**SAMPLE – For Reference Only** – This sample is a redacted copy of a work statement accomplished under a NITAAC GWAC. A Statement of Work (SOW) is typically used when the task is well-known and can be described in specific terms. Statement of Objective (SOO) and Performance Work Statement (PWS) emphasize performance-based concepts such as desired service outcomes and performance standards. Whereas PWS/SOO's establish high-level outcomes and objectives for performance and PWS's emphasize outcomes, desired results and objectives at a more detailed and measurable level, SOW's provide explicit statements of work direction for the Contractor to follow. However, SOW's can also be found to contain references to desired performance outcomes, performance standards, and metrics, which is a preferred approach. **This sample is not all inclusive, therefore the reader is cautioned to use professional judgment and include agency specific references and regulations to their own PWS/SOO/SOW.**

Data and Document Services (D&D)

Performance Work Statement

# Background

*Instruction to reader*: Enter background information here.

# Purpose and Scope

The goal of this task order (TO) is to provide flexible, innovative, and cost-effective solutions to meet the data and document requirements of the <AGENCY> and partner user communities including other federal and state agencies. Prospective vendors are encouraged to offer creative and innovative solutions that meet overall strategic objectives.

This performance work statement (PWS) does not provide specific details on the types of solutions to be offered or the comprehensiveness of any specific solutions such as location of performance. The Contractor shall provide the necessary facilities, qualified personnel, supplies and equipment necessary to manage this work. The government requires the Contractor to offer comprehensive solutions that (1) are based on an understanding of the current <AGENCY> Information Management (IM) and Information Technology (IT) environment, and (2) provide the scope and breadth of document and data services that are responsive to the present and future needs of the <AGENCY>, and partner user communities.

# Period of Performance

One-year base period with six one-year option periods.

# Task Order Objectives

<AGENCY> objective is to establish a performance-based Task Order to provide data and document services support. Central to this effort are the means to:

* Assist in developing and maintaining an approach to data and document services support that is responsive to <AGENCY> and <AGENCY> business needs.
* Foster the rapid and appropriate adoption of new technologies in support of data and document services.
* Optimize internal and external communications and sharing of information.
* Provide flexibility for change as the nature of the support services changes.
* Provide uninterrupted operations and minimize organizational disruption during transition.
* Respond to requirements on short notice and provide rapid solutions following established and known processes.

The Contractor may also be tasked to support other <AGENCY> offices other than <AGENCY>, which would be identified in a Technical Directive Document (TDD) or specifically within an individual Work Request (WR) issued under a TDD.

# Tasks

## Task 1 – Task Order Management

### Subtask 1-A Monthly Progress Reporting

The Contractor shall provide progress reports in accordance with XXX <AGENCY> Monthly Progress Reports. <AGENCY> reserves the right to provide the format of the Progress Report.

### Subtask 1-B. Financial Reporting and Cost Tracking

In addition to standard Task Order reporting requirements, <AGENCY> requires a mechanism for providing costs and estimates at the subtask, TDD or work request level with the capability to track costs to the type of work performed as it relates to data and document services. All costs associated with tasks, subtasks, TDDs, and work requests shall be reported in the monthly report by individual TDDs as well as at an aggregate level. It is noted that a work request is a specific project or task that is to be performed under an approved TDD. All costs associated with specific project codes shall be reported in the monthly report, and as specified in the individual work request. Project codes shall be established before technical work begins. Work estimates shall include costs associated with each major project milestone/phase. All cost-tracking for work to be billed should include information to identify the following:

* Task Order Number
* <AGENCY>’s Lab, Center, or Office for which requested work was done
* Location to which requested work shall be charged
* Task and Subtask Areas of this PWS
* TDD

Create financial reports and track costs at a detailed level and produce standard reports as well as ad hoc reports. Changes in established project codes must be reviewed and approved by the TO COR.

Costs shall be included in the monthly financial report due by the 15th of the month following the month reported.

Additional financial reporting requirements will be specified in the individual work request and TDD.

Reports shall be accurate, clear, complete, timely and in accordance with the requirements in the work request. Information in the monthly progress reports should be consistent with costs identified in the associated monthly invoice and consistent with generally accepted accounting principles.

Under this PWS, the TOCOR and Alternate TOCOR are responsible for overseeing this effort as a whole. For TDDs and WRs, there will be designated Technical Monitors (TMs) that are responsible for those specific projects.

A list of deliverables for Task 1-A and 1-B is provided in the table below.

Table – Deliverables for Subtask 1-A and 1-B

| **Subtask** | **Subtask Name** | **Due Date** |
| --- | --- | --- |
| 1-A. | Monthly Progress Reports | On or before the 15th of each month |
| 1-B.1 | Cost Tracking Reports included in the Monthly Financial Status Report | On or before the 15th of each month |
| 1-B.2 | Ad-hoc Cost Tracking Reports | As requested by TOCOR |

### Subtask 1-C. Task Order Services

1. The Contractor shall create and maintain a Data and Document support catalog of services, to include the following items, at a minimum:
   * Description of the services offered under the TO.
   * How to request those services.
   * Lead-time required for requests (i.e. how long prior to due date a specific data and document deliverable should be requested).
   * Approximate turn-around times to receive level of effort estimates (i.e. how long before the customer gets first contact from the service provider).
   * Length of time required for completion of common service requests.
2. The Contractor shall create and maintain standard operating procedures (SOPs) for reviewing and updating the Data and Document support catalog of services.

A list of deliverables for Task 1-C is provided in the table below.

Table – Deliverables for Subtask 1-C

| **Subtask** | **Subtask Name** | **Due Date** |
| --- | --- | --- |
| 1-C.1 | Task Order Catalog of Services | Created within 60 calendar days of Task Order Award |
| 1-C.2 | SOPs for Task Order Catalog of Services | Delivered within 60 calendar days of Task Order Award and updates as necessary and/or requested by TOCOR |

### Subtask 1-D. Work Request Handling and Tracking

1. The Contractor shall provide <AGENCY> customers with a centralized, electronic method, at no cost to the Government, for requesting data and document services. The proposed standard solution provided by the Contractor shall be referred to hereafter as Work Request System (WRS). The appropriate TOCORs and TMs shall have access to this system for the purposes of tracking status, approval, and cost. The WRS shall be able to produce reports to include, but not limited to work type by quantity, location, LCO, number of hours, TDD, etc. as requested by TOCORs and TMs. The TOCOR will issue TDDs to the Contractor that will provide technical direction for work requirements. After the establishment of a TDD, work shall be issued as projects/work requests through the Contractor-provided WRS. The WRS shall provide detailed work descriptions and routing approvals for requests associated with the applicable TDD. The work requests shall be routed to the appropriate TM for review, and approved requests will then be routed to the Contractor. When required, the Contractor shall provide a written estimate of the number of hours necessary to complete the work. Work shall not start until approved by the TM, or as established in SOPs. Work requests may be approved/disapproved by the TOCOR/ATOCORs in the absence of the TM. When ad hoc plans or reports are required, a request will be submitted via the WRS. The date of delivery for such items will be specified at time of the request. A technical work plan may be required and shall be submitted to the TM within a specified timeframe that contains specific deliverables and due dates. When eighty-five percent (85%) of the ceiling hours have been expended on any WR issued with a ceiling of forty (40) hours or more, the TM as designated in the TDD shall be notified by the Contractor in writing via the WRS. If additional hours are necessary, the Contractor shall provide the TM with an estimate to complete the work request. The request shall include a description of changes to the original estimate and why hours beyond the original estimate are needed to complete the work outlined in that estimate. The TM will approve or disapprove the requests and additional hours as appropriate.
2. The Contractor shall provide <AGENCY>-enterprise workflow diagrams, SOPs, and process documents for work requested and products created under this Task Order.
3. The Contractor shall provide a schedule for review of workflow diagram, SOPs, and process documents, and shall maintain these documents and deliverables according to that schedule following <AGENCY> approval.
4. The Contractor shall provide a work plan and cost estimate for TDDs, including staffing approach (e.g., on-site/off-site, shared resources, etc.).

A list of deliverables for Task 1-D is provided in the table below.

Table – Deliverables for Subtask 1-D

| **Subtask** | **Subtask Name** | **Due Date** |
| --- | --- | --- |
| 1-D.1 | WRS | Available for use at time of award |
| 1-D.2 | Workflow, SOPs, and process documents | Delivered to TOCOR, ATOCORs and TMs within 45 calendar days of Task Order Award |
| 1-D.3 | Schedule for Review of Workflow, SOPs, and process documents | Delivered to TOCOR, ATOCORs and TMs within 60 calendar days of Task Order Award |
| 1-D.4 | TDD Work Plans | Delivered to TOCOR, ATOCORs and TMs within 15 calendar days of issuance of TDDs |

### Subtask 1-E. Organizational and Management Services

The Contractor shall perform evaluations of the services performed under this task order. This evaluation may include, a summary of efficiencies to be gained by streamlining, different staffing approaches, new technologies, etc. Specific requirements will be included in a Work Request (WR).

A list of deliverables for Task 1-E is provided in the table below.

Table – Deliverable for Subtask 1-E

| **Subtask** | **Subtask Name** | **Due Date** |
| --- | --- | --- |
| 1-E.1 | Service evaluations | Due date to be specified in Work Request |

### Subtask 1-F. Weekly Staff Report

The Contractor shall provide reports in accordance with Clause XXX Weekly Staff Report. <AGENCY> reserves the right to provide the format of the Weekly Staff Report.

## Task 2: Data & Document Services

The Contractor shall provide support for ancillary use-oriented business services that require either specific technical expertise or access to specialized technologies. The Contractor shall provide trained and experienced staff for state-of-the-art service provision for all Data and Document service task areas, familiar standard off-the-shelf internet, word processing, and image packages such as, but not limited to, the following:

* + Microsoft Office Products (Word, Excel, Access, InfoPath, etc.)
  + Adobe Suite (Acrobat InDesign, Adobe Photoshop, Adobe Illustrator, Adobe Acrobat, Adobe PageMaker, Adobe Premier)
  + Dreamweaver, Drupal, Web-based Browsers such as Chrome, etc.

### Subtask 2-A. Image Scanning

Utilizing an electronic document imaging system with an adequate blend of hardware, software, maintenance, people, and training, the Contractor shall provide image capture, scanning, and reproduction of hardcopy and softcopy documents and images for digital use including but not limited to:

* + Scanning hardcopy and softcopy documents, articles, applications, or images produced, sent to, or acquired by <AGENCY> for conversion to electronic format.
  + Image manipulation to transform the captured images into an appropriate format for reproduction and storage.
  + Conversion of scanned or soft copy images from one format type to other format types.
  + Forwarding digital files or load into document and content management systems and databases.
  + Indexing or assigning metadata or keywords to scanned documents, digital documents, or images.
  + Archival and storage of scanned images for retrieval upon request.

### Subtask 2-B. Report Development

The Contractor shall create and maintain reports to be used internally to <AGENCY> and <AGENCY> for business management purposes, as well as externally for scientific and other business purposes, including but not limited to:

* + Retrieving data from systems or other sources, compiling data, and updating data for reporting purposes.
  + Reading, summarizing, grouping, and developing information to be included in reports or report templates.
  + Developing and maintaining report templates.
  + Maintaining report distribution lists.
  + Distributing reports to appropriate audience.

### Subtask 2-C. Data Entry

The Contractor shall provide data entry services for general administrative, scientific, and technical data and maintenance of data in systems, databases, and spreadsheets. Common types of data entry required may include entry into:

* + <AGENCY>, <AGENCY>, or other organizational financial systems, applications, or databases.
  + <AGENCY>, <AGENCY>, or other organizational human resources systems applications, or databases.
  + Spreadsheets or other documents utilized for creation of reports.
  + Technical Reference Center (TRC) reference and subscription databases.
  + Document tracking systems and databases, such as those used for the processing of grant applications.

### Subtask 2-D. Writing, Editing, and Documentation

The Contractor shall provide general, scientific, and technical writing, editing and documentation services as required in this TO, including:

* + Documenting scientific processes and their outcomes
  + Editing technical or scientific content required to deliver data and document products
  + Ensuring documents conform to standards and specifications such as AGENCY> and <AGENCY> style guidelines

Editing capabilities shall include at a minimum, editing, text formulation, abstract and document summary creation, writing consultation, standards conformance, and document finalization and release. Editing may include correcting errors in spelling, grammar, punctuation, and checking materials including tables, figures, units of measure, headings, etc., for consistency of style and format in accordance with <AGENCY> and Agency established guidelines. Editing also includes checking reference lists for accuracy and completeness. Any discrepancies found during checks shall be documented so that the author/manager of the text can verify or correct. The Contractor may be requested to perform these verifications or corrections. The Contractor shall evaluate sentence structure, vocabulary usage, organization of the material, accuracy of technical terminology, and verify text citations of tables and figures.

The Contractor shall identify the project documentation requirements, indexing, bibliography, standards and conventions, data and status tracking, and automated mailing list addressing, together with control, information, and dissemination features to ensure timely, efficient, and cost-effective project documentation support. The Contractor shall have the knowledge and skills in English writing and editing, document layout, publication production, text tools, and Government document standards to provide cost-effective and timely completion of each product.

### Subtask 2-E. Technology Transfer & Assessment

The Contractor shall distribute information, tools, and technology within <AGENCY> including but not limited to:

* + Developing and identifying appropriate methods and mechanisms for the distribution of Agency-created information, tools, and technology.
  + Implementing methods and mechanisms for the distribution of Agency- created tools, information, and technology.

### Subtask 2-F. Content Management

<AGENCY> is moving to a Drupal web platform. Drupal is an open source content management platform that allows individuals to publish, manage, and organize the content of websites. Drupal is licensed under the <AGENCY> General Public License (GPL) and is maintained by a community of developers and end users. By implementing Drupal at <AGENCY>, <AGENCY> benefits from a system that employs innovative technology from practitioners with an eye for standards compliance, separation of content from design, and the ability to create and maintain websites and pages without advanced technical know- how. Drupal's modular architecture is well-documented and supported and can be extended in order to meet customer needs.

The Contractor shall facilitate the creation, update, publishing, translation, archival, and retrieval of digital content on <AGENCY> and <AGENCY> websites. The Contractor shall arrange, add, and maintain content in web, file, or document management systems, including:

* + Managing the organization and structure of content on web pages, file systems, or other systems such as document management systems.
  + Ensuring version control of all content.
  + Developing and maintaining taxonomies and metadata for content.
  + Managing and updating content on web sites, file systems, or in other systems such as document management systems.
  + Ensuring 508 compliance where applicable.

## **Task 2 Deliverables**

Specific deliverables will be defined in the TDDs and/or Work Requests issued under this task order. Examples of products are shown at Attachment XXX.

The Contractor shall adhere to <AGENCY> product development guidelines. If applicable, deliverables shall be prepared in accordance with:

* + Section 508 of the Americans with Disabilities Act
  + Government Paperwork Elimination Act
  + Clinger-Cohen Act
  + Computer Security Act
  + Government Information Security Reform Act
  + Applicable OMB Guidance

### Additional Deliverables may Include

Reference manuals, user guides, user procedures, SOPs, specifications, technical reports, criteria documents, training material, financial status reports, and other types of technical communication.

Deliverables will include various types of <AGENCY> business-related data services and documents and daily requirements that must be fulfilled as specified through the work request system.

Deliverables shall be provided in electronic format conforming to <AGENCY> standards and any other format(s) requested in the work request. Other formats may include at a minimum CDs, DVDs, printed documents and articles, or other printed materials. Some deliverables may need to be provided in multiple electronic formats for various uses, including but not limited to integration into <AGENCY> financial databases and project management systems or for reporting purposes and use in management dashboard web applications.

### Acceptance Criteria for Deliverables

During the review of deliverables, the designated TMs shall have the right to reject or require correction of any deficiencies found in the deliverables. In the event of rejection of any deliverable, the Contractor will be notified in writing by the TM of the specific reasons why the deliverable is being rejected. The Contractor shall correct the rejected deliverable and return it to the appropriate TM. The following list of acceptance criteria applies to all tasks:

* + Completeness, clarity, timeliness, organization, consistency, meets requirements, quality, grammatically correct, technical accuracy, and meet Agency Standards for documentation
  + Where appropriate, deliverables shall also be evaluated for adherence to SOPs and enterprise-wide processes.
  + All SOPs shall demonstrate quality assurance and control aspects of each task.
  + All SOPs shall demonstrate adherence to policies, procedures and directives issued by Agency XXX authorities.
  + Additional acceptance criteria may be specified in individual work requests.

## Task 3 (Optional): Data & Document Services for <AGENCY>

This task may or may not be exercised at the discretion of the Government. If it is exercised, it will be done by the Contracting Officer via a TO modification. If exercised, it will be done so on a period by period basis and may or may not be consecutively (e.g., exercise in Base Period, not in Option Period I or II, and exercise in Option IV, etc.). This optional task shall be priced separately, period by period, from the basic PWS.

## Overview:

The <AGENCY> is one of five research organizations that comprise the <AGENCY> <AGENCY>. <AGENCY> mission is to support high-quality research by the nation’s leading scientists that will improve the scientific basis for decisions on national environmental issues and help <AGENCY> achieve its goals.

<AGENCY> supports the development of innovative environmental technologies and products through its XXX Program and funds research grants and graduate fellowships in numerous environmental science and engineering disciplines with its Science to Achieve Results or STAR program.

## Purpose and Scope:

In order to support the presentation and dissemination of the scientific work performed by <AGENCY>, the Contractor shall provide high quality data and document services. All work is to be performed off-site.

<AGENCY>’s work is currently being performed and maintained in a Windows™ environment known as the XXX; the system’s purpose is to receive, store, and perform all the necessary tracking, processing, and response activities for the applicants and <AGENCY> staff. The XXX is composed of five modules:

* + Application module that serves as a repository to house all key information extracted from submitted applications;
  + Panels module that contains pertinent information to facilitate peer review preparation activities for peer review panels and posting panel results;
  + Relevancy module that contains information pertinent only to those applications deemed scientifically or technically meritorious;
  + Funding module that generates all appropriate documentation/funding information as required by the Agency for award selection; and
  + Tracking module that is in the early stages of development. The XXX will accommodate applications and any supporting documents that are submitted electronically, sent to a fax machine, or sent as a hard copy.

The submission and processing of these applications are managed in terms of tracking information, responding to the applicants, compiling, and analyzing evaluation results, and generating reports. In order to use the most efficient methods for soliciting, receiving, and processing applications, various methods of electronic communication and electronic storage are being employed to the maximum extent possible throughout the process. This will include, but will not be limited to, electronic receipt of applications.

Electronic submission of applications and associated material may come to the Agency indirectly from the centralized <AGENCY> site. The <AGENCY> will receive the electronic packages through the <AGENCY’s> XXX. From the XXX, the electronic files will move to the XXX office, where they will be extracted, and data contained within an XML (extensible mark-up language) file will be moved to an XXX database file along with a PDF version of the application information (this might be more than one PDF file).

Although the exact numbers and types of applications will determine the actual processing steps that will be used, all applications will undergo some type of peer review. Those STAR Grant and XXX applications found to have the greatest scientific merit will undergo programmatic review as well. <AGENCY>’s Science to Achieve Results or STAR program funds research grants in numerous environmental science and engineering disciplines through a competitive solicitation process and independent peer review. (Note: Fellowship and Scientific and Technological Achievement Award (STAA) applications are not reviewed for relevancy). The STAA program is an agency-wide competition sponsored by the Office of Research and Development (<AGENCY>) that recognizes outstanding scientific and technological papers published by <AGENCY> employees. Peer reviews are designed to evaluate the scientific merit of an application, while programmatic reviews are designed to evaluate the relevance of an application to <AGENCY>’s mission, among other considerations. Although peer reviews may take the form of a mail review or a panel review, almost all of <AGENCY>’s peer reviews are done through panels.

## Task 3 Requirements:

The Contractor shall provide support for ancillary use-oriented business services that require either specific technical expertise or access to specialized technologies. The Contractor shall provide trained and experienced staff for state-of-the-art service and familiar with standard off-the-shelf internet, word processing, and image packages such as the following (not all-inclusive):

* Microsoft Office Products (Word, Excel, Access, etc.)
* Adobe Suite (Acrobat InDesign, Adobe Photoshop, Adobe Illustrator, Adobe Acrobat, Adobe PageMaker, Adobe Premier)

Support shall be requested by an authorized Technical Monitor (TM) using a work request system to be provided by the Contractor at no cost to the Government.

Support shall be provided in an expert manner following customary guidelines.

The Contractor shall meet with the TM on a routine basis, by work request or as needed. The Contractor shall also participate in ad hoc meetings as requested by the TM, and as required to complete <AGENCY> data and document services as requested through the work request system.

Reporting requirements outlined in the TO PWS shall be met and all electronic products shall be 508-compliant, unless an appropriate 508 compliance waiver is obtained. The TM may also request additional ad hoc or summary reports related to tasks performed under this task.

### Subtask 3-A. Image Scanning

The Contractor shall provide image capture, scanning, and reproduction of hardcopy and softcopy documents and images for digital use.

**Deliverables:** In most cases, the Contractor shall use the electronic file submitted by the applicant. Occasionally, there may be a need to create a digital image from a hardcopy. Utilizing an electronic document imaging system with an adequate blend of hardware, software, maintenance, people, and training. Specific deliverables will be defined in work requests approved by the TM.

### Subtask 3-B. Report Development

The Contractor shall create and maintain reports to be used internally to <AGENCY> and <AGENCY> for business management purposes, as well as externally for scientific and other business purposes.

**Deliverables**: Contractor shall provide non-recurring or ad hoc reports concerning data and document services support activities and procedures, Standard Operating Procedure documentation, and documentation to instruct users in proper use of software packages or special purpose applications or scripts. Reports or documentation will be requested via work request and date of delivery will be specified at time of request.

### Subtask 3-C. Data Entry

The Contractor shall enter general administrative, scientific, technical, and maintenance of data in systems, databases, and spreadsheets. In addition, the Contractor shall transfer the uploaded Letter of Recommendation (LOR) files from <AGENCY>’s Web Site Server to the XXX Database Server. The Contractor shall identify fields in each Fellowship application then search five to six thousand Fellowship LORs to find letters that match. The Contractor must manually merge all LORs (3) to the appropriate Fellowship application. The Contractor shall QA/QC the data uploaded into the XXX server and LORs match to the application.

**Deliverables:** The Contractor shall perform appropriate validation of information imported into the XXX until the TM determines that all of the protocols and procedures are fully functional. Other deliverables will be requested via work request and date of delivery will be specified at time of request.

### Subtask 3-D. <AGENCY>’s STAR Grants, Fellowships, STAA, and the SBIR Program

1. **Subtask 3-D.1 The STAR Grant & Fellowship Program**

The Contractor shall create a specified number of CDs (the exact number will be provided in writing by the TM) which will be reviewed for eligibility. For each CD, the Contractor shall create a cover identifying the Name and Sort Code of Request for Application (RFA).In addition the Contractor shall process the Grants and Fellowship Applications according to the steps listed below:

1. Receiving and Sorting Packages,
2. Abstract procedures,
3. Data Input into XXX,
4. Electronic Notifications,
5. Data input of Individual Reviewer and Summary Forms, and
6. Processing Declination Packages.
7. **Subtask 3-D.2 The STAA Program**

The Contractor shall maintain and manipulate the existing STAA database. In addition the Contractor shall process the STAA Nominations according to the steps listed below:

1. Receiving, sorting, and Numbering STAA nominations,
2. Data Entering selected information,
3. Electronic Notifications,
4. Generating Award Letters, and Certificates for the winners.
5. **Subtask 3-D.3 The SBIR Program**

SBIR proposals are submitted to <AGENCY> Contracts Office in XXX. That office keeps the original and delivers copies of each proposal to <AGENCY> (via by CD or some electronic method, this to be determine at a later date by <AGENCY>’s Contracts Office in XXX). The Contractor shall place each proposal in an electronic folder identified with the respective tracking number. In completing this task, the Contractor shall process the XXX Applications according to the steps listed below:

1. Receiving, Sorting, and Number packages,
2. Data Entering selected information,
3. Abstract Procedures,
4. Data entering and receiving individual reviewer and summary forms, and the debriefing process.

**Deliverables:** The Contractor shall be responsible for updating the existing SOPs. The draft version shall be delivered to the TM for review and comments no later than 6 to 7 months into the base period of performance. The final version shall be delivered to the TM for review and comments no later than XXX of the base year. The SOP may require minor modifications throughout the life of the contract. Also, the SOP should incorporate any Agency/<AGENCY> changes in policy/direction that will have a direct correlation to the SOPs, i.e., the electronic submissions, etc. The TM shall be responsible for keeping the Contractor abreast of these changes/decisions in a timely manner.

## **Optional Task 3 Deliverables**:

Deliverables will include various types of <AGENCY> business-related data services and documents and daily requirements that must be fulfilled as specified through the work request system. Additional specific deliverables will be defined in work requests and may include reference manuals, user guides, user procedures, SOPs, specifications, technical reports, criteria documents, training material, financial status reports, and other types of technical communication.

All deliverables shall be provided in electronic format conforming to <AGENCY> standards and any other format(s) requested in the work request. Other formats may include at a minimum CDs, DVDs. Some deliverables may need to be provided in multiple electronic formats for various uses, including but not limited to integration into <AGENCY> financial databases and project management systems or for reporting purposes and use in management dashboard web applications.

## Acceptance Criteria for Deliverables:

During the review of deliverables the TM or other designated TM shall have the right to reject or require correction of any deficiencies found in the deliverables. In the event of rejection of any deliverable, the Contractor will be notified in writing by the TM of the specific reasons why the deliverable is being rejected. The Contractor shall correct the rejected deliverable and return it to the TM, except where specified by work requests.

The following list of acceptance criteria applies to all deliverables defined in this Optional Task as well as to all deliverables identified in work requests:

1. Completeness, clarity, timeliness, organization, consistency, meets requirements, quality, grammatically correct, and technical accuracy.
2. Follows established <AGENCY> and Agency procedures, policies, standards, and directives.
3. Additional acceptance criteria may be specified in individual work requests.

Attachment X: Schedule – Subtask 3-D.X

Support for <AGENCY>’S STAR Grants and Fellowships

Program

| **Steps for Applications Associated with a Given Panel/Subpanel**  **(Approximately 50-100 applications)** | **Elapsed Time from Submission Deadline (Work Weeks)**  **STAR Grants** | **Elapsed Time from Submission Deadline (Work Weeks)**  **Fellowships** |
| --- | --- | --- |
| 1. Receive, extract data, input into XXX, and send electronic notifications | 1.0 | 1.0 |
| 1. Generate and deliver electronic applications to TM | 1.0 | 1.0 |
| 1. Deliver reviewer-specific Score Sheets, an Assignment Sheet, and an electronic Scoring File to TM | 11.8 | 11.8 |
| 1. Import peer review results and scores back into XXX | 12.8 | 12.8 |
| 1. Provide TM with documents needed for programmatic review for STAR Grants or for funding decisions for Fellowships | 12.8 | 12.8 |
| 1. Provide TM with CD of applications for Grants that will be funded | 15.0 | N/A |
| 1. Send declination letters to unsuccessful applicants for Grants and Fellowships | 20.0 | 20.0 |
| 1. Provide TM with documents needed for programmatic review for STAR Grants or for funding decisions for Fellowships | 12.8 | 12.8 |

Attachment X: Schedule – Subtask 3-D.X

Support for <AGENCY>’s STAA Program

| **Steps** | **Elapsed Time from Submission Deadline**  **(Work Weeks)** |
| --- | --- |
| 1. Receive, extract data enter, input into STAA database, generate a report of applications received and send electronic notifications. | 2.0 |
| 1. Organize and deliver electronic applications to TM. | 3.0 |
| 1. Update database and generate items such as award packages, award letters, certificates, and summary tables. | 50.0 |

Attachment X: Schedule – Subtask 3-D.X

Support for <AGENCY>’s XXX Program

| **Steps for Proposals Associated with a Given Panel/Subpanel**  **(Approximately 50-100 Proposals)** | **Elapsed Time from Receipt of Proposals (Work Weeks)** |
| --- | --- |
| Receive, extract data, and file. | 1.0 |
| Generate and deliver electronic proposals received to TM. | 1.0 |
| Deliver reviewer-specific Score Sheets, an Assignment Sheet, and an electronic Scoring File to TM. | 11.8 |
| Import panel scores back into XXX database. | 12.8 |
| Organize and Prepare De-briefing packages to go out via email. | 13.3 |

Attachment X: Travel and Training

# Other Direct Costs and Travel

1. Other Direct Costs--Other Direct Costs (ODCs) are items which are allowable and allocable direct costs to the task order for which <AGENCY> may reimburse the Contractor. Such items shall be charged in accordance with the Contractor's established and accepted accounting practices except as stated below. The Task Order COR (TOCOR) may provide approval for materials and supplies up to $XXX (for a single item or a related group of items). For costs beyond $XXX, the <AGENCY> Contracting Officer's approval is required. This consent is only intended to be a determination of technical reasonableness and is not a pre-determination as to the allowability of these costs. Equipment is considered to be “facilities” for the purpose of Part 45 of the Federal Acquisition Regulation and, with certain exceptions, may not be reimbursed as a direct charge to the contract.
2. Travel—Travel up to of $XXX for a single trip (e.g. one trip for X people or X trip for X person) may be an allowable charge to this task order with prior written consent of the TOCOR. Travel in excess of $XXX for a single trip (e.g. one trip for X people or X trip for X person) is not allowable as a charge to this task order without prior written consent of the Contracting Officer. Except as explicitly set forth below, the Contractor shall be reimbursed for allowable and allocable travel costs actually incurred by and paid to the Contractor's employees, provided such costs do not exceed the amount that would be payable to an employee of the <AGENCY> conducting the same travel while on Government business. In determining the dollar value of allowable contractor employee travel costs, the limitation of the Federal Travel Regulations effective on the date of travel will apply to contractor employees to the same extent they apply to Federal Government employees.
3. The Contractor may be required to furnish to the Contracting Officer documentary proof of every travel expenditure that exceeds twenty-five dollars ($25), including receipts for common carrier transportation expenditures. Bona fide lodging receipts may be required to be submitted by the Contractor along with the monthly invoices.
4. The Contractor may elect to reimburse its employees for meals and incidental expenses (as defined in the Federal Travel Regulations) on a per diem basis, and the Contractor will be reimbursed for such payments. In no event shall the reimbursement allowed under this provision exceed the standard per diem for meals and incidental expenses allowable under the Federal Travel Regulations.
5. To the maximum extent practicable consistent with travel requirements, the Contractor agrees to use the reduced air transportation and hotel/motel rates and services provided through available Government discount air fares and lodging rates for bona fide employees' travel that is otherwise reimbursable as a direct cost pursuant to this contract when use of such rates results in the lowest overall cost. The Contractor shall submit requests, including pertinent information, for specific authorization to use these rates to the Contracting Officer.

# Travel Required by Contractor Staff

Contractor staff may be required to travel in support of this Task Order. The following table shows the locations to which travel may occur.

| **City** | **State** |
| --- | --- |
| XXX | XX |
| XXX | XX |
| XXX | XX |

The Contractor shall generate and submit to the TOCOR, a detailed Trip Report within five working days of completing the travel. The trip report shall contain the purpose of the trip, its length, location visited, issues/information obtained on the trip, action items and recommendations resulting from the trip that impact the services being delivered.

# Training

The Contractor shall provide and maintain a qualified staff of personnel to meet the requirements of the Statement of Work. The Contractor shall provide training to its staff at no cost to government to keep its personnel abreast of changes to the science and/or technology associated with the requirements of the task order or to obtain and sustain an appropriate level of professionalism. In addition, the Contractor shall ensure that its personnel receive appropriate safety, health, and environmental training in accordance with Federal, state, and local requirements prior to assigning any task that require such training. The Contractor shall provide documentation of such training upon the request of the Contracting Officer Representative (COR) and/or Contracting Officer (CO).

There may be occasions when it is determined to be in the best interest of the Government to reimburse the Contractor for the indirect cost of training associated with a requirement that represents a unique Government need.

When such circumstances occur, the Contractor shall secure the prior written approval of the TOCOR by submitting a written request that includes, at a minimum the following information:

* Individual to be trained (Identify position and job duties under task order.)
* Description of circumstances necessitating the training. (Describe the specific change to the performance requirements. Identify by number and title of the task order(s) that will benefit from training and describe in detail how the training relates to the Statement of Work and job duties under the task order.)
* Estimated cost (Include a cost breakdown with an explanation of why this is the most cost-effective means to fulfill the task order requirements.)
* The Contractor may include a request to use Government facilities for <AGENCY>- requested training only. The use of Government facilities for any other training is prohibited.

The TOCOR will provide the Contractor with written approval or disapproval of the request.