



Ordering Guide

ORIGINAL COPY

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

Contract Number: W52P1J-18-D-A036

Submitted To:

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FOREWORD

These ordering guidelines contain the information needed to issue Task Orders (TOs) against the Information Technology Enterprise Solutions-3 Services (ITES-3S) contract. This contract was awarded under the Federal Acquisition Streamlining Act (FASA) and Clinger-Cohen Act and Section 803 of the National Defense Authorization Act (NDAA) for Fiscal Year (FY) 2002, which requires that the prime contractors be provided a fair opportunity to be considered for TO awards. The contract is structured as an Indefinite Delivery/Indefinite Quantity (ID/IQ) contract, using TOs for acquisition of specified services.

This contract is available to the Army, Department of Defense (DoD), and other Federal agencies. In addition, Government support contractors may place orders against the contract in support of their Government customers, In Accordance With (IAW) Federal Acquisition Regulation (FAR) Part 51.

Questions regarding these guidelines and procedures for placing orders against the contract should be directed to Computer Hardware, Enterprise Software and Solutions (CHESS).

Questions of a contractual nature should be directed to the Procuring Contracting Office (PCO), Army Contracting Command - Rock Island (ACC-RI). These guidelines will be revised, as needed, to improve the process of awarding and managing orders under the ITES-3S contracts.

This Ordering Guide has been compiled by DirectViz Solutions, LLC (DVS), an ITES-3S contract holder (Contract # W52P1J-18-D-A036). Additional DVS information is included below:

DVS Corporate Information

- Organization Name: DirectViz Solutions, LLC (DVS)
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- CAGE Code: 6EVD4
- DUNS Number: 078579152
- TIN/EIN: 46-0795124
- Web: <https://www.directviz.com/ites-3s/>
- Top Secret Facility Cleared
- ISO 9001, ISO/IEC 20000, ISO/IEC 27001 Certified
- CMMI Maturity Level 3 Appraised

ITES-3S POC Points of Contact

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ITES-3S ORDERING GUIDE

1 GENERAL INFO

1.1 BACKGROUND

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

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

1.2 SCOPE

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

- IT Solution Services
- IT Subject-Matter Expert (SME)
- IT Functional Area Expert (FAE)
- Incidental Construction
- Other Direct Costs (ODCs)
- IT Solution Equipment
- Travel and Per Diem
- IT Solution Software
- IT Solution –ODCs

The types of services and solutions offered by ITES-3S fall under the following task areas:

- Cybersecurity Services
- IT Services
- Enterprise Design, Integration, and Consolidation Services
- Network/Systems Operation and Maintenance (O&M) Services
- Telecommunications/Systems Operation and Maintenance Services
- Business Process Reengineering Services
- IT Supply Chain Management Services
- IT Education and Training Services.

Copies of the ITES-3S contract can be found on the CHESSE IT e-mart. The IT e-mart website is <https://chess.army.mil>. Services will be acquired by issuing individual TOs.

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



1.3 TEAMMATES

Exhibit 1 contains a list of the Small Business and Large Business teammates DVS has assembled for ITES-3S. Each contractor name is hyperlinked to their website.

Exhibit 1. Small Business and Large Business Teammates

Small Business Contractor	Large Business Contractor
Aurotech, Inc.	AASKI Technology, Inc.
Blue Compass, LLC	Analyst Warehouse, LLC
Bluestone Logic, LLC	Artel, LLC
Broadleaf, Inc.	Digital Management, LLC
Business Management Research Associates	Data Systems Analysts, Inc. (DSA)
Creek Technologies, Inc.	Perspecta, Inc.
GINIA, Inc.	Kearney & Company P.C.
Government Network Solutions, Inc.	Kratos Technology & Training Solutions, Inc.
GovProIT, Inc.	Elliassen Group, LLC
H2K Solutions Incorporated	Insight Global, LLC
International Computing Systems, Inc.	Kforce, Inc.
Interos Solutions, Inc.	
Louisiana Technology Group, Inc.	
Lunarline, Inc.	
Management Science and Innovation, Inc.	
Nationwide IT Services, Inc.	
Sienna Systems Corporation	
The Kenific Group	
The Millennium Group International, LLC	
VYD & Associates	

1.4 CONTRACT TERMS/APPROACH

Exhibit 2 shows DVS ITES-3S contract award terms and provisions.

Exhibit 2. ITES-3S Terms and Provisions

Contract Terms	ITES-3S Contract Terms
Contract Maximum	<ul style="list-style-type: none"> ▪ \$12,100,000,000 ▪ The contract maximum represents the total requirement for the life of the contract (including options, if exercised)
Period of Performance	<ul style="list-style-type: none"> ▪ Nine (9) Years, including: <ul style="list-style-type: none"> ▪ One five (5)-year base Ordering Period ▪ Four (4), one (1)-year Ordering Period options (if exercised)
Pricing Structure	<ul style="list-style-type: none"> ▪ FFP ▪ T&M ▪ CR
Performance-Based Contracting	<ul style="list-style-type: none"> ▪ Preferred method for acquiring services
Fair Opportunity to be Considered	<ul style="list-style-type: none"> ▪ Subject to FAR 16.505
Ordering Guidance and Process	<ul style="list-style-type: none"> ▪ See Section 3 Ordering Guidance (below)



1.5 PERFORMANCE-BASED SERVICE ACQUISITION

Performance-Based Service Acquisition (PBSA) is an acquisition structured around the results to be achieved, as opposed to the manner by which the work is to be performed. Orders placed under ITES-3S are not required to be performance-based under all circumstances; however, policy promulgated by the NDAA for FY 2001 (PL 106-398, section 821), FAR 37.102, and FAR 16.505(a), establishes PBSA as the preferred method for acquiring services. In addition, for DoD agencies, DFARS 237.170-2 requires higher-level approval for any acquisition of services that is not performance-based. Accordingly, it is expected that most ITES-3S TOs will be performance-based. A Performance Work Statement (PWS) or Statement of Objectives (SOO) should be prepared to accompany the Task Order Request (TOR) to the ITES-3S contractors.

1.6 FAIR OPPORTUNITY TO BE CONSIDERED

IAW10 U.S. Code § 2304c(b) and FAR 16.505(b), the Ordering Contracting Officer (OCO) must provide each ITES-3S contractor a fair opportunity to be considered for each order exceeding \$3,000, unless an exception applies.

FAR 16.505, DFARS 216.5, and **Section 3.7** below contain procedures on exceptions to the fair opportunity process, as well as details on the applicability and implementation of fair opportunity to be considered.

1.7 SITUATIONS REQUIRING HARDWARE OR SOFTWARE ACQUISITION

All hardware and software acquisitions shall follow standard practices, as outlined in the sections below:

1.7.1 Software

In situations where it is necessary to purchase new commercial software, including preloaded software, to satisfy the requirements of a particular TO, the contractor will first be required to review and utilize available DoD Enterprise Software Initiative (ESI) agreements.

If software is not available to the contractor through a DoD ESI source, the contractor shall be authorized to obtain the software through an alternate source. For Army users, a Statement of Non-Availability (SoNA) is required from CHES when acquiring non-ESI software, regardless of the dollar value. The customer shall access the SoNA process, located on the IT e-mart at <https://chess.army.mil/Content/Page/SONA>. The SoNA should be included in the TO file upon award.

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

1.7.2 Related Incidental Commercial Off-The-Shelf (COTS) Hardware and Software

If related incidental hardware and software are required for a particular TO, the CHES hardware contracts are the preferred source of supply. For Army users, it is the mandatory source for hardware and software, IAW Army Federal Acquisition Regulation Supplement (AFARS) 5139.101. CHES also has a representative sample list on its web site of Commercial IT Products and Services authorized for use by customers worldwide. A request for quote may be submitted for products not found on the CHES site. If the hardware and related software required is not



available from a CHESS contract or the authorized list, the contractor shall be authorized to obtain the hardware through an alternate source.

For Army users, a SoNA is required for purchase of products from another source, regardless of dollar value. The listing of COTS hardware available from CHESS sources can be viewed on the IT e-mart at <https://chess.army.mil>. The customer shall access the SoNA process, located on the IT e-mart at <https://chess.army.mil/Content/Page/SONA>. The SoNA should be included in the TO file upon award.

2 ITES-3S ROLES AND RESPONSIBILITIES

The following sections contain a summary of the roles and responsibilities for the primary organizations in the ITES-3S contract process:

2.1 ARMY CONTRACTING COMMAND- ROCK ISLAND (ACC-RI)

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

- Serves as the PCO for the ITES-3S contracts. The PCO has overall contractual responsibility for the ITES-3S contract. All TOs issued are subject to the terms and conditions of the contract. The contract takes precedence in the event of conflict with any order or the Ordering Guide.
- Provides advice and guidance to Requiring Activities (RA), OCOs, and contractors regarding contract scope, acquisition regulation requirements, and contracting policies.
- Approves and issues base ITES-3S contract modifications.
- Represents the Contracting Officer position at various contract-related meetings.

2.2 COMPUTER HARDWARE, ENTERPRISE SOFTWARE AND SOLUTIONS (CHESS)

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

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

2.3 REQUIRING ACTIVITY

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

- Adheres to the requirements and procedures defined in the ITES-3S contract and these ordering guidelines.
- Defines requirements.
- Prepares TO requirements packages.
- Funds the work to be performed under ITES-3S orders.



- Provides personnel to evaluate proposals submitted.
- Provides past performance assessments.
- Monitors and evaluates contractor performance.

2.4 ORDERING CONTRACTING OFFICER (OCO)

The OCO's roles and responsibilities are as follows:

- OCOs within the Army, DoD, and other Federal agencies are authorized to place orders within the terms of the contract and within the scope of their authority.
- OCO's are not authorized to make changes to the contract terms and/or conditions. The OCO's authority is limited to the individual orders.
- Serves as the interface between the contractor and the Government for individual TOs issued under the ITES-3S contract.
- Determines if bundling of requirements (see FAR 2.101) complies with FAR 7.107.
- Determines whether consolidation of requirements, compliance, and approval are IAW DFARS 207.170.
- Requests, obtains, and evaluates proposals/quotations and obligates funds for orders issued.
- Reserves the right to withdraw and cancel a task if issues pertaining to the proposed task arise that cannot be satisfactorily resolved.
- Identifies when Earned Value Management System (EVMS) is applicable at the TO level, IAW DFARS 252.234-7002.

2.5 ORDERING CONTRACTING OFFICER'S REPRESENTATIVE (OCOR)

The TO OCOR's roles and responsibilities are as follows:

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

2.6 CONTRACTORS

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

2.7 OMBUDSMAN

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



from contractors on all TOs issued by ACC-RI. The Ombudsman for TOs not issued by ACC-RI will be the Ombudsman that supports the OCO. The designated Ombudsman for ITES-3S TOs issued by ACC-RI is:

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

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

3 ITES-3S ORDERING GUIDANCE

3.1 GENERAL

The following general guidelines for ordering:

- Ordering is decentralized for all ITES-3S requirements. Ordering under the contract is authorized to meet the needs of the Army, DoD, and other Federal agencies. There is no approval, coordination, or oversight imposed by the PCO on any OCO. OCOs are empowered to place orders IAW the terms and conditions of the ITES-3S contract, ITES-3S ordering guidelines, the FAR, DFARS (as applicable), and the OCO's agency procedures.
- The PCO will not make judgments or determinations regarding orders awarded under the ITES-3S contract by an OCO. All issues must be resolved consistent with individual agency procedures and/or oversight.
- Upon request, the PCO is available to provide guidance to OCOs executing orders under the ITES-3S contract.
- The CHESS IT e-mart at <https://chess.army.mil> is available to make price comparisons among all ITES-3S awardees and solicit competitive quotes. Only services and related incidental hardware/software items are to be released on the ITES-3S IT e-mart. Hardware/software-only items are to be placed on ADMC-2 or ITES- 2H/3H. The OCO will initiate the TOR process by issuing a TOR to all awardees via the CHESS IT e-mart. OCOs MUST issue the Request for Proposal (RFP)/TORs via the IT e-mart.
- When posting an RFP/TOR, RAs are not simply to submit an ITES-3S contractor's quote as an RFP/TOR. This is considered contractor proprietary information.
- When posting a TOR, include specific delivery instructions for proposal responses. Contractors will indicate their interest via CHESS IT e-mart; however, proposal packages shall be delivered by means identified in the TOR.

3.2 PRICING

The following guidelines apply in pricing:

- All TOs awarded pursuant to this contract on a FFP or T&M basis must be priced IAW the pricing set forth in the Labor Rate Table (reference DVS' ITES-3S Price Matrix). The labor rates in the labor rate table reflect the fully burdened composite rates for each labor category and will apply to all direct labor hours. The composite rates include separate rates for work



performed at the contractor site and at the Government site for each labor category. An ITES-3S contractor may propose labor rates that are lower than those specified in its Labor Rate Table but shall not exceed the labor rates in its Labor Rate Table.

- CR TOs are allowable under ITES-3S. CR TOs are suitable for use only when uncertainties involved in contract performance do not permit costs to be estimated with sufficient accuracy to use any type of FP TO. A CR TO may be used only when the contractor’s accounting system is adequate for determining costs applicable to the TO and appropriate Government surveillance during performance will provide reasonable assurance that efficient methods and effective cost controls are used.
- The Government’s minimum requirements for each labor category are identified in Labor Category Descriptions. Contractors may augment their labor categories and job descriptions on a TO basis. If a contractor decides to augment a labor category, the labor type and cost shall not change. Augmenting a labor category is not defined as adding a new labor category. TO proposals shall be limited to only those labor categories contained within the base contract. The contractor may propose to the Government, at its discretion, additional labor categories and job descriptions within the scope of ITES-3S. The PCO is the only official authorized to add a labor category to the base contract via contract modification.
- Unlike other labor categories, the IT SME, IT FAE, and incidental construction categories may only be used if no other labor category can satisfy the requirement. If the ITES-3S contractor proposes these categories when not directed by the OCO, no fee or profit is allowed. OCOs are discouraged from directing the use of FAEs and SMEs. However, if the OCO deems it necessary to direct the ITES-3S contractor to propose these categories, a fixed fee of 3% is allowable. ITES-3S contractors are required to seek and obtain approval from the OCO for the use of these categories when proposed in a TO. There is no fixed labor rate associated with the SME, FAE, and incidental construction categories.

3.3 SMALL BUSINESS SET ASIDE

The following clauses only apply at the TO level when the requirement has been set-aside for Small Business:

- 52.219-3 - Notice of HUBZone Set-Aside or Sole Source Award (Nov 2011)
- 52.219-6 - Notice of Total Small Business Set-Aside (Nov 2011) with Alternate I
- 52.219-13 - Notice of Set-Aside of Orders (Nov 2011)
- 52.219-14 - Limitations on Subcontracting (Nov 2011)
- 52.219-27 - Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (Nov 2011)
- 52.219-29 - Notice of Set-Aside for, or Sole Source Award to, Economically Disadvantaged Women-Owned Small Business Concerns (Dec 2015)
- 52.219-30 - Notice of Set-Aside for, or Sole Source Award to, Women-Owned Small Business Concern Eligible Under the Women-Owned Small Business Program (Dec 2015)

Note that the Limitations on Subcontracting clause only applies at the Task Order level. Small businesses may compete on unrestricted TOs without having to meet the requirements of the Limitations on Subcontracting clause.

3.4 ORDER FORMS AND NUMBERING

An appropriate order form (Defense Department (DD) Form 1155, Order for Supplies or Services, or Non-DoD Federal agencies equivalent) shall be issued for each TO. The use of Government



credit cards is also authorized IAW applicable rules and procedures. TOs may be issued via telephone, fax, e-mail, postal mail or CHESS's IT e-mart.

3.5 DELIVERY REQUIREMENTS

Delivery of services shall be IAW individual TOs.

3.6 SECURITY CONSIDERATIONS

The level of classified access will be incorporated into individual TOs as necessary. If determined necessary based on the level of classification, a DD Form 254, Contract Security Classification Specification, should be prepared and included in the TO request and resulting order.

3.7 FAIR OPPORTUNITY TO BE CONSIDERED

IAW FAR 16.505(b)(2), for all orders exceeding \$3,500, the OCO shall give every ITES-3S contractor a fair opportunity to be considered for a TO unless one of the exceptions to fair opportunity applies (see paragraph below for further discussion of exceptions). The OCO must consider all ITES-3S contractors for the work, though he/she is not necessarily required to contact any of them. The OCO must document his/her rationale if applying one of the exceptions to fair opportunity; however, no special format is required. All orders exceeding \$150,000 for DoD agencies must be placed on a competitive basis IAW FAR 16.505, unless a written waiver is obtained, using the limited sources justification and approval format in FAR 16.505(b)(2)(ii)(B). OCO should refer to their agency's approval authorities for placing orders on an "other than a competitive" basis. This competitive basis requirement applies to all orders by, or on behalf of, DoD. Non-DoD agencies shall comply with their own agency's procedures.

For orders by, or on behalf of, DoD exceeding \$150,000, the requirement to place orders on a competitive basis is met only if the OCO:

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

3.7.1 Exceptions to Fair Opportunity

As provided in FAR 16.505(b)(2), the OCO may waive the requirement to place an order on a competitive basis with a written limited sources justification and approval if one of the following circumstances applies:

- The agency's need for the supplies or services is so urgent that providing a fair opportunity would result in unacceptable delays. Use of this exception requires a justification that includes reasons why the ITES-3S processing time for a fair opportunity to be considered will result in an unacceptable delay to the agency. The justification should identify when the effort must be completed and describe the harm to the agency caused by such a delay.
- Only one contractor is capable of providing the supplies or services required at the level of quality required because the supplies or services ordered are unique or highly specialized. Use of this exception should be rare. When using this exception, explain: (1) what is unique or highly specialized about the supply or service, and (2) why only the specified contractor can meet the requirement.



- The order must be issued on a sole-source basis in the interest of economy and efficiency because it is a logical follow-on to an order already issued under these contracts, provided that all awardees were given a fair opportunity to be considered for the original order.
- A statute expressly authorizes or requires that the purchase be made from a specified source.

FAR 16.505(b)(1)(ii) provides that the OCO is not required to contact each of the awardees if information is available that will ensure that each awardee is provided a fair opportunity to be considered for each order.

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

3.8 ORDERING PROCEDURES

3.8.1 Task Order Request

The RA prepares the TOR package and submits it to the OCO.

NOTE: When submitting requests, ensure the customer and/or site address is correct and includes as much information as possible to allow for an accurate proposal. (i.e., serial numbers, manufacturer/part numbers, quantities, whether the requirement is a renewal or new requirement, customer identification number, contract numbers, renewal contract number or other type of account identifier.)

At a minimum, the package should contain a Statement of Work (SOW), PWS, or SOO. The RA may select from these work statements depending on their specific requirements. However, performance-based orders must be used to the maximum extent possible for services as required by FAR 37.102 and FAR 16.505(a). Specific formats have been developed to streamline the processing time. Options include:

PWS – Identifies the technical, functional, and performance characteristics of the Government's requirements. The PWS describes the work in terms of the purpose of the work to be performed rather than either "how" the work is to be accomplished or the number of hours to be provided.

SOO – An alternative to the PWS, it is a very brief document (commonly 2-10 pages, depending upon complexity, although there is no maximum or minimum required length), which summarizes key agency goals and outcomes to which contractors respond. It is different from a PWS in that, when a SOO is used, offerors are asked to develop and propose a PWS as part of their solution. Typically, SOO responses would also propose a technical approach, performance standards, incentives/disincentives, and a QASP based upon commercial practices.

At a minimum, a SOO must contain the following information:

- Purpose
- Scope or Mission
- Period and Place of Performance
- Background
- Performance Objectives (i.e., required results)
- Any Operating Constraints

Upon award, the winning offeror's solution to the SOO should be incorporated into the resulting TO; the SOO itself is not part of the TO.



Additional information required when submitting requests:

- **Funding Document:** ITES-3S orders are funded by the OCO's RA. Individual OCOs should provide specific instructions as to the format and content.
- **Independent Government Cost Estimate:** The estimate will assist the OCO in determining the reasonableness of the contractors' cost and technical proposals. The estimate is for Government use only and should not be made available to the ITES-3S contractors.
- **Basis for TO Award:** The OCO, in conjunction with the RA, develops the evaluation criteria that forms the basis for TO award. Whether the award will be based on low price, technical acceptability, or best value, the criteria should be provided to the contractor. If the award will be based on best value, evaluation factors and significant subfactors that will affect contract award and their relative importance should be shown.

3.8.2 Task Order Request Preparation

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

Other important information:

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

3.8.3 Evaluation Criteria

All evaluation criteria must be identified and clearly explained in the TOR. The TOR must also describe the relative importance of the evaluation criteria. The OCO, in conjunction with the RA, must consider price/cost as a factor in the selection criteria and may consider the following technical/management approach evaluation criteria to evaluate contractors' proposals:

- Understanding of the requirement
- Technical and management approach
- Staffing Plan (e.g., skill mix; personnel experience, qualifications, or availability of personnel; and performance location)
- Areas of expertise
- Past performance on prior TOs under this contract (e.g., approach, personnel, responsiveness, timeliness, quality, and cost control) (NOTE: If practicable, automated systems, such as Past



Performance Information Management System (PPIMS) or Past Performance Information Retrieval System (PPIRS) should be utilized in lieu of requesting past performance information from the contractors).

- Current distribution of workload
- Knowledge of the customer’s organization
- Teaming arrangements (including subcontracting)
- Security (including clearance level)
- Performance-based approach
- Other specific criteria as applicable to the individual TO

3.8.4 Cost/Price

This part of the proposal will vary depending upon the contract type planned for the TO. It should include detailed cost/price amounts of all resources required to accomplish the TO (labor hours, rates, travel, etc.). The contractor may not exceed the labor rates specified in its respective contract’s ITES-3S Price Matrix. However, the contractor is permitted to propose labor rates that are lower than those established in the Labor Rate Table. The contractor shall fully explain the basis for proposing lower rates. The proposed reduced labor rates will not be subject to audit; however, the rates will be reviewed to ensure the Government will not be placed at risk of nonperformance. The reduced labor rates will apply only to the respective TO and will not change the fixed rates in Labor Rate Tables. The level of detail required shall be primarily based on the contract type planned for use, as further discussed below:

- **FFP and T&M** – The proposal shall identify labor categories IAW the ITES-3S Price Matrices and the number of hours required for performance of the task. The proposal must identify and justify use of all non-labor cost elements. It must also identify any Government-Furnished Equipment (GFE) and/or Government Furnished-Information (GFI) required for task performance. If travel is specified in the TOR, airfare and/or local mileage, per diem rates by total days, number of trips, and number of contractor employees traveling shall be included in the cost/price proposal. Other information shall be provided as requested in the proposal request.
- **CR** – Both “sanitized” and “unsanitized” cost/price proposals will be required for CR-type TOs only. “Unsanitized” cost proposals are complete cost proposals that include all required information. “Sanitized” cost proposals shall exclude all company proprietary or sensitive data but must include a breakdown of the total labor hours proposed and a breakout of the types and associated costs of all proposed ODCs. Unless otherwise noted, unsanitized proposals will only be provided to the OCO, while sanitized proposals may be provided to the evaluator(s) and other personnel involved in the procurement. Cost/price proposals shall include, at a minimum unless otherwise indicated in the TOR, a complete Work Breakdown Structure (WBS) that coincides with the detailed technical approach and provides proposed labor categories, hours, wage rates, direct/indirect rates, ODCs, and fees. CR proposals shall be submitted IAW FAR clause 52.215-20 “Requirements for Cost or Pricing Data or Information Other Than Cost or Pricing Data.”

3.8.5 Evaluation

If a “mini-competition” is being conducted, a panel of evaluators should be appointed to review the proposals submitted by ITES-3S contractors. For each non-price evaluation factor, the evaluators should identify strengths and weaknesses in the proposals and should assign an



adjectival rating (e.g., outstanding, good, etc.) for each non-price factor. The evaluators' findings should be documented in a written evaluation report. The price factor should be evaluated independently from the non-price factors. Individuals who are evaluating non-price aspects of the proposal should not have access to pricing information while performing their evaluations. Evaluations must be conducted fairly and IAW the selection criteria in the solicitation. After an initial evaluation of proposals, negotiations (discussions) may be held. Refer to FAR Part 15 for general guidance on the proper conduct of discussions.

3.8.6 Award

Once evaluations are completed, an authorized selection official must make an award decision and document the rationale for his/her decision. Prior to making a decision, copies of all evaluations must be forwarded to the selection official for his/her review and consideration.

The Selection Recommendation Document is signed by the selection official and forwarded to the OCO. This form can also be used to document an exception to the fair opportunity requirements.

At a minimum, the following information shall be specified in each TO Award:

- Date of order
- POC (name), commercial telephone and fax numbers, and e-mail address
- OCO's commercial telephone number and e-mail address
- Description of the services to be provided, quantity unit price and extended price, or estimated cost and/or fee (to include the CLIN from Part B). The work statement should be attached; the contractor's proposal may be incorporated by reference.
- Delivery date for supplies
- Address and place of performance
- Packaging, packing, and shipping instructions, if any
- Accounting and appropriation data and Contract Accounting Classification Reference Number (ACRN); Defense Finance and Accounting Service requires an ACRN(s) on all orders.
- Specific instructions regarding how payments are to be assigned when an order contains multiple ACRNs
- Invoice and payment instructions
- Any other pertinent information

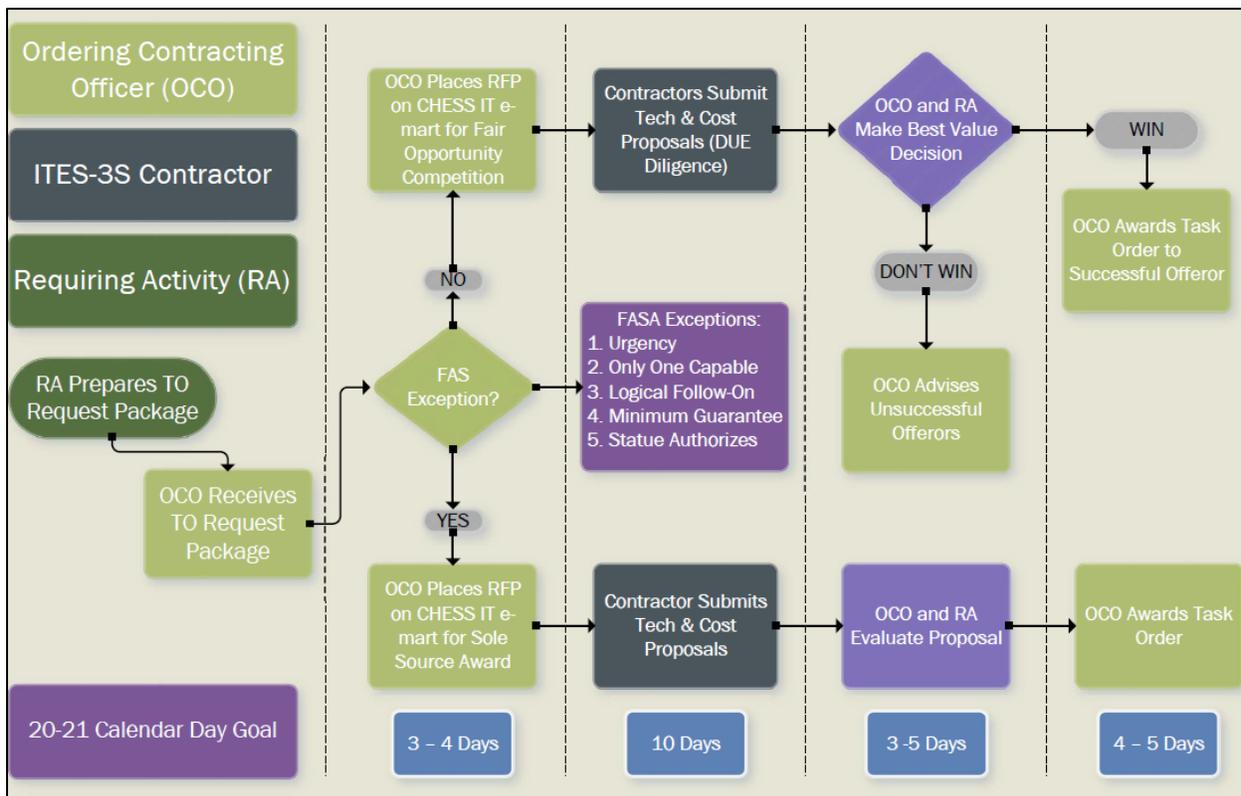
IAW 10 U.S. Code § 2304c(d) and FAR 16.505(a)(10), the ordering agency's award decision on each order is generally not subject to protest under FAR Subpart 33.1, except for a protest that an order increases the scope, period, or maximum value of the contract. In lieu of pursuing a bid protest, ITES-3S contractors may seek independent review by the designated Ombudsman. The Ombudsman will review complaints from the contractors and ensure that all contractors are afforded a fair opportunity to be considered for each order, consistent with the procedures in the contract. The designated Ombudsman is identified in **Section 2.7** of these guidelines.

The executed order will be transmitted via fax, e-mail, or by verbal direction from the OCO. If verbal direction is given, written confirmation will be provided within five (5) working days.

After award, timely notification shall be provided to the unsuccessful offerors and will identify, at a minimum, the awardee and award amount.

The ITES-3S TO award process is illustrated in **Exhibit 3** below.

Exhibit 3. ITES-3S Task Order Award Process



3.8.7 Post Award Debriefing

Under 10 USC § 2305(b)(5), unsuccessful offerors in competitions for TOs exceeding \$5,500,000 have the right to a post-award debriefing if they meet certain request deadline requirements. The deadline requirements can be found in FAR 15.506(a)(1). Under FAR 15.506(a)(4)(i), untimely debriefing requests may be accommodated, and 15.506 is not limited to unsuccessful offerors. Timely requests for a post-award debriefing for TOs meeting the threshold above must be honored, and their debriefings must meet the requirements of FAR 15.506. Also, Contracting Officers are encouraged to provide debriefings to untimely offerors under competitions exceeding \$5,500,000 and to offer a debriefing to all other offerors under TO competitions, even those valued below the mandatory threshold described above. Non-mandatory debriefings should follow all of the requirements in FAR 15.506(d), (e), and (f). Debriefings may be done orally, in writing, or by any method acceptable to the Contracting Officer.

3.8.8 Evaluation of Contractor’s TO Performance

At TO completion, the ITES-3S contractor submits a request for a performance evaluation to the order’s COR or his/her designated representative. The order’s COR or his/her designated representative shall complete these evaluations for each TO, regardless of dollar value, within 30 days of completion. Performance evaluations shall also be completed annually for orders that have a performance period in excess of one year. Annual performance evaluations shall be completed within 30 days of TO renewals.



Performance evaluations may also be done, as otherwise considered necessary, throughout the duration of the order (but generally no more than quarterly). The performance evaluations will be located on the CHESST IT e-mart at https://chess.army.mil/Static/SRV_ITS_SB_EVL_CON.

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