Office of Logistics and Acquisition Operations

NIH National Institutes of Health

LTASC II
Standard Operating Procedures

Last Updated: November 2, 2020

FOREWORD

The National Institutes of Health (NIH) Long-Term Administrative Support Contract II (LTASC II) vehicle is intended to assist the NIH community with obtaining administrative services on a long-term basis. The LTASC II vehicle is structured as seventeen contracts to small business entities. Task orders are to be issued under the seventeen contracts to acquire services. The Standard Operating Procedures (SOP) herein contain guidelines for utilizing this vehicle, covering the roles and responsibilities of all three parties involved in the LTASC II Procurement process, including the IC customer, LTASC II Program Support Team, and contractor personnel.

For general information regarding the contract vehicle and to understand details regarding roles, responsibilities, and task order management, refer to this document.

For specific, streamlined guidance about how to use the LTASC II electronic Government Ordering System (eGOS) to place a task order, refer to the Customer eGOS User Manual, which is available on the LTASC II Website.

Questions about the Standard Operating Procedures should be directed to the LTASC II Program Support Team.

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LTASC II Solutions Center
Contractor Support
301-435-5468
LTASCII@mail.nih.gov

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ACRONYMS

Following is a list of acronyms used throughout this document.

Abbreviation	Full Name
CO:	Contracting Officer
COAC:	Consolidated Operations Acquisition Center
COR:	Contracting Officer's Representative
CV:	Curriculum Vitae
D&F	Determination & Findings
eGOS	Electronic Government Ordering System
FAR:	Federal Acquisition Regulations
FASA:	Federal Acquisition Streamlining Act
IC:	Institutes and Centers
ID/IQ:	Indefinite Delivery/Indefinite Quantity
IGCE	Independent Government Cost Estimate
LTASC II:	Long-Term Administrative Support Contract II
NIH:	National Institutes of Health
OLAO:	Office of Logistics and Acquisitions Operations
SOW:	Statement of Work
SRD:	Selection Recommendation Document
TO:	Task Order
TORP:	Task Order Request Package

LTASC II Organizational Chart

Additional details of the roles and responsibilities shown in this diagram are described in Section 2 and Section 3.

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1. GENERAL INFORMATION

The Long Term Administrative Support Contract II (LTASC II) is an acquisition vehicle available to all Institutes, Centers and Offices (ICs) within the National Institutes of Health (NIH) to obtain commercially provided administrative services on a long-term basis. This multiple award contract with seventeen contractors is used by NIH to procure administrative services for a period of at least twelve months on a task order (TO) basis. In technical terms, LTASC II is an Indefinite Delivery / Indefinite Quantity (ID/IQ) contract, which allows customers to order services after requirements materialize, providing NIH with flexibility in both quantities and delivery scheduling. Additional information including the scope, labor categories, and services related to LTASC II can be found in the following sections.

1.1   Non-Personal Services and Inherently Government Functions

Pursuant to FAR 37.1, no personal services shall be performed under this contract. All work requirements shall flow only from the Contracting Officer's Representative (COR) to the contractor's Project Manager. No contractor employee will be directly supervised by the Government. All individual employee assignments, and daily work direction, shall be given by the applicable employee supervisor. If the contractor believes any Government action or communication has been given that would create a personal services relationship between the Government and any contractor employee, the contractor shall promptly notify the Contracting Officer of this communication or action. The management infrastructure of contractors is an important feature of the LTASC II vehicle and contractors are expected to have the capacity to manage personnel assigned to perform the services required.

Pursuant to FAR 7.5, the contractor shall not perform any inherently governmental actions under this contract. No contractor employee shall hold him or herself out to be a Government employee, agent, or representative. No contractor employee shall state orally or in writing at any time that he or she is acting on behalf of the Government. In all communications with third parties in connection with this contract, contractor employees shall identify themselves as contractor employees and specify the name of the company for which they work. In all communications with other Government contractors in connection with this contract, the contractor employee shall state that they have no authority to in any way change the contract and that if the other contractor believes this communication to be a direction to change their contract, they should notify the Contracting Officer for that contract and not carry out the direction until a clarification has been issued by the Contracting Officer.

The contractor shall insure that all of its employees working on this contract are informed of this information. Nothing in this section shall limit the Government's rights in any way under the other provisions of the contract, including those related to the Government's right to inspect and accept the services to be performed under this contract. The substance of this section shall be included in all subcontracts at any tier.

1.2   Labor Categories

Support under this contract will include the following administrative support and management labor categories.

1.2.1   Administrative Support Labor Categories

A brief description of the various levels of administrative support, including skill, education, and experience requirements, is given below. Additional examples of duties/services that may be performed under each category are described in the next section.

Labor Category	Education & Experience
General Clerk I (Clerk 1)	High school diploma **OR** GED
General Clerk II (Clerk 2)	High school diploma **OR** GED
Administrative Assistant 1 (Admin 1)	High school diploma **OR** GED
Administrative Assistant 2 (Admin 2)	High school diploma **and** two (2) years of related work experience
Senior Administrative Assistant (Admin 3)	College degree **OR** High school diploma **and** four (4) years of related work experience
Executive Assistant (Admin 4)	College degree **and** four (4) years of related work experience **OR** High school diploma **and** eight (8) years of related work experience

- **General Clerk I (Clerk 1)**
  At a minimum the Clerk 1 duties includes following a few clearly detailed procedures in performing simple repetitive tasks in the same sequence, such as aide in laboratory/clinical center, filing precoded documents in a chronological file or operating office equipment, e.g., scanner, photocopier, or printer. A minimum of high school diploma or GED is required.

- **General Clerk II (Clerk 2)**
  Follows a number of specific procedures in completing several repetitive clerical steps performed in a prescribed or slightly varied sequence, such as coding and filing documents in an extensive alphabetical file, data entry, simple posting to individual accounts, opening mail, running mail through metering machines, and calculating and posting charges to departmental accounts. Little or no subject-matter knowledge is required, but the clerk needs to choose the proper procedure for each task. A minimum of high school diploma or GED is required.

- **Administrative Assistant 1 (Admin 1)**
  The Admin 1 performs administrative functions. Duties include generic clerical skills such as greeting and directing visitors, fielding phone calls, scheduling meetings, responding to callers, taking minutes, composing memos, transcribing, developing presentations, generating reports, and monitoring invoices and expense reports. Must have basic computer skills to conduct internet research and perform data entry. Additional duties may include filing and faxing. A minimum of high school diploma or GED is required.

- **Administrative Assistant 2 (Admin 2)**
  In addition to the skills defined under the Admin 1 level category, the Admin 2 performs administrative and office support activities that require an ability to multi-task and assist multiple NIH employees at once. More advanced computer skills are required as the assistant will be required to perform word processing, spreadsheet management, and conduct more advanced internet research. Also, reviewing and disseminating memorandums to staff; conducting documents control for routing through office; preparing purchase request for small purchases, reviewing draft policies, standard operating procedures, and memorandums for grammar and format; coordinating travel and submitting data into the NIH travel system; compiling equipment requirements for office staff (e.g., laptops, printers,

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monitors); preparing training requests; and preparing matrix of office needs. Staff in this category must have a minimum of a high school diploma and two (2) years of related work experience.

- **Senior Administrative Assistant (Admin 3)**
  In addition to the skills defined under the Admin 2 level category, the senior administrative assistant is expected to perform more complex administrative tasks and will typically be supporting senior-level staff. Responsibilities include those described for administrative assistant but require more work experience within each function. Advanced computer skills and internet research skills are required. The position requires the assistant to perform a variety of administrative functions such as creating and analyzing written documents for dissemination to leadership, compiling information for outside inquiries and reports, and developing and maintaining tracking tools to be used for reporting data. A high level of creativity is expected. Prior work in a scientific research environment for a large Federal agency, as well as a firm knowledge of business administration is desired. A college degree or a high school diploma and four (4) years of related work experience are required for this position.

- **Executive Assistant (Admin 4)**
  The executive assistant performs administrative duties for executive management. Relieves the executive of administrative type functions in order to increase the time an executive has available for executive level responsibilities This position requires the ability to perform all tasks of the other positions, but requires advanced computer and internet research skills. May handle a wide variety of situations and conflicts involving the clerical and administrative function of the office. Responsible for confidential and time sensitive material. Prepares routine and advanced correspondence including letters, memoranda, and reports. Relies on experience and judgment to plan and accomplish goals. Candidate should have the ability to work well with all levels of management and staff. Prior experience in a scientific research environment for a large Federal agency is preferred. A comprehensive understanding of NIH, its organization and culture is also desired. A college degree and four (4) years of related work experience or a high school diploma and eight (8) years of related work experience are required.

The contract allows an administrative support position on an awarded task order to increase admin level (Clerk 1 through Admin 4) during the life of the task order. A position on a task order can graduate levels only when exercising an option year. The SOW will need to be updated to reflect additional required duties reflecting the new level. Please note that task orders are based on NIH's needs not contractor qualifications.

1.2.2 Management Labor Categories

Every contractor under LTASC II is required to have at least one Program Manager (PM) and one Deputy Program Manager (DPM) available for this contract. These managers will act as the NIH points of contact to the contractor. A brief description of the various levels of management support, including skill requirement, is given below.

Labor Category	Education & Experience
Program Manager (PM)	College degree **and** five (5) years of relevant experience **OR** High school diploma **and** ten (10) years of relevant experience
Deputy Program Manager (DPM)	College degree **and** four (4) years of relevant experience **OR** High school diploma **and** eight (8) years of relevant experience

- **Program Manager (PM)**
  The Program Manager will be responsible for the overall performance objectives, contract deliverables, quality control (QC), and the placement of qualified personnel on this contract. The Program Manager will serve as the contractor's authorized point of contact with NIH and shall ensure contract compliance

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and satisfactory performance. This person requires a college degree **and** at least five (5) years of relevant experience **OR** a high school diploma **and** ten (10) years of relevant experience. Relevant experience required for this position involves program management performing tasks such as staffing, budgeting, scheduling, and client interaction. Experience in a scientific research or clinical environment or a Federal agency is preferred.

- **Deputy Program Manager (DPM)**
  The Deputy Program Manager will manage one or more task orders depending on the contractor's management structure. The Deputy Program Manager must have a working knowledge of the contract and some degree of authority to perform the Program Manager's role for limited periods of time when the Program Manager is unavailable. The Deputy Program Manager requires a college degree **and** at least four (4) years of relevant experience **OR** a high school diploma **and** eight (8) years of relevant experience. Relevant project management experience performing tasks such as staffing, budgeting, and scheduling is required in this role. Experience in a scientific research or clinical environment or a Federal agency is preferred.

While each contractor is required to provide one PM and one DPM, additional DPMs may be involved to help manage the contract. These additional DPMs may be assigned for either of two reasons:

1. Based on future contract requirements, it may be necessary for a contractor to assign additional Deputy Program Manager(s) to oversee administrative support personnel either (a) not accessible to the Program Manager (i.e., at a remote location) or (b) located in a large concentration (e.g., a Deputy Program Manager may provide service to an IC where a large number of administrative support personnel are operating). Since the management structure of the contractor is critical to the performance of the contract, this assignment of additional management personnel will generally be a responsibility of the contractor, with input from NIH. If additional management personnel affect the price then approval will be necessary.

2. An IC may choose to request additional Deputy Program Managers on-site (at NIH facilities) or off-site (at the contractor's facilities) depending on task order requirements. For instance, if an IC would like to procure ten administrative support personnel under a task order, that IC may also wish to employ the services of a Deputy Program Manager that is dedicated to managing those ten people. In such a case, this position will be included in the pricing of the task order and the IC will have input as to whether this situation is feasible.

The Program Manager and one Deputy Program Manager shall be available for assignment to this contract on the effective date of the first task order award, and remain in their respective positions a minimum of twelve (12) months. However, the Program Manager and the Deputy Program Manager are not required to be designated full-time on this contract when off-site. The number of contractor personnel and workload required shall determine the extent of time the Program Manager and Deputy Program Manager dedicate to this contract. Either the Program Manager or the Deputy Program Manager shall be available for consultation during regular business hours.

1.3 Services

Since the administrative support function for this requirement is decentralized across NIH, each of the Agency's 27 ICs, and the operating units under the ICs, may have slightly different needs. The following grouping of activities has been developed to indicate the types of services administrative support personnel working under a contractor must be able to provide for this contract. It is important to note that the services are grouped based on similar tasks and not based on individual positions. Administrative support personnel in any labor category may be expected to perform some, many, or all of the services listed below; however, duties may not be limited to the services detailed.

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Administrative Tasks for General Office Support Services

Assembling, copying, faxing and scanning a variety of materials and ensuring proper distribution of copies as required
Maintaining a variety of office logs and files
Maintaining calendars
Managing complex schedules and calendars
Greeting visitors, answering the main office phone, and taking messages as required
Maintaining main staff directories
Preparing, writing, and editing a variety of correspondence including letters and memos
Preparing, creating, formatting, and editing spreadsheets, presentations, and charts
Assisting with performing searches of electronic and hardcopy files and databases for records, supportive data, and historical documents
Assisting in preparing or drafting initial correspondence in response to requests and in preparing an array of other documents for release in response to requests
Responding to first line inquiries from a wide variety of key public, internal, and external constituencies

Administrative Tasks for Services Support

Submitting and following up on requests for services (i.e. telephone, key request, and help desk, etc.)
Arranging for housekeeping, facility, and vehicle services
Ensuring office equipment is maintained and functional

Administrative Tasks for Travel Support Services

Preparing all types of travel orders using the official travel system
Preparing vouchers and making travel arrangements
Answering/Researching general travel related questions
Maintaining travel associated files

Administrative Tasks for Meeting Support Services

Organizing and supporting workshops and meetings
Coordinating with NIH travel office to make travel arrangements
Preparing notebooks, invitations, agendas, and support documents
Reserving space for meetings
Coordinating logistical and administrative arrangements for guest speakers and meeting attendees
Providing administrative support during meetings, including arranging for audiovisual displays, taking meeting minutes, and following up with summary minutes or reports from meetings

Administrative Tasks for Mail Support Services

Receiving and processing incoming mail including preparing requests for FedEx shipments, UPS, and other priority mail services, and couriers

Administrative Tasks for Procurement Support Services

Preparing purchase requests for office supplies
Preparing purchase requests for office equipment and services
Answering questions and investigating discrepancies related to purchases
Entering payment information into internal and external administrative databases
Assisting with tracking and maintaining associated files related to purchases

Administrative Tasks for Property Management Support Services

Requesting property passes and property transfers
Answering questions, assisting with tracking, and maintaining associated files
Managing office Self Service Store accounts for office products

Administrative Tasks for Personnel Support Services

Preparing personnel packages as needed
Assisting with various logistics required for faculty recruitments
Processing and entering training requests
Assisting with updating of Curriculum Vitaes (CVs), bibliographies, bio sketches, and annual reports

Administrative Tasks for Publication Support Services

| Providing assistance with manuscript preparation and editing |
| Assisting with manuscript tracking and manuscript submissions |
| Scanning journal articles, establishing PDF formatted files of articles, and updating manuscript tracking databases, filing books, journals, and articles |

1.4   Minimum Duration of Task Order Awards

The LTASC II vehicle is for long-term administrative support, not temporary services. Use of this contract vehicle shall be reserved for acquisition of administrative support needed for a minimum of twelve (12) months. The life of the LTASC II vehicle is one (1) base year and four (4) one-year option periods. Task order option periods are for one year. Task orders awarded during the life of the LTASC II vehicle will be permitted to continue up to 364 days after the LTASC II vehicle expires following LTASC II option year 4. If a task order is awarded during LTASC II's final year, option year 4, the task order will have only a base year (no options) and no funding can be added to the task order after the LTASC II vehicle expires. Refer to the table and example scenario below for assistance in determining the maximum duration of task orders awarded under the contract.

Task Order Award Period	Minimum Period of Performance for Task Order	Maximum Period of Performance for Task Order
Between date of LTASC II Award and end of LTASC II option year 3	12 months*	One year base with up to four options through 364 days after the end of LTASC II contract option year 4*
During LTASC II option year 4	12 months*	Through 364 days after the end of LTASC II contract option year 4*

* Note, the contract with any LTASC II contractor can be terminated at any point during the period of performance of this contract. If this event occurs, all task orders will also be terminated.

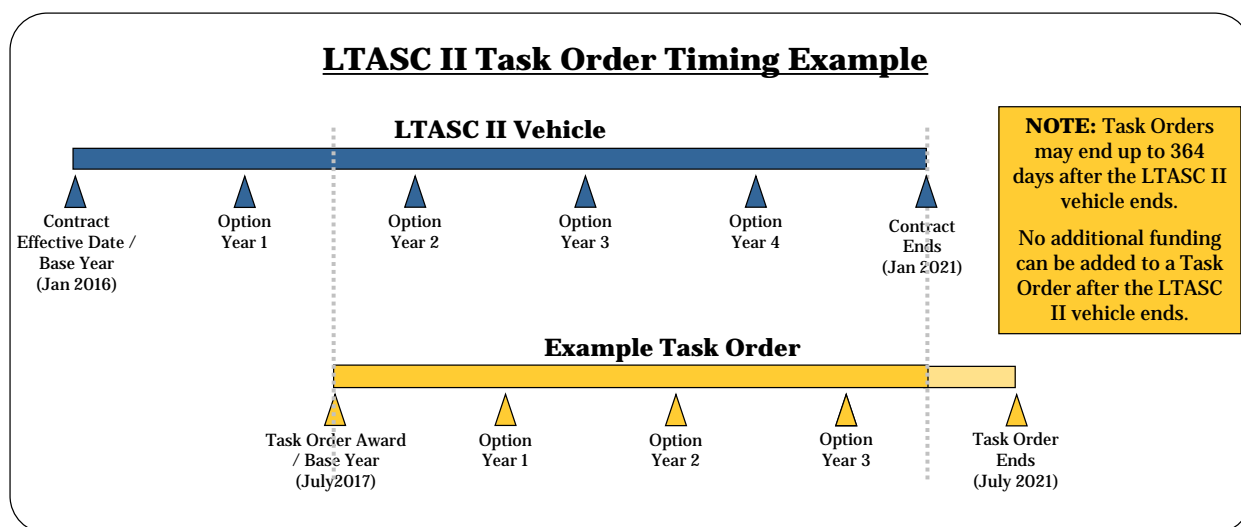Figure 1.1 provides an example scenario demonstrating the timing of task orders issued under the LTASC II vehicle.

Figure 1.1: LTASC II Task Order Timing Example

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This graphic illustrates an example task order issued in July 2017, during LTASC II option year 1. The period of performance for the final task order option year for the example task order may run until July 2021. Though task orders may continue up to 364 days after the LTASC II vehicle ends, no funding can be added to existing task orders and no new task orders or option years can be initiated after the end of the LTASC II vehicle.

1.5   Task Orders

All requirements will be fulfilled under task orders. Task orders may include a single administrative support position or multiple administrative support positions. The task order will provide detail of the specific tasks that will be required and the labor category of the position(s). For each task order, the contractor shall perform initial interviews, reference checks, and other preliminary hiring functions prior to submitting one (1) to three (3) resumes of personnel suited to each position for evaluation. In addition, the contractor shall submit a basic business proposal for the task order. Federal personnel will not be able to interview candidates submitted by the contractor.

Details describing the process for initiating a task order are described in Section 3. For details on how to create a task order in the electronic Government Ordering System (eGOS) refer to the Customer eGOS Manual on the LTASC II Website.

1.6   Rates

Depending on the requirement established in the Task Order Request Package outlined in Section 3.1, the business proposal will be based on either a fixed price or labor hour task order type. Fixed price contracts will be used when the expected number of hours that contractor personnel will work is known. Labor hour means that the ordering office will be billed on a monthly basis using the rate(s) prescribed in the contract for labor that meets the qualifications for the specified labor categories.

Fixed price task orders are encouraged because they provide the maximum incentive for the contractor to control costs and perform effectively while exposing the government to the least risk.

Labor Hour task orders require a Determination and Findings (D&F) document which will be approved within the contracting office if the task order is for three years or less and by the Head of Contracting Activity (HCA) if over three years. This type of task order would generally be used if the number of hours the administrative support personnel will be working is not known.

The contractor may choose to discount the negotiated contract hourly rates at the task order level, but shall not exceed the rates established in the LTASC II vehicle for any task order.

1.7   LTASC II Resources

There are LTASC II resources available to help work with this vehicle, including an informational website located at http://LTASC.od.nih.gov, an electronic Government Ordering System (eGOS) to assist users in creating a TORP, and an LTASC II Solutions Center that can be reached at 301-435-5468 or by email using LTASCII@mail.nih.gov.

1.8   Classified Material

A Task Order Request Package will contain only unclassified material, regardless of the level of classification of the work to be performed under the task order.

The customer is responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure. It is the contractors' responsibility to ensure that all proprietary information is appropriately marked.

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1.9   LTASC II Usage Assessments

This contract is designed primarily for NIH wide usage. However, limited use by HHS OPDIV's and STAFDIV's may be allowed with agreement from the OLAO Associate Director. For external customers (outside of NIH) to use the LTASC II Contracts, there will be an assessment collected via an Interagency Agreement (IAA) between the requesting agency and the NIH. The assessment, which will be a percentage of the estimated dollar amount of award, will be determined by whether the order is unassisted or assisted.

An unassisted order is one where the requesting agency uses its own contracting shop/contracting officer (this includes HHS/PSC). The assessment for an unassisted order is 0.5%.

An assisted order would be a task order administrated by this office, meaning NIH/OLAO would serve as the contracting shop/contracting officer. For assisted orders, there will be an additional 2% assessed making the total assessment for an assisted order 2.5% (0.5% to use the vehicle + 2% for NIH/OLAO serving as the contracting shop/contracting officer).

Our office requests the Memorandum of Understanding (MOU) and Interagency Agreement (IAA) forms 7600 A and B in order to begin the task order process. Please provide the MOU and IAA to the LTASC II Support Team when you submit the Task Order Request Package (TORP) in eGOS. Your TORP will be released to the contractors once a complete package (including the MOU and draft 7600 A and B forms) is received.

The IAA will need to be fully executed, with all documents signed and CAN numbers received, prior to the award of the task order.

1.10 Supporting Documentation Submission

The preferred channel for delivery of all correspondence to the LTASC II Contracting Officer is electronic via e-mail (LTASCII@mail.nih.gov). Microsoft Word is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel. PDFs are also acceptable.

Documents related to the competition of a particular TORP will be handled through the electronic Government Ordering System (eGOS).

2. ROLES AND RESPONSIBILITIES

The primary roles supporting the LTASC II contract and task orders on behalf of the NIH are:

- LTASC II Program Support Team

  o LTASC II Contracting Officer (CO)

  o LTASC II Contracting Officer's Representative (COR)

- Customer

  o Task Order CO (located in the requesting IC's Office of Acquisition/COAC)

  o Task Order COR

Each will play a significant role in the maintenance of the LTASC II contract as well as the initiation, tracking, and close-out of each task order. Responsibilities are outlined in the following sections and again later in the task order procedures.
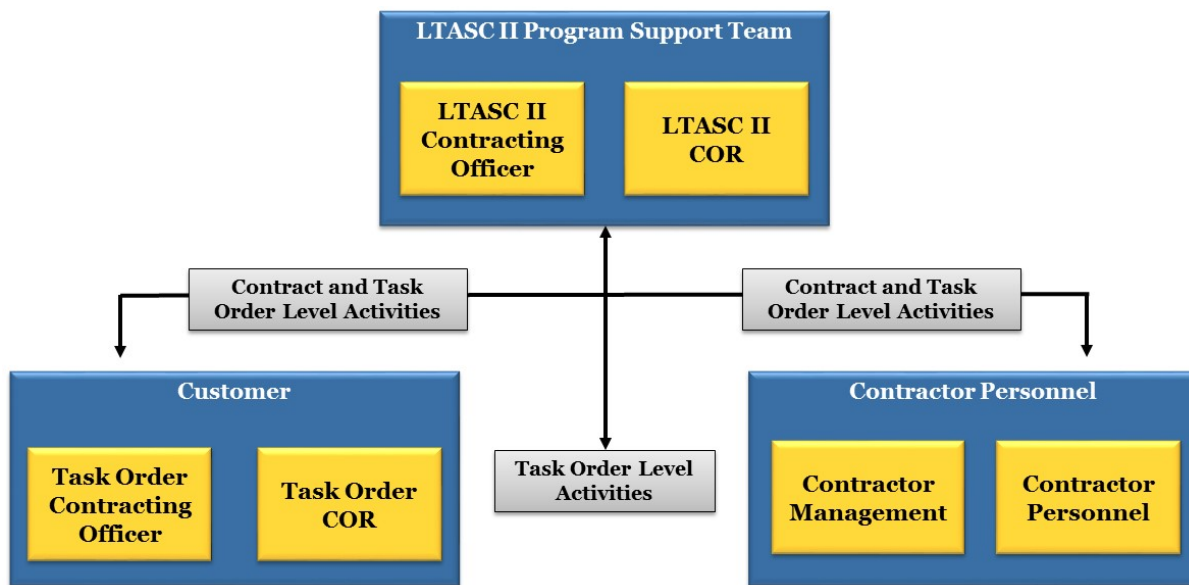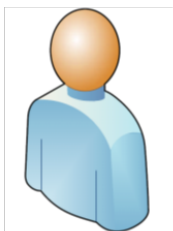

Figure 2.1: Primary LTASC II Roles

2.1   LTASC II Program Support Team

The Office of Logistics and Acquisition Operations (OLAO) has established the LTASC II Program Support Team to provide contract-level **management and oversight for the LTASC II vehicle**. The LTASC II COR within OLAO has been designated to oversee and manage the contract with support from the LTASC II Contracting Officer. While individual task orders will include guidelines specific to the performance of the requirements of that TO, the overall contractual relationship between NIH and contractors is maintained by the LTASC II Program Support Team.

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2.1.1   LTASC II Contracting Officer

LTASC II Contracting Officer

LTASC II Contracting Officer

Role: OLAO representatives who can negotiate changes to the Statement of Work (SOW), delivery schedule, and Period of Performance for the LTASC II contract vehicle. Act as the Point of Contact (POC) for contractual issues.

Primary Responsibilities:
- Review and approve TORPs submitted by customers
- Release approved TORPs to vendors
- Coordinate and liaison between vendors and customers
- Announce task orders awards

The LTASC II Contracting Officer will have the authority to act as an agent of the Government under this contract. Only the LTASC II Contracting Officer has authority to:
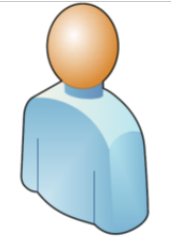
(1) direct or negotiate any changes in the Statement of Work or specifications of the **LTASC II vehicle**;

(2) modify or extend the period of performance;

(3) change the delivery schedule;

(4) otherwise change any terms and conditions of this contract;

(5) concur with any exceptions to the Fair Opportunity Process; and

(6) perform contract administration duties such as exercising option years and contract close-out functions.

Other responsibilities of the LTASC II Contracting Officer include:

(1) receiving TORP packages from LTASC II customers;

(2) reviewing TORPs and releasing TORPs to all contractors;

(3) reviewing Q&A and releasing Q&A to all contractors;

(4) concurring on Selection Recommendation Documents (SRDs);

(5) announcing task order awards; and

(6) acting as the point of contact for contractual issues related to the LTASC II vehicle.

The LTASC II Contracting Officer will serve as the primary point of contact for this contract.

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2.1.2   LTASC II COR

LTASC II COR

Role: Support the LTASC II Contracting Officer by monitoring the technical progress of the vendors and assisting in the resolution of technical problems.

LTASC II COR

Primary Responsibilities:
- Log and maintain task order records
- Track and guide contract performance over the life of the LTASC II contract vehicle

The LTASC II COR within OLAO shall act as the LTASC II Contracting Officer's Representative for the purpose of the LTASC II vehicle. The LTASC II COR is responsible for:

(1)   monitoring the contractors' technical progress, including the surveillance and assessment of performance, and recommending changes in requirements to the LTASC II Contracting Officer;

(2)   interpreting the Statement of Work and any other technical performance requirement;

(3)   performing technical evaluation as required;

(4)   performing technical inspections and acceptance required by this contract; and

(5)   assisting in the resolution of technical problems encountered during performance.
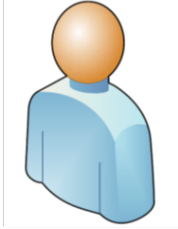
Additional duties include

(1)   logging and maintaining records of all task orders; and

(2)   tracking and guiding contract performance over the life of the LTASC II vehicle.

2.2   Customer: Task Order Contracting Officer & COR

Task orders will be used to define and obtain services under the LTASC II vehicle and each task order is expected to have differing requirements based on the unique needs of the customer. The roles listed below describe NIH personnel who will be responsible for the **procurement and oversight of task orders**. People in these roles are considered to be "customers" of the LTASC II vehicle.

2.2.1   Task Order Contracting Officer

The Task Order Contracting Officer will be the representative of an NIH Consolidated Operations Acquisition Center (COAC) and will have the authority to act as an agent of the Government under a particular task order.

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Task Order Contracting Officer

Task Order Contracting Officer

Role: The Task Order CO will have the authority to act as an agent of the Government under a particular task order and have the right to negotiate changes to the Statement of Work. The Task Order CO will support the Task Order COR through the task order process.

Primary Responsibilities:
- Submit TORP to LTASC II CO and COR
- Assist in the task order proposal evaluation
- Monitor and assess task order performance
- Responsible for all pre-award, award, administration, and close-out activities

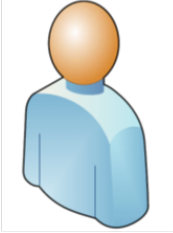The Task Order Contracting Officer has authority to:

(1) direct or negotiate any changes in the Statement of Work or specifications of a **task order**;

(2) modify or extend the period of performance of the task order;

(3) change the delivery schedule;

(4) otherwise change any terms and conditions of a particular task order; and

(5) create and gain approval for the exceptions to the Fair Opportunity Process.

Additional responsibilities of Task Order Contracting Officer include:

(1) submitting the TORP to the LTASC II Contracting Officer;

(2) executing the determination and findings (D&F) per FAR 16.602 for each task order placed on a labor-hour basis (note: additional approval is required for contracts expected to extend beyond three years);

(3) collaborating with the Task Order COR in the evaluation of proposals;

(4) signing the Selection Recommendation Document (SRD);

(5) creating and awarding a task order;

(6) submitting award documents to the LTASC II Program Support Team;

(7) reviewing modifications to the task order;

(8) monitoring and assessing the contractor's task order performance; and

(9) signing acceptance of the final product or completed statement, and performing general task order initiation and close-out tasks.

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2.2.2   Task Order COR

The Task Order COR will typically be the individual requiring the services offered under the LTASC II vehicle, or may be a designee within the IC requiring the service. The Task Order COR will be a certified COR. With assistance from Task Order Contracting Officer, the Task Order COR will develop the requirement and will represent the Government as the main interface between NIH and the contractor during the delivery of services.

Task Order COR

Task Order COR

Role: The individual requiring LTASC II contract services and represents the Government as the main interface between NIH and the contractor during the delivery of services.

Primary Responsibilities:
- Monitor the contractor's task order progress
- Interface with contractor management staff
- Complete contractor performance evaluation
- Develop TORP

The Task Order COR is responsible for:

(1)   monitoring the contractor's technical progress on a **task order**;

(2)   collaborating with Task Order Contracting Officer in the evaluation of proposals;

(3)   completing formal contractor performance evaluations as required by the LTASC II Program Support Team;

(4)   interpreting the Statement of Work and any other technical performance requirements of a task order;

(5)   performing technical evaluation as required;

(6)   performing technical inspections and acceptance required by a task order; and

(7)   assisting in the resolution of technical problems encountered during performance.

Additional Duties of the Task Order COR include:

(1)   working with Task Order Contracting Officer to draft the Task Order Request Package (TORP);

(2)   providing direction to the contractor's management staff to facilitate task order performance; and

(3)   monitoring performance over the life of the task order.

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3. TASK ORDER PROCEDURES

Task Orders will need to be issued to procure services under the LTASC II contract vehicle. This section describes the details of the task order creation, award, and management. For streamlined instructions about how to create a task order in the LTASC II eGOS system, refer to the Customer eGOS Manual on the LTASC II website.

In accordance with Federal Acquisition Streamlining Act (FASA) and Federal Acquisition Regulations (FAR), section 16.505(b), each contractor will be provided a fair opportunity to be considered for each order in excess of $3000 unless one of the conditions in FAR 16.505(b)(2) applies.

The figure below charts the Task Order Process Flow from initiation of the requirement through task order close-out, mapping each step to the party primarily responsible for completing the required activities. A more detailed description of the activities occurring at each step is provided in subsequent sections of these guidelines.
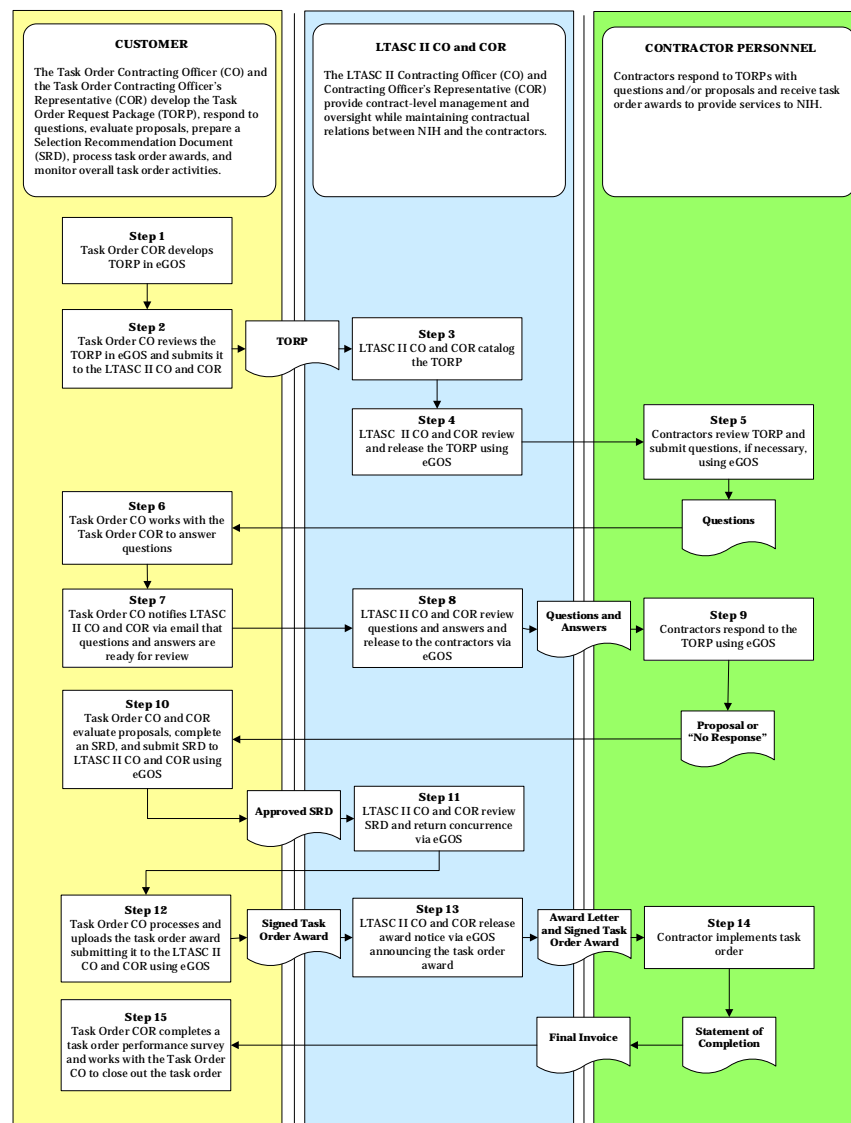

Figure 3.1: LTASC II Task Order Process Flow

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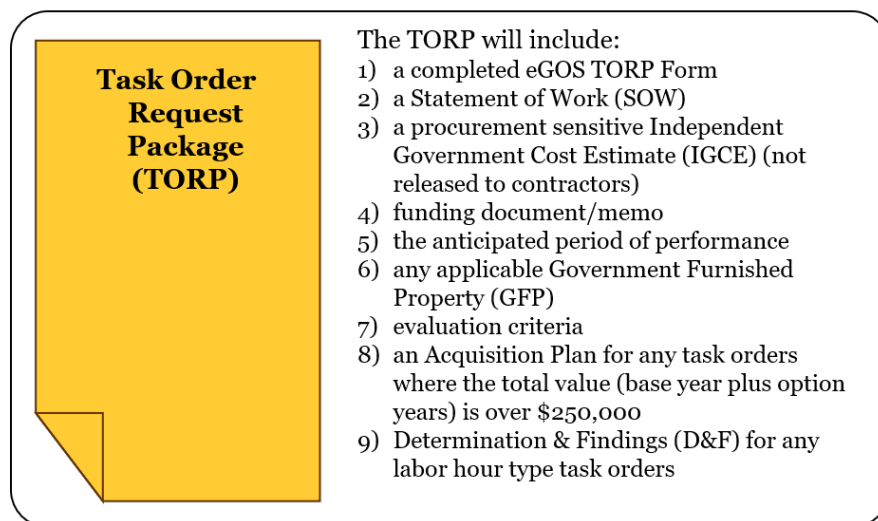
Presolicitation

3.1 Step 1 - Task Order Contracting Officer's Representative (COR) develops TORP

When an NIH IC determines a need exists for administrative support services, a Task Order COR and Task Order Contracting Officer (CO) will first be identified. The Task Order COR may or may not be the requestor for services, but must be Federal Acquisition Certification (FAC)-COR certified. Similarly, the Task Order CO must be FAC-C certified. Before creating a Task Order Request Package, the Task Order COR and CO should review the LTASC II Contract that can be found on the LTASC II Website (http://ltasc.od.nih.gov).

The Task Order COR will create a TORP using the electronic Government ordering system (eGOS). **All Task Order CORs must coordinate the internal administrative review and management of their respective task orders as defined within these procedures with their Task Order CO.**

The TORP will include (1) a completed eGOS TORP Form, (2) a completed Statement of Work (SOW) template, (3) Independent Government Cost Estimate (IGCE) (not released to contractors), (4) Determination and Findings for any labor hour type task orders., (5) the anticipated period of performance, (6) any applicable Government Furnished Equipment or Government Furnished Information (GFE/GFI), (7) evaluation criteria (criteria may include management infrastructure, recruitment and retention plan, related experience, key personnel, and price), and either a (8) funding memo (evidence that funding is available) for task order that have a total value (base year plus option years) less than $250,000 <u>or</u> (9) an Acquisition Plan for task orders that have a total value greater than $250,000.

Task Order COR will coordinate with the Task Order CO. **The TORP must be reviewed and submitted in eGOS by the Task Order CO.**

Task Order Request Package (TORP)

The TORP will include:
1) a completed eGOS TORP Form
2) a Statement of Work (SOW)
3) a procurement sensitive Independent Government Cost Estimate (IGCE) (not released to contractors)
4) funding document/memo
5) the anticipated period of performance
6) any applicable Government Furnished Property (GFP)
7) evaluation criteria
8) an Acquisition Plan for any task orders where the total value (base year plus option years) is over $250,000
9) Determination & Findings (D&F) for any labor hour type task orders

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3.2 Step 2 - Task Order CO reviews the TORP in eGOS and submits it to the LTASC II CO and COR

Upon review and acceptance, the Task Order CO will submit the TORP via eGOS to the LTASC II CO and COR for review.

3.3 Step 3 - LTASC II CO and COR catalog the TORP

The LTASC II CO and COR will catalog the TORP. The TORP number assigned by the eGOS system will serve as the task order tracking number. <u>When submitting or sending any documents or e-mails, the Task Order CO shall reference the TORP number (e.g., subject line for e-mails, headers for documents).</u>

Solicitation and Award

3.4 Step 4 - LTASC II CO and COR review and release the TORP using eGOS

The LTASC II CO and COR will review the TORP for completion and scope. Any issues with the TORP will be resolved with the Task Order CO and COR. TORPs requiring revisions will be returned by the LTASC II CO and COR via eGOS. After review and approval, the LTASC II CO and COR will release the TORP to all contractors via eGOS. The TORP does not commit NIH to pay any costs incurred in the submission of any proposal, nor does it commit NIH to award a task order for such services. NIH intends for each TORP to be negotiated into a resulting task order; however, there is no guarantee that a task order will be issued in every case.

3.5 Step 5 - Contractors review TORP and submit questions if necessary, using eGOS

Upon notification of the TORP, all contractors will have the opportunity to review the requirement in eGOS and submit questions requiring clarification. Contractors shall submit all questions to the Task Order CO via eGOS by the date and time indicated in the TORP.

3.6 Step 6 - Task Order CO works with the Task Order COR to answer questions

The Task Order CO will work with the Task Order COR to sufficiently respond to any questions submitted by the contractors in eGOS. Technical related questions will be answered by the Task Order COR; contractual questions will be answered by the Task Order CO. **In accordance with fair competition guidelines, all answers to questions responded to must be announced to all contractors collectively.**

3.7 Step 7 - Task Order CO notifies LTASC II CO and COR via email that questions and answers are ready for review

After answering all questions submitted in eGOS, the Task Order CO will notify the LTASC II CO and COR through eGOS that responses are ready for review. **The questions and responses must be reviewed and the email sent in eGOS by the Task Order CO.**

3.8 Step 8 - LTASC II CO and COR review questions and answers and release to the contractors via eGOS

Questions and answers will be released simultaneously to all contractors by the LTASC II CO via eGOS.

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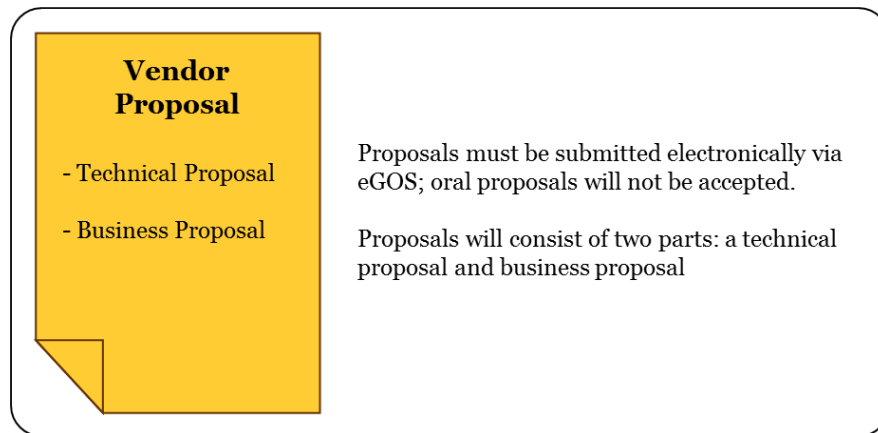## 3.9 Step 9 - Contractors respond to the TORP using eGOS

Each contractor will have the opportunity to review the requirement, any provided questions and answers, and determine whether or not to submit a proposal. The contractors shall submit via eGOS either a written proposal or a "No Response" statement in response to the TORP.

3.9.1 Proposals

Proposals shall be submitted electronically via eGOS or otherwise will not be accepted. Oral proposals will not be accepted. Proposals will consist of two parts: a technical proposal and a business proposal. The contractors shall prepare a proposal with as much detail as requested by the TORP. Please note that these proposals may be quite brief unless additional information is required. If price is the only evaluation factor listed, award will be made to the lowest price.

Technical Proposals shall sufficiently respond to all elements of the TORP.

Business Proposals shall include the price at which the services will be offered. For labor-hour type TORPs, rates shall be provided for each person proposed. For fixed-price type TORPs, the price will be based upon the rates multiplied by a number of hours defined in the TORP. The applicable labor category rates shall not exceed the rates established in the LTASC II vehicle although these rates can be discounted at the contractor's option. All proposed rates are subject to review by the LTASC II Contracting Officer for compliance with the contract.

Vendor Proposal

- Technical Proposal

- Business Proposal

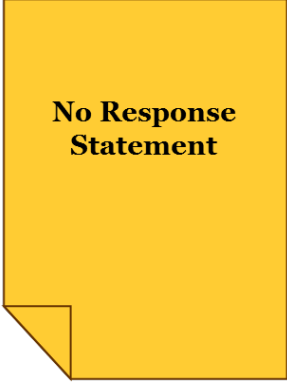Proposals must be submitted electronically via eGOS; oral proposals will not be accepted.

Proposals will consist of two parts: a technical proposal and business proposal

The contractors will ensure that all proprietary information is appropriately marked within the proposals.

3.9.2 "No Response" Statements

A "No Response" statement shall be submitted if a contractor is unable or otherwise cannot perform a requirement. This shall be submitted electronically via eGOS to the Task Order CO.

All **"No Response" statements** shall include a brief statement as to why the contractor has elected to forego the opportunity.

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<table>
<tr>
<td>**No Response Statement**</td>
<td>A "No Response" statements shall be submitted if a contractor is unable or otherwise cannot perform a requirement.

All "No Response" statements shall include a brief statement as to why the contractor has elected to forego the opportunity.</td>
</tr>
</table>

3.10 Step 10 - Task Order CO and COR evaluate the proposals, complete an SRD, and submit SRD to LTASC II CO and COR using eGOS

The Task Order CO and Task Order COR will evaluate the contractors' technical and business proposals submitted in eGOS. It is the responsibility of the Task Order CO and Task Order COR to ensure that contractors are treated equitably and fairly during this evaluation process.

The Task Order CO and Task Order COR are responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure.

After completion of the evaluation, an Awardee is selected. The Task Order COR will complete a Selection Recommendation Document (SRD) describing the review process and detailing the reason that award to the recommended contractor is in the best interest of the Federal government in accordance with FAR 16.505(b). An SRD template and sample may be found on the 'Resources' page of the LTASC II Website (http://LTASC.od.nih.gov). **Please note all proposals submitted must be fully evaluated in justification and selection of the Awardee.**

The SRD must include (1) the selection criteria/methodology for evaluating submitted proposals as originally defined in the TORP package, (2) a list of the contractors that responded to the TORP, and (3) rationale for the recommendation of the task order Awardee, including a summary of evaluation results, any negotiations conducted, price analysis, and award analysis (rationale for the recommendation of the Awardee).

The Task Order CO will upload the signed SRD electronically in the eGOS 'Selection' screen and submit to the LTASC II CO and COR for review and concurrence. **The Task Order CO cannot process the award until concurrence is received.**

The Selection Recommendation Document (SRD) will include:

Selection Recommendation Document (SRD)

1) the selection criteria for evaluating submitted proposals as originally defined in the TORP package
2) list of contractors that responded to the TORP
3) evaluation results and rationale for the recommendation of the awardee

3.11 Step 11 - LTASC II CO and COR review SRD and return concurrence via eGOS

After reviewing and concurring with the SRD, the LTASC II CO and COR will notify the Task Order CO via eGOS to begin processing the task order award. **This step must be completed before any award can be processed.**
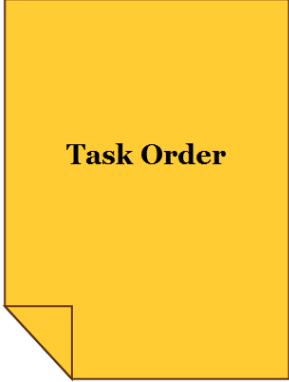
3.12 Step 12 - Task Order CO processes and uploads the task order award submitting it to the LTASC II CO and COR using eGOS

Per NIH acquisition rules, no task order released under this vehicle can be awarded as a standalone contract or purchase order.

The task order will contain:

- contract number (for the LTASC II contractor selected),
- task order number,
- order date,
- point of contact for billing purposes,
- statement of work (SOW),
- appropriation/funding citation,
- amount of funds obligated,
- billing and delivery addresses, and
- period of performance.

The Task Order CO will process an OF-347 Purchase Order Form. A copy of the signed OF-347, or other approved award document, and DCIS report must be uploaded electronically in the eGOS 'Selection' screen alongside the approved SRD. Please note, following upload of the award document and DCIS report, the Task Order CO must click submit again on the 'Selection' screen.

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The Task Order will contain:

(1) contract number
(2) task order number
(3) order date
(4) billing point of contact
(5) statement of work (SOW)
(6) appropriation/funding citation
(7) amount of funds obligated
(8) billing and delivery addresses
(9) period of performance

Task Order

The Task Order CO and Task Order COR should establish and maintain a task order file containing, at a minimum, all pre-award documentation/proposals/approvals, awarded task order, task order administration documents and correspondence, modifications and supporting documentation, invoices, performance evaluations, closeout documents, and any other documents/correspondence relative to each individual task order.

3.13 Step 13 - LTASC II CO and COR release the award notice via eGOS announcing the task order award

The LTASC II CO and COR will announce the task order award by emailing the contract award along with an award letter to the winning contractor. The Task Order CO and COR will be copied on this email.

Upon approval of the award selection in eGOS, the system will release a notification to the unsuccessful offerors that submitted a proposal but did not win the task order.

According to the FAR, Task Order COs must provide a debriefing for all task orders exceeding $5.5M to offerors that request one within 3 days of being notified. For task orders less than $5.5M, providing a debriefing will be at the discretion of the Task Order CO.

Once the award selection is approved in eGOS, the LTASC II Support Team will email an award notice to all LTASC II contractors informing them of the task order award. In addition, contractors will be able to access the LTASC II eGOS to see which company won a particular task order.

Note: All internal debrief requests for any task order will be coordinated by the Task Order CO and Contractor. A summary of the debriefing proceedings are to be forwarded to the LTASC II CO within three days of the meeting for filing/audit purposes.

Administration

3.14 Step 14 - Contractor implements the task order

The contractor must contact the Task Order COR to start the work.

The contractor will submit all task order invoices to the billing address indicated in Article G.8 (Invoice Submission) of their LTASC II contract. All invoices shall include both current and cumulative billing and clearly cite the funds remaining. The Task Order CO and Task Order COR are responsible for reviewing/approving these invoices and ensuring that appropriate receiving is entered. Receiving should not be entered until invoices are approved by the Task Order CO.

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3.15 Step 15 - Task Order COR completes a task order performance survey and works with the Task Order CO to close out the task order

After the Task Order has expired, the Task Order COR will, in conjunction with the Task Order CO, assess the quality of services received by completing a performance survey (available on the LTASC II Website at http://LTASC.od.nih.gov), and ensure that all task order requirements were met. The Task Order CO will send the performance survey to the LTASC II COR via e-mail.

The contractor shall also submit the final invoice to the Task Order COR including a statement indicating that all work has been completed and all costs have been accounted for and billed. The contractor shall forward a copy of the final invoice to the LTASC II CO via email (LTASCII@mail.nih.gov) when the task order has been completed.

3.16 Task Order Timelines

Task order award timelines are largely dependent on the specific requirement. The timeline for the LTASC II Program Support Team to review and release the TORP to contractors (Task Order Steps 3-4 from above) is targeted to be approximately five (5) business days. Task orders with special requirements or complex requirements may take longer. This processing time begins once a complete, acceptable TORP is received by the LTASC II Contracting Officer. Incomplete or unacceptable TORPs will require additional time for the LTASC II Contracting Officer to advise the Task Order CO on minimum acceptable requirements.

Task Order COR in consultation with the Task Order CO will establish a TORP response time that will afford contractors a reasonable opportunity to respond to the requirement. When establishing the TORP response time, Task Order COR and Task Order CO shall consider the circumstances of the individual acquisition and account for factors such as the complexity, availability, and value of the requirement.

4. CONTRACT AND TASK ORDER MANAGEMENT

As outlined in Section 2 of this document, the Office of Logistics and Acquisition Operations (OLAO) will provide contract-level management and oversight for the LTASC II contracts through the LTASC II Program Support Team. The Task Order Contracting Officer (CO) and Task Order Contracting Officer's Representative (COR) will perform day-to-day management and oversight for each task order.

4.1 Contract Management

The LTASC II Contracting Officer (CO) will perform contract administration duties while the LTASC II Contracting Officer's Representative (COR) will track and guide contract performance over the life of the contract. The LTASC II Program Support Team employs several methods and tools to assist this effort, in close concert with performance monitoring and evaluation efforts.

4.1.1 Contract Files

The LTASC II Program Support Team maintains a central file for each of the contracts. The file contains the contract and all documentation; all contract modifications, correspondence, and performance evaluation reports, as well as copies of task orders, task order documentation, and task order modifications. The Task Order Contracting Officer maintains the official task order file and associated documentation.

4.1.2 Training

The LTASC II Program Support Team will prepare and conduct training presentations to assist LTASC II customers in understanding and using the LTASC II contracts. Training sessions will also be held with the contractors to improve their understanding of the task order process. Training all parties involved will facilitate adherence to the task order procedures. In addition, materials such as this SOP document, FAQs, templates, and other supporting documents are available on the LTASC II Website (http://LTASC.od.nih.gov). To request training for your office or IC, please complete the Training Request Form on the 'Resources' page of the LTASC II Website.

4.2 Task Order Management

The Task Order CO and Task Order COR will be responsible for the task order activities involving initiating, awarding, administering, and closing out task orders. They will track and guide task order performance over the life of the task order. The LTASC II Program Support Team will assist all customers in their task order activities as well as log and maintain records of all task orders.

4.2.1 Initiation and Close-out of Task Orders

Task order initiation and close-out activities will be the responsibility of the Task Order CO and Task Order COR. These materials may be reviewed by the LTASC II COR.

4.3 Day-to-Day Oversight and Management

The Task Order CO and Task Order COR provide "frontline" day-to-day monitoring of the task order during the task order period of performance. Since this is a non-personal services contract, the Task Order CO and Task Order COR shall ensure that direct management of contractor personnel remains the responsibility of the contractor's management staff.

The Task Order CO and Task Order COR are responsible for monitoring and assessing the contractor's task order performance, including the responsiveness of the contractor management staff.

Contract level issues that arise during task order performance should be referred to the LTASC II Program Support Team for resolution (e.g., need for contract modifications, contract disputes, contract terminations).

4.3.1   Acceptance of Services

The Task Order CO and Task Order COR are responsible for inspection and acceptance of task order services provided. If services are rejected, this must be documented in writing to the contractor, with recitation of the requirement and factual statements of how the contractor failed to meet these requirements.

4.4   Task Order Modifications

Task order modifications are generally made to correct oversights or changes in conditions from the original task order. The following procedures will apply to task order modifications:

4.4.1   No-Cost Modifications

After obtaining approval by the LTASC II CO, no-cost modifications will be processed directly by the Task Order CO with input from the Task Order COR.

Copies of any task order modification executed must be sent to the LTASC II CO and COR via the LTASC II Program Support Team e-mail (LTASCII@mail.nih.gov).

4.4.2   Addition of Funds

After obtaining approval by the LTASC II CO, modifications to add funds to a task order will be processed directly by the Task Order CO with funding documentation provided by the Task Order COR.

Copies of any task order modification executed must be sent to the LTASC II CO and COR via the LTASC II Program Support Team e-mail (LTASCII@mail.nih.gov).

4.4.3   Additional Work / Additional Time

If the customer's modification requirement alters the scope, adds an additional period of performance, or provides for major changes such as additional work, a task order modification is not appropriate. Instead, a new TORP must be initiated.