfy a Government requirement,
3416 and establishes a time-frame and price, or not-to-exceed price (so identified), for accomplishing the work.
3417 The task order defines the performance of a specified unit of work in a definable service or applications
3418 area, and may have one or more deliverable products.
3419

3420 The TO/CO will award task orders using a GSA Form 300 (or other appropriate Using Agency form
3421 "Award Document") that incorporates the Performance Work Statement and the contract holder's final

3422 revised quotation by reference. The Award Document authorizes the Contractor to proceed based upon
3423 the agreed-to technical requirements, milestone and deliverable schedules, and total award price. For
3424 fixed price tasks, a milestone schedule including start and end dates for each milestone or deliverable
3425 shall be submitted with the quotation.

3426
3427 All tasks must be fully staffed within ninety (90) calendar days after task award (the date in block 1 of the
3428 GSA Form 300, or Agency equivalent) unless otherwise specified in the task order.

3429
3430 Resumes for key personnel as defined in the Request for Quotation shall be submitted to the Government
3431 in the format specified in the task order. The Government will approve or reject the resume in writing
3432 within five (5) workdays of its receipt. For approved resumes, the Contractor shall notify the Government
3433 when the individual will report for work on the task order. If review of the resume determines the
3434 individual not to be qualified for the position indicated, the resume shall be rejected and a written
3435 explanation provided. If the Contractor desires further consideration of the candidate, the resume must be
3436 resubmitted within two workdays of the notice of rejection with the necessary clarification or additional
3437 information. Rejection of a resume does not obviate the Contractor's responsibility to fully staff the
3438 facility with ninety (90) calendar days after task award, or as otherwise specified in the task order.

3439
3440 **G.2.5 Task Order Changes**

3441 Task orders may be modified, either at the Government's initiative, or in response to a request from the
3442 Contractor. No direction changing the requirements of a task order will be binding upon the Contractor
3443 unless issued by the TO/CO in writing. Likewise, the Government shall not be liable for an equitable
3444 adjustment to the price of a task order on account of a change, unless the change is authorized in writing
3445 by the TO/CO. Task order modifications are issued by means of a Standard Form 30 (Amendment of
3446 Solicitation/Modification of Contract).

3447
3448 **G.2.6 Failure to Reach Agreement**

3449 If agreement cannot be reached on total task order price, time for performance, or other terms of the
3450 agreement, the TO/CO may unilaterally establish the terms at issuance. The Contractor may pursue any
3451 disagreement as a dispute under the "Disputes" clause of this contract.

3452
3453 **G.2.7 Types of Tasks**

3454 **G.2.7.1 Fixed-Price Task**

3455 A task order with well-defined requirements and fixed deliverable products will normally be issued on a
3456 fixed price basis.

3457
3458 **G.2.7.2 Time and Materials or Labor Hour Task**

3459 A task order for which the performance requirements or deliverable products cannot be quantified or
3460 well-defined in advance typically will be issued on a time and material or a labor hour basis. Work orders
3461 are issued by the Government to define individual performance requirements for specific work or
3462 milestones to be accomplished.

3463
3464
3465 **G.3 CONTRACT ACCESS FEE**

3466 GSA operating costs associated with awarding and managing this contract may be recovered through a
3467 Contract Access Fee (CAF) of the total invoice amount.

3468

3469 GSA will determine the amount of the CAF after contract award. GSA has the unilateral right to change
3470 the percentage at any time, but not more than once per year. As part of each invoice, the Contractor shall
3471 collect the CAF and then rebate it to GSA. The timing of the rebate, the organization to which it will be
3472 delivered, and the method of delivery will all be specified in the individual task orders.

3473
3474 Where multiple invoices and/or multiple orders are involved, the CAF may be consolidated into one
3475 payment. To ensure that the payment is credited properly, the Contractor shall submit a check along with
3476 a printed copy of the "Cost Recovery Report (CRR)" as required by section G.5.4. Each check shall be
3477 annotated with the corresponding contract number.

3478
3479 The Contractor shall pay GSA not later than 30 calendar days after the end of the reporting quarters
3480 specified in section G.5.

3481
3482 If the full amount of the CAF is not paid within 30 calendar days after the end of the applicable reporting
3483 period, it shall constitute a debt to the United States Government under the terms of FAR 32.6. The
3484 Government may exercise all rights under the Debt Collection Act of 1982, including withholding or
3485 setting off payments and interest on the debt (see FAR 52.232-17, Interest).

3486
3487 The Contractor shall submit to GSA sales reports and payment information in a timely manner.

3488
3489 Failure on the part of the Contractor to pay GSA all CAF which is currently due in a timely manner, or
3490 the willful submission of inaccurate information in sales reports or payment information, constitutes a
3491 material breach of the contract's terms and conditions.

3492
3493

3494 **G.4 BILLING AND PAYMENT**

3495 **G.4.1 General Billing Information**

3496 The Contractor shall deliver invoices and billing support data to GSA, and, if so specified in task orders,
3497 to the Using Agency via paper or electronic format in a mutually agreed upon medium. Agreement will be
3498 reached at time of award. If agreement cannot be reached, the TO/CO will establish the medium to be
3499 used. Each invoice shall reflect all charges from the first day through the last day of the previous billing
3500 cycle. The Contractor shall charge for all services or equipment within three billing cycles after the
3501 services were rendered.

3502
3503 The Contractor shall submit a properly prepared invoice for services or supplies that have been accepted
3504 by the Government not later than five (5) work days after such acceptance has taken place. In the absence
3505 of Government acceptance within 30 days, the Contractor shall submit the invoice.

3506
3507 A separate invoice shall be submitted for each task order. Invoices shall be prepared on official company
3508 letterhead, and provide price information for each contract line item number (CLIN) being billed. In
3509 addition, each invoice shall include the following minimum task order identification data:

- 3510
- 3511 ○ GSA contract number
- 3512 ○ GSA or Using Agency task order number
- 3513 ○ Purchase Request Number: the number used by GSA or the Using Agency to control the
- 3514 commitment of funds
- 3515 ○ Period of Performance: monthly services performed or deliverable completed
- 3516 ○ Invoice Number

3517 ○ Client name and address
3518

3519 When the paying office is GSA, the original of each invoice with supporting documentation shall be
3520 submitted to the GSA Paying Office designated in Block 24 of the Award Document. In those cases
3521 where the paying office is other than GSA, the invoice/paying office will be designated on an order-by-
3522 order basis. Up to two additional copies of each invoice with supporting documentation shall be
3523 submitted to the address(es) as designated on an order-by-order basis.
3524

3525 For fixed price tasks, an invoice reflecting amounts that do not exceed the fixed price approved for that
3526 deliverable product or service in the task order shall be submitted for those tangible deliverable products
3527 or services that have been accepted by the Government.
3528

3529 For time and materials tasks, the amount invoiced shall include labor charges for actual hours worked and
3530 other allowable and allocable expenses based upon contract rates and conditions, not to exceed the limits
3531 specified in the task order, provided that such charges have been accepted by the Government.
3532 Contractors should note that profit is to be applied to labor charges only.
3533

3534 For other direct costs (ODC) such as equipment, software, supplies and services not previously priced
3535 under this contract, non-routine travel or per diem, etc., invoices shall reflect the Contractor's actual
3536 expense for the item, plus General and Administrative costs (G&A) (the only allowable indirect cost).
3537 These charges shall not exceed the limits specified in the task order. No charges will be paid by the
3538 Government for goods, services, or rates which are not specifically detailed in the individual task order.
3539 The invoices shall also include the CAF as ODC. CAF is a percentage of the total amount of goods or
3540 services being invoiced. The percentage to be used will be stipulated by GSA prior to issuance of the
3541 Requests for Quotation.
3542

3543 Copies of Contractor paid invoices, receipts, and travel vouchers completed in accordance with Federal
3544 Travel Regulations (FTR) shall be maintained by the Contractor, for the duration of the task order and for
3545 three (3) years thereafter, and made available to the Government upon request.
3546

3547 Invoices for final payment must be so identified, and submitted when tasks have been completed and no
3548 further charges are to be incurred. These close-out invoices, or a written notification that final invoicing
3549 has been completed, must be submitted to the ordering agency within 60 days of task order completion.
3550 A copy of the Government's written acceptance of task completion must be attached to final invoices. If
3551 the Contractor requires an extension of the 60-day period, a request with supporting rationale must be
3552 received by the TO/CO prior to the end of the 60-day period.
3553

3554 The Contractor shall not be compensated directly for payment of the salaries or wages of the Program
3555 Manager, Group Managers, or any other management or staff member not directly associated with and
3556 negotiated for task order performance as direct-charge hourly-rate contract line items.
3557

3558 **G.4.2 Billing Content**

3559 At least fifteen (15) days prior to its initial submittal, the Contractor shall provide an example and specify
3560 the content and format of all invoice(s) to be used for the billing of services required under this contract.
3561 Each invoice shall contain all pricing components in sufficient detail necessary to reconcile charges with
3562 actual usage.
3563

3564 **G.4.3 Payment of Invoices**

3565 Payment of invoices will be made based upon acceptance by the Government of the entire task, of the
3566 completion of payable milestones (identified as such) in the task order, of the tangible product

3567 deliverable(s) invoiced, or for services rendered during the time period invoiced and accepted on a
3568 periodic basis.

3569
3570 If the services provided fail to conform to the technical requirements of the task order or do not conform
3571 to the terms and conditions of the contract, the TO/CO will take action in accordance with FAR clause
3572 52.246-04 entitled, "Inspection of Services-Fixed Price", or 52.246-06 entitled, "Inspection of Services
3573 Time and Materials and Labor Hour", whichever is applicable.

3574
3575 Payment to the Contractor will not be made for temporary work stoppage due to circumstances beyond
3576 the control of the Government, such as acts of God, inclement weather or power outages and the results
3577 thereof, or temporary closings of facilities at which Contractor personnel are performing. This may,
3578 however, be justification consideration under the clause entitled, "Excusable Delays".

3579
3580 Section B of this contract contains Contract Line Item Numbers (CLINs) for overtime. However,
3581 overtime CLINs will only be billable when approved in advance and in writing by the TO/CO to meet
3582 task order requirements on a bonafide exigency basis. The Government will not authorize overtime to
3583 compensate for shortcomings in Contractor performance.

3584
3585 The Contractor will be reimbursed by the Government for non-routine travel and per diem expenses
3586 incurred by Contractor personnel for travel specifically authorized in a task order and approved by the
3587 Government. The Government may require the Contractor to use Government supply sources for official
3588 travel, subject to the same conditions as those applicable to Government employees; except that the
3589 Contractor's employees are not "employees of the Government" as defined by 28 U.S.C. 2671, and thus
3590 are not covered under the tort claims provisions of 28 U.S.C. 2679(b). Note: if a time and materials task
3591 order is issued under this contract, only actual costs for material are reimbursable, per FAR 16.601.

3592
3593 **G.4.4 Billing Disputes**

3594 The Government requires evidence that the services ordered have been provided, and that each associated
3595 charge has been priced correctly, or it may dispute the charge.

3596
3597 The Contractor shall attempt to resolve billing disputes to the satisfaction of the Government within sixty
3598 (60) calendar days following official notification from the TO/CO or COTR that such a dispute exists.
3599 The Contractor shall take a proactive lead in resolving disputes promptly with the initiator of the dispute
3600 by establishing and maintaining meaningful dialogue directed toward a fair and equitable resolution. In
3601 cases where a resolution is not forthcoming, the Contractor shall submit partial resolutions valued at (less
3602 than the total amount in dispute) to the Government for acceptance or denial. The TO/CO or his/her
3603 representative, so designated in writing by the TO/CO, will respond within five business days with a
3604 proposed resolution. If either party wants to escalate the dispute to the TO/CO at any time, it may do so.
3605 Disputes that are not resolved within 60 calendar days, or within the approved extension time, must be
3606 escalated to the TO/CO. Any disputes escalated to the TO/CO will be resolved in accordance with
3607 Federal Acquisition Regulation (FAR) 52.233-1 (Alternate I) (Disputes).

3608
3609 **G.4.5 Right to Withhold Payment**

3610 The Government reserves the right to withhold a partial or entire payment of an invoice as provided for in
3611 FAR clause 52.232-01 entitled, "Payments".

3612
3613

3614

3615

3616 **G.5 REPORTING REQUIREMENTS**

3617 Contractors are required to provide the requisite reports identified in this section as part of contract
3618 administration. Contractors will not be compensated directly by the Government for the preparation and
3619 delivery of the requisite reports for the duration of the contract, including the contract base period and all
3620 option periods and extended performance periods if applicable.
3621

3622 **G.5.1 Sales Reports**

3623 The Contractor shall electronically report all sales under this contract. “Sales” means the dollar amount
3624 invoiced under the task order. The Contractor shall accurately report the dollar value, in U. S. dollars and
3625 rounded to the nearest whole dollar, by calendar quarter (January 1–March 31, April 1–June 30, July 1–
3626 September 30, and October 1–December 31). Reports, including “zero” sales shall be submitted
3627 electronically to an e-mail address provided by the ACO after contract award.
3628

3629 The report is due within thirty (30) calendar days following the end of the reporting quarter. The
3630 Contractor shall continue to provide the report until final closeout of all task orders. Reporting will be by
3631 contract at the task order level. Reports for multiple contracts shall not be consolidated.
3632

3633 Failure to submit required reports or the falsification of reports is sufficient cause for the Government to
3634 terminate the contract for default under the termination provisions hereof.
3635

3636 **G.5.2 Task Status Reports**

3637 As directed by GSA or client representatives, these reports shall be defined in the Performance Work
3638 Statement or work orders, and shall be prepared by task personnel and funded by the client.
3639

3640 **G.5.3 Reports on Special Hiring**

3641 The Special Hiring Report is a report that shows whether the Contractor is meeting the 5% minimum
3642 special hiring objective required in Section H.8. The report shall be electronically submitted via e-mail to
3643 an e-mail address specified by the ACO, using the GSA specified format (currently Microsoft Office
3644 Excel 2003), by the tenth work day following the close of the calendar month. The report shall include
3645 the Contract Number, Task Order Number, Ordering Agency, Client, Special Hire Organization, Quantity
3646 of Total Contact Center Staff, Quantity of Special Hire Staff, and the percentage of Special Hire Staff of
3647 Total for each reporting period. The report shall include monthly totals and cumulative totals for all tasks
3648 performed under this contract. The report is required even when no tasks were performed during the
3649 reporting period, and shall continue to be provided until all task orders are completed under the contract.
3650

3651 **G.5.4 Cost Recovery Report (CRR)**

3652 The CRR is a report of all invoices tendered under this contract, including the collection of all Contract
3653 Access Fees. The CRR shall be electronically submitted via e-mail to an e-mail address specified by the
3654 ACO, using the GSA specified format (currently Microsoft Office Excel 2003), by the tenth work day
3655 following the close of the calendar month. The CRR shall include the Contract Number, Task Order
3656 Number, Ordering Agency, Client, the Invoice Number, Date of Invoice, the Invoice Amount, and the
3657 amount of the Contract Access Fee for each invoice of the reporting period. The report shall include the
3658 total amount of the listed invoices and Contract Access Fees for both the reporting period, as well as
3659 cumulative totals for the contract to date. A CRR is required even when no invoices are submitted during
3660 the reporting period, and shall continue to be provided until all task orders are completed under the
3661 contract.
3662

3663 The Government reserves the right to inspect without further notice such records of the Contractor as
3664 pertain to orders under this contract. Willful failure or refusal to furnish the required reports, or
3665 falsification thereof, shall constitute sufficient cause for terminating the contract for default under FAR
3666 52.249-8, Default (Fixed-Priced Supply and Service).

3667
3668 **G.5.5 Utilization of Small Business Reporting**

3669 If required according to its business size, the Contractor shall submit the following Standard Forms (SF)
3670 and Optional Form (OP) for compliance with FAR, Part 19.7. The Contractor shall provide
3671 subcontracting information during the entire time that it is providing task order service under this
3672 contract.

3673
3674 The purpose of the forms is to collect subcontracting information on awards to: small business, small-
3675 disadvantaged business, women-owned small business, veteran-owned small business, veteran-owned
3676 small business, service-disabled veteran-owned small business and HUBZone small business concerns
3677 under the Contractor's subcontracting plan.

3678
3679 Each report shall be submitted to the GSA Contracting Officer, with a copy to the TO/CO, if reporting a
3680 task order written by an Agency contracting officer. Reports are due 30 days after the close of a reporting
3681 period.

3682
3683 Subcontracting Report for Individual Contracts (SF 294): This report is required on every task order and
3684 must be submitted semi-annually (for the six months ending March 31st and the twelve months ending
3685 September 30th). A separate report must be submitted for each task order.

3686
3687 Summary Subcontracting Report (SF 295): The report shall be submitted semi-annually (for the six
3688 months ending March 31st and the twelve months ending September 30th, if the task order is a
3689 Department of Defense requirement, and annually (for the twelve months ending September 30th for all
3690 other Agencies).

3691
3692 Small Disadvantaged Business Participation Report (OP 312): This report is prepared and submitted only
3693 when the Contractor is submitting a report for the last performance period of a task order on a Standard
3694 Form 294.

3695
3696

3697 **G.6 MARKETING**

3698 **G.6.1 Marketing Calls**

3699 The Contractor shall coordinate marketing efforts with the Director of USA Service at GSA to keep
3700 him/her apprised of planned client visits. The current director of GSA's USA Services E-Gov Initiative is
3701 Mr. Stuart Willoughby. His contact information is as follows:

3702
3703 General Services Administration
3704 Office of E-Gov Solutions Support (XCE)
3705 1800 F Street, NW (Room G-132)
3706 Washington D.C. 20405-0001

3707 Telephone Number: (202) 501-9121

3708

3709 **G.6.2 Trade Shows/ Exhibitions**

Request for Proposal GSV07PD0003
Amendment-A001

3710 The Contractor shall report participation in trade shows/exhibitions prior to attendance. Information
3711 provided shall consist of date, location, and name of conference. The Director of USA Service at GSA
3712 shall be notified at least two (2) weeks prior to the show/exhibit.
3713

SECTION H

SPECIAL CONTRACT REQUIREMENTS

3714
3715
3716
3717
3718
3719
3720

H.1 TERM OF CONTRACT

3721 The term of this contract shall cover a Base Period of two (2) years, followed by four (4) two-year option
3722 periods. The Government reserves the right to extend the term of this contract at the prices set forth in
3723 Section B in accordance with the terms and conditions contained in the clause in Section I, "Option to
3724 Extend the Term of the Contract".

3725
3726 During the contract base period and any of the option periods exercised by the ACO, the Government
3727 may issue task orders with performance periods, including options, of up to five (5) years in duration,
3728 provided that the task orders do not extend beyond year 3 of the Extended Performance Period. The term
3729 of such task orders can extend beyond the term of the contract under which it is written. If the situation
3730 arises where the task order will extend beyond the maximum term of the contract (i.e., into years eleven
3731 [11] through ~~fifteen [15]~~ thirteen [13] after contract award) the prices set forth for Extended Performance
3732 Periods in Section B shall apply for the respective periods.

3733
3734

H.1.1 Transition and Start-Up

3735 The time period required to transition new requirements will be determined on a case-by-case basis, and
3736 shall be stated in individual task orders. Transition shall begin at Notice-To-Proceed and continue for a
3737 period as specified in the task order. During the transition period, the Contractor shall work with the
3738 Government to develop a sound project implementation plan and to perform all preparatory work to
3739 establish one or more fully functional multi-channel contact centers in support of the task. The
3740 Government will transfer business and procedural data, including appropriate training material, to the
3741 Contractor, and work with the Contractor to establish appropriate system feeds. The transition period will
3742 provide the Contractor with the opportunity to prepare and staff its contact center; develop the support the
3743 knowledge base and scripts for automated response in support of the project; establish a fully functional
3744 contact center to handle the expected work volume; and complete all transition related activities to
3745 migrate the service to the new center. Government personnel will closely monitor the Contractor's effort
3746 to ensure a successful launch. Based on the Contractor's ability and expert advice on transitioning the
3747 work volume, the Government reserves the right to coordinate with the Contractor to achieve a staffing
3748 plan that minimizes disruption of the existing services and seamlessly transitions the customer base and
3749 work volumes to the new center.

3750
3751

H.1.2 North American Industry Classifications System (NAICS) 519190

3752 Effective October 1, 2000, Small Business size standards for all Federal Government Programs are those
3753 that the U.S. Small Business Administration (SBA), in conjunction with the U.S. Census Bureau, has
3754 established for industries as described in the NAICS. Size standard for industries described in Standard
3755 Industrial Classification (SIC) have been replaced by the NAICS and no longer apply.

3756
3757 For the purpose of this contract, NAICS Code 519190, Other Information Services, applies. The size
3758 standard is ~~\$6,000,000.00~~ \$6,500,000.

3759

3760 **H.2 OVERALL CONTRACT MINIMUM AMOUNT**

3761 The Government guarantees that this Contractor will be awarded a minimum order amount of \$10,000.00
3762 (ten thousand dollars) in aggregate task orders.

3763
3764 Task orders involving any item listed under Section B of this contract, including any Other Direct Costs
3765 associated with that item, will apply toward the calculation of the minimum order amount.
3766

3767

3768

3768 **H.3 OVERALL CONTRACT MAXIMUM AMOUNT**

3769 The maximum aggregate value of all task orders awarded under “USA Contact” shall not exceed
3770 \$2,500,000,000.00. USA Contact is defined as all contracts resulting from GSA solicitation
3771 GSV07PD0003.

3772

3773 Task orders involving any items listed under Section B of this contract, including any Other Direct Costs
3774 associated with those items, will apply toward the calculation of the minimum order amount. The
3775 maximum contract limitation shall be applied to the aggregate value of the base period and all option
3776 periods of all USA Contact contracts.
3777

3778

3779

3779 **H.4 SUPERVISION OF CONTRACTOR PERSONNEL**

3780 The Contractor’s employees shall remain under the Contractor’s direct supervision at all times. Although
3781 the Government will coordinate direction within the scope of the contract, detailed instructions for the
3782 Contractor’s employees’ performance and supervision shall remain the sole responsibility of the
3783 Contractor.
3784

3785

3786

3786 **H.5 STANDARDS OF CONDUCT AND RESTRICTIONS**

3787 The Contractor shall adhere to the same professional and ethical standards of conduct required of
3788 Government personnel. The Contractor shall not:

3789

3790 ○ Discuss with unauthorized persons any information obtained in the performance of work under
3791 this contract;

3792

3793 ○ Conduct business other than that which is covered by this contract during periods paid by the
3794 Government;

3795

3796 ○ Conduct business not directly related to this contract on Government premises;

3797

3798 ○ Use computer systems and/or other Government facilities for company or personal business; or

3799

3800 ○ Recruit personnel on Government premises or otherwise act to disrupt official Government
3801 business.
3802

3803

3804

3804 **H.6 REMOVAL OF CONTRACTOR PERSONNEL**

3805 Transfer and/or assignment of Contractor personnel shall be the prerogative of the Contractor;
3806 however, when the Task Order Contracting Officer (TO/CO) so directs, the Contractor shall
3807 remove from performance on the contract any and all persons who identified by the TO/CO as
3808 endangering life, property, or national security. The TO/CO's decision is final and is not subject
3809 to discussion or negotiation.

3810

3811 **H.7 KEY PERSONNEL**

3812 The Program Manager, Project Manager, or a designee who is capable of binding the Contractor
3813 contractually shall be considered key personnel for this contract. The Program Manager shall be the
3814 overall manager of the contract and single point-of-contact for resolution of contract-related issues.

3815

3816 The Contractor shall provide the following key personnel with assignment responsibilities as indicated:

3817

3818 H.7.1 *Program Manager* – responsible for managing and implementing the overall contract requirement
3819 and overseeing implementation of more complex tasks; organizes, directs, and coordinates planning, and
3820 implements all contract and/or task order support activities; interacts with high level program officials
3821 regarding issues and status of the contract and/or task orders; coordinates financial and staffing resources;
3822 monitors and analyzes contract and performance data, and reports results to senior Government officials;
3823 coordinates recruitment and training activities to keep staff current on agency programs and performance
3824 objectives; manages the activities of subcontractors; and reviews contract, operations and management
3825 reports. The Government reserves the right to approve the selection of the Contractor-assigned Program
3826 Manager prior to his/her placement in supporting a task order issued under this contract.

3827

3828 H.7.2 *Project Manager* – responsible for managing and implementing the overall Project; organizes,
3829 directs, and coordinates planning, and implements all Project support activities; interacts with
3830 Government program officials regarding issues and status of Projects; coordinates financial and staffing
3831 resources; monitors and analyzes performance data and reports results to the Government; coordinates
3832 training activities to keep staff current on Government programs and customer service objectives; and
3833 manages the activities of subcontractors. The Government reserves the right to approve the selection of
3834 the Contractor-assigned Project Manager prior to his/her placement in support of the task.

3835

3836 H.7.3 *Site Manager* – responsible for overall daily operations and management of the contact center,
3837 including staffing, facility, training, service delivery, problem escalation and resolution, and performance
3838 monitoring; provides technical assistance for the planning, design, installation, modification, and
3839 operation of telecommunications and information systems capabilities; ensures all functions and
3840 processes are implemented and operated properly.

3841

3842 H.7.4 *Information Systems Security Manager (ISSM)* – responsible for ensuring that information
3843 systems used in supporting task requirements comply with initial and ongoing information systems
3844 security requirements, in accordance with FIPS Publication 200, Minimum Security Requirements of
3845 Federal Information Systems. The ISSM shall ensure that information systems used to support a specific
3846 task meet the minimum security requirements as defined in FIPS Publication 200 through the use of
3847 security controls, in accordance with the NIST Special Publication 800 – 53, Recommended Security
3848 Controls for Federal Information Systems, As Amended. This includes preparing all required
3849 documentation for the compliance process, including a security plan, risk assessments, contingency and
3850 contingency test plans, a configuration management plan, system test and evaluation reports, security
3851 certifications, and an accreditation package.

3852

3853 The Contractor shall use all commercially reasonable efforts to ensure the continued availability of key
3854 personnel assigned to each task. Key personnel proposed and accepted for task orders issued under this

3855 contract are expected to be and remain dedicated to the task. Unless indicated otherwise in the Request
3856 for Quotation, key personnel will be dedicated to the task on a full-time basis. Substitutions will not be
3857 accepted unless specifically agreed upon in writing by the TO/CO. During the first one hundred eighty
3858 (180) days of the task order performance period, no key personnel substitutions will be permitted unless
3859 such substitutions are necessitated by an individual's sudden illness, death, or termination of employment,
3860 or as otherwise approved by the TO/CO. In any of these events, the Contractor shall promptly notify the
3861 TO/CO's Technical Representative (COTR) and provide the information required by Section G of this
3862 contract. After the initial one hundred eighty (180) day period, all proposed substitutions of key
3863 personnel must be submitted in writing, at least thirty (30) business days in advance of the proposed
3864 substitution, to the TO/CO except as provided herein. This provision also applies to personnel engaged
3865 by the Contractor's teaming partners and/or subcontractors if they are designated as key personnel.
3866
3867

3868 **H.8 SPECIAL HIRING REQUIREMENT**

3869 The Government is committed to using the services provided by individuals who are blind or severely
3870 handicapped through organizations affiliated with the Committee for Purchase From People Who Are
3871 Blind or Severely Disabled (National Industries for the Blind [NIB] and National Industries for the
3872 Severely Handicapped [NISH]) to fulfill part of the staffing requirements for this contract. Contractor-
3873 provided personnel shall consist of a minimum of five (5) percent of individuals employed through
3874 organizations affiliated with NIB and/or NISH. The Contractor is responsible for working with NIB
3875 and/or NISH affiliated agencies to recruit, hire, and train these individuals to ensure that performance
3876 objectives are not compromised. The Contractor is responsible for compensating NIB/NISH affiliated
3877 organizations for any work performed to recruit, hire, train, and retain these individuals for the
3878 performance of each task.
3879

3880 **H.9 INFORMATION SPECIALISTS HOURLY RATE**

3881 The unit of measure for the Hourly Information Specialist (IS) Rate is "HOUR" and refers to a "worked"
3882 hour. "Worked" time is defined as all time expended by an IS:

- 3883
- 3884 ○ gathering, researching, composing, or delivering responses to customer inquiries;
- 3885 ○ listening to, or actively communicating with, customers;
- 3886 ○ in performance of post inquiry work (such as updating systems or conducting follow up
- 3887 activities);
- 3888 ○ in the available (to respond to a call or inquiry) mode *;
- 3889 ○ while receiving instruction or coaching *;
- 3890 ○ while on breaks *; and
- 3891 ○ while attending task-related meetings *.

3892
3893 *Activities denoted with * are not accounted for nor reimbursed as "work time" under Information*
3894 *Specialist Hourly Rate for Shared or Non-Dedicated Response Services.*
3895

3896 **H.10 PLACE OF PERFORMANCE**

3897 The work to be performed by the Contractor can be categorized as follows:

- 3898
- 3899 ○ Start-up and implementation;

- 3900 ○ Contact center operations and management; and
- 3901 ○ Project management

3902
3903 Work performed during start-up can take place at the Contractor's facilities or on Government premises.
3904 Work performed for contact center operations and management shall take place primarily at one or more
3905 locations designated by the Contractor. Work performed for Project Management shall take place
3906 primarily at the Contractor's premises.

3907
3908
3909 **H.11 FEDERAL HOLIDAYS**

3910 The following days are considered Federal holidays and will be observed by the Contractor(s) in
3911 performance of work under each task order:

- 3912
- 3913 ○ New Year's Day (January 1)
- 3914 ○ Martin Luther King, Jr., Day (3rd Monday in January)
- 3915 ○ Washington's Birthday (3rd Monday in February)
- 3916 ○ Memorial Day (Last Monday in May)
- 3917 ○ Independence Day (July 4th)
- 3918 ○ Labor Day (1st Monday in September)
- 3919 ○ Columbus Day (2nd Monday in October)
- 3920 ○ Veterans Day (November 11)
- 3921 ○ Thanksgiving Day (4th Thursday in November)
- 3922 ○ Christmas Day (December 25th)

3923
3924 If any of the above holidays falls on a Saturday, then the preceding Friday is the holiday. If any of the
3925 above holidays falls on a Sunday, then the following Monday is the holiday.

3926
3927 In addition to the days designated above as holidays, the Government observes the following as non-
3928 working days:

- 3929
- 3930 ○ Any other day designated by Federal Statute
- 3931 ○ Any day designated by Executive Order
- 3932 ○ Any other day designated by the President's Proclamation

3933
3934 Contractor personnel shall work in accordance with the Government's designated holiday schedule unless
3935 otherwise stated specifically in the task order.

3936
3937 *NOTE:* Additional non-working days are sometimes authorized, but these are regional in nature (e.g.,
3938 Inauguration Day in Washington, DC) and not included as Federal holidays for the purposes of this
3939 contract.

3940

3941
3942

H.12 SYSTEMS REQUIREMENTS

3943 The Contractor shall provide and maintain robust and scalable state-of-the-art multi-channel contact
3944 center system hardware, software, and accessories to meet task order requirements. The Contractor shall
3945 provide a commercial off-the-shelf (COTS) solution that meets the Government requirements ~~with the~~
3946 ~~least amount of customization required~~. The system shall be adequately sized and equipped to handle
3947 fluctuations in the volume of inquiries received. The system shall be configured such that it can easily be
3948 expanded to accommodate growth in call volume; electronic and written inquiries, electronic transactions,
3949 automated voice responses and FAQ services; knowledge base; inquiry tracking; data storage and
3950 retrieval; automatic fax-back; and other affected areas. The systems shall have adequate backup
3951 capability to maximize availability and reliability of all services.

3952

3953 When Earned Value Management (EVM) is determined to be applicable to individual task orders issued
3954 under this contract, the requirements of Federal Acquisition Regulation: 52.234-02 Notice of Earned
3955 Value Management System Pre-Award; 52.234-03 Notice of Earned Value Management System; and
3956 52.234-04 Earned Value Management System will apply.

3957

3958

H.13 PERMITS

3960 The Contractor shall, without additional expense to the Government, be responsible for obtaining all
3961 necessary licenses and permits in connection with the performance of this contract. The Contractor shall
3962 also be responsible for complying with any applicable Federal, state, and municipal laws, codes, or
3963 regulations.

3964

3965

H.14 TELECOMMUNICATIONS INTERFACE

3967 The Government may provide its own telecommunication services to connect to the Contractor's
3968 facilities. The type of telecommunications access provided shall be at the discretion of the Government.
3969 After task order award, the Government will determine what solution is the most efficient and cost
3970 effective and will decide at that time what type of telecommunications access to use. If the Government
3971 requires an interface other than the one detailed by the Contractor in its Technical Proposal, the TO/CO
3972 and the Contractor may negotiate an equitable adjustment to the task order amount.

3973

3974

H.15 TRAVEL

H.15.1 Routine Travel

3977 Neither Contractor nor subcontractor employees will not be reimbursed for commuter travel for
3978 employees between their residences and their regular assigned duty stations, or for travel in support of
3979 project start-up and the day-to-day performance of this contract. A regular assigned duty station is
3980 defined as the Contractor employee's continuing place of duty, whether the assignment is permanent or
3981 temporary.

3982

H.15.2 Non-Routine Travel

3984 Non-routine travel directed by the Government will require the advance written approval of the TO/CO or
3985 his/her designee, and will be reimbursed as ODC expense. Reimbursement shall not exceed the rates and
3986 expenses allowed by Federal Travel Regulations (see <http://www.gsa.gov> "Federal Travel Regulation") to

3987 a Government employee traveling under identical circumstances. The Contractor shall comply with the
3988 more restrictive of its own internal policies or with the Government’s policies for making reimbursable
3989 travel and per-diem expenditures. The Government will supply the Contractor with a copy of its travel
3990 policies upon award of each task order issued under this contract or they may be accessed online as noted
3991 above. Note: if the task order is issued on a time and materials, or labor-hour basis, the provisions of
3992 Federal Acquisition Regulation 16.601 apply.
3993
3994
3995

3996 **H.16 CONTINGENCIES**

3997 The Contractor shall ensure continuity of call center operations, and shall be entirely responsible for
3998 maintaining continuity of support for the assigned tasks. Contractor employment and staffing difficulties
3999 will not be acceptable justification for failure to meet the requirements of the Performance Work
4000 Statement, Section C of this contract.
4001

4002 If required by the task order request for proposal, Contractor shall submit a contingency plan to the
4003 TO/CO’s Technical Representative (COTR) for approval by the task order start date. The plan shall
4004 outline the Contractor’s response to operational problems and its anticipated response to unusual events
4005 that may occur during the life of the task order and disrupt operations (such as a structural fire, accident,
4006 terrorist attack, personnel strike, extended power failure, etc.) which may require the Contractor to
4007 proceed under altered work conditions at locations other than those originally established. The Contractor
4008 shall continue to provide the services required by the contract, as directed by the COTR, for the duration
4009 of such an emergency situation.
4010

4011

4012 **H.17 COMPLIANCE WITH SECTION 508**

4013 The services requested under this contract are to be accessed by callers/users employing various
4014 technologies, including, but not limited to: touch-tone and rotary/dial-pulse telephones, TDD/TTY
4015 devices, mobile and wireless telephones, wireless communications devices, facsimile equipment, portable
4016 and desktop computers, and Internet appliances. Callers/users may use these devices to access the
4017 requested services via the telephone network, mobile and wireless network, the Internet, or other
4018 communications media. The Government requires that the information and services provided by the
4019 Contractor under this contract be made available in accessible formats.
4020

4021 The Contractor shall ensure that the technology infrastructure and support services provided are fully
4022 accessible by individuals with disabilities as required by Section 508 of the Rehabilitation Act
4023 Amendments of 1998. All Electronic and Information Technology systems provided under this contract
4024 must meet the applicable accessibility standards established in 36 CFR 1194, unless an agency exception
4025 to this requirement exists. 36CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as
4026 amended, and is viewable at <http://www.section508.gov> – E & IT Requirements.
4027

4028

4029 **H.18 CONSTRUCTIVE CHANGE ORDERS**

4030 No order, statement, or conduct of the TO/CO, authorized representative(s) of the TO/CO, or any other
4031 representative of the Government, whether or not the individual is acting within the limits of his/her
4032 authority shall constitute a change under the “Changes” clause of this contract, or entitle the Contractor to
4033 an equitable adjustment of the task order price or delivery schedule unless such change is issued in
4034 writing and signed by the TO/CO. No representative of the TO/CO shall be authorized to issue a written

4035 change order under the “Changes” clause of this contract. The Contractor shall be under no obligation to
4036 comply with any orders or directions not issued in writing and signed by the TO/CO.
4037

4038
4039 **H.19 GOVERNMENT OBSERVATIONS**

4040 Prior to the award of a task order, the TO/CO and the task order’s COTR will develop a Quality
4041 Assurance Evaluation (QAE) plan designed to evaluate the quality of service being provided to
4042 Government. The QAE plan will be used in conjunction with the performance standards set forth in the
4043 task order’s statement of objectives. The QAE process will include such things as: sampling of services;
4044 a method of inspecting the sample; the frequency of such inspections; documentation of the QAE
4045 findings; feedback from customers; the minutes of meetings with the Contractor (periodic and ad hoc);
4046 Contractor response to evaluation findings and the corrective action(s) instituted, if any. The process will
4047 form the basis for determining the acceptability of services provided under the Inspection of Services
4048 clause of the contract.
4049

4050 In addition, Government safety officials and other agency officials reserve the right to conduct surveys
4051 and inspections of operations and facilities. Other Government personnel, such as Inspector General’s
4052 staff, are authorized to observe Contractor performance and records. In addition, the Government may
4053 use third-party Contractor personnel to provide various forms of service, such as audits or customer
4054 surveys. Any such Contractor personnel will be required to sign non-disclosure agreements to protect
4055 each contract holder’s procurement-sensitive information. These personnel will not interfere with the
4056 Contractor’s performance, and the Contractor shall provide all such personnel with its full cooperation.
4057 All comments concerning the Contractor’s operations will be provided to the COTR. Findings from any
4058 audit, report, survey, etc. may be provided to the TO/CO, as deemed appropriate by the COTR.
4059

4060
4061 **H.20 ADMINISTRATIVE IMPROVEMENTS/SERVICE ENHANCEMENTS**

4062 It is the intention of the Government to work with the Contractor to introduce administrative
4063 improvements and service enhancements that would be advantageous to the Government and the
4064 Contractor. The Contractor agrees to negotiate in good faith with the Government to implement any
4065 suggested administrative improvements or service enhancements that are determined to be in the best
4066 interests of both parties.
4067

4068
4069 **H.21 TASK ORDER PHASE-OUT PROCEDURES**

4070 At the conclusion of a task order, the Government may require the Contractor to participate in a task order
4071 phase-out process. If the Government so directs, the following procedures will apply:
4072

4073 After the Government’s selection of a successor Contractor, but prior to the end of the expiring task order,
4074 the current Contractor and the successor Contractor will jointly prepare a mutually agreeable detailed plan
4075 for the transition to the successor Contractor.
4076

4077 The current Contractor agrees to provide, if required in writing by the Government, transitional services
4078 for a period of up to ninety (90) days after the expiration of the current task order at the then current task
4079 order prices. Continuity for all operations required under the task order shall be maintained during that
4080 period.
4081

4082
4083

H.22 DISCLOSURE OF INFORMATION

4084 Any Government information made available to the Contractor or gathered by the Contractor from
4085 Government employees or customers shall be used only for the purpose of carrying out the provisions of
4086 this contract, and shall not be divulged or made known in any manner to any person except as may be
4087 necessary in the performance of task requirements. Furthermore, no article, book, pamphlet, recording,
4088 broadcast, speech, television appearance, film, or photograph concerning any aspect of work performed
4089 under this contract shall be published or disseminated through any medium without prior written
4090 authorization from the Government. These obligations do not cease upon expiration or termination of this
4091 contract. The Contractor shall include the substance of this provision in all contracts for employment and
4092 subcontracting work performed under this contract.

4093

4094 In performance of this contract, the Contractor agrees to assume responsibility for protecting the
4095 confidentiality of Government information, and for ensuring that all work is performed under the
4096 supervision of the Contractor or the Contractor's responsible employees. The Contractor shall keep
4097 confidential information provided by inquirers consistent with Federal law, primarily the Privacy Act of
4098 1974 and the Freedom of Information Act and their amendments. The Contractor shall not disclose
4099 personal identification information (e.g. name, address, telephone number) or personal financial
4100 information (e.g. credit card account number) of an inquirer without the verbal or written consent of the
4101 inquirer, provided that such verbal consent is recorded.

4102

4103 Inquirers who make threats against persons or property, either Government or private, may have already
4104 forfeited their rights to privacy thereby. The Contractor shall work with the appropriate Government law
4105 enforcement agency(ies) for the prevention of threatened crime on a case-by-case basis.

4106

4107 Each employee of the Contractor to whom information may be made available or disclosed shall be
4108 notified in writing by the Contractor that information disclosed to such employee can be used only for the
4109 purpose and to the extent authorized herein. Use of such information for a purpose or to an extent not
4110 authorized herein may subject the offender to criminal sanctions imposed by 18 United States Code
4111 (U.S.C.) 641. The law provides, in pertinent part, that whoever knowingly converts to their use or to the
4112 use of another, or without authority sells, conveys, or disposes of any record of the United States, or
4113 whoever receives the same with intent to convert it to his/her use or gain, knowing it to have been
4114 converted, shall be guilty of a crime punishable by a fine of up to \$10,000, or imprisonment up to 10
4115 years, or both.

4116

4117 The limitations noted in the preceding paragraphs do not apply to information which has been made
4118 public by the Government. Further, this provision does not preclude the use of any information
4119 independently acquired by the Contractor without such limitations, or prohibit an agreement, at no cost to
4120 the Government, between the Contractor and the information owner, which provides for greater rights to
4121 the Contractor.

4122

4123

4124 H.23 LIABILITY

4125 H.23.1 Performance Liability

4126 The Contractor will not be liable for any form of consideration when the failure to provide service or meet
4127 contract requirements arises from causes beyond the control and without the fault or negligence of the
4128 Contractor. Examples of such causes include:

4129

- 4130 ○ Acts of God or of the public enemy

- 4131 ○ Fires
- 4132 ○ Floods
- 4133 ○ Epidemics
- 4134 ○ Quarantine restrictions
- 4135 ○ Freight embargoes
- 4136 ○ Unusually severe weather
- 4137 ○ Denial of access by a third party

4138 **H.23.2 Information Liability**

4139 The Contractor shall be solely responsible for damages suffered by the public that result from the use
4140 and/or dissemination of information not previously approved by the Government during the performance
4141 of this contract. Information to be supplied by the Government, along with the approval process required
4142 for adding new and/or updating existing information, will be specified in individual task orders.

4143
4144
4145

4146 **H.24 HOLD HARMLESS AND INDENNIFICATION**

4147
4148 The Contractor shall save, hold harmless, and indemnify the Government against any and all liability,
4149 claims, and costs of whatever kind or nature for injury to or death of any person or persons, and for loss,
4150 destruction, or damage to any property (including electronic storage areas), occurring in connection with
4151 or in any way incident to or arising out of the occupancy, use, service, operations, or performance of work
4152 under the terms of this contract, resulting in whole or in part from the willful, negligent, or careless acts or
4153 omissions of the Contractor, its subcontractors, or any employee, agent, or representative of the
4154 Contractor or its subcontractors.

4155
4156

4157 **H.25 OWNERSHIP OF DATA**

4158
4159 During the course of this contract, the Contractor will create and maintain databases that are used in
4160 support of processing inquiries, and contain information such as scripted responses, topical information
4161 entries, business rules, preformatted responses, personal information, transaction histories, and agency
4162 contacts. The Contractor may also capture and store certain inquiry data in Contractor-provided and/or
4163 Government-provided databases. All of this information is the property of the Government. At the
4164 conclusion of each task order issued under this contract, or upon termination of this contract, all
4165 information resources developed in support of the task(s), including any databases or associated formats
4166 or call tools, shall be turned over to the Government in their entirety. Should a task order terminate for
4167 any reason, the Contractor shall arrange for the timely transfer of such data records to the Government.
4168 The Contractor may not keep any information resources or paper or electronic copies of information
4169 without the express written consent of the Contracting Officer's Technical Representative. If the
4170 supporting software systems are not commercially available at that time, the Contractor shall sell or
4171 license the software to the agency at a good faith mutually agreed upon price. Failure on the part of the
4172 Contractor to negotiate such pricing in good faith, or to provide such software on demand shall be subject
4173 to the Disputes clause of this contract.

4174

4175
4176
4177
4178
4179
4180
4181
4182
4183

H.26 NEWS RELEASES

News releases pertaining to task orders issued under this contract shall not be made by the Contractor without the prior written approval of the ACO or his/her designee. A minimum of 48 hours' notice is required to respond to Contractor requests for approval to release contract-related information to the news media. The Contractor's request shall contain a copy of the specific information for which the Contractor is seeking approval to release, and a description of the intended form of release.

4184 **H.27 ELECTRONIC ACCESS TO THE CONTRACT**

4185 The Contractor is hereby advised that, in compliance with the Freedom of Information Act, a redacted
4186 version of the contract and all modifications thereto will be made available on the Internet.

4187
4188 The Contractor shall submit both a redacted version and a non-redacted version of the contract to the
4189 ACO within fifteen (15) business days after contract award. Each version shall be submitted in both
4190 "Adobe .pdf" format and in "Microsoft Word" format. The redacted version shall be prepared in
4191 accordance with Freedom of Information Act guidance and will be approved by the ACO before release.

4192
4193 This process shall be repeated each time a modification to the contract is awarded.
4194

4195

4196 **H.28 MARKETING EFFORTS**

4197 The Contractor is responsible for ongoing marketing efforts during the life of this contract as specified
4198 below. Such efforts will commence not later than thirty (30) calendar days after contract award, subject
4199 to the following:

- 4200 ○ All marketing brochures shall conform to the requirements of the GSAR 552.203-70 and be
4201 approved by the ACO prior to issuance
- 4202 ○ Contractors shall not assist prospective client agencies in the development of future requirements,
4203 or provide preliminary estimates, except as provided for in an existing task order
- 4204 ○ Contractors shall not include marketing expenses as a direct cost item
- 4205 ○ Approval for marketing by the Contractor does not obligate GSA to undertake, under this
4206 contract, any potential work identified
- 4207
- 4208
- 4209
- 4210
- 4211

4212 **H.28.1 Marketing Calls**

4213 The Contractor shall prepare and give formal or informal presentations to prospective GSA clients on the
4214 contract when requested by the Government. These presentations will be consistent with materials
4215 previously reviewed and approved for use by GSA.

4216 **H.28.2 Marketing Materials**

4217
4218 The Contractor shall provide marketing materials which will enhance program and service visibility. The
4219 types of marketing materials provided shall be at the discretion of the Contractor, and may include the
4220 following: brochures, pamphlets, visual aids, newsletters, technology updates, white papers, news
4221 releases, training tools and seminars, work tools and materials such as quick reference

Request for Proposal GSV07PD0003
Amendment-A001

4222 estimating/measuring tools, folders, pens, mouse pads, rolodex cards, and literature. The Contractor shall
4223 provide sample marketing materials prior to distribution. GSA will have ten (10) working days to review
4224 and approve materials.

PART II

SECTION I - CONTRACT CLAUSES

I.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>.

I.1.1 FEDERAL ACQUISITION REGULATION (48 CFR, APR 1984) CLAUSES

<u>Clause No.</u>	<u>Clause Title</u>	<u>Date</u>
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

4242
4243

FEDERAL ACQUISITION REGULATION CLAUSES, *continued*

<u>Clause No.</u>	<u>Clause Title</u>	<u>Date</u>
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
52.219-23	Notice of Price Evaluation Adjustment for Small Disadvantaged Business Concerns	SEP 2005
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

4247
4248

FEDERAL ACQUISITION REGULATION CLAUSES, *continued*

<u>Clause No.</u>	<u>Clause Title</u>	<u>Date</u>
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

4252

FEDERAL ACQUISITION REGULATION CLAUSES, *continued*

4253

<u>Clause No.</u>	<u>Clause Title</u>	<u>Date</u>
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

4257

4258

I.1.2 GENERAL SERVICES ADMINISTRATION MANUAL (GSAM) CLAUSES

4260

52.222-42 STATEMENT OF EQUIVALENT RATES FOR FEDERAL HIRES (MAY 1989)

4262 In compliance with the Service Contract Act of 1965, as amended, and the regulations of the Secretary of
4263 Labor (29 CFR Part 4), this clause identifies the classes of service employees expected to be employed
4264 under the contract and states the wages and fringe benefits payable to each if they were employed by the
4265 contracting agency subject to the provisions of 5 U.S.C. 5341 or 5332.

4266

4267

This Statement is for Information Only: It is not a Wage Determination

Employee Class	Monetary Wage-Fringe Benefits
_____	_____
_____	_____
_____	_____
_____	_____

4268

4269 **552.203-71 RESTRICTION ON ADVERTISING (SEP 1999)**

4270 The Contractor shall not refer to this contract in commercial advertising or similar promotions in such a
4271 manner as to state or imply that the product or service provided is endorsed or preferred by the White
4272 House, the Executive Office of the President, or any other element of the Federal Government, or is
4273 considered by these entities to be superior to other products or services. Any advertisement by the
4274 Contractor, including price-off coupons, that refers to a military resale activity shall contain the following
4275 statement:

4276 "This advertisement is neither paid for nor sponsored, in whole or in part, by any element
4277 of the United States Government."
4278

4279 **552.215-70 EXAMINATION OF RECORDS BY GSA (FEB 1996)**

4280 The Contractor agrees that the Administrator of General Services or any duly authorized representatives
4281 shall, until the expiration of 3 years after final payment under this contract, or of the time periods for the
4282 particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever
4283 expires earlier, have access to and the right to examine any books, documents, papers, and records of the
4284 Contractor involving transactions related to this contract or compliance with any clauses thereunder. The
4285 Contractor further agrees to include in all its subcontracts hereunder a provision to the effect that the
4286 subcontractor agrees that the Administrator of General Services or any authorized representatives shall,
4287 until the expiration of 3 years after final payment under the subcontract, or of the time periods for the
4288 particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever
4289 expires earlier, have access to and the right to examine any books, documents, papers, and records of such
4290 subcontractor involving transactions related to the subcontract or compliance with any clauses there
4291 under. The term "subcontract" as used in this clause excludes (a) purchase orders not exceeding \$100,000
4292 and (b) subcontracts or purchase orders for public utility services at rates established for uniform
4293 applicability to the general public.

4294

4295 **552.232-1 PAYMENTS (APR 1984) (DEVIATION, FAR 52.232-1)**

4296 (a) The Government shall pay the Contractor, without submission of invoices or vouchers, 30 days after
4297 the service period, the prices stipulated in this contract for supplies delivered and accepted or
4298 services rendered and accepted, less any deductions provided in this contract.

4299 (b) Unless otherwise specified in this contract, the Government will make payment on partial deliveries
4300 accepted by the Government if either:

4301 (1) The amount due on the deliveries warrants it.

Request for Proposal GSV07PD0003
Amendment-A001

4302 (2) The Contractor requests it and the amount due on the deliveries is at least \$1,000 or 50 percent of
4303 the total contract price.

4304 (c) When processing payment, GSA's Finance Office will automatically generate the 12 digit invoice
4305 number using the ACT number assigned to the contract, followed by an abbreviated month and year
4306 of service (e.g., 84261554JUN7, for June 1997). The ACT number appears on the contract award
4307 document.

4308 **552.232-25 PROMPT PAYMENT (JUL 1998) (DEVIATION FAR 52.232-25)**

4309 Notwithstanding any other payment clause in this contract, the Government will make invoice payments
4310 and contract financing payments under the terms and conditions specified in this clause. Payment shall be
4311 considered as being made on the day a check is dated or the date of an electronic funds transfer.
4312 Definitions of pertinent terms are set forth in section 32.902 of the Federal Acquisition Regulation. All
4313 days referred to in this clause are calendar days, unless otherwise specified. (However, see subparagraph
4314 (a)(4) of this clause concerning payments due on Saturdays, Sundays, and legal holidays.)

4315 (a) Invoice payments.
4316

4317 (1) The due date for making invoice payments by the designated payment office is:

4318 (i) For orders placed electronically by the General Services Administration (GSA) Federal
4319 Supply Service (FSS), and to be paid by GSA through electronic funds transfer (EFT), the
4320 later of the following two events:

4321 (A) The 10th day after the designated billing office receives a proper invoice from the
4322 Contractor. If the designated billing office fails to annotate the invoice with the date
4323 of receipt at the time of receipt, the invoice payment due date shall be the 10th day
4324 after the date of the Contractor's invoice; provided the Contractor submitted a proper
4325 invoice and no disagreement exists over quantity, quality, or Contractor compliance
4326 with contract requirements.

4327 (B) The 10th day after Government acceptance of supplies delivered or services
4328 performed by the Contractor.

4329 (ii) For all other orders, the later of the following two events:

4330 (A) The 30th day after the designated billing office receives a proper invoice from the
4331 Contractor. If the designated billing office fails to annotate the invoice with the date
4332 of receipt at the time of receipt, the invoice payment due date shall be the 30th day
4333 after the date of the Contractor's invoice; provided the Contractor submitted a proper
4334 invoice and no disagreement exists over quantity, quality, or Contractor compliance
4335 with contract requirements.

4336 (B) The 30th day after Government acceptance of supplies delivered or services
4337 performed by the Contractor.

4338 (iii) On a final invoice, if the payment amount is subject to contract settlement actions, acceptance
4339 occurs on the effective date of the contract settlement.

Request for Proposal GSV07PD0003
Amendment-A001

- 4340 (2) The General Services Administration will issue payment on the due date in (a)(1)(i) above if the
4341 Contractor complies with full cycle electronic commerce. Full cycle electronic commerce
4342 includes all the following elements:
- 4343 (i) The Contractor must receive and fulfill electronic data interchange (EDI) purchase orders
4344 (transaction set 850).
- 4345 (ii) The Contractor must generate and submit to the Government valid EDI invoices (transaction
4346 set 810) or submit invoices through the GSA Finance Center Internet-based invoice process.
4347 Internet-based invoices must be submitted using procedures provided by GSA.
- 4348 (iii) The Contractor's financial institution must receive and process, on behalf of the Contractor,
4349 EFT payments through the Automated Clearing House (ACH) system.
- 4350 (iv) The EDI transaction sets in (i) through (iii) above must adhere to implementation conventions
4351 provided by GSA.
- 4352 (3) If any of the conditions in (a)(2) above do not occur, the 10 day payment due dates in (a)(1)
4353 become 30 day payment due dates.
- 4354 (4) Certain food products and other payments.
- 4355 (i) Due dates on Contractor invoices for meat, meat food products, or fish; perishable
4356 agricultural commodities; and dairy products, edible fats or oils, and food products prepared
4357 from edible fats or oils are—
- 4358 (A) For meat or meat food products, as defined in section 2(a)(3) of the Packers and
4359 Stockyard Act of 1921 (7 U.S.C. 182(3)), and as further defined in Pub. L. 98-181,
4360 including any edible fresh or frozen poultry meat, any perishable poultry meat food
4361 product, fresh eggs, and any perishable egg product, as close as possible to, but not
4362 later than, the 7th day after product delivery.
- 4363 (B) For fresh or frozen fish, as defined in section 204(3) of the Fish and Seafood
4364 Promotion Act of 1986 (16 U.S.C. 4003(3)), as close as possible to, but not later than,
4365 the 7th day after product delivery.
- 4366 (C) For perishable agricultural commodities, as defined in section 1(4) of the Perishable
4367 Agricultural Commodities Act of 1930 (7 U.S.C. 499a(4)), as close as possible to, but
4368 not later than, the 10th day after product delivery, unless another date is specified in
4369 the contract.
- 4370 (D) For dairy products, as defined in section 111(e) of the Dairy Production Stabilization
4371 Act of 1983 (7 U.S.C. 4502(e)), edible fats or oils, and food products prepared from
4372 edible fats or oils, as close as possible to, but not later than, the 10th day after the
4373 date on which a proper invoice has been received. Liquid milk, cheese, certain
4374 processed cheese products, butter, yogurt, ice cream, mayonnaise, salad dressings,
4375 and other similar products, fall within this classification. Nothing in the Act limits
4376 this classification to refrigerated products. When questions arise regarding the proper
4377 classification of a specific product, prevailing industry practices will be followed in
4378 specifying a contract payment due date. The burden of proof that a classification of a

4379 specific product is, in fact, prevailing industry practice is upon the Contractor making
4380 the representation.

4381 (ii) If the contract does not require submission of an invoice for payment (e.g., periodic lease
4382 payments), the due date will be as specified in the contract.

4383 (5) Contractor's invoice. The Contractor shall prepare and submit invoices to the designated billing
4384 office specified in the contract. Notwithstanding paragraph (g) of the clause at FAR 52.212-4,
4385 Contract Terms and Conditions—Commercial Items, if the Contractor submits hard-copy
4386 invoices, submit only an original invoice. No copies of the invoice are required. A proper invoice
4387 must include the items listed in subdivisions (a)(5)(i) through (a)(5)(viii) of this clause. If the
4388 invoice does not comply with these requirements, it shall be returned within 7 days after the date
4389 the designated billing office received the invoice (3 days for meat, meat food products, or fish; 5
4390 days for perishable agricultural commodities, edible fats or oils, and food products prepared from
4391 edible fats or oils), with a statement of the reasons why it is not a proper invoice. Untimely
4392 notification will be taken into account in computing any interest penalty owed the Contractor in
4393 the manner described in subparagraph (a)(5) of this clause.

4394 (i) Name and address of the Contractor.

4395 (ii) Invoice date. (The Contractor is encouraged to date invoices as close as possible to the date of
4396 the mailing or transmission.)

4397 (iii) Contract number or other authorization for supplies delivered or services performed
4398 (including order number and contract line item number).

4399 (iv) Description, quantity, unit of measure, unit price, and extended price of supplies delivered or
4400 services performed.

4401 (v) Shipping and payment terms (e.g., shipment number and date of shipment, prompt
4402 payment discount terms). Bill of lading number and weight of shipment will be shown for
4403 shipments on Government bills of lading.

4404 (vi) Name and address of Contractor official to whom payment is to be sent (must be the same
4405 as that in the contract or in a proper notice of assignment).

4406 (vii) Name (where practicable), title, phone number, and mailing address of person to be
4407 notified in the event of a defective invoice.

4408 (viii) Any other information or documentation required by the contract (such as evidence of
4409 shipment).

4410 (ix) While not required, the Contractor is strongly encouraged to assign an identification
4411 number to each invoice.

4412 (6) Interest penalty. An interest penalty shall be paid automatically by the designated payment office,
4413 without request from the Contractor, if payment is not made by the due date and the conditions
4414 listed in subdivisions (a)(6)(i) through (a)(6)(iii) of this clause are met, if applicable. However,
4415 when the due date falls on a Saturday, Sunday, or legal holiday when Federal Government offices
4416 are closed and Government business is not expected to be conducted, payment may be made on
4417 the following business day without incurring a late payment interest penalty.

- 4418 (i) A proper invoice was received by the designated billing office.
- 4419 (ii) A receiving report or other Government documentation authorizing payment was processed,
4420 and there was no disagreement over quantity, quality, or Contractor compliance with any
4421 contract term or condition.
- 4422 (iii) In the case of a final invoice for any balance of funds due the Contractor for supplies
4423 delivered or services performed, the amount was not subject to further contract settlement
4424 actions between the Government and the Contractor.
- 4425 (7) Computing penalty amount. The interest penalty shall be at the rate established by the Secretary
4426 of the Treasury under section 12 of the Contract Disputes Act of 1978 (41 U.S.C. 611) that is in
4427 effect on the day after the due date, except where the interest penalty is prescribed by other
4428 Governmental authority (e.g., tariffs). This rate is referred to as the "Renegotiation Board Interest
4429 Rate," and it is published in the Federal Register semiannually on or about January 1 and July 1.
4430 The interest penalty shall accrue daily on the invoice principal payment amount approved by the
4431 Government until the payment date of such approved principal amount; and will be compounded
4432 in 30-day increments inclusive from the first day after the due date through the payment date.
4433 That is, interest accrued at the end of any 30-day period will be added to the approved invoice
4434 principal payment amount and will be subject to interest penalties if not paid in the succeeding
4435 30-day period. If the designated billing office failed to notify the Contractor of a defective invoice
4436 within the periods prescribed in subparagraph (a)(5) of this clause, the due date on the corrected
4437 invoice will be adjusted by subtracting from such date the number of days taken beyond the
4438 prescribed notification of defects period. Any interest penalty owed the Contractor will be based
4439 on this adjusted due date. Adjustments will be made by the designated payment office for errors
4440 in calculating interest penalties.
- 4441 (i) For the sole purpose of computing an interest penalty that might be due the Contractor,
4442 Government acceptance shall be deemed to have occurred constructively on the 7th day
4443 (unless otherwise specified in this contract) after the Contractor delivered the supplies or
4444 performed the services in accordance with the terms and conditions of the contract, unless
4445 there is a disagreement over quantity, quality, or Contractor compliance with a contract
4446 provision. In the event that actual acceptance occurs within the constructive acceptance
4447 period, the determination of an interest penalty shall be based on the actual date of
4448 acceptance. The constructive acceptance requirement does not, however, compel Government
4449 officials to accept supplies or services, perform contract administration functions, or make
4450 payment prior to fulfilling their responsibilities.
- 4451 (ii) The following periods of time will not be included in the determination of an interest penalty:
4452 (A) The period taken to notify the Contractor of defects in invoices submitted to the
4453 Government, but this may not exceed 7 days (3 days for meat, meat food products,
4454 or fish; 5 days for perishable agricultural commodities, dairy products, edible fats or
4455 oils, and food products prepared from edible fats or oils).
- 4456 (B) The period between the defects notice and resubmission of the corrected invoice by
4457 the Contractor.
- 4458 (C) For incorrect electronic funds transfer (EFT) information, in accordance with the
4459 EFT clause of this contract.
- 4460 (iii) Interest penalties will not continue to accrue after the filing of a claim for such penalties
4461 under the clause at 52.233-1, Disputes, or for more than 1 year. Interest penalties of less
4462 than \$1 need not be paid.

- 4463 (iv) Interest penalties are not required on payment delays due to disagreement between the
4464 Government and the Contractor over the payment amount or other issues involving contract
4465 compliance or on amounts temporarily withheld or retained in accordance with the terms of
4466 the contract. Claims involving disputes, and any interest that may be payable, will be resolved
4467 in accordance with the clause at 52.233-1, Disputes.
- 4468 (8) Prompt payment discounts. An interest penalty also shall be paid automatically by the designated
4469 payment office, without request from the Contractor, if a discount for prompt payment is taken
4470 improperly. The interest penalty will be calculated as described in subparagraph (a)(7) of this
4471 clause on the amount of discount taken for the period beginning with the first day after the end of
4472 the discount period through the date when the Contractor is paid.
- 4473 (9) Additional interest penalty.
- 4474 (i) If this contract was awarded on or after October 1, 1989, a penalty amount, calculated in
4475 accordance with subdivision (a)(9)(iii) of this clause, shall be paid in addition to the interest
4476 penalty amount if the Contractor--
- 4477 (A) Is owed an interest penalty of \$1 or more;
- 4478 (B) Is not paid the interest penalty within 10 days after the date the invoice amount is
4479 paid; and
- 4480 (C) Makes a written demand to the designated payment office for additional penalty
4481 payment, in accordance with subdivision (a)(9)(ii) of this clause, postmarked not later
4482 than 40 days after the invoice amount is paid.
- 4483 (ii) (A) Contractors shall support written demands for additional penalty payments with the
4484 following data. No additional data shall be required. Contractors shall—
- 4485 (1) Specifically assert that late payment interest is due under a specific invoice, and
4486 request payment of all overdue late payment interest penalty and such additional
4487 penalty as may be required;
- 4488 (2) Attach a copy of the invoice on which the unpaid late payment interest was due;
4489 and
- 4490 (3) State that payment of the principal has been received, including the date of
4491 receipt.
- 4492 (B) Demands must be postmarked on or before the 40th day after payment was made,
4493 except that--
- 4494 (1) If the postmark is illegible or nonexistent, the demand must have been received
4495 and annotated with the date of receipt by the designated payment office on or
4496 before the 40th day after payment was made; or
- 4497 (2) If the postmark is illegible or nonexistent and the designated payment office fails
4498 to make the required annotation, the demand's validity will be determined by the
4499 date the Contractor has placed on the demand; provided such date is no later than
4500 the 40th day after payment was made.
- 4501 (iii) (A) The additional penalty shall be equal to 100 percent of any original late payment
4502 interest penalty, except--
- 4503 (1) The additional penalty shall not exceed \$5,000;
- 4504 (2) The additional penalty shall never be less than \$25; and

4505 (3) No additional penalty is owed if the amount of the underlying interest penalty is
4506 less than \$1.

4507 (B) If the interest penalty ceases to accrue in accordance with the limits stated in
4508 subdivision (a)(5)(iii) of this clause, the amount of the additional penalty shall be
4509 calculated on the amount of interest penalty that would have accrued in the absence
4510 of these limits, subject to the overall limits on the additional penalty specified in
4511 subdivision (a)(7)(iii)(A) of this clause.

4512 (C) For determining the maximum and minimum additional penalties, the test shall be the
4513 interest penalty due on each separate payment made for each separate contract. The
4514 maximum and minimum additional penalty shall not be based upon individual
4515 invoices unless the invoices are paid separately. Where payments are consolidated for
4516 disbursing purposes, the maximum and minimum additional penalty determination
4517 shall be made separately for each contract therein.

4518 (D) The additional penalty does not apply to payments regulated by other Government
4519 regulations (e.g., payments under utility contracts subject to tariffs and regulation).

4520 (b) Contract financing payments.

4521 (1) Due dates for recurring financing payments. If this contract provides for contract financing,
4522 requests for payment shall be submitted to the designated billing office as specified in this
4523 contract or as directed by the Contracting Officer. Contract financing payments shall be made
4524 on the *[insert day as prescribed by Agency head; if not prescribed, insert 30th day]* day after
4525 receipt of a proper contract financing request by the designated billing office. In the event that
4526 an audit or other review of a specific financing request is required to ensure compliance with the
4527 terms and conditions of the contract, the designated payment office is not compelled to make
4528 payment by the due date specified.

4529 (2) Due dates for other contract financing. For advance payments, loans, or other arrangements
4530 that do not involve recurring submissions of contract financing requests, payment shall be made
4531 in accordance with the corresponding contract terms or as directed by the Contracting Officer.

4532 (3) Interest penalty not applicable. Contract financing payments shall not be assessed an interest
4533 penalty for payment delays.

4534 (c) Fast payment procedure due dates. If this contract contains the clause at 52.213-1, Fast Payment
4535 Procedure, payments will be made within 15 days after the date of receipt of the invoice.

4536

4537 **552.232-70 INVOICE REQUIREMENTS (SEP 1999)**

4538 (a) Invoices shall be submitted in an original only, unless otherwise specified, to the designated billing
4539 office specified in this contract or order.

4540 (b) Invoices must include the Accounting Control Transaction (ACT) number provided below or on the
4541 order.

4542 ACT Number *(To be provided on each, individual Task Order)*

4543 (c) In addition to the requirements for a proper invoice specified in the Prompt Payment clause of this
4544 contract or order, the following information or documentation must be submitted with each invoice:

4545 *(As may be required on individual Task Orders).*

4546

4547

4548 **552.232-78 PAYMENT INFORMATION (JUL 2000)**

4549 The General Services Administration (GSA) makes information on contract payments available
4550 electronically at <http://www.finance.gsa.gov>. The Contractor may register at the site and review its record
4551 of payments. This site provides information only on payments made by GSA, not by other agencies.

4552

4553 **552.252-6 AUTHORIZED DEVIATIONS IN CLAUSES (DEVIATION FAR 52.252-6) (SEP 1999)**

4554 (a) Deviations to FAR clauses.

4555 (1) This solicitation or contract indicates any authorized deviation to a Federal Acquisition
4556 Regulation (48 CFR Chapter 1) clause by the addition of “(DEVIATION)” after the date of
4557 the clause, if the clause is not published in the General Services Administration Acquisition
4558 Regulation (48 CFR Chapter 5).

4559 (2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation
4560 (FAR) clause that is published in the General Services Administration Acquisition Regulation
4561 by the addition of “(DEVIATION [FAR clause no.])” after the date of the clause.

4562 (b) Deviations to GSAR clauses. This solicitation indicates any authorized deviation to a General
4563 Services Administration Acquisition Regulation clause by the addition of “(DEVIATION)” after the
4564 date of the clause.

4565 (c) “Substantially the same as clauses.” Changes in wording of clauses prescribed for use on a
4566 “substantially the same as” basis are not considered deviations.

4567

4568
4569
4570
4571
4572
4573
4574
4575
4576
4577
4578
4579
4580
4581
4582
4583
4584
4585
4586
4587
4588
4589
4590
4591
4592
4593
4594
4595
4596
4597
4598
4599
4600
4601
4602
4603
4604
4605
4606
4607

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: ~~OUTLINE FOR~~ TECHNICAL PROPOSALS INDEX

Offerors shall use the outline in Attachment 3 in preparing ~~their technical proposals~~ 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.



Past Performance Questionnaire (page 2 of 4)

4612
4613
4614
4615
4616
4617

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		



4618
4619
4620
4621

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		



4622
4623
4624
4625

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		
Signature:		Date:

4626
4627
4628
4629
4630
4631
4632
4633
4634
4635
4636
4637
4638
4639
4640
4641
4642
4643
4644

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



4645 **Attachment 2: Small Business Subcontracting Plan Outline (Model)**

4646
4647 ***PLEASE NOTE:*** *This model is provided as a tool. It does not establish minimum requirements for an acceptable*
4648 *plan. The model reflects objectives GSA encourages contractors to adopt. GSA expects offerors to thoroughly*
4649 *review the requirements set forth in FAR 19.704, Subcontracting plan requirements, and FAR clause 52.219-9,*
4650 *Small Business Subcontracting Plan, before submitting their contracting plans.*

4651
4652 The model is not intended to replace any existing corporate plan which is more extensive. If you need
4653 assistance to locate small business sources, contact the General Services Administration's Office of Small
4654 Business Utilization on (202) 501-1021.

4655 **Identification Data:**

4656 Company Name: _____
4657 Address: _____
4658 Type of Plan: _____
4659 Date Prepared: _____ Solicitation Number: _____
4660 Item/Service: _____
4661 Period of Plan: _____

4662 **TYPE OF PLAN: (Check only one)**

4663 _____ **INDIVIDUAL PLAN:** *In this type of plan, all elements are developed specifically for this contract and*
4664 *apply for the full term of this contract*

4665 _____ **MASTER PLAN:** *In this type of plan, goals are separately developed for this contract in an individual plan;*
4666 *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.

4667
4668
4669 **I. GOALS ((percentage and dollars)**

4670 *State separate dollar and percentage goals for small business, HUBZone small, small disadvantaged*
4671 *business, women-owned small, veteran-owned-small, and service-disabled veteran-owned small business*
4672 *in the following format. For individual plans, goals for each option must be provided. Express all dollar*
4673 *goals as a percentage of total planned subcontracting dollars.*

4674
4675 a. Estimated dollar value of all planned subcontracting, i.e., to all types of business concerns under this
4676 contract is:

Estimated Dollar Value of All Planned Subcontracting

Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent	100 percent

4677
4678
4679
4680

b. Estimated dollar value and percentage of total planned subcontracting to large business concerns (all business concerns classified as other than small):

Subcontracting to Large Business Concerns

Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent

4681
4682
4683
4684
4685

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)

Subcontracting to Small Business Concerns

Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent

4686
4687
4688
4689

d. Estimated dollar value and percentage of total planned subcontracting to HUBZone small business concerns is:

Subcontracting to HUBZone Small Business Concerns

Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent

4690
4691
4692
4693

e. Estimated dollar value and percentage of total planned subcontracting to small disadvantaged business concerns is:

Subcontracting to Small-Disadvantaged Concerns

Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent	__ percent

Request for Proposal GSV07PD0003
Amendment-A001

4694 f. Estimated dollar value and percentage of total planned subcontracting to women-owned small
 4695 business concerns is:
 4696

<i>Subcontracting to Women-Owned Small Business Concerns</i>									
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent

4697
 4698 g. Estimated dollar value and percentage of total planned subcontracting to veteran-owned small
 4699 business concerns is:
 4700

<i>Subcontracting to Veteran-Owned Small Business Concerns</i>									
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent

4701
 4702 h. Estimated dollar value and percentage of total planned subcontracting service-disabled veteran-owned
 4703 small business concerns is:
 4704

<i>Subcontracting to Service-Disabled, Veteran-Owned Small Business Concerns</i>									
Base Period (Two Years)	Option 1 (Two Years)	Option 2 (Two Years)	Option 3 (Two Years)	Option 4 (Two Years)	Extended 1 (One Year)	Extended 2 (One Year)	Extended 3 (One Year)	Extended 4 (One Year)	Extended 5 (One Year)
\$	\$	\$	\$	\$	\$	\$	\$	\$	\$
__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent	__percent

4705
 4706
 4707 **II PRODUCTS AND/OR SERVICES TO BE SUBCONTRACTED UNDER THIS CONTRACT, AND THE**
 4708 **TYPES OF BUSINESSES SUPPLYING THEM, ARE: (Check all that apply).**
 4709

<i>Business Category or Size</i>								
Product Service	NAICS	Large	Small	HUB Small	SDB	WOSB	VOSB	SDVOSB

4710 (Attach additional sheets if necessary.)

4711 **III DESCRIPTION OF METHOD USED TO DEVELOP THE SUBCONTRACTING GOALS AND**
4712 **DESCRIPTION OF THE METHOD USED TO IDENTIFY POTENTIAL SOURCES**

- 4713
- 4714 a. Explain the methods used to develop the subcontracting goals for small, HUBZone small, small
4715 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small
4716 business concerns.
- 4717
- 4718 b. Explain how the product and service areas to be subcontracted were established, how the areas to be
4719 subcontracted to small, HUBZone small, small disadvantaged, women-owned small, veteran-owned
4720 small, and service-disabled veteran-owned small business concerns were determined.
- 4721
- 4722 c. How the capabilities of small, HUBZone small, small disadvantaged, women-owned small, veteran-
4723 owned small, and service-disabled, veteran-owned small business concerns were determined.
- 4724
- 4725 d. Identify all source lists used in the determination process.
- 4726

- 4727
- 4728
- 4729

4730 **IV STATEMENT OF INDIRECT AND OVERHEAD COSTS**

- 4731
- 4732 a. Indirect and overhead costs ___ *HAVE BEEN* or ___ *HAVE NOT BEEN* included in the dollar and
4733 percentage subcontracting goals stated above. (Check one.)
- 4734
- 4735 b. If indirect and overhead costs *HAVE BEEN* included, explain the method used to determine the
4736 proportionate share of such costs to be allocated as subcontracts to small, HUBZone small, small
4737 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small
4738 business concerns.
- 4739

- 4740
- 4741
- 4742

4743 **V PROGRAM ADMINISTRATOR**

4744

4745 FAR 52.219-9(d)(7) requires information about the company employee who will administer the
4746 subcontracting program. Please provide the name, title, address, phone number, position within the
4747 corporate structure and the duties of that employee.

Request for Proposal GSV07PD0003
Amendment-A001

4748 Name: _____

4749 Title: _____

4750 Address: _____

4751 Telephone: _____

4752 E-mail _____ Address: _____

4753 _____

4754 Facsimile Number: _____

4755

4756 *Duties:* The Program Administrator’s general overall responsibility for the Contractor’s subcontracting
4757 program, i.e., developing, preparing, and executing individual subcontracting plans and monitoring
4758 performance relative to this particular plan. These duties may include, but are not limited to the following
4759 activities.

4760

4761 a. Developing and promoting company/division policy statements that demonstrate the
4762 company’s/division’s support for awarding contracts and subcontracts to small, HUBZone small, small
4763 disadvantaged, and women-owned small business concerns.

4764

4765 b. Developing and maintaining bidders’ lists of small, HUBZone small, small disadvantaged, women-
4766 owned small, veteran-owned small, and service-disabled veteran-owned small business concerns from all
4767 possible sources.

4768

4769 c. Ensuring periodic rotation of potential subcontractors on bidders’ lists.

4770

4771 d. Assuring that small, HUBZone small, small disadvantaged, women-owned small, veteran-owned-
4772 small, and service-disabled veteran-owned small business concerns are included on the bidders' list for
4773 every subcontract solicitation for products and services they are capable of providing.

4774

4775 e. Ensuring that subcontract procurement “packages” are designed to permit the maximum possible
4776 participation of small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small,
4777 and service-disabled veteran-owned small business concerns.

4778

4779 f. Reviewing subcontract solicitations to remove statements, clauses, etc., which might tend to restrict
4780 or prohibit small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and
4781 service-disabled veteran-owned small business participation.

4782

4783 g. Ensuring that the subcontract bid proposal review board documents its reasons for not selecting any
4784 low bids submitted by small, HUBZone small, small disadvantaged, women-owned small, veteran-owned
4785 small, and service-disabled veteran-owned small business concerns.

4786

4787 h. Overseeing the establishment and maintenance of contract and subcontract award records.

4788

4789 i. Attending or arranging for the attendance of company counselors at Business Opportunity
4790 Workshops, Minority Business Enterprise Seminars, Trade Fairs, etc.

4791

4792 j. Directly or indirectly counseling small, HUBZone small, small disadvantaged, women-owned small,
4793 veteran-owned small, and service-disabled veteran-owned small business concerns on subcontracting
4794 opportunities and how to prepare bids to the company
4795

4796 k. Providing notice to subcontractors concerning penalties for misrepresentations of business status as
4797 small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, or service-
4798 disabled veteran-owned small business for the purpose of obtaining a subcontract that is to be included as
4799 part or all of a goal contained in the contractor's subcontracting plan.
4800

4801 l. Conducting or arranging training for purchasing personnel regarding the intent and impact of Public
4802 Law 95-907 on purchasing procedures.
4803

4804 m. Developing and maintaining an incentive program for buyers which support the subcontracting
4805 program.
4806

4807 n. Monitoring the company's performance and making any adjustments necessary to achieve the
4808 subcontract plan goals.
4809

4810 o. Preparing and submitting timely reports.
4811

4812 p. Coordinating the company's activities during compliance reviews by Federal agencies.
4813
4814

4815 **VI EQUITABLE OPPORTUNITY**
4816

4817 FAR 52.219-9(d)(8) requires a description of the efforts your company will make to ensure that small,
4818 HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled
4819 veteran-owned small business concerns will have an equitable opportunity to compete for subcontracts.
4820 These efforts may include, but are not limited to the following activities:
4821

4822 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

4823 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

4825 c. Additional efforts: (Please describe.)
4826

4827

4828 **VII CLAUSE INCLUSION AND FLOWDOWN**

4829
 4830 FAR 52.219-9(d)(9) requires that your company provide assurances that it will include the clause at
 4831 FAR 52.219-8, "Utilization of Small Business Concerns," in all subcontracts that offer further
 4832 subcontracting opportunities.

4833
 4834 FAR 52.219-9(d)(9) also requires that your company agrees in this plan that it will require all
 4835 subcontractors, except small business concerns, that receive subcontracts in excess of \$500,000
 4836 (\$1,000,000 for construction) to adopt a plan complies with the requirements of FAR 52.219-9, "Small
 4837 Business Subcontracting Plan."

4838
 4839 *[Insert company name]* agrees that the clause will be included and that the plans will be
 4840 reviewed against the minimum requirements for such plans. The acceptability of percentage
 4841 goals for small, HUBZone small, small disadvantaged, women-owned small, veteran-owned
 4842 small, and service-disabled veteran-owned small business concerns must be determined on a
 4843 case-by-case basis depending on the supplies and services involved, the availability of potential
 4844 small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and
 4845 service-disabled veteran-owned small business subcontractors and prior experience. Once the
 4846 plans are negotiated, approved, and implemented, the plans must be monitored through the
 4847 submission of periodic reports, including Standard Form (SF) 294 and SF 295 reports.

4848
 4849 In accordance with policy letters published by the Office of Federal Procurement Policy, such
 4850 assurance must describe the offer's procedures for the review, approval and monitoring for
 4851 compliance with such subcontracting plans.

4852
 4853
 4854 **VIII REPORTING AND COOPERATION**

4855 *FAR 52.219-9(d)(10) requires that your company (1) cooperate in any studies or surveys as may be*
 4856 *required, (2) submit periodic reports which show compliance with the subcontracting plan; (3) submit*
 4857 *Standard Form (SF) 294, "Subcontracting Reports for Individual Contracts," and SF 295,*

4858 *"Summary Subcontract Report," in accordance with the instructions on the forms; and (4) ensure that*
 4859 *subcontractors agree to submit SF 294 and SF 295.*

4860 *Both the Associate Administrator for the Office of Small Business Utilization and the Small Business*
 4861 *Technical Advisor must receive the report(s) within 30 days after the close of each calendar period. That*
 4862 *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

4866
 4867 SF 295 Must be submitted to SBA's Commercial Market Representative

Small Business Technical Advisor address is: (To be completed by Contracting Officer)	Associate Administrator for Office of Small Business Utilization address is: (To be completed by Contracting Officer)
--	--

4868 **IX RECORDKEEPING**

4869
4870
4871
4872
4873
4874
4875
4876
4877
4878
4879
4880
4881
4882
4883
4884
4885
4886
4887
4888
4889
4890
4891
4892
4893
4894
4895
4896
4897
4898
4899
4900
4901
4902
4903
4904
4905
4906
4907
4908

FAR 52.219-9(d)(11) requires a list of the types of records your company will maintain to demonstrate the procedures adopted to comply with the requirements and goals in the subcontracting plan. These records include, but are not limited to, the following:

a. Small, HUBZone small, small disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small business concern source lists, guides, and other data identifying such vendors.

b. Organizations contacted for small, HUBZone small, small disadvantaged, women-owned small, veteran-owned-small, and service-disabled veteran-owned small business sources

c. On a contract-by-contract basis, records on all subcontract solicitations over \$100,000 which indicate for each solicitation:

- o Whether small business concerns were solicited, and if not, why not.
- o Whether HUBZone small business concerns were solicited, and if not, why not.
- o Whether small disadvantaged business concerns were solicited, and if not, why not.
- o Whether women-owned small business concerns were solicited, and if not, why not.
- o Whether veteran-owned small business concerns were solicited, and if not, why not.
- o Whether service-disabled veteran-owned small business concerns were solicited, and if not, why not.
- o Reasons for the failure of solicited small, small disadvantaged, women-owned small business, veteran-owned small business, service-disabled veteran-owned small business, and HUBZone small business concerns to receive the subcontract award.

d. Records to support other outreach efforts, e.g., contacts with minority and small business trade associations, attendance at small, HUBZone small, minority, women-owned small, veteran-owned small, and service-disabled veteran-owned small business procurement conferences and trade fairs.

e. Records to support internal activities to (1) guide and encourage purchasing personnel, e.g., workshops, seminars, training programs, incentive awards; and (2) monitor activities to evaluate compliance.

f. On a contract-by-contract basis, records to support subcontract award data including the name, address and business size of each subcontractor. (This item is not required for company or division-wide commercial plans).

g. Other records to support your compliance with the subcontracting plan: (Please describe)

4909 **X TIMELY PAYMENTS TO SUBCONTRACTORS**

4910
4911 FAR 52.219-8(a) requires your company to establish and use procedures to ensure the timely payment of
4912 amounts due pursuant to the terms of your subcontracts with small, HUBZone small, small
4913 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small
4914 business concerns.

4915
4916 [Insert company name] has established and uses such procedures:

4917
4918
4919 **XI DESCRIPTION OF GOOD FAITH EFFORT**

4920
4921 Maximum practicable utilization of small, HUBZone small, small disadvantaged, women-owned small,
4922 veteran-owned small, and service-disabled veteran-owned small business concerns as subcontractors in
4923 Government contracts is a matter of national interest with both social and economic benefits. When a
4924 contractor fails to make a good faith effort to comply with a subcontracting plan, these objectives are not
4925 achieved, and 15 U.S.C. 637(d)(4)(F) directs that the contractor must pay liquidated damages. In order to
4926 demonstrate your compliance with a good faith effort to achieve the small, HUBZone small, small
4927 disadvantaged, women-owned small, veteran-owned small, and service-disabled veteran-owned small
4928 business subcontracting goals, outline the steps your company plans to take. These steps will be
4929 negotiated with the contracting officer prior to approval of the plan.

4930

4931
4932 *The offeror is advised that submission of the subcontracting plan and Standard Form 294 and/or*
4933 *Standard Form 295 will be made a material part of the contract.*

4934
4935
4936 **XII SIGNATURES REQUIRED**

4937 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>

4938

Attachment 3: Technical Proposal Index

4939
 4940
 4941
 4942
 4943
 4944
 4945
 4946
 4947
 4948

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 [Table J.2 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 [the table 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	

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	

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.7.2.1.6	Management Plan	
L.7.2.1.6.1	Program 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	

4949

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

4996 offeror's organization responsible for determining the prices offered in this bid or proposal, and the title of
4997 his or her position in the offeror's organization];

4998
4999 (ii) As an authorized agent, does certify that the principals named in subdivision (b)(2)(i)
5000 of this provision have not participated, and will not participate, in any action contrary to paragraphs (a)(1)
5001 through (a)(3) of this provision; and

5002 (iii) As an agent, has not personally participated, and will not participate, in any action contrary to
5003 paragraphs (a)(1) through (a)(3) of this provision.

5004
5005 (c) If the offeror deletes or modifies paragraph (a)(2) of this provision, the offeror must furnish with its
5006 offer a signed statement setting forth in detail the circumstances of the disclosure.

5007
5008

5009 **K.3 52.204-03 TAXPAYER IDENTIFICATION (OCT 1998)**

5010 (a) Definitions. "Common parent," as used in this provision, means that corporate entity that owns or
5011 controls an affiliated group of corporations that files its Federal income tax returns on a consolidated
5012 basis, and of which the offeror is a member.

5013
5014 "Taxpayer Identification Number (TIN)," as used in this provision, means the number required by the
5015 Internal Revenue Service (IRS) to be used by the offeror in reporting income tax and other returns. The
5016 TIN may be either a Social Security Number or an Employer Identification Number.

5017
5018 (b) All offerors must submit the information required in paragraphs (d) through (f) of this provision to
5019 comply with debt collection requirements of 31 U.S.C. 7701(c) and 3325(d), reporting requirements of 26
5020 U.S.C. 6041, 6041A, and 6050M, and implementing regulations issued by the IRS. If the resulting
5021 contract is subject to the payment reporting requirements described in Federal Acquisition Regulation
5022 (FAR) 4.904, the failure or refusal by the offeror to furnish the information may result in a 31 percent
5023 reduction of payments otherwise due under the contract.

5024
5025 (c) The TIN may be used by the Government to collect and report on any delinquent amounts arising out
5026 of the offeror's relationship with the Government (31 U.S.C. 7701(c)(3)). If the resulting contract is
5027 subject to the payment reporting requirements described in FAR 4.904, the TIN provided hereunder may
5028 be matched with IRS records to verify the accuracy of the offeror's TIN.

5029
5030 (d) Taxpayer Identification Number (TIN).

5031 TIN: _____.

5032 TIN has been applied for.

5033 TIN is not required because:

5034 Offeror is a nonresident alien, foreign corporation, or foreign partnership that does not have
5035 income effectively connected with the conduct of a trade or business in the United States and does
5036 not have an office or place of business or a fiscal paying agent in the United States;

5037 Offeror is an agency or instrumentality of a foreign Government;

5038 Offeror is an agency or instrumentality of the Federal Government.

5039
5040 (e) Type of organization.

5041 Sole proprietorship;

5042 Partnership;

5043 Corporate entity (not tax-exempt);

5044 Corporate entity (tax-exempt);

5045 Government entity (Federal, State, or local);

Request for Proposal GSV07PD0003
Amendment-A001

- 5046 [] Foreign Government;
5047 [] International organization per 26 CFR 1.6049-4;
5048 [] Other _____.

5049
5050 (f) Common parent.

5051 [] Offeror is not owned or controlled by a common parent as defined in paragraph (a) of this
5052 provision.

5053 [] Name and TIN of common parent:

5054 Name _____

5055 TIN _____

5056

5057

5058 **K.4 52.204-05 WOMEN-OWNED BUSINESS (OTHER THAN SMALL BUSINESS) (MAY 1999)**

5059 (a) Definition. "Women-owned business concern," as used in this provision, means a concern that is at
5060 least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51
5061 percent of its stock is owned by one or more women; and whose management and daily business
5062 operations are controlled by one or more women.

5063

5064 (b) Representation. [Complete only if the offeror is a women-owned business concern and has not
5065 represented itself as a small business concern in paragraph (b)(1) of FAR 52.219-1, Small Business
5066 Program Representations, of this solicitation.] The offeror represents that it [] is [] is not a women-
5067 owned business concern.

5068

5069

5070 **K.5 52.209-05 CERTIFICATION REGARDING DEBARMENT, SUSPENSION, PROPOSED**
5071 **DEBARMENT, AND OTHER RESPONSIBILITY MATTERS (DEC 2001)**

5072 (a)(1) The Offeror certifies, to the best of its knowledge and belief, that-

5073

5074 (i) The Offeror and/or any of its Principals-

5075 (A) Are [] are not [] presently debarred, suspended, proposed for debarment, or declare
5076 ineligible for the award of contracts by any Federal agency;

5077

5078 (B) Have [] have not [], within a three-year period preceding this offer, been convicted
5079 of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in
5080 connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract
5081 or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or
5082 commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false
5083 statements, tax evasion, or receiving stolen property; and

5084 (C) Are [] are not [] presently indicted for, or otherwise criminally or civilly charged
5085 by a Governmental entity with, commission of any of the offenses enumerated in paragraph (a)(1)(i)(B) of
5086 this provision.

5087

5088 (ii) The Offeror has [] has not [], within a three-year period preceding this offer, had one or
5089 more contracts terminated for default by any Federal agency.

5090

5091 (2) "Principals," for the purposes of this certification, means officers; directors; owners; partners;
5092 and, persons having primary management or supervisory responsibilities within a business entity (e.g.,
5093 general manager; plant manager; head of a subsidiary, division, or business segment, and similar
5094 positions).

5095

Request for Proposal GSV07PD0003
Amendment-A001

5096 This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the
5097 Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution
5098 Under Section 1001, Title 18, United States Code.

5099
5100 (b) The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to
5101 contract award, the Offeror learns that its certification was erroneous when submitted or has become
5102 erroneous by reason of changed circumstances.

5103
5104 (c) A certification that any of the items in paragraph (a) of this provision exists will not necessarily result
5105 in withholding of an award under this solicitation. However, the certification will be considered in
5106 connection with a determination of the Offeror's responsibility. Failure of
5107 the Offeror to furnish a certification or provide such additional information as requested by the
5108 Contracting Officer may render the Offeror non-responsible.

5109
5110 (d) Nothing contained in the foregoing shall be construed to require establishment of a system of records
5111 in order to render, in good faith, the certification required by paragraph (a) of this provision. The
5112 knowledge and information of an Offeror is not required to exceed that which is
5113 normally possessed by a prudent person in the ordinary course of business dealings.

5114
5115 (e) The certification in paragraph (a) of this provision is a material representation of fact upon which
5116 reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an
5117 erroneous certification, in addition to other remedies available to the Government, the Contracting Officer
5118 may terminate the contract resulting from this solicitation for default.

5119
5120 **K.6 52.214-16 MINIMUM BID ACCEPTANCE PERIOD (APR 1984)**

5121 (a) "Acceptance period," as used in this provision, means the number of calendar days available to the
5122 Government for awarding a contract from the date specified in this solicitation for receipt of bids.

5123
5124 (b) This provision supersedes any language pertaining to the acceptance period that may appear elsewhere
5125 in this solicitation.

5126
5127 (c) The Government requires a minimum acceptance period of **120** calendar days

5128
5129 (d) In the space provided immediately below, bidders may specify a longer acceptance period than the
5130 Government's minimum requirement. The bidder allows the following acceptance period:
5131 _____ calendar days.

5132
5133 (e) A bid allowing less than the Government's minimum acceptance period will be rejected.

5134
5135 (f) The bidder agrees to execute all that it has undertaken to do, in compliance with its bid, if that
5136 bid is accepted in writing within-

5137
5138 (1) The acceptance period stated in paragraph (c) of this clause; or

5139
5140 (2) Any longer acceptance period stated in paragraph (d) of this clause.

5141
5142 **K.7 52.215-06 PLACE OF PERFORMANCE (OCT 1997)**

5143
5144 (a) The offeror or respondent, in the performance of any contract resulting from this solicitation, []
5145 intends, [] does not intend [check applicable block] to use one or more plants or facilities located at a

Request for Proposal GSV07PD0003
Amendment-A001

5146 different address from the address of the offeror or respondent as indicated in this proposal or response to
5147 request for information.

5148
5149 (b) If the offeror or respondent checks "intends" in paragraph (a) of this provision, it shall insert in the
5150 following spaces the required information:
5151

Place of Performance (Street Address, City, State, County, Zip Code)	Name and Address of Owner and Operator of the Plant or Facility if Other than Offeror or Respondent

5152
5153

5154 **K.8 52.219-22 SMALL DISADVANTAGED BUSINESS STATUS (OCT 1999)**

5155 (a) General. This provision is used to assess an offeror's small disadvantaged business status for the
5156 purpose of obtaining a benefit on this solicitation. Status as a small business and status as a small
5157 disadvantaged business for general statistical purposes is covered by the provision at FAR 52.219-1,
5158 Small Business Program Representation.
5159

5160 (b) Representations.

5161 (1) General. The offeror represents, as part of its offer, that it is a small business under the size
5162 standard applicable to this acquisition; and either-

5163
5164 [] (i) It has received certification by the Small Business Administration as a small
5165 disadvantaged business concern consistent with 13 CFR 124, Subpart B; and

5166
5167 (A) No material change in disadvantaged ownership and control has occurred since
5168 its certification;

5169
5170 (B) Where the concern is owned by one or more disadvantaged individuals, the net
5171 worth of each individual upon whom the certification is based does not exceed \$750,000 after taking into
5172 account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and

5173
5174 (C) It is identified, on the date of its representation, as a certified small disadvantaged
5175 business concern in the database maintained by the Small Business Administration (PRO-Net); or
5176

5177 [] (ii) It has submitted a completed application to the Small Business Administration or a
5178 Private Certifier to be certified as a small disadvantaged business concern in accordance with 13 CFR
5179 124, Subpart B, and a decision on that application is pending, and that no material change in
5180 disadvantaged ownership and control has occurred since its application was submitted.

5181
5182 (2) [] For Joint Ventures. The offeror represents, as part of its offer, that it is a joint venture that
5183 complies with the requirements at 13 CFR 124.1002(f) and that the representation in paragraph (b)(1) of
5184 this provision is accurate for the small disadvantaged business concern that is participating in the joint
5185 venture. [The offeror shall enter the name of the small disadvantaged business
5186 concern that is participating in the joint venture:_____.]

5187 (c) Penalties and Remedies. Anyone who misrepresents any aspects of the disadvantaged status of a
5188 concern for the purposes of securing a contract or subcontract shall-

5189 (1) Be punished by imposition of a fine, imprisonment, or both;

5190 (2) Be subject to administrative remedies, including suspension and debarment; and

5191 (3) Be ineligible for participation in programs conducted under the authority of the Small
5192 Business Act.

5193

5194 **K.9 52.222-22 PREVIOUS CONTRACTS AND COMPLIANCE REPORTS (FEB 1999)**

5195 The offeror represents that-

5196 (a) It [] has, [] has not participated in a previous contract or subcontract subject the Equal Opportunity
5197 clause of this solicitation;

5198
5199 (b) It [] has, [] has not filed all required compliance reports; and

5200
5201 (c) Representations indicating submission of required compliance reports, signed by proposed
5202 subcontractors, will be obtained before subcontract awards.

5203

5204

5205 **K.10 52.222-25 AFFIRMATIVE ACTION COMPLIANCE (APR 1984)**

5206 The offeror represents that-

5207 (a) It [] has developed and has on file, [] has not developed and does not have on file, at each
5208 establishment, affirmative action programs required by the rules and regulations of the Secretary of Labor
5209 (41 CFR 60-1 and 60-2); or

5210
5211 (b) It [] has not previously had contracts subject to the written affirmative action programs requirement
5212 of the rules and regulations of the Secretary of Labor.

5213

5214

5215 **K.11 52.222-38 COMPLIANCE WITH VETERANS' EMPLOYMENT REPORTING REQUIREMENTS**
5216 **(DEC 2001)**

5217
5218 By submission of its offer, the offeror represents that, if it is subject to the reporting requirements of
5219 38 U.S.C. 4212(d) (i.e., if it has any contract containing Federal Acquisition Regulation clause 52.222-37,
5220 Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible
5221 Veterans), it has submitted the most recent VETS-100 Report required by that clause.

5222

5223

5224 **K.12 52.223-13 CERTIFICATION OF TOXIC CHEMICAL RELEASE REPORTING (AUG 2003)**

5225 (a) Executive Order 13148, of April 21, 2000, Greening the Government through Leadership in
5226 Environmental Management, requires submission of this certification as a prerequisite for contract award.
5227

5228 (b) By signing this offer, the offeror certifies that-

5229 (1) As the owner or operator of facilities that will be used in the performance of this contract that
5230 are subject to the filing and reporting requirements described in section 313 of the Emergency Planning
5231 and Community Right-to-Know Act of 1986 (EPCRA) (42 U.S.C. 11023) and section 6607 of the
5232 Pollution Prevention Act of 1990 (PPA) (42 U.S.C. 13106), the offeror will file and continue to file for
5233 such facilities for the life of the contract the Toxic Chemical Release Inventory Form (Form R) as
5234 described in sections 313(a) and (g) of EPCRA and section 6607 of PPA; or
5235

5236 (2) None of its owned or operated facilities to be used in the performance of this contract is
5237 subject to the Form R filing and reporting requirements because each such facility is exempt for at least
5238 one of the following reasons: [Check each block that is applicable.]
5239

5240 (i) The facility does not manufacture, process, or otherwise use any toxic chemicals listed
5241 in 40 CFR 372.65;
5242

5243 (ii) The facility does not have 10 or more full-time employees as specified in
5244 section 313(b)(1)(A) of EPCRA, 42 U.S.C. 11023(b)(1)(A);
5245

5246 (iii) The facility does not meet the reporting thresholds of toxic chemicals established
5247 under section 313(f) of EPCRA, 42 U.S.C. 11023(f) (including the alternate thresholds at 40 CFR 372.27,
5248 provided an appropriate certification form has been filed with EPA);
5249

5250 (iv) The facility does not fall within the following Standard Industrial Classification (SIC)
5251 codes or their corresponding North American Industry Classification System sectors:

5252 (A) Major group code 10 (except 1011, 1081, and 1094.

5253 (B) Major group code 12 (except 1241).

5254 (C) Major group codes 20 through 39.

5255 (D) Industry code 4911, 4931, or 4939 (limited to facilities that combust coal and/or oil
5256 for the purpose of generating power for distribution in commerce)
5257

5258 (E) Industry code 4953 (limited to facilities regulated under the Resource Conservation and
5259 Recovery Act, Subtitle C (42 U.S.C. 6921, et seq.), or 5169, or 5171, or 7389 (limited to facilities
5260 primarily engaged in solvent recovery services on a contract or fee basis); or
5261

5262 (v) The facility is not located in the United States or its outlying areas..
5263

5264 **K.13 52.227-15 REPRESENTATION OF LIMITED RIGHTS DATA AND RESTRICTED COMPUTER**
5265 **SOFTWARE (MAY 1999)**
5266

5267 (a) This solicitation sets forth the work to be performed if a contract award results, and the Government's
5268 known delivery requirements for data (as defined in FAR 27.401). Any resulting contract may also
5269 provide the Government the option to order additional data under the Additional Data Requirements
5270 clause at 52.227-16 of the FAR, if included in the contract. Any data delivered under the resulting
5271 contract will be subject to the Rights in Data-General clause at 52.227-14 that is to be included in this

5272 contract. Under the latter clause, a Contractor may withhold from delivery data that qualify as limited
5273 rights data or restricted computer software, and deliver form, fit, and function data in lieu thereof. The
5274 latter clause also may be used with its Alternates II and/or III to obtain delivery of limited rights data or
5275 restricted computer software, marked with limited rights or restricted rights notices, as appropriate. In
5276 addition, use of Alternate V with this latter clause provides the Government the right to inspect such data
5277 at the Contractor's facility.

5278
5279 (b) As an aid in determining the Government's need to include Alternate II or Alternate III in the clause at
5280 52.227-14, Rights in Data-General, the offeror shall complete paragraph (c) of this provision to either
5281 state that none of the data qualify as limited rights data or restricted computer software, or identify, to the
5282 extent feasible, which of the data qualifies as limited rights data or restricted computer software. Any
5283 identification of limited rights data or restricted computer software in the offeror's response is not
5284 determinative of the status of such data should a contract
5285 be awarded to the offeror.

5286 (c) The offeror has reviewed the requirements for the delivery of data or software and state
5287 [offeror check appropriate block]-

5288 [] None of the data proposed for fulfilling such requirements qualifies as limited rights data or
5289 restricted computer software.

5290
5291 [] Data proposed for fulfilling such requirements qualify as limited rights data or restricted
5292 computer software and are identified as follows:

5293 _____
5294 _____
5295 _____

5296
5297 Note: "Limited rights data" and "Restricted computer software" are defined in the contract clause entitled
5298 "Rights in Data-General.

5299
5300
5301 **K.14 552.252-05 AUTHORIZED DEVIATIONS IN PROVISIONS (DEVIATION FAR 52.252-5) (SEP**
5302 **1999) (GSAM Clause)**

5303
5304 (a) Deviations to FAR provisions.

5305
5306 (1) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation (48
5307 CFR Chapter 1) provision by the addition of "(DEVIATION)" after the date of the provision, if the
5308 provision is not published in the General Services Administration Acquisition Regulation (48 CFR
5309 Chapter 5).

5310
5311 (2) This solicitation indicates any authorized deviation to a Federal Acquisition Regulation
5312 (FAR) provision that is published in the General Services Administration Acquisition Regulation by the
5313 addition of "(DEVIATION (FAR provision no.))" after the date of the provision.

5314 (b) Deviations to GSAR provisions. This solicitation indicates any authorized deviation to a General
5315 Services Administration Acquisition Regulation provision by the addition of "(DEVIATION)" after the
5316 date of the provision.

5317
5318 (c) "Substantially the same as" provisions. Changes in wording of provisions prescribed for use on a
5319 "substantially the same as" basis are not considered deviations.

SECTION L

INSTRUCTIONS, CONDITIONS AND NOTICES TO OFFERORS

L.1 2.252-2 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>.

L.1.1 Federal Acquisition Regulation (48 CFR, APR 1984) Clauses

Clause No.	Clause Title	Date
52.211-01	Availability of Specifications in the GSA Index of Federal Specifications, Standards and Commercial Item Descriptions	AUG 1998
52.215-01	Instructions to Offerors – Competitive Acquisition (Alt.I [Oct 1997])	JAN 2004
52.222-24	Preaward On-Site Equal Opportunity Compliance Review	JUL 2005
52.222-46	Evaluation of Compensation for Professional Employees	FEB 1993

L.1.2 General Services Administration Acquisition Manual (GSAM) Clauses

552.219-72	Preparation, Submission and Negotiation of Subcontracting Plans	JUN 2005
------------	---	----------

L.2 ELECTRONIC VERSION OF SOLICITATION

An electronic version of this solicitation is on the FedBizOpps website at www.fedbizopps.gov. It will be the responsibility of the Offeror to print copies for its use. No hard copy of the solicitation will be issued by the Government.

L.3 52.216-01 TYPE OF CONTRACT (APR 1984)

The Government anticipates award of one or more indefinite-delivery, indefinite-quantity (IDIQ) contracts from this solicitation for contractor operated and managed multi-channel contact center services.

L.4 52.216-27 SINGLE OR MULTIPLE AWARDS (OCT 1995)

The Government may elect to award a single delivery order contract or task order contract, or to award multiple delivery order contracts or task order contracts, for the same or similar supplies or services to two or more sources under this solicitation.

L.5 52.233-2 SERVICE OF PROTEST (SEP 2006)

a) Protests, as defined in section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the Government Accountability Office (GAO),

Request for Proposal GSV07PD0003
Amendment-A001

5366 shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated
5367 acknowledgment of receipt from Mr. Robert H. Corey or Dr. Carol Barton:

5368
5369 General Services Administration
5370 Office of Chief Acquisition Officer
5371 Operational Contracting Staff (VC)
5372 1800 F Street NW, Room G127
5373 Washington, DC 20405
5374

5375 b) The copy of any protest shall be received in the office designated above within one day of filing a
5376 protest with the GAO.

5377
5378
5379 **L.5 552.233-70 PROTESTS FILED DIRECTLY WITH THE GENERAL SERVICE ADMINISTRATION**
5380 **(MAR 2000)**

5381 The following definitions apply in this provision:

5382
5383 (a) "Agency Protest Official for GSA" means the official in the Office of Acquisition Policy
5384 designated to review and decide procurement protests filed with GSA.

5385
5386 "Deciding official" means the person chosen by the protester to decide the agency protest. The deciding
5387 official may be either the Contracting Officer or the Agency Protest Official.

5388
5389 (b) The filing time frames in FAR 33.103(e) apply. An agency protest is filed when the protest
5390 complaint is received at the location the solicitation designates for serving protests. GSA's hours of
5391 operation are 8:00 a.m. to 4:30 p.m. Protests delivered after 4:30 p.m. will be considered received and
5392 filed the following business day.

5393
5394 (c) A protest filed directly with the General Services Administration (GSA) must:

5395
5396 (1) Indicate that it is a protest to the agency.

5397
5398 (2) Be filed with the Contracting Officer

5399
5400 (3) State whether the protester chooses to have the Contracting Officer or the Agency Protest
5401 Official for GSA decide the protest. If the protest is silent on this matter, the Contracting Officer will
5402 decide the protest.

5403
5404 (4) Indicate whether the protester prefers to make an oral presentation, a written presentation, or an
5405 oral presentation confirmed in writing, of arguments in support of the protest to the deciding official.

5406
5407 (5) Include the information required by FAR 33.103(d)(2):

5408
5409 (i) Name, address, fax number, and telephone number of the protester.

5410
5411 (ii) Solicitation or contract number.

5412
5413 (iii) Detailed statement of the legal and factual grounds for the protest, to include a
5414 description of resulting prejudice to the protester.

5415

- 5416 (iv) Copies of relevant documents.
5417
5418 (v) Request for a ruling by the agency.
5419
5420 (vi) Statement as to the form of relief requested.
5421
5422 (vii) All information establishing that the protester is an interested party for the purpose of
5423 filing a protest.
5424
5425 (viii) All information establishing the timeliness of the protest (see paragraph (b) of this
5426 provision).
5427
5428 (d) An interested party filing a protest with GSA has the choice of requesting either that the
5429 Contracting Officer or the Agency Protest Official for GSA decide the protest.
5430
5431 (e) The decision by the Agency Protest Official for GSA is an alternative to a decision by the
5432 Contracting Officer. The Agency Protest Official for GSA will not consider appeals from the Contracting
5433 Officer's decision on an agency protest.
5434
5435 (f) The deciding official must conduct a scheduling conference with the protester within three days
5436 after the protest is filed. The scheduling conference will establish deadlines for oral or written arguments
5437 in support of the agency protest and for agency officials to present information in response to the protest
5438 issues. The deciding official may hear oral arguments in support of the agency protest at the same time as
5439 the scheduling conference, depending on availability of the necessary parties.
5440
5441 (g) Oral conferences may take place either by telephone or in person. Other parties (e.g.,
5442 representatives of the program office) may attend at the discretion of the deciding official.
5443
5444 (h) The following procedures apply to information submitted in support of or in response to an agency
5445 protest:
5446
5447 (1) The protester and the agency have only one opportunity to support or explain the substance of
5448 the protest (either orally, in writing, or orally confirmed in writing).
5449
5450 (2) GSA procedures do not provide for any discovery.
5451
5452 (3) The deciding official has discretion to request additional information from either the agency or
5453 the protester. However, the deciding official will normally decide protests on the basis of information
5454 provided by the protester and the agency.
5455
5456 (4) Except as provided in paragraph (5)(ii) below, the parties are encouraged, but not required, to
5457 exchange information submitted to the Agency Protest Official for GSA.
5458
5459 (5) If the agency makes a written response to the protest, the following filing requirements apply:
5460
5461 (i) The agency must file its response to the protest with the deciding official within five (5)
5462 days after the filing of the protest.
5463
5464 (ii) The agency must also provide the protester with a copy of the response on the same day it
5465 files the response with the deciding official. If the agency believes it needs to redact or withhold any
5466 information in the response from the protester, it must obtain the approval of the deciding official.

- 5467
5468 (i) The deciding official will resolve the protest through informal presentations or meetings to the
5469 maximum extent practicable.
5470
5471 (j) An interested party may represent itself or be represented by legal counsel. GSA will not reimburse
5472 the party for any legal fees related to the agency protest.
5473
5474 (k) GSA will stay award or suspend contract performance in accordance with FAR 33.103(f). The stay
5475 or suspension, unless over-ridden, remains in effect until the protest is decided, dismissed, or withdrawn.
5476
5477 (l) The deciding official will make a best effort to issue a decision on the protest within twenty-eight
5478 (28) days after the filing date. The decision may be oral or written. If the decision is communicated
5479 orally to the protester, the deciding official will confirm in writing within three (3) days after the decision.
5480
5481 (m) GSA may dismiss or stay proceedings on an agency protest if a protest on the same or similar basis
5482 is filed with a protest forum outside of GSA.
5483

5484 **L.6 552.219-72 Preparation, Submission, and Negotiation of Subcontracting Plans (JUN 2005)**
5485

- 5486 (a) An offeror, other than a small business concern, submitting an offer that exceeds \$500,000
5487 (\$1,000,000 for construction) shall submit a subcontracting plan with its initial offer. The subcontracting
5488 plan will be negotiated concurrently with price and any required technical and management proposals,
5489 unless the offeror submits a previously-approved commercial plan.
5490
5491 (b) Maximum practicable utilization of small, HUBZone small, small disadvantaged, women-owned,
5492 veteran-owned, and service-disabled veteran owned small business concerns as subcontractors is a matter
5493 of national interest with both social and economic benefits. The General Services Administration (GSA)
5494 expects that an offeror's subcontracting plan will reflect a commitment to assuring that small, HUBZone
5495 small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small
5496 business concerns are provided the maximum practicable opportunity, consistent with efficient contract
5497 performance, to participate as subcontractors in the performance of the resulting contract. An offeror
5498 submitting a commercial plan can reflect this commitment through subcontracting opportunities it
5499 provides that relate to the offeror's production generally; i.e., for both its commercial and Government
5500 business.
5501
5502 (c) GSA believes that this potential contract provides significant opportunities for the use of small,
5503 HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran
5504 owned small business concerns as subcontractors. Consequently, in addressing the eleven elements
5505 described at FAR 52.219-9(d) of the clause in this contract entitled Small Business Subcontracting Plan,
5506 the offeror shall:
5507
5508 (1) Demonstrate that its subcontracting plan represents a creative and innovative program for
5509 involving small, HUBZone small, small disadvantaged, women-owned, veteran-owned, and service-
5510 disabled veteran owned small business concerns in performing the contract.
5511 (2) Include a description of the offeror's subcontracting strategies used in any previous contracts,
5512 significant achievements, and how this plan will build upon those earlier achievements.
5513
5514 (3) Demonstrate through its plan that it understands the small business subcontracting program's
5515 objectives and GSA's expectations, and it is committed to taking those actions necessary to meet these
5516 goals or objectives.
5517

5518 (d) In determining the acceptability of any subcontracting plan, the Contracting Officer will take each
5519 of the following actions:

5520
5521 (1) Review the plan to verify that the offeror demonstrates an understanding of the small business
5522 subcontracting program's objectives and GSA's expectations with respect to the program and has
5523 included all the information, goals, and assurances required by FAR 52.219-9.

5524
5525 (2) Consider previous goals and achievements of contractors in the same industry.

5526
5527 (3) Consider information and potential sources obtained from agencies administering national and
5528 local preference programs and other advocacy groups in evaluating whether the goals stated in the plan
5529 adequately reflect the anticipated potential for subcontracting to small, HUBZone small, small
5530 disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small business
5531 concerns.

5532
5533 (4) Review the offeror's description of its strategies, historical performance and significant
5534 achievements in placing subcontracts for the same or similar products or services with small, HUBZone
5535 small, small disadvantaged, women-owned, veteran-owned, and service-disabled veteran owned small
5536 business concerns. The offeror's description can apply to commercial as well as previous Government
5537 contracts.

5538
5539 (e) Failure to submit an acceptable subcontracting plan and/or correct deficiencies in a plan within the
5540 time specified by the Contracting Officer shall make the offeror ineligible for award.

5541
5542

5543 **L.7 GENERAL INSTRUCTIONS FOR PREPARATION OF PROPOSAL**

5544
5545 A Standard Form 33 "Solicitation, Offer, and Award", completed and signed by the offeror, constitutes
5546 the vendor's acceptance of the terms and conditions of this solicitation document. Therefore, the form
5547 must be executed by a representative of the offeror authorized to commit the offeror to contractual
5548 obligations.

5549
5550 The Government may award a contract based on the initial offers received, without discussion of such
5551 offers. Offerors are cautioned to include all relevant information in their proposals, as the Government
5552 may award without discussions, using only the information provided by the offerors in the initial proposal
5553 submission and customer-provided/Government-obtained past performance information.

5554
5555 Issuance of this solicitation does not commit the Government to pay any Bid and Proposal costs incurred
5556 by offerors in the preparation and submission of proposals, nor does it commit the Government to procure
5557 or contract for said services. The Contracting Officer is the only individual who can commit the
5558 Government to the expenditure of public funds in connection with this proposed procurement, and he/she
5559 will do so by means of formal award documents.

5560
5561 Proposals shall set forth current, accurate, and complete information as required by this solicitation
5562 document (including attachments). ***It is important to note that the penalties for making false statements
5563 in proposals are prescribed in 18 U.S.C. 1001.***

5564
5565 Offerors submitting restricted data shall mark such data in accordance with Federal Acquisition
5566 Regulation (FAR) provision 52.215-12, which is incorporated by reference. FAR 52.215-12 states that,
5567 "Offerors or quoters who include in their proposals or quotations data that they do not want disclosed to
5568 the public for any purpose or used by the Government except for evaluation purposes, shall – (i) Mark the

5569 title page with the following legend: “This proposal or quotation includes data that shall not be disclosed -
5570 - in whole or in part – for any purpose other than to evaluate this proposal or quotation. If, however, a
5571 contract is awarded to this offeror or quoter as a result of – or in connection with – the submission of data,
5572 the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the
5573 resulting contract. This restriction does not limit the Government’s right to use information contained in
5574 this data if it is obtained from another source without restriction. The data subject to the restriction is
5575 contained in sheets (insert numbers or other identification of sheets)”; and (ii) Mark each sheet of data it
5576 wishes to restrict with the following legend: “Use or disclosure of data contained in this sheet is subject to
5577 the restriction on the title page of this proposal or quotation”.

5578
5579 The Government assumes no liability for disclosure of unmarked data for any purpose. Unless restricted,
5580 information submitted in response to this request may become subject to disclosure to the public pursuant
5581 to the provisions of the Freedom of Information Act (5 U.S.C. 551).
5582

5583 **L.7.1 Submission of Proposals**

5584 A proposal submitted in response to this solicitation shall consist of two separate packages, placed in
5585 separate sealed envelopes/containers, and identified and appropriately marked as “Technical Proposal”
5586 and “Business Proposal”. Both packages shall then be placed in one sealed submission container. The
5587 offeror shall enter the following information on the submission containers: (i) the deadline (hour and date)
5588 for receipt of proposals; (ii) the solicitation by number and title; and (iii) the offeror’s name and address.
5589 The submission shall be addressed as follows:

5590
5591 General Services Administration
5592 Operational Contracting Staff (VC)
5593 1800 F Street NW, Room G127
5594 Washington DC 20405

5595 Attention: Robert H. Corey
5596 Contracting Officer
5597

5598 Offerors shall submit an original and eight (8) paper copies of the Technical Proposal and an original and
5599 two (2) paper copies of the Business Proposal. Each proposal shall also be provided in electronic format
5600 using CD-ROM media in Microsoft Word or Microsoft Excel for Windows XP format, as appropriate.
5601 Each disk shall be clearly identified with the name of the offeror, the content of the CD-ROM, the
5602 solicitation number, and the date of the proposal.
5603

5604 This method of submission shall be used throughout the solicitation process, from the initial proposal to
5605 Final Proposal Revisions. After the initial proposals, each revision, if the determination has been not
5606 been made to award on the basis of initial proposal(s) only, shall also include the revision number, e.g.,
5607 Revision 01, Revision 02, etc. When submitting a revision the offeror shall submit a complete proposal.
5608 The material added or changed in each revision shall be identified with a vertical line in the right hand
5609 margin. *Identification lines from previous revisions shall be removed to ensure that only current
5610 revision changes are identified. This process will also be used to identify any segment of in the
5611 proposal that has been deleted. It is important to note that changes that are not provided in this
5612 manner may not be evaluated by the Government.*
5613

5614 Offerors are advised that hand-carried proposals must be received in the place designated on the Standard
5615 Form 33, Solicitation, Offer and Award, before the time and date set for receipt of proposals. Hand-
5616 carried proposals are subject to FAR provision 52.215-01 entitled, Instruction to Offerors – Competitive
5617 Acquisition [Alternate I, Oct 1997]), dated May 2001, which is incorporated by reference.
5618

5619 GSA's hours of operation are 8:00 a.m. to 4:30 p.m. eastern time. Requests for preaward debriefings
5620 postmarked or otherwise submitted after 4:30 p.m. will be considered to be received the following
5621 business day. Requests for post-award debriefings delivered after 4:30 p.m. will be considered to have
5622 been received and filed the following business day.

5623

5624 **L.7.2 Technical Proposal Submission Requirements**

5625

5626 An original and eight (8) paper copies of the Technical Proposal, together with one (1) electronic copy
5627 using CD-ROM media as described in L.7.1 are required. No pricing information shall be included in the
5628 Technical Proposal. A 125-page limitation has been set for the Technical Proposal. Excluded from this
5629 limit are: the transmittal letter, title page, proposal index or table of contents, list of figures and
5630 abbreviations, organizational charts, sample reports, and resumes of key personnel. (This limitation is
5631 based on the number of pages when printed ~~double-spaced~~ **single-spaced** on 8 ½ x 11 inch paper with 1
5632 inch margin in 12-point Times New Roman or equivalent font size. Font size used in figures and tables
5633 can be 8-point or higher as long as the content is legible.)

5634

5635 **L.7.2.1 Technical Proposal**

5636 Offerors must submit a comprehensive Technical Proposal to provide a sound basis for evaluation by the
5637 Government. Proposals that merely offer to provide the requirements as specified in the solicitation, or
5638 "parrot back" the requirements of the solicitation without further elaboration, may be determined to be
5639 technically unacceptable.

5640

5641 The Technical Proposal shall be organized as follows:

5642

- 5643 ○ Proposal Index
- 5644 ○ Executive Summary
- 5645 ○ Experience and Past Performance
- 5646 ○ Technical Approach
- 5647 ○ Management Plan
- 5648 ○ Security Plan
- 5649 ○ Plan for Special Hiring

5650

5651 **L.7.2.1.1 Proposal Index**

5652 As part of their Technical Proposals, offerors are required to submit a compliance index referencing the
5653 page and paragraph numbers that contain their response/methodology/narrative, on an item-by-item basis
5654 to all requirements of this solicitation.

5655

5656 **L.7.2.1.2 Executive Summary**

5657 The purpose of the executive summary is to present a brief introduction and overview of the proposal,
5658 including a summary of the offeror's capabilities and qualifications. The executive summary shall be
5659 written so that a layperson can easily grasp the essence of the technical approach and plans being
5660 proposed.

5661

5662 **L.7.2.1.3 Experience and Past Performance**

5663 In addition to general background information, the offeror must provide specific information about its
5664 experience in implementing, operating, and managing operations, services facilities, or contracts, and

5665 associated contractual or budgetary arrangements, similar to the USA Contact requirement. The
5666 Government reserves the right to contact individuals and firms for which the offeror has performed such
5667 services in the past to evaluate the offeror's experience and past performance record.
5668

5669 **L.7.2.1.3.1 Minimum Experience Qualifications Criteria**

5670 To be considered for an award under this solicitation, the offeror must have gained the following
5671 minimum experience qualifications during the five (5) years immediately prior to the date of the
5672 Government's receipt of proposals for this solicitation:

- 5673
- 5674 ○ at least three (3) years' general experience in providing information and referral services with
5675 monthly work volumes handled by agents of no less than 100,000 telephone inquiries and 7,500
5676 e-mail inquiries per month;
- 5677
- 5678 ○ at least one (1) year of specialized experience in providing information services in a multi-
5679 media environment, including the use of telephone, facsimile, e-mail, and web-based media;
- 5680
- 5681 ○ at least three (3) years experience in providing information services in a multi-language
5682 environment; and
- 5683
- 5684 ○ at least two (2) years of specialized experience in handling case management in an information
5685 and referral service environment.
- 5686

5687 **L7.2.1.3.1.1 Offerors Without Minimum Experience Qualifications**

5688 Minimum experience qualifications will be evaluated on a pass/fail basis. To be considered acceptable,
5689 an offeror's proposal must meet all of all of the minimum experience qualifications criteria set forth in
5690 L.7.2.1.3.1. For:

5691

5692 *Large business offerors* who do not meet all of the minimum experience qualifications criteria will be
5693 evaluated as lacking the inherent experience necessary for performance, and their proposal will be
5694 evaluated as unacceptable. At that point such firms will be eliminated from further competition for
5695 award under this solicitation.

5696

5697 *Small business offerors* who do not meet the minimum experience qualifications criteria will be
5698 referred to the United States Small Business Administration (SBA) for a Certificate of Competency
5699 under the procedures outlined in FAR Subpart 19-602. Based on evaluation by the SBA, such firms
5700 will either be evaluated as having sufficient experience for performance under this solicitation, or
5701 eliminated from further competition for award under this solicitation.

5702

5703

5704

5705 **L.7.2.1.3.2 Documentation of Experience**

5706 The offeror shall provide the following information in its response to the relevant experience requirements of
5707 this solicitation:

5708

5709 A narrative describing its financial strength; core business lines; number of years of experience designing,
5710 implementing, operating and managing multi-channel contact centers; the number and location(s) of centers
5711 currently in operation, and their capacity for expansion; the type of services and business sectors the center(s)
5712 support; the total number of full-time and part-time employees working in those centers; the size and depth of

5713 the technical and management staff dedicated to supporting contact center services; and the offeror's
5714 experience in managing teaming partners and/or subcontractors.

5715
5716 A narrative describing the offeror's experiences in the following key disciplines:

- 5717 ○ recruiting, training, and retaining contact center personnel;
- 5718 ○ supporting projects that have diverse language and skill requirements;
- 5719
- 5720 ○ evaluating and implementing integrated knowledge and case management solutions that support
- 5721 multiple access channels;
- 5722 ○ developing and implementing quality assurance and improvement programs in support of contact
- 5723 center services including tools used to support the programs;
- 5724
- 5725 ○ supporting projects with stringent systems and information security requirements, similar to those
- 5726 required for Federal information systems;
- 5727
- 5728 ○ implementing electronic services to support automated self-help applications;
- 5729
- 5730 ○ short-notice ramping up operations to support crisis and/or high priority situations, including the
- 5731 provision of support 24 hours a day, 7 days a week;
- 5732
- 5733 ○ preparedness for and recovery from disasters and/or major service disruptions; and
- 5734
- 5735 ○ evaluating and implementing new technology.
- 5736
- 5737
- 5738
- 5739

5740 A narrative describing the operational and management processes and programs (e.g. Quality
5741 Assurance/Quality Improvement, Training, Disaster Recovery/Contingency Planning, Information Systems
5742 Security) implemented by the offeror that demonstrate a high commitment to service excellence and
5743 consistent and repeatable results. (Identify any processes that are certified by industry organizations, and
5744 indicate why such certifications may enhance the offeror's ability to meet or exceed project requirements.)
5745

5746 A narrative describing any specialized expertise and/or capabilities, including those offered by teaming
5747 partners and/or subcontractors, that may enhance the offeror's ability to meet or exceed project
5748 requirements. Describe any successful current and/or past associations with such teaming
5749 partners/subcontractors, and explain why they were effective.
5750

5751 **L.7.2.1.4 Past Performance**

5752 The offeror shall provide the information identified below in its response to past performance. The offeror is
5753 cautioned to include all relevant past performance information (including corrective actions taken) in its
5754 proposal, as the Government may award without discussions, using only the information provided by the
5755 offeror in the initial proposal submission and customer-provided/Government-obtained past performance
5756 information. The offeror may be given the opportunity to address adverse past performance information;
5757 however, this exchange of information is for clarification only, and not for purposes of discussion.
5758

5759 A project profile identifying no more than three (3) contact center projects performed within the past five
5760 years that were similar in scope and complexity to the work required by the USA Contact Performance
5761 Work Statement. For each of the projects, the offeror shall provide the following information:
5762

Request for Proposal GSV07PD0003
Amendment-A001

- 5763 ○ contract number, task order number, and/or other identification;
- 5764
- 5765 ○ project title or name;
- 5766
- 5767 ○ name of client/contracting entity with contact information;
- 5768
- 5769 ○ role (prime or subcontractor);
- 5770
- 5771 ○ period of performance (including the original completion date established at contract/task order
- 5772 award, and the actual completion date, with an explanation of any variance). If the referenced
- 5773 contract is no longer in effect, provide a brief explanation on why that is the case;
- 5774
- 5775 ○ geographic location(s) where contract work was performed;
- 5776
- 5777 ○ names, the phone numbers, and e-mail addresses (if available) of the Contracting Officer and
- 5778 Contracting Officer's Technical Representative and/or Commercial Buyer and Project Manager;
- 5779
- 5780 ○ total dollar value of contract (including value at initial contract/task order award, and the actual
- 5781 final price, with an explanation of any variance); and
- 5782
- 5783 ○ annual work volumes by work type (e.g. inbound calls, e-mail, chat, facsimiles, fulfillment, etc.)
- 5784 and languages supported.
- 5785

5786 ~~○ for each of the projects listed in Section L.7.2.1.4, the offeror shall provide a narrative describing~~
5787 ~~the scope and complexity of the project, including:~~
5788

5789 For each of the projects listed in Section L.7.2.1.4, the offeror shall provide a narrative describing the
5790 scope and complexity of the project, including:
5791

- 5792 ○ technical objectives of the project and the scope of work;
- 5793
- 5794 ○ relevancy of the selected project to the nature of the work to be performed under the USA Contact
- 5795 program;
- 5796
- 5797 ○ complexity and duration of the phase-in (start-up) and phase-out (transition) processes. Describe
- 5798 any innovative approaches that were used to minimize disruption or degradation of service to
- 5799 customers during the phase-in and/or phase-out process;
- 5800
- 5801 ○ complexity of the contact center inquiries, type of end-users served, operating hours, language
- 5802 proficiency requirements and length of Information Specialist (IS) training;
- 5803
- 5804 ○ complexity of area knowledge and case-management requirements;
- 5805
- 5806 ○ complexity of information systems security requirements; and
- 5807
- 5808 ○ frequency and complexity of reporting requirements. (Provide a sample report package for the
- 5809 project.)
- 5810

5811 ~~○ for each of the above projects, the offeror shall provide a narrative describing overall project~~
5812 ~~performance, including:~~
5813

Request for Proposal GSV07PD0003
Amendment-A001

5814 | For each of the above projects, the offeror shall provide a narrative describing overall project
5815 | performance, including:

- 5816
5817
- 5818 ○ project objectives and performance goals and whether they were achieved;
 - 5819
 - 5820 ○ a summary of the financial benefits the project delivered to the customer, including any return on
5821 investment calculation that qualifies the financial benefits;
 - 5822
 - 5823 ○ major deliverables produced;
 - 5824
 - 5825 ○ variations in work volumes and how they were managed, including unforeseen volume spikes in
5826 crisis and high-priority situations;
 - 5827
 - 5828 ○ two unanticipated challenges and the corresponding remedial actions;
 - 5829
 - 5830 ○ any innovative technologies and/or re-engineered business processes proposed and adopted by the
5831 customer that resulted in service improvement and/or cost reduction;
 - 5832
 - 5833 ○ any performance awards and/or special recognition received during the performance period of the
5834 project for superior achievement and/or significant cost savings; and
 - 5835
 - 5836 ○ any problems or issues that occurred, and the corrective action taken, that may impact the
5837 offeror's past performance evaluation by its customer.
 - 5838

5839 For the selected project(s), the offeror shall provide the name of the individual to whom the Past
5840 Performance Survey Questionnaire (Attachment J.1) is to be sent. The contact information shall include
5841 the individual's name and position; the name of the company; the project title; the point of contact's
5842 address; the phone and fax number; and, where available, his/her e-mail address. The offeror shall direct
5843 the individual(s) who will be completing the Questionnaire to submit the completed document directly to:

5844
5845 General Services Administration
5846 1800 F Street NW, Room G127
5847 Washington DC, 20405
5848 Attention: Robert H. Corey

5849 Questions may also be sent as a ".pdf" file via e-mail to: bob.corey@gsa.gov.

5850
5851 The offeror is responsible for informing the selected customers of the need to address the experience
5852 factors identified in Section L.7.2.1.3.1 in completing the questionnaire, as well as for alerting them that
5853 the completed questionnaire must be received by the Contracting Officer no later than the proposal due
5854 date set forth in the Standard Form 33 issued with the solicitation.

5855
5856 **L.7.2.1.5 Technical Approach**

5857 The offeror shall describe how it intends to meet the requirements specified in Section C - Performance
5858 Work Statement. The description shall include the following:

5859
5860 **L.7.2.1.5.1 Services to be Provided**

5861 The offeror shall describe its proposed solution or approach for providing each of the services and support
5862 | specified in Sections C.3 through C.11 of the Performance Work Statement, including any authentication

5863 process used to validate users/systems access to these services. Descriptions should demonstrate an in-
5864 depth understanding of the nature of the services and support to be provided; how the offeror will fulfill
5865 the requirements; what technology and tools will be used to support the services; and the industry best
5866 practices that will be employed by the offeror to accomplish task objectives and performance goals. The
5867 offeror shall describe plans and approaches detailing the methods by which proposed services and support
5868 will be implemented. The proposal shall not merely offer to conduct an investigation or perform work in
5869 accordance with the stated requirements, but shall outline the actual approach and/or methodology
5870 proposed. Insightful responses that describe proven state-of-the-art methods, and solutions that
5871 demonstrate the offeror's ability to quickly undertake and successfully complete the required contract
5872 tasks are preferred.
5873

5874 **L.7.2.1.5.2 Facilities and Technology Infrastructure**

5875 The offeror shall provide a detailed description of the proposed facilities and technology infrastructure
5876 that will be used in support of this contract, including the following:
5877

- 5878 ○ proposed contact center site(s) for supporting tasks to be performed under this contract, with an
5879 explanation on why the site(s) were selected. Provide a description of how the offeror intends
5880 to utilize scalable solutions to meet a diverse range of agency requirements, and the criteria and
5881 processes that it will use to evaluate and select new contact center sites to ensure compliance
5882 with the requirements set forth in Section C.5 of this solicitation;
5883
- 5884 ○ proposed systems architecture in block diagram form with appropriate explanation and
5885 identification of site location(s), hardware, network devices, etc., including those used for
5886 primary and backup operations. (Identify system capacity and scalability where applicable);
5887
- 5888 ○ the proposed technology solution for each of the requirements listed in Sections C.6, and C.7 of
5889 this solicitation, including the proposed technology and any special capabilities that are unique
5890 to the solution;
5891
- 5892 ○ proposed technology solutions and facilities for training;
5893
- 5894 ○ proposed technology solutions to support an effective quality assurance program; and
5895
- 5896 ○ a stipulation that the proposed technology solutions will be fully accessible by individuals with
5897 disabilities as required by Section 508 of the Rehabilitation Act Amendments of 1998 with an
5898 explanation of how then technology supports the stipulation.
5899

5900 **L.7.2.1.5.3 Contingency/Disaster Recovery Planning**

5901 The offeror shall submit a plan that describes its approaches for contingency/disaster recovery planning
5902 and implementation. The plan shall identify potential risks as well as the safeguards necessary to prevent
5903 them from occurring. The plan shall include, at a minimum, the following:
5904

- 5905 ○ an alternative set of steps to minimize the impact should risk prevention fail;
5906
- 5907 ○ a definition of the backup and restoration processes that will be implemented and the precise
5908 steps necessary to recover as quickly as possible, including recovery procedures for physical
5909 facility; voice, data, and desktop systems and applications; communications networks; electrical
5910 service; customer access points; partners and procedures; and staff;
5911

- 5912 ○ a definition of the roles and responsibilities of Contractor and Government personnel during
- 5913 contingent and disaster events, including provisions for training to prepare them to respond to
- 5914 such events; and
- 5915
- 5916 ○ implementation procedures to test and execute the plan on a regular basis to ensure
- 5917 preparedness for such events. Provide a sample of such a contingency test plan.
- 5918

L.7.2.1.5.4 Emergency Response Capability

5920 The offeror shall provide a description of its capability and procedures for short-notice ramping up and
5921 ramping down of its contact center operations in crisis or high priority situations including any past
5922 experience with such contingency operations. The offeror shall quantify its capacity to provide
5923 emergency contact center services in terms of capacity, operating hours, staffing, language support, and
5924 estimated ramp-up and ramp-down time. This section of the proposal will describe the following:

- 5925
- 5926 ○ use of excess capability versus additional infrastructure;
- 5927
- 5928 ○ plans for rapid addition of qualified information specialists;
- 5929
- 5930 ○ plans for processing security clearances for, and training of, newly hired information agents;
- 5931 and
- 5932
- 5933 ○ method of accounting for all information specialist hours in a rapidly changing, volume surge
- 5934 environment.
- 5935

L.7.2.1.6 Management Plan

5937 The offeror shall submit a Management Plan for accomplishing the work specified in this solicitation.
5938 The plan shall include, at a minimum, sections and structure described as follows:

L.7.2.1.6.1 Program Management Plan

5941 The offeror shall provide a detailed description of the program management structure and the support
5942 resources that it will provide to fulfill project requirements. This includes [providing the staff identified in](#)
5943 [Section C.4 of this solicitation](#) and support for project and site management, technology, security, human
5944 resources (including recruiting and training), finance, and quality assurance. Identify key positions within
5945 the management structure that are considered essential to successful project execution, and list the
5946 experience and educational criteria to be used to qualify candidates for these positions. Identify any
5947 operational and management processes and programs (e.g. Quality Assurance/Quality Improvement,
5948 Training, Disaster Recovery/Contingency Planning) implemented that demonstrate the offeror's high
5949 commitment to service excellence and consistent, repeatable results.

5950

5951 The Plan shall include an organization chart that identifies the entire chain of command in the organization;
5952 the chain of command for managing this contract; and the organizational components that will support this
5953 contract. In relation to the organizational structure, the offeror shall describe the management, technical,
5954 administrative and contractual delegations of authority within the organization. The offeror shall further
5955 describe the lines of authority and roles and responsibilities of all corporate entities (including subcontractors
5956 and/or teaming partners, if any) together with the escalation procedures for problem/dispute resolution.
5957 Provide a description of how the offeror's teaming partners and/or subcontractors (if any) will be managed to
5958 ensure that performance objectives are met.

5959

5960 The Plan shall also include a description on methodologies and approaches for providing timely
5961 operational and management reports to meet the requirements identified in Section C.11 of this
5962 solicitation.

5963

5964 **L.7.2.1.6.2 Human Resources Management Plan**

5965 The offeror shall provide a draft Human Resources Management Plan, which shall include relevant details
5966 of its plans for and approaches to recruiting, staffing, training, and retaining employees **identified in**
5967 **Section C.8 of this solicitation**. In addition, the offeror shall provide a description of its methods,
5968 procedures, and qualification requirements for recruiting qualified and competent contact center
5969 personnel, including: those required to provide foreign language support; staffing during start-up and
5970 contract performance periods; and personnel necessary to perform the tasks required by the contract,
5971 together with contingency plans for human resource acquisition during surge operations. The offeror
5972 shall identify the corresponding wage rate category as defined by the Department of Labor's wage
5973 determinations that will be used to compensate each level of contact center staff covered under the
5974 Service Contract Act. Provide a description of the processes and methodologies that will be used in the
5975 recruiting process for personnel screening and to ensure compliance with Homeland Security Presidential
5976 Directive 12 (HSPD-12).

5977

5978 **L.7.2.1.6.3 Performance Management Plan**

5979 The offeror shall provide a detailed description of the processes and methodologies to be implemented to
5980 ensure effective performance management, including service-level monitoring; workload forecasting;
5981 scheduling; service recovery (from system failures, disasters, etc.); problem identification and resolution;
5982 problem notification; and contingency planning and escalation. The offeror shall describe the processes
5983 and methodologies that it will follow in projecting and monitoring workload, performance objectives, and
5984 expenditure of the authorized funding level for the project, as well as for keeping the Government
5985 appraised of the situation in the event of an adverse program event. The offeror shall describe corrective
5986 actions and contingent plans that it will take to balance workload and performance objectives with
5987 funding allocations on an ongoing basis until the problem is corrected.

5988

5989 **L.7.2.1.6.4 Quality Control/Quality Improvement Plan**

5990 The offeror shall provide a detailed description of the processes and methodologies it will utilize for
5991 effective quality assurance, including the offeror's plan for developing, operating, and maintaining a
5992 quality control program to effectively address the following areas: staffing; training; operations; contract
5993 deliverables; performance management; process engineering; service delivery; service improvements; and
5994 customer satisfaction. The Contractor shall describe the processes and methodologies that it intends to
5995 follow in conducting performance assessment evaluations.

5996

5997 **L.7.2.1.7 Security Plan**

5998 The offeror shall provide a detailed description of its methodology for complying with the information
5999 systems security requirements set forth in Section C.3.5.5 of the Performance Work Statement. The
6000 description shall address existing and planned security controls (management, operational, and technical)
6001 that it will use to protect the confidentiality, integrity, and availability of information, and to ensure
6002 thereby that IT systems are protected. It shall also indicate whether these controls are in compliance with
6003 the recommended security controls for Federal information systems set forth in NIST Special Publication
6004 800-53. The offeror shall describe how it plans to achieve certification and accreditation of its
6005 information systems prior to award of any initial task order hereunder. Identify any previous experience
6006 with the certification and accreditation process that may enhance the ability of the offeror to successfully

6007 obtain certification and accreditation for information systems to be used to support task requirements
6008 under this contract. The offeror shall provide documented evidence of the existing policies and
6009 procedures that will be used to conduct periodic assessments of the security controls to ensure their
6010 effectiveness on an ongoing basis. Identify any existing and planned arrangements within the offeror's
6011 organization, or with third party vendors, to conduct and document these assessments on an ongoing
6012 basis. Identify methodologies and approaches for the development and implementation of plans of action
6013 designed to correct deficiencies in and reduce or eliminate vulnerabilities of information systems.
6014

6015 **L.7.2.1.8 Plan for Special Hiring**

6016 The offeror shall describe how it plans to meet the minimum five (5) percent human resource recruitment
6017 goal for the services of blind or severely disabled individuals through organizations that are affiliated with
6018 the Committee for Purchase from People Who Are Blind or Severely Disabled (National Industries for the
6019 Blind [NIB] and National Industries for the Severely Handicapped [NISH]). The offeror shall identify the
6020 qualified organization(s) through which these individuals will be hired, and describe any current and past
6021 association with such organizations in supporting similar projects. The offeror shall clearly describe its
6022 recruitment, hiring, training, and retention processes, and the roles and responsibilities of the NIB and
6023 NISH organization(s) within those processes, as well as any compensation arrangements between the
6024 offeror and the associated organizations.
6025

6026 **L.7.3 Business Proposal Submission Requirements**

6027 An original and two (2) copies of the Business Proposal and one (1) electronic copy using CD-ROM
6028 media (in Microsoft Word or Excel Windows XP format, (as appropriate) are required. Business
6029 Proposals shall consist of:

- 6030
- 6031 ○ a cover letter on company letterhead stipulating that the proposal shall remain in effect for ~~ninety~~
6032 ~~(90)~~ two hundred seventy (270) days;
- 6033
- 6034 ○ a signed Standard Form 33 (Solicitation, Offer and Award);
- 6035
- 6036 ○ a completed copy of Section B, Schedule of Supplies or Services;
- 6037
- 6038 ○ a fully prepared Small Business Subcontracting Plan (*large businesses only*);
- 6039
- 6040 ○ a fully executed copy of Section K, Representations, Certifications, and Acknowledgments; and
- 6041
- 6042 ○ an itemized statement of any exception(s) taken to any portion of the solicitation with a complete
6043 explanation for such exception(s), or a statement that no exceptions are being taken.
6044

6045 Offerors shall insert "fully burdened" prices in the spaces provided in Section B, Schedule of Supplies or
6046 Services, of this solicitation. For the purposes of this solicitation, the term "*fully burdened*" is defined as
6047 *Wage Determination-compliant direct labor rates, direct material (if applicable), plus overhead costs*
6048 *from all applicable overhead pools, plus general and administrative expenses, plus proposed profit*
6049 *margin for this program.*
6050

6051 A direct labor rate that is "*Wage Determination-compliant*" is one that meets the Federal minimum wage
6052 requirements in addition to the Health, Welfare and other benefit requirements of the Occupation Code
6053 for each employee being proposed pursuant to the United States Department of Labor Wage
6054 Determination currently in effect for the location (county and state) where the services are to be
6055 performed. As part of the Business Proposal, the offeror shall cite the applicable Department of Labor
6056 Wage Determination, including revision number and date that he/she used in preparing the proposal.

6057
6058 All prices proposed shall be considered to be ceiling rates that can not be exceeded when preparing a
6059 quotation for a task order under an awarded contract. If awarded a contract pursuant to this solicitation,
6060 the Contractor may propose a lower rate for any or all CLINs on a task-by-task basis. Part of the
6061 Contractor’s strategy may include offering services at a location(s) in the United States that is different
6062 from the location used to prepare this proposal. Offerors are cautioned that, at the task order level all
6063 offered rates must be *Wage Determination-compliant*. This means that rates must meet the requirements
6064 of the Department of Labor Wage Determination in effect at the time the task quotation is prepared for the
6065 location (county and state) where the quoted services are to be performed.
6066

6067 Prices shall be provided for each contract period (the two-year base period, each of the four [4] two-year
6068 option periods, and each of the ~~five [5]~~ three [3] ~~the~~ one-year extended periods).
6069

6070 **L.7.3.1 Business Proposal**

6071 The Business Proposal shall be organized as follows: (i) Cover letter and Standard Form 33 signed by a
6072 company official who is authorized to financially and contractually bind the company for the full amount
6073 of the proposal; (ii) Pricing Tables and an itemized list of all assumptions, and the rationale for each
6074 assumption, used in preparation of the pricing tables; (iii) Small Business Subcontracting Plan; and (iv) a
6075 completed copy of all terms and conditions of the solicitation, as called for above.
6076

6077 Subcontracting Plans shall be prepared using the format provided for in Section J, Attachment 2 of this
6078 solicitation entitled, “Small Business Subcontracting Plan Outline (Model)”. A Small Business
6079 Subcontracting Plan is required as part of your proposal if your firm *does not* qualify as a small business
6080 under the North American Industry Classification System code of 519190.
6081

6082 The Government will evaluate all Business Proposals received. The purpose of this price analysis will be
6083 to develop a negotiation position that permits the Contracting Officer and the offeror the opportunity to
6084 reach agreement as to a fair and reasonable price. A fair and reasonable price does not require that
6085 agreement be reached on every element of cost, nor is it mandatory that the agreed-to price be within the
6086 contracting officer’s initial negotiation position. Technical information submitted in the Business
6087 Proposal will not be evaluated as part of the Government’s evaluation of the Technical Proposal.
6088

6089 **L.7.3.1.1 Pricing Structure**

6090 The offeror shall include as part of its Business Proposal completed Price Tables for the contract base
6091 period, and for each of the option periods, for each Category of Services” described in the Section B,
6092 Schedule of Supplies or Services. In addition, the offeror shall include completed price tables for each of
6093 the Extended Performance Periods. The price schedule in Section B is comprised of four (4) main
6094 service categories, each of which must reflect *fully-burdened* prices:
6095

6096 L.7.3.1.1.1 *Project Start-Up* – identify one-time charges associated with project start-up for Facility
6097 and Equipment, Initial Training, Knowledge and Content Development, and Project Implementation
6098 Support.
6099

6100 L.7.3.1.1.2 *Project Management* – identify monthly recurring charges associated with the performance
6101 of all technical and management services as defined in Section C.3.5, Technical and Management
6102 Services. This service category includes a Core Project Management Support component and an
6103 Incremental Project Management Support component.
6104

6105 L.7.3.1.1.3 *Automated and Other Support Services* – identify recurring charges for providing
6106 Automated and Other Support services as defined in Sections C.3.1 and C.3.3. This service category
6107 includes a service initiation component and a recurring monthly or usage sensitive component.
6108

6109 L.7.3.1.1.4 *Attended Services* – identify the recurring charges for providing Attended Services based
6110 on the requisite skill levels as defined in Sections C.3.2 and C.4, respectively. The "Information
6111 Specialist (IS) Hourly Rate" is the fully burdened fixed hourly rate to be paid by the Government to the
6112 Contractor for each hour of work performed as defined in Section H.8. *The fixed hourly rate shall include*
6113 *the cost for all contact center IS staff and support personnel (e.g. quality monitoring personnel, trainers, etc.)*
6114 *required to support those ISs in their performance of the Project. The IS Hourly Rate shall not include any*
6115 *billable categories included in the Project Management fee described in Section 7.3.1.1 b above.* The offeror
6116 shall identify the wage rate category and wage rate used to develop the fully burdened IS hourly rate for
6117 each skill level. The applicable Department of Labor Wage Determination will also be identified by
6118 number, revision and date. Failure to include the wage category and rate information or an explanation as
6119 to why such information was not provided may render the offeror’s proposal “non- responsive”. The
6120 offeror shall include the multiplication factors for accommodating tasks that require above/below average
6121 IS-to-QA personnel ratios.
6122

6123 **L.7.3.1.2 Pricing Tables**

6124 The offeror shall include, as part of its Business Proposal, completed Price Tables for the contract base
6125 period and each of the option periods for each “category of services” described in the Section B Schedule
6126 of Supplies or Services. In addition, the offeror shall include completed price tables for each of the
6127 Extended Performance Periods. The offeror shall include prices for supporting each of the services
6128 requested using the pricing tables provided in Section B.2. Failure to provide supporting documentation
6129 may render the offeror’s proposal “non-responsive”.
6130

6131 *Note:* Extended-period pricing will only be used in task orders awarded before the end of the contract
6132 term if the task order’s period of performance will extend beyond the end of the contract term.
6133

6134 The offeror’s Pricing Tables must demonstrate both cost realism and balance. The following information
6135 is a guide to what each of the terms mean:
6136

6137 *Cost realism* exists when the estimated proposed cost elements are realistic for the work to be performed,
6138 reflect a clear understanding of the requirements; and are consistent with the unique methods of
6139 performance and materials described in the offeror’s technical proposal.
6140

6141 *Balanced pricing* can best be defined by describing its opposite: unbalanced pricing. Unbalanced pricing
6142 exists when, despite an acceptable total evaluated price, the price of one or more contract line items is
6143 significantly over or understated as indicated by the application of cost or price analysis techniques.
6144

6145 **L.7.3.2 Pricing Support Documentation**

6147 If required by the Government, the offeror shall furnish detailed supporting documentation for any or all
6148 of its prices. This may involve all information up to and including a complete breakdown of each element
6149 of cost. The Government will only ask for this documentation if it is necessary to reach a determination
6150 on the fairness and reasonableness of pricing. Failure to provide supporting documentation when
6151 requested to do so may render the offeror’s proposal “non-responsive”.

6152
6153

L.7.4 Oral Presentations

6154 a. At the option of the Government, offerors may be required to provide oral presentations to the proposal
6155 evaluation team at a Government site. If the Government requires an oral presentation, it will occur after
6156 competitive range is established. Offerors will receive a minimum of five (5) business days notice prior
6157 to the requested time for presentation. The total duration of the oral presentation shall be limited to one
6158 (1) hour or less. A question and answer period following the presentation will be limited to 45 minutes.
6159 The presentation shall include, but need not be limited to:

- 6160 o Experience and Past Performance
- 6161
- 6162 o Technical Approach
- 6163
- 6164 o Management Plans
- 6165
- 6166 o Security
- 6167
- 6168 o Plan for Special Hiring
- 6169

6170
6171 The Government will allow up to four (4) representatives from each offeror's team to attend the oral
6172 presentation. Information presented during the oral presentation, and any subsequent written discussion
6173 items, may be used by the Government to augment the offeror's written proposal for the purposes of
6174 evaluation hereunder.
6175

6176 **L.7.5 Technical Assistance in Evaluation of Proposals**

6177 Offerors are hereby notified that the Government may contract with a private company whose lines of
6178 business do not extend to the services called for herein to assist in the evaluation of the entirety or
6179 portions of the technical and/or Business Proposals submitted by offerors in response to this solicitation.
6180 This shall include, but not be limited to, data marked as proprietary by offerors.

6181 Such third-party contractor involvement may include one or more of the following activities: preparing
6182 responses to vendor questions; participating as a member of technical and/or price evaluation panel(s);
6183 attending oral presentations; conducting oral discussions with members of the Government's evaluation
6184 panel(s); and preparing written evaluation report(s).
6185

6186 Any such third-party contractor will only play an advisory role and their employees will not be voting
6187 members of either evaluation panel.
6188

6189 All third-party contractor personnel assisting in the review and/or evaluation of technical and/or Business
6190 Proposals submitted by offerors in response to this solicitation as described herein will be required to sign
6191 non-disclosure agreements to protect the offerors' propriety information.
6192

6193
6194
6195
6196
6197
6198

SECTION M
EVALUATION CRITERIA

M.1 BASIS FOR AWARD

6199 The Government intends to evaluate proposals and award contract(s) without discussions with offerors,
6200 except that offerors may be given an opportunity to clarify minor irregularities or apparent clerical
6201 mistakes in their submissions. Therefore, the offeror's initial proposal should contain the offeror's best
6202 terms from a price and technical standpoint.

6203
6204 However, the Government reserves the right to conduct discussions if the Contracting Officer later
6205 determines them to be necessary. If the Contracting Officer determines that the number of proposals that
6206 would otherwise be in the competitive range exceeds the number at which an efficient competition can be
6207 conducted, the Contracting Officer may limit the number of proposals in the competitive range to the
6208 greatest number that will permit an efficient competition among the most highly-rated proposals.

6209
6210 This solicitation will result in the award of one or more indefinite delivery, indefinite quantity (IDIQ)
6211 contracts for complete managed multi-channel contact center services. Award(s) will be made to the
6212 responsive, responsible offeror(s) whose proposal(s) provide the best-value solution to the Government.

6213
6214 The first award will be made to the responsive, responsible offeror which provides the best-value
6215 solution. The next award will be made to the responsive, responsible offeror which provides the second
6216 best-value solution. Additional awards will follow the same procedure, up to a maximum of ten (10)
6217 awards. In determining best-value, technical approach is significantly more important than price.

6218
6219

M.2 EVALUATION PROCESS

6220
6221 Technical Proposals will initially be evaluated against the minimum experience requirements in Section
6222 L.7.2.1.3.1 of this solicitation. This evaluation will be conducted on a pass/fail basis. In order to pass, an
6223 offeror must demonstrate that it meets all of the minimum experience qualifications set forth in Section
6224 L.7.2.1.3.1, and that all of that experience has occurred within the five (5) years immediately prior to the
6225 deadline for receipt of proposals.

6226
6227 Offers that have not demonstrated that the offerors meet the minimum experience qualifications will be
6228 processed as follows:

- 6229
- 6230 ○ If the proposal from a large business firm, as defined by NAICS 519190, it will be evaluated as
6231 unacceptable and that offeror will not be considered for the award of a contract hereunder.
 - 6232
 - 6233 ○ If the proposal is from a small business firm, as defined by NAICS 519190, it will be referred to
6234 the United States Small Business Administration (SBA) for a Certificate of Competency under
6235 the procedures are outlined in Federal Acquisition Regulation 19-602. Based on evaluation by
6236 the SBA, such firms will either be evaluated as having met the minimum experience requirement
6237 for performance under this solicitation, or will be evaluated as unacceptable. Small business
6238 offerors evaluated as unacceptable will not be considered for the award of a contract hereunder.
 - 6239

6240 Technical Proposals that pass the minimum experience requirements evaluation will then be reviewed for
6241 compliance with the solicitation requirements, in accordance with the evaluation factors set forth below.

6242 Evaluation of an offeror's Technical Proposal will be conducted independently of the evaluation of its
6243 Business Proposal. Technical sub-factors will be rated individually using a numerical rating scale. A
6244 weighting factor will be applied to the numerical rating to calculate the weighted rating for each sub-
6245 factor. The weighted numerical rating of each technical sub-factor will be combined to derive an overall
6246 rating for the relevant technical evaluation factor.

6247
6248 The numerical ratings in Table M.2-1 will be used by the Government to rate the evaluation sub-factor
6249 elements of an offeror's Technical Proposal.
6250

6251 **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

6252
6253 **M.2.1 Evaluation of Technical Proposals**

6254 The Government will evaluate the offeror's proposed solutions and approaches for meeting or exceeding
6255 contract requirements based on the following considerations, among others that may be deemed relevant
6256 by the Government. ~~Insightful responses that describe unique, innovative, and proven methods,~~
6257 ~~approaches, and capabilities that will enable the Government to achieve project objectives will receive~~
6258 ~~higher evaluation scores.~~

6259
6260 Technical proposals will be evaluated using a weighted numbering system. The purpose of weighting the
6261 factors and sub-factors is to ensure the achievement of program objectives by emphasizing the more
6262 important technical evaluation criteria.

6263
6264 *Sub-factors:* The rating that each sub-factor is awarded (based on the criteria in Table M.2.1) will be
6265 multiplied by a predetermined weighting factor. The sum of the weighting for all sub-factors within a
6266 technical factor will equal 100 percent. ~~(For illustration purposes only: sub factor one is weighted at 40~~
6267 ~~percent; sub factor two is weighted at 30 percent; sub factor three is weighted at 20 percent; and sub~~
6268 ~~factor four is 10 percent. The total weighting of the sub factors is 100 percent.)~~ The aggregate value of
6269 all weighted sub-factors will become the score for that technical factor.

6270
6271 Technical Factors: Once the score each technical factor is known, those scores will be weighted by
6272 multiplying each of the scores by predetermined weighting factor. As with sub-factors, the weighting for
6273 all technical factors will equal 100 percent. The technical evaluation score for the proposal will be the
6274 sum of all weighted technical factor scores.
6275

6276
6277
6278
6279
6280
6281
6282
6283
6284
6285
6286
6287
6288
6289
6290
6291
6292
6293
6294
6295
6296
6297
6298
6299
6300
6301
6302
6303
6304
6305
6306
6307
6308
6309
6310
6311
6312
6313
6314
6315
6316
6317
6318
6319

The following technical evaluation factors are listed in descending order of importance:

- Experience and Past Performance
- Technical Approach
- Management Plans and Processes
- Security
- Special Hiring

M.2.1.1 Experience and Past Performance (Factor 1)

The Government will evaluate the offeror’s experience and past performance based on the information to be provided in accordance with Sections L.7.2.1.3 and L.7.2.1.4 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:

- Demonstration of past performance
- Relevancy of corporate experience and core competencies
- Soundness of Operational and Management Plans and processes
- Demonstration of experience in key disciplines
- Documented successes with teaming partners and/or subcontractors

M.2.1.2 Technical Approach (Factor 2)

The Government will evaluate the offeror’s Technical Approach based on the information to be provided in accordance with Section L.7.2.1.5 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:

- Understanding of services to be provided
- Adequacy facilities and technology infrastructure
- Preparedness for disaster recovery/contingency planning
- Documented emergency response capability

M.2.1.3 Management Plan (Factor 3)

The Government will evaluate the offeror’s Management Plan based on the information to be provided in accordance with Section L.7.2.1.6 of this solicitation. The following sub-factors are applicable to this technical evaluation factor and are listed in descending order of importance:

- Soundness of the Program Management Plan
- Soundness of the Human Resources Management Plan
- Soundness of the Performance Management Plan
- Soundness of the Quality/Assurance/Quality Improvement Plan

6320 **M.2.1.4 Security Plan (Factor 4)**

6321 The Government will evaluate the offeror's Security Plan based on the information to be provided in
6322 accordance with Section L.7.2.1.7 of this solicitation. The following sub-factors are applicable to this
6323 technical evaluation factor and are listed in descending order of importance:

- 6324
- 6325 ○ Knowledge of Federal information systems security requirements
- 6326 ○ Appropriateness and effectiveness of security controls
- 6327 ○ Soundness of offeror's plan to attain certification and accreditation
- 6328 ○ Soundness of policies and procedures for conducting on-going risk assessments
- 6329

6330 **M.2.1.5 Plan for Special Hiring (Factor 5)**

6331 The Government will evaluate the offeror's Special Hiring based on the information to be provided in
6332 accordance with Section L.7.2.1.8 of this solicitation. The following sub-factors are applicable to this
6333 technical evaluation factor and are listed in descending order of importance:

- 6334
- 6335 ○ Soundness of the recruitment, hiring, training and retention processes
- 6336 ○ Clarity of the proposal regarding the roles and responsibilities between the offeror and partner
6337 organization(s)
- 6338 ○ Documented historical successes in the employing blind and/or severely disabled individuals for
6339 similar work
- 6340
- 6341

6342 **M.3 BUSINESS PROPOSAL EVALUATION**

6343 **M.3.1 Pricing Evaluation Tool**

6344 The Government will evaluate contract line item (CLINs) for all contract years (including Option Years
6345 and Extended Periods) in each responsive Business Proposal received. This will be accomplished by
6346 applying a uniform set of anticipated requirements to a standard USA Contract-developed source selection
6347 pricing tool. The CLINs and quantities will provide the price evaluators with comparable representative
6348 samplings of services that may be required throughout the term of the contract.

6349

6350 The Government understands that there is significant risk in providing ceiling prices over a fifteen year
6351 period. On the one hand, the offeror must have sufficient escalation in its pricing model to ensure that the
6352 ceiling prices are high enough to allow it to bid on requirements in the later years of the contract. On the
6353 other hand, the offeror must make sure that the escalation factor is not so steep that it prevents the
6354 company from receiving a contract award in the first place. It is obvious that the farther you go into the
6355 future, the harder the analysis becomes, and the greater the risk of over-or-under estimating. For this
6356 reason, the pricing tool will contain weighting factors. Weighting, for the purposes of the price
6357 evaluation, will be accomplished as follows:

- 6358
- 6359 ○ Base Period and Option Periods 1 and 2 (Years 1 through 6): Pricing is rated "Very Important"
- 6360 ○ Option Periods 3 and 4 (Years 7 through 10): Pricing is rated "Moderately Important"
- 6361 ○ Extended Periods (Years 11 through ~~15~~ 13): Pricing is rated "Least Important"
- 6362
- 6363

6364 **M.3.2 Basis for Evaluation**

6365 Business Proposals will be evaluated based on the following factors: price realism, price reasonableness,
6366 and total evaluated price.

6367
6368 **Price Realism** - Price realism will be evaluated to ensure that the proposed prices reflect a clear
6369 understanding of the work and skills required for contract performance. Business Proposals determined
6370 to be unrealistic in terms of technical commitment, or that appear to be unrealistically low in price, will be
6371 deemed reflective either of an inherent lack of technical competence, or of failure to comprehend the
6372 complexity of and risks inherent in the contract requirements.

6373
6374 **Price Reasonableness** - Business Proposals will be evaluated to ensure that proposed prices are
6375 consistent with industry standards for similar requirements, and are not excessive in comparison with
6376 such standards. Proposed prices that are determined to be unreasonable will be rejected.

6377
6378 Price realism and price reasonableness will be evaluated on a pass/fail basis. If an offer does not
6379 demonstrate both price realism and price reasonableness, it will be evaluated as unacceptable and the
6380 offeror will be eliminated from consideration for the award of a contract

6381
6382 **Total Price** – The Government will apply estimated quantities for each Contract Line Item Number
6383 (CLIN) in evaluating the total price of each proposal. The estimated quantities that will be used for
6384 evaluation purposes are based on the Government’s best estimate of current and future requirements.
6385 These estimated quantities will be applied consistently to all proposals to obtain the total evaluated price
6386 for the base and all option and extended performance periods. Total pricing that is evaluated as lacking
6387 balance (see Section L.7.3.1.2) may be rejected if it is determined that the lack of balance poses an
6388 unacceptable risk to the Government.

6389