**Information Analysis Center (IAC) Multiple Award Contract (MAC) Task Order (TO)
Performance Work Statement (PWS)
*Insert Task Order Title***

**for *Requiring Activity (RA) Name (Organization/Directorate)
P1/P2/P3-Fiscal Year (FY)-0999 (choose P1, P2, or P3 and insert FY and TO number)***

*Notes:*

* *Highlights are intended to bring attention to recent changes to the template.*
* *There should be NO italics in your final Performance Work Statement (PWS); all italics in this document and the template are used to indicate a choice or a note to the author or reviewer. Non-italicized text is approved boilerplate language or is an example of contractually acceptable language.*
* *100% of the font should be Times New Roman style, size 10.*

**Table of Contents**

[1.0 ORGANIZATION AND MISSION 1](#_Toc144292177)

[2.0 OBJECTIVE AND SCOPE 1](#_Toc144292178)

[3.0 TASKS 2](#_Toc144292179)

[4.0 GOVERNMENT PROPERTY 12](#_Toc144292180)

[5.0 SECURITY REQUIREMENTS 13](#_Toc144292181)

[6.0 SERVICE SUMMARY 13](#_Toc144292182)

[7.0 TRAVEL AND OTHER DIRECT COSTS (ODCs) 15](#_Toc144292183)

[8.0 PERSONNEL QUALIFICATIONS 15](#_Toc144292184)

[9.0 PLACE OF PERFORMANCE AND FACILITY CAPABILITIES 16](#_Toc144292185)

[10.0 Special Requirements, APPLICABLE PUBLICATIONS, and REFERENCES 16](#_Toc144292186)

# ORGANIZATION AND MISSION

*Insert one to two concise paragraphs that identify and explain the RA’s organization and mission. The information in this section should establish the context for the work required under this TO.*

# OBJECTIVE AND SCOPE

## Objective

The primary purpose of this Task Order (TO) is to provide Information Analysis Center (IAC) Multiple Award Contract (MAC) related Scientific and Technical Information (STI) deliverables by performing Research, Development, Test, and Evaluation (RDT&E) and other Research and Development (R&D) related analytical services in achieving the mission requirements of the Requiring Activity (RA) defined herein.

*Beyond the boilerplate language in the paragraph above, the objective should include one paragraph that identifies the mission-related requirements, objectives, goals, or expected outcomes of the TO.*

## Scope

### Information Analysis Center (IAC) Multiple Award Contract (MAC) Basic Performance Work Statement (PWS) References. The work under this TO is within the scope of the following IAC MAC PWS Technical Focus Areas: \_\_\_\_\_\_\_\_\_\_. *In the blank, insert the Technical Focus Area(s) that are applicable or fit the work of the TO. Technical Focus Areas are found in Section 1.4.2 of the IAC MAC Basic Contract PWS and include the following: Survivability and Vulnerability (1.4.2.2.1); Reliability, Maintainability, Quality, Supportability, and Interoperability (RMQSI) (1.4.2.2.2); Military Sensing (1.4.2.2.3); Advanced Materials (1.4.2.2.4); Energetics (1.4.2.2.5); Non-Lethal Weapons and Information Operations (1.4.2.2.6); Directed Energy (1.4.2.2.7); Autonomous Systems (1.4.2.2.8); Weapons Systems (1.4.2.2.9); Command, Control, Communications, Computers, Intelligence, Surveillance, and Reconnaissance (C4ISR) (1.4.2.2.10); Software and Data Analysis (1.4.2.3.1); Cyber Security (CS) (1.4.2.3.2); Modeling and Simulation (M&S) (1.4.2.3.3); Knowledge Management and Information Sharing (1.4.2.3.4); Homeland Security and Defense (1.4.2.4.1); Critical Infrastructure Protection (CIP) (1.4.2.4.2); Weapons of Mass Destruction (WMD) (1.4.2.4.3); Biometrics (1.4.2.4.4); Medical (1.4.2.4.5); Cultural Studies (1.4.2.4.6); Alternative Energy (1.4.2.4.7); Chemical, Biological, Radiological, and Nuclear (CBRN) Non-Laboratory (1.4.2.4.8); and CBRN Laboratories (1.4.2.4.9).*

### Requiring Activity (RA) and Partners. The work under this TO is being done principally for \_\_\_\_\_\_\_\_\_\_\_\_, and as described in Section 1.0 above, at the locations set forth in Section 9.0. *In the blank, add the Requiring Activity (RA) (i.e., organization name). Add an additional sentence listing any strategic partners and additional funders included in the scope of this effort.*

# TASKS

The Contracting Officer (CO) is the only person authorized to direct the contractor or take any actions that would change the TO or commit the Government in any way. The CO will appoint an Alternate Contracting Officer’s Representative (ACOR) who will be the RA’s contact. The ACOR will work with the contractor pursuant to the scope of the PWS to meet mission requirements.

*Prior to any Foreign Military Sales (FMS) funds being obligated to this TO, and subsequent to execution of FMS financed tasks, the CO must receive a copy of the pertinent Letter of Offer and Acceptance (LOA) identifying the line number and FMS case number for the in-scope determination and inclusion in the TO.*

Any and all source code, models, prototypes, programming, language, licensure, enterprise-wide rights, software, Contract Data Requirements Lists (CDRLs), manuals, training documents, and other similar products and related data developed, modified, or created under the TO shall be exclusively at the United States (U.S.) Government's expense. Per Defense Federal Acquisition Regulation Supplement (DFARS) 252.227-7014(b)(1), all of these items must be delivered to the U.S. Government with unlimited rights. As such, the Government may use, modify, reproduce, release, perform, display, or disclose the source code in whole or in part, in any manner and for any purpose whatsoever, and it may authorize others to do so.

*Task 3.1 Program Management, Task 3.2 STI Relevance Assessment and Gap Analysis, and Task 3.3 TO Transition Support are required in all IAC MAC TOs.* ***Please do not change the language in Tasks 3.1 through 3.3, though you may add to them if it is appropriate to do so to capture your program management needs.***

## (Task 1) – Program Management

### Post-Award Brief (PAB). The Post-Award Brief (PAB) shall be held within seven calendar days of the start of performance. The contractor shall schedule and conduct this meeting in coordination with the ACOR, Contracting Officer’s Representative (COR), and CO.

The purpose of the PAB is to: (1) discuss any unique characteristics of the requirement(s); (2) identify stakeholder roles and responsibilities; (3) review the 30-day transition-in to full performance; and 4) establish a common understanding of cost, schedule, and performance expectations (Deliverable 3.1-1: TO PAB Slides).

### Project Management Plan (PMP). The purpose of the Project Management Plan (PMP) is to capture a brief overview of the overarching TO but more specifically baseline and establish a record of all the projects under this TO (Deliverable 3.1-2: PMP).

#### **Overview.** The PMP shall include a snapshot of current and completed projects, any project interdependencies as applicable, and TO value remaining for additional projects (Deliverable 3.1-2: PMP).

#### **Projects.** The contractor shall establish a comprehensive resource-loaded baseline for each project as they arise during performance. The PMP entry for each project shall include the following:

1. Project title with associated project number and phase, if applicable
2. Project objective statement and summary scope of work (i.e., brief narrative)
3. Any technical or quality standards
4. Anticipated STI and other deliverables
5. Estimated baseline Level of Effort (LOE) (i.e., Full-Time Equivalents (FTEs) and skillsets)
6. Estimated baseline costs:
	1. Breakout of labor, travel, materials, and equipment
	2. Proposed or anticipated subcontractors
7. Estimated baseline project Period of Performance (PoP). Note, the PoP of any given project shall not extend beyond the PoP or end of existing option period of the TO.
8. Significant performance milestones
9. Anticipated project expenditure plan
10. Project assumptions (e.g., any anticipated significant expenditures, Government Furnished Property (GFP), security concerns, risk mitigation, data rights, and Synchronized Predeployment and Operational Tracker (SPOT)-generated letters of authorization)
11. The following statement as applicable: “Project re-baselined as of [date]. Initial project incorporated on PMP dated [date].”

(Deliverable 3.1-2: PMP).

#### **Project Re-Baselining.** The nature of R&D is fluid. It is imperative that the Government has a realistic estimated baseline of cost, schedule, performance, and risks that can be measured as a project progresses. The intent of re-baselining is for the contractor to proactively evaluate their performance data and identify any known or projected changes to the original baseline. Re-baselining is required to reflect an upward or downward adjustment to cost or schedule of 25% or more using the data as reported on the Monthly Status Report (MSR). When a project needs to be re-baselined, the PMP shall detail the circumstances that led to the required change and shall reflect both the original and revised estimates. Examples of things that may trigger re-baselining include achieved efficiencies in performance, changes to the phases of projects, Government delays, any required re-work, increased or decreased deliverables, changes in security requirements, and additional travel. Re-baselining allows the Government to either obligate additional funds to avoid project stop works or performance gaps or de-obligate excess funds for reutilization (Deliverable 3.1-2: PMP).

#### **Project Management Plan (PMP) Deliverable.** An initial PMP is due 30 days after start of TO performance. An updated PMP shall be provided within 30 days after each project is established or re-baselined. Otherwise, the PMP shall be updated at least quarterly if no projects are established or re-baselined during that quarter. The format of the PMP, and any additional content not specified in this section, shall be mutually agreed upon by the contractor and the ACOR. The format and content are subject to revision during the PoP. The contractor shall make every reasonable effort to meet the cost, schedule, and any technical or quality standards specified to fulfill the project requirement(s). The contractor shall report the progress of each project in the MSR. The deliverable quantities listed in each table from Task 4 through Task *X* are estimates provided for reference for the entirety of the TO. The actual deliverable quantities shall be reflected within the PMP upon assignment of the project(s) and within the Final Technical Report (FTR) (Deliverable 3.1-2: PMP).

### Monthly Status Report (MSR). The purpose of the MSR is to report cost, schedule, technical performance, and risk against the baseline established for each project in the PMP, and the overall TO. The PMP and the MSR shall not be duplicate documents (Deliverable 3.1-3: MSR).

#### **Overview.** The MSR shall include a snapshot of the overall burn rate of the TO that indicates if the overall pace of performance will exhaust the value of the TO on or ahead of schedule with respect to the TO PoP. The overview shall also discuss any delays in performance and detail impacts of those delays on project interdependencies as applicable (Deliverable 3.1-3: MSR).

#### **Projects.** The MSR entry for each project shall include the following information to report against the baseline established in the PMP:

1. Planned, obligated, and actual expenditures per project
2. Narrative as well as potential visual elements such as graphs
3. Breakout by labor, materials, travel, and equipment
4. Performance against any increment of funds with PoP constraints (e.g., Operations and Maintenance (O&M) funds)
5. A forecast when additional funds will be required to avoid a stop-work at the project level
6. If the project is on, ahead of, or behind schedule
7. The amount of funds available for de-obligation after the final project deliverable has been accepted
8. Technical progress of the project
9. Status of STI and other deliverables, to include title, date, and number of deliverable(s) completed and accepted
10. All funds received. Identify the Military Interdepartmental Purchase Request (MIPR) numbers, Contract Line Item Numbers (CLINs), Sub-Line Item Numbers (SLINs), Accounting Classification Reference Numbers (ACRNs), and modification numbers funding the project.
11. Identification of any known and perceived risk(s) and plans or efforts taken to mitigate the risk(s)
12. Discussion of the circumstances and rationale surrounding any get-well plans required In Accordance With (IAW) PWS Section 6.0

(Deliverable 3.1-3: MSR).

#### **Project Re-Baselining.** The MSR shall identify if a project has been re-baselined (Deliverable 3.1-3: MSR).

#### **Monthly Status Report (MSR) Deliverable.** The contractor shall deliver the MSR monthly on a scheduled day mutually agreed upon by the contractor and the ACOR. The format of the MSR, and any additional content not specified in this section, shall mirror the format of the PMP for ease of use and be mutually agreed upon by the contractor and ACOR. The format and content are subject to revision during performance (Deliverable 3.1-3: MSR).

### Quarterly Project Management Reviews. Conduct quarterly project management reviews with the ACOR to include detailed project information on cost, schedule, performance, risk assessment, and risk mitigation plans (Deliverable 3.1-4: Quarterly Project Management Review).

### Final Technical Reports (FTRs). The FTRs shall include TO-specific background information, objectives, assumptions, specific data collected, analyses conducted, recommendations, and conclusions. An initial technical report shall be submitted halfway through the PoP. A draft FTR shall be submitted 45 days prior to the last date of the TO’s PoP, and the completed FTR shall be submitted 10 days prior to the last date of the TO’s PoP. Each report shall be delivered to the ACOR and COR (Deliverable 3.1-5: FTR).

### Redacted Task Order (TO). Within 30 days after TO award, provide a redacted copy of the awarded TO that is appropriate for public release. The redacted TO will be posted by the Government to a public website (Deliverable 3.1-6: Redacted TO).

### Contractor Acquired Property (CAP) Report. Provide a monthly report for all Contractor Acquired Property (CAP) acquired via Other Direct Cost (ODC) charging, to be included in the MSR (Deliverable 3.1-3: MSR).

### Conferences. A “conference” is defined in the Joint Travel Regulations (JTR) as, “[a] meeting, retreat, seminar, symposium, or event that involves attendee travel. The term ‘conference’ also applies to training activities that are considered to be conferences under 5 Code of Federal Regulations (CFR) 410.404.” Contractor responsibilities for hosting conferences may include coordinating the location for a conference and providing the venue by reserving and incurring the cost of meeting rooms and required technical equipment ODCs under this TO. Additionally, contractors may manage attendee invites and acceptances, badging, and security, and may provide printouts of briefs to attendees. The contractor shall not expend any resources associated with hosting a conference until the RA has obtained the requisite approval to conduct a conference from the appropriate approval authority. The contractor shall be aware of and not incur any prohibited conference expenses. The contractor shall not expend any funds under this TO for providing food or nutrition for technical symposiums or conferences or for blocking off or reserving lodging for attendees.

The contractor shall draft the Conference Planning and Approval Information Request. Approval is required for each individual conference, unless one-time approval is provided for a recurring Department of Defense (DoD)-sponsored or -hosted conference. *Conference support for this TO is estimated to be approximately XX conferences per year. Each conference duration is estimated at YY day(s) up to ZZ days, with attendance of approximately WW people* (Deliverable 3.1-7: Conference Planning and Draft Approval Information Request; Deliverable 3.1-8: Conference Report).

### Completion Statements (Defense Department (DD) Form 250 and Standard Form (SF) 298). The DoD requires contractors who supply goods or services under a contract to submit a Material Inspection and Receiving Report (RR), Defense Department (DD) Form 250, or electronic equivalent Wide Area Workflow (WAWF) RR IAW DFARS Appendix F. This form is the receiving document used to record the delivery of goods or services including pertinent information about the TO. The Defense Technical Information Center (DTIC) is the central library for the DoD, and its digital repository (i.e., Research and Engineering (R&E) Gateway) stores and makes available to the greater Science and Technology (S&T) community the STI produced under this TO. The contractor shall provide a completed DD Form 250 as well as a STI Report Documentation Page, Standard Form (SF) 298 (Deliverable 3.1-9: STI TO Completion Statements).

**Task 1 Deliverables Table**

|  |  | **Performance Deliverables** | **STI Deliverables** |  |
| --- | --- | --- | --- | --- |
| **#** | **Title** | **Estimated TO Quantity**  | **Estimated****Due Date or Frequency** | **Estimated TO Quantity**  | **Estimated****Due Date or Frequency** | **Description** |
| 3.1-1 | TO PAB Slides  | 1 | 7 days after PAB | 0 | Not Applicable (NA) | (CDRL A008) Identifies, as a minimum, the key stakeholders and highlights their roles and responsibilities and summarizes the tasks and associated deliverables. PAB template slides will be provided by the Government and updated by the contractor. Slides shall be emailed to the ACOR, COR, and CO. Meeting minutes shall be the responsibility of the contractor and provided to the Government post PAB. |
| 3.1-2 | PMP | *Specify number based on total duration of TO*  | 30 days after PoP start date; quarterly thereafter; and updated within 30 days of each project being established or re-baselined | 0 | NA | (CDRL A009) Includes a baseline schedule and cost baseline that outlines the steps to take and a timeline to completion of each project as well as any interdependencies amongst the projects’ schedules. As a minimum, the PMP shall provide formal updates to cost, schedule, performance, risk assessment, and risk mitigation plans for each project. The schedule shall specify estimated project start and stop dates as well as expenditure plan aligned to key milestones within the project, to include any anticipated ODCs. The PMP shall be emailed to the ACOR, COR, and CO. |
| 3.1-3 | MSR | *Specify number based on total duration of TO* | 45 days after PoP start date; monthly thereafter | 0 | NA | (CDRL A010) Reports cost, schedule, risks, and performance against PMP and PWS requirements. Includes actual versus planned task expenditures, technical progress made, schedule status, and travel recommendations. Identifies funding compared to the overall estimate, status of known risks, risk mitigation efforts, deliverables funded and date they were funded, schedule status per deliverable, deliverable titles and numbers completed within the previous month, and the deliverables scheduled to be delivered within the upcoming month. Reports all funding and details the funding source or project specified. Reports all CAP acquired via ODC charging. Establishes a baseline schedule for and steps to completion for each requirement. Upon acceptance and approval by the Government, the contractor shall meet the schedule and forecasted delivery date of all deliverables by taking all reasonable measures to fulfil the requirement. Specific MSR format and content shall be mutually agreed upon by the contractor and ACOR, per the guidance contained herein. The MSR content shall be established by the PAB. The MSR shall be in Portable Document Format (PDF), emailed to the ACOR, COR, and CO. |
| 3.1-4 | Quarterly Project Management Review | *Specify number based on total duration of TO* | 45 days after PoP start date; quarterly thereafter | 0 | NA | (CDRL A007) Includes a Quarterly Project Management Review as a formal presentation to the ACOR. As a minimum, provides formal updates to cost, schedule, performance, risk assessment, and risk mitigation plans for each project. Slides shall be due three days prior to presentation. Minutes shall be provided to all attendees.  |
| 3.1-5 | FTR | 3 | Initial technical report due halfway through PoP; draft FTR due 45 days prior to the last date of the PoP; completed FTR due 10 days prior to the last date of the PoP | 1 | 10 days prior to the last date of the PoP | (CDRL A012) Includes task background, objectives, assumptions, specific data collected, analyses conducted, recommendations, and conclusions. Each report shall be delivered to the ACOR and COR prior to expiration of the PoP. Under authority of the ACOR, with approval by the COR, the FTR, whether unclassified or classified, shall have a Distribution Statement. Every effort shall be made to avoid utilizing Distribution F (further distribution only as directed by RA). However, if sensitive internal information is contained in the FTR, every attempt shall be made to produce a sanitized (i.e., redacted) version of the FTR for distribution within DoD (Distribution D) and inclusion in the DTIC repository (i.e., R&E Gateway). For classified STI, an unclassified SF298 shall be produced and signed by the Government ACOR. The SF298 shall serve as the basis for creating unclassified metadata, which the IAC will add to the R&E Gateway, IAW established policies and procedures. The FTR shall be emailed to the ACOR, COR, and CO. |
| 3.1-6 | Redacted TO | 1 | 30 days after PoP start date | 0 | NA | (CDRL A002) Supports transparency of Government contracting by providing a redacted copy of awarded TO appropriate for public release, which will be posted by the Government to a public website. The Redacted TO shall be emailed to the ACOR, COR, and CO. |
| 3.1-7 | Conference Planning and Draft Approval Information Request | 1/event | 30 days after start of project  | 0 | NA | (CDRL A007) Includes a draft pre-conference determination and approval for Government ACOR submittal.  |
| 3.1-8 | Conference Report | 1/event | 10 days after event concludes | 0 | NA | (CDRL A007) Provides a summary of the conference, to include the information required by the ACOR for reporting purposes.  |
| 3.1-9 | STI TO Completion Statements | 1 | 30 days prior to the end of PoP | 0 | NA | (CDRL A007) Includes final STI TO Completion Statements, submitted electronically, using DD Form 250 and SF298 through the WAWF system for approval, and provides the collective amount of STI provided for the duration of the TO. |

## (Task 2) – Scientific and Technical Information (STI) Relevance Assessment and Gap Analysis

In order to ensure TO performance builds on the breadth of the DoD’s knowledge base and contributes to the knowledge base, a pre-award literature search and an annual STI relevance assessment and gap analysis shall be performed. The pre-award literature search is performed by the IAC functioning in the same technology domain area as the TO, i.e., Defense Systems, Cyber Security and Information Systems, or Homeland Security and Defense. The results of this literature search will be provided to the contractor performing the TO work at the PAB. This literature search provides the TO contractor with the results of previous research done in the same technology area, providing a foundation of knowledge upon which the TO contractor can build.

The annual STI relevance assessment and gap analysis builds on the pre-award literature search performed by the IAC. In conducting the STI relevance assessment and gap analysis, the contractor shall do two things: first, the contractor shall evaluate relevance, applicability, and usability of the relevant STI identified in the pre-award literature search and develop a list of STI that were applicable in the execution of the TO requirement and second, the contractor shall conduct a STI gap analysis based on the literature search bibliography, relevant STI assessment, as well as the STI produced during execution of the TO against all key TO research requirements and identify existing gaps. For each gap identified, the contractor shall provide recommendations on how the IAC program can improve the depth and breadth of its knowledge base for the associated research area, which may include STI collection and development methods, emerging research areas, and potential target sources for STI. This STI relevance assessment and gap analysis shall be provided annually (during the life of the TO) to the IAC that generated the literature search. The identified gaps and recommendations shall provide insight into areas in which the IAC needs to build knowledge, especially as the IAC notices trends across multiple TOs (Deliverable 3.2-1: TO-Specific Annual Gap Analysis).

**Task 2 Deliverables Table**

|  |  | **Performance Deliverables** | **STI Deliverables** |  |
| --- | --- | --- | --- | --- |
| **#** | **Title** | **Estimated TO Quantity** | **Estimated****Due Date or Frequency** | **Estimated TO Quantity** | **Estimated****Due Date or Frequency** | **Description** |
| 3.2-1 | TO-Specific Annual Gap Analysis | *Specify number between 1-5 based on total duration of TO* | Annually | 0 | NA | (CDRL A011) Includes a summary of STI used in performance of the TO, including the value of that STI and feedback on its usefulness. Also includes a summary of TO needs for STI unmet by the existing IAC knowledge base (i.e., areas where additional IAC STI would have been useful in performance of the TO). This shall be emailed to the ACOR and COR.  |

## (Task 3) – Task Order (TO) Transition Support

### Transition-In. Facilitate the accomplishment of a seamless transition of requirements. Transition-in services shall begin on the effective date of the award and shall be complete on the date which is 30 days after the effective date when the contractor shall assume full responsibility for Tasks 4 and beyond.

#### Identify Points of Contact (POCs) for liaison between the Government, the prime contractor, and other contracted industry partners for a proper and orderly transition and transfer of services and assets between the parties cited.

#### Prevent disruption to vital Government business, including service degradation during or after transition.

#### Establish an overview of the transition efforts and describe the activities to transition, which shall include a schedule with milestones by activity.

#### Coordinate the transition of Government property, if applicable.

#### Obtain the following from contractor personnel or Government personnel:

1. Transition knowledge and information regarding risk or problem areas
2. *Please list any additional needs that are specific to your effort.*

### Transition-Out Plan. Develop and execute a Transition-Out Plan that shall facilitate the accomplishment of a seamless transition from the incumbent to incoming contractor or Government personnel at the expiration of the TO. Provide a Transition-Out Plan 60 days prior to expiration of the TO. Identify how the incumbent shall coordinate with the incoming contractor personnel and Government representatives to provide a seamless transition and transfer knowledge regarding the following:

1. Program and project management processes
2. POCs
3. Location of technical, program, and project management documentation
4. Status of ongoing technical initiatives
5. Transition of personnel
6. Schedules and milestones
7. Actions required of the Government
8. Communication with the incoming contractor personnel and Government representatives for the period of the transition via weekly status meetings
9. Transition-Out Plan, to include:

*The following list is* ***an example*** *and should be tailored to meet the RA’s needs:*

1. Review, evaluation, and transition of current support services
2. Transition of historic data to new contractor systems
3. Identification of Government-approved training and certification process
4. Transfer of hardware warranties and software licenses
5. Transfer of business and technical documentation
6. Development of an orientation phase and program to introduce Government personnel, programs, and users to the contractor's team, tools, methodologies, and business processes
7. Disposition of contractor-purchased Government owned assets, including facilities, equipment, furniture, phone lines, and computer equipment
8. Transfer of Government Furnished Equipment (GFE) and Government Furnished Information (GFI), and GFE inventory management assistance
9. Personnel out-processing procedures including turn-in of all Government keys, identification, and access cards

(Deliverable 3.3-1: Transition-Out Plan).

**Task 3 Deliverables Table**

|  |  | **Performance Deliverables** | **STI Deliverables** |  |
| --- | --- | --- | --- | --- |
| **#** | **Title** | **Estimated TO Quantity**  | **Estimated****Due Date or Frequency** | **Estimated TO Quantity**  | **Estimated****Due Date or Frequency** | **Description** |
| 3.3-1 | Transition-Out Plan | 1 | 60 days prior to expiration of the TO | 0 | NA | (CDRL A007) Summarizes transition efforts from the incumbent to the incoming contractor. Identifies transfer of knowledge and coordination between contractors. Only one Transition-Out Plan shall be prepared and delivered, regardless of whether there are option periods. |

## (Task 4 and beyond (e.g., Task 5 and Task 6)) – Title (IAW IAC MAC Basic Contract PWS 1.4.2.2.X, 1.4.2.2.X)

*In tasks 3.4 and beyond, the RA’s requirements are to be identified and described in detail. Every subtask or paragraph needs to include any relevant information that pertains to each task, using subtasks as needed. There is no minimum or maximum given to the number of tasks that a PWS can have. Within each task, the goal is to define the level of service for the effort.*

*Work should be described in terms of the required output, focusing on what is expected from the contractor, rather than how the work is to be accomplished, thus allowing each contractor freedom to exercise innovation and creativity. Avoid using words that are broad or non-specific, such as “various” or “all.” Tasks MUST be within the scope of the IAC MAC Basic Contract PWS, without exception.*

*It is important to provide enough specificity and details when describing a task and its associated deliverable(s) so that offerors bidding on the effort will be able to gauge the workload associated with the effort and propose a realistic price. Offerors need to understand:*

* *what the task deliverables are,*
* *when and where tasks/deliverables will be performed,*
* *how much time they will have to complete them,*
* *how frequently they will have to perform them (if recurring),*
* *how much advance notice they will have before the task needs to commence,*
* *the complexity, magnitude, size, and quantity of the effort and deliverable,*
* *what the expected outcome is, and*
* *what platform/systems/projects will require work.*

*If these details are not definitely known, provide an estimate or example of the typical quantity, frequency, magnitude, duration, and complexity of the tasks and deliverables.*

*Task format: If subtasks and sub-subtasks are used, use bold font for numbering. The numbering should stay consistent with the left 1” margin of the page, even when using sub-subtasks. Immediately after the subtask or sub-subtask number, one 1” tab (tab is generally set at 0.5”, hit twice) should be used before the beginning of the description, then all subsequent lines of the description should stay consistent with the 1” margin of the page. The following format is an example of the appropriate format of subtasks and sub-subtasks that reference the deliverables for each subtask and sub-subtask:*

***3.X.1*** *Develop software code using the detailed design documented in the System Design Documents (SDD), Interface Management Document (IMD), and other appropriate requirements documentation. The software shall be developed in task appropriate programming language in conjunction with Navy Functional Area Manager (FAM)-approved Commercial Off-The-Shelf (COTS)-software tools (Deliverable 3.X-1: Production Release Notes; Deliverable 3.X-2: Version Description Documents; Deliverable 3.X-3: Source “Uncompiled” Code and Executable “Compiled” Code).*

***3.X.2*** *Gather, review, analyze, and document end user functional requirements, system performance requirements, logical database requirements, design constraints, system attributes and quality characteristics, and hardware and software requirements for fixes, system upgrades, enhancements, and modifications. Record and develop recommendations to update requirements IAW Automated Logistics Environment (ALE) requirements, Change Management (CM), and CM processes (Deliverable 3.X-4: Requirements Documents Recommendations).*

***3.X.3*** *Research, identify, and collect requirements for gathering data from authoritative sources (such as COMNAVAIRFORINST 4790.2A Decision Knowledge Programming for Logistics Analysis and Technical Evaluation (DECKPLATE)), which is the authoritative source for Navy aviation maintenance data and Navy Enterprise Resource Planning (ERP, which is the financial system of record). Identify and update interfaces to provide a near real time update and feed of data into the designated ALE data warehouse, application, or system (Deliverable 3.X-5: Interface Management Documents; Deliverable 3.X-6: Development Analysis Results and Recommendations).*

*The deliverables in Task 1-3 are required for all IAC TOs;* ***begin numbering for TO-specific deliverables with 3.N-x*** *where N is the task number and x is the deliverable number within task N.*

***Every subtask or paragraph needs to end with a reference to a deliverable that is being developed as a direct or indirect result of the work that is described in that subtask or paragraph.*** *The reference is formatted as follows: (Deliverable 3.N-x: Deliverable Title).*

*Each deliverable should be textually referenced within the task descriptions of the PWS.*

***The DoD IAC Program Management Office will consider STI production as a criterion for TO award; IAC work is deliverables-based, and work shall be codified in formal deliverables in order to record TO work efforts and results.***

*STI Definitions:*

* *STI is information that has value and applicability to the broader scientific and technical community beyond the TOs sponsoring program or activity mission. STI is intended to be perpetuated and reused.*
* *STI Definition per DoD INSTRUCTION 3200: Communicable knowledge or information resulting from or about the conduct and management of scientific and engineering efforts. STI is used and reused by administrators, managers, scientists, and stakeholders engaged in scientific and technical efforts, and are the basic intellectual resource for, and result of, such efforts. STI may be represented in many forms and media, including paper, electronic data, audio, photographs, video, drawings, numeric data, and textual documents.*

***Not all deliverables required are STI.*** *Examples of deliverables that are typically not considered to be STI are deliverables related to executing TOs, such as monthly progress reports, trip reports, financial status reports, workload and staffing plans and reports, cover and transmittal letters, and Plans of Action and Milestones (POA&M).* ***IAC TOs are established to reuse existing STI and generate new STI; as such, one factor in evaluating the PWS for appropriateness under IAC contracts is the amount and quality of STI expected to be produced under the TO.***

*Conclude each task in the PWS with a task-specific deliverables table, structured like the following table. Include both STI and non-STI deliverables in this table. From the information given in the descriptions, the contractor should be able to determine the intent of the deliverable as well as the level of effort required. Format for table: 10 point, Times New Roman Font. Manually adjust sides of table as shown below.*

**Task 4 (Task 5, Task 6, etc.) Deliverables Table**

|  |  | **Performance Deliverables** | **STI Deliverables** |  |
| --- | --- | --- | --- | --- |
| **#** | **Title** | **Estimated TO Quantity**  | **Estimated****Due Date or Frequency** | **Estimated TO Quantity** | **Estimated****Due Date or Frequency** | **Description** |
| 3.4-1 | *Insert Title* | *Insert number* | *Insert due date or frequency (e.g., 30 days after completion)* | *Insert number* | *Insert due date or frequency (e.g., Monthly, with annual rollup and trend analysis)* | (CDRL A007) *Insert description* |
| 3.4-2 | *Insert Title* | *Insert number* | *Insert due date or frequency* | *Insert number* | *Insert due date or frequency (e.g., Monthly, with annual rollup and trend analysis)* | (CDRL A007) *Insert description* |

# GOVERNMENT PROPERTY

## Access to Government Property

The Government will provide the contractor with access to facilities *on an as-needed basis,* *inclusive of items incidental to the place of performance* *such as office space, office supplies, personal computers, telephones for contractor on-site personnel, and other equipment* as necessary to complete taskings under this TO. The Government will arrange for the contractor to have access to all necessary military installations including test ranges and test facilities necessary to complete all aspects of the tasks. *This access is not to be considered a primary duty location.*

## Government Furnished Property (GFP)

*There is currently no GFP anticipated under this TO.* Any GFP shall be handled IAW Federal Acquisition Regulation (FAR) 52.245-1.

## Contractor Acquired Property (CAP)

Any CAP shall be handled IAW FAR 52.245-1. Government acceptance of CAP will be made by the ACOR. Copies of the approved forms shall be provided with the MSR (Deliverable 3.1-3: MSR).

## Government Furnished Information (GFI)

The Government will provide the contractor and contractor personnel with access to information on an as-needed basis to complete the taskings under this TO. Any GFI such as federal policies, directives, instructions, or documents provided during performance of this TO shall be provided with a Distribution Statement setting forth the disclosure limitations with which the contractor must comply. In the event that GFI is provided without a Distribution Statement, any disclosure shall be IAW DFARS 252.204-7000, Disclosure of Information, and the IAC MAC Basic Contract. The contractor and contractor personnel shall treat technical data in its possession as Government sensitive information that is not to be released outside of the originating organization.

# SECURITY REQUIREMENTS

*Explain the highest level of security clearance that would be needed to execute the TO. Edit “example” language below as needed. If personnel will require clearances, state how many FTEs or which labor functions, categories, or tasks will require each level of clearance and by when.*

*Example: The Government anticipates that access to classified data and information up to and including Top Secret (TS)//Sensitive Compartmented Information (SCI) COMINT/TALENT KEYHOLE/GAMMA/HUMINT* *(SI/TK/G/HCS), Special Access Program/Special Access Required (SAP/SAR), and NATO Cosmic Top Secret (CTS) will be required for both facility and personnel in the performance of this work. The Government estimates that approximately four FTEs will require TS clearance and all other personnel will require, at minimum, a Secret clearance in performance of this TO.*

Security specifications applicable to performance of the TO are expressed on the associated DD Form 254.

# SERVICE SUMMARY

*Use this table to convey the appropriate number of acceptable complaints and errors, and to develop standards and thresholds regarding what would need to be tracked and measured to ensure the contractor is meeting the requirements of the TO.*

*The following is an example and can be adjusted.*

**Service Summary Table**

| **TO****PERFORMANCE OBJECTIVE** | **TO****PWS REFERENCE** | **TO****PERFORMANCE STANDARD AND THRESHOLD** |
| --- | --- | --- |
| MSR | 3.1 | Standard: MSRs are timely, complete, and accurate.Threshold: No more than two errors per month. An error is defined as an incorrect statement or the omission of required information. A corrected MSR shall be submitted within five business days of identification of an error. |
| PMP  | 3.1 | Standard: Performance is IAW the PMP. Threshold: The PMP is completed on time and updated to reflect changes as they occur 98% of the time. A corrected PMP shall be submitted within five business days of identification of an error. All reasonable efforts (in the Government’s view) shall be taken by the contractor to adhere to the PMP.  |
| Project Schedule | 3.1 | Standard: Performance is on schedule.Threshold: Project is within 10% of schedule as defined in the PMP. A get-well plan and revised PMP shall be submitted within five business days if schedule is not within 10%. |
| Project Budget | 3.1 | Standard: Performance is on budget.Threshold: Project is within 10% of the budget as defined in the PMP. A get-well plan and revised PMP shall be submitted within five business days if budget is overrun. |
| Effective Resource Planning (Staffing) | 3.1 thru 3.*X* | Standard: The contractor shall manage, retain, replace, and assign capable and qualified contractor personnel in a manner that meets all expressed contractual requirements with no observable degradation of services or impacts to mission requirements.Threshold: 98% compliance with PWS and CDRL requirements. The Government shall receive no more than three Corrective Action Reports (CARs) or similar deficiency reports during the contractor’s performance of the entire TO. A get-well plan shall be submitted within five business days of identification of deficiency. |
| Quality Deliverables (Data) | 3.1 thru 3.*X* | Standard: The contractor shall research, develop, prepare, compile, and submit deliverables and CDRLs on time, addressing all data contents, fields, and specified instructions adequately. Upon submission to the Government, deliverables may require minimal non-substantive changes, such as corrections to spelling, but shall not require substantive document corrections or revisions.Threshold: 98% compliance with CDRL requirements. The contractor shall submit all deliverables and CDRLs as instructed per the established schedule (due date) with no need for substantive changes. A revised deliverable shall be submitted within five business days of identification of deficiency. |
| Responsive Customer Service (Business Acumen) | 3.1 thru 3.*X* | Standard: The contractor shall respond to all tasks, questions, and inquiries by providing initial written acknowledgement to the requesting individual within two business days. The contractor shall close all corrective action tasks within 30 calendar days, providing written documentation to the Government detailing actions taken. All Government questions and inquiries shall be addressed within five business days. The contractor shall provide courteous and competent customer service during performance of the TO. The contractor shall be flexible and responsive to the Government's evolving requirements or emergent activities.Threshold: The Government will perform random service sampling (reviews) to gauge the contractor’s customer service responsiveness and professionalism. The Government will receive no more than three complaints or negative reviews denoting a customer service or business acumen deficiency during the contractor’s performance of the entire TO. A get-well plan shall be provided within five business days of identification of deficiency. |

# TRAVEL AND OTHER DIRECT COSTS (ODCs)

## Travel

*Include the statement shown below in this section. At a minimum, provide the estimated locations of all probable and possible local, Continental United States (CONUS), and Outside the Continental United States (OCONUS) travel.*

Travel is anticipated to meet PWS requirements and shall comply with Section 4.3 of the IAC MAC Basic Contract. Travel shall be approved by the Government in writing prior to actual travel. The following locations are examples of where travel may occur: *List specific locations, not just CONUS or OCONUS, including location cities and countries where possible. This list should match IGCE travel tab.*

## Other Direct Costs (ODCs)

*Identify any probable and possible items, equipment, licenses, and materials that may be required by the contractor to perform the PWS, which will be bought and invoiced to the Government by the contractor under this TO and will not be furnished by the Government. This list should match the IGCE materials, supplies, and equipment tab.*

*ODCs are CAP, a type of Government property for which the Government reimburses the contractor, and of which the Government takes ownership during or after TO completion.*

*Contractors can charge fees on materials and supplies purchases. Although contractors cannot charge a direct fee on equipment and travel, certain General and Administrative (G&A) and indirect costs may be allowable.*

*Per FAR 45.101, “Equipment” means a tangible item that is functionally complete for its intended purpose, durable, nonexpendable, and needed for the performance of a contract. Equipment is not intended for sale and does not ordinarily lose its identity or become a component part of another article when put into use. Equipment does not include material, real property, special test equipment, or special tooling.*

*Per FAR 45.101, "Material" means property that may be consumed or expended during the performance of a contract, component parts of a higher assembly, or items that lose their individual identity through incorporation into an end-item. Material does not include equipment, special tooling, special test equipment, or real property.*

Any items purchased under this TO shall be CAP and subject to Section 4.3 of this PWS.

# PERSONNEL QUALIFICATIONS

## Certification

The contractor shall possess the necessary training, qualifications, experience, and clearances to accomplish all tasks identified in this PWS. *The RA can opt to include further certification requirements beyond the boilerplate statement above, when there are key personnel or highly specialized certifications or qualifications that are critical to the tasks of the PWS.*

# PLACE OF PERFORMANCE AND FACILITY CAPABILITIES

## Primary Place of Performance

*If the contractor will be required to perform work at a Government facility (or facilities), indicate that here. Include the name and address of the agency. Include locations for partners listed in Section 2.2.2. If work is to be performed at multiple locations, identify the approximate percentage of work to be performed at each location. If the contractor will not perform work at a Government facility, use caution in limiting location and facility capacities.*

Primary place(s) of performance will be (*Government/contractor)* location(s) (estimated *XX*%) and (*Government/contractor)* location(s) (estimated *XX*%).

The Government location is:

*XXX/BBB*

*777 Mockingbird Lane*

*XXX AFB, XX 9999*

## Facility Capabilities

*If the contractor will be required to provide a facility capability, provide a detailed description of the minimum requirement. If there is no facility requirement associated with the TO, omit 9.2 and remove numbering for 9.1.*

# Special Requirements, APPLICABLE PUBLICATIONS, and REFERENCES

## Special Requirements

*Include any special requirements related to the execution of the TO.*

## Applicable Publications and References

*Include any relevant publications or references (e.g., federal regulations, guidelines, or websites).*

The following is a list of applicable publications and references. This list is not all-inclusive.

1. *Department of Defense Instruction (DoDI) XX.YY.ZZZ*
2. *DFARS 111.222.333*

*The below table includes all acronyms used in the standard PWS template. Add all additional acronyms used in the PWS for the RA’s requirement. While developing the list, make sure each acronym is defined within the text at its first use.*

**Acronym List**

|  |  |
| --- | --- |
| ACOR | Alternate Contracting Officer’s Representative |
| ACRN | Accounting Classification Reference Number |
| CAP | Contractor Acquired Property |
| CAR | Corrective Action Report |
| CDRL | Contract Data Requirements List |
| CFR | Code of Federal Regulations |
| CLIN | Contract Line Item Number |
| CO | Contracting Officer |
| COR | Contracting Officer’s Representative |
| DFARS | Defense Federal Acquisition Regulation Supplement |
| DD | Defense Department |
| DoD | Department of Defense |
| DODAAC | Department of Defense Activity Address Code |
| DTIC | Defense Technical Information Center  |
| FAR | Federal Acquisition Regulation |
| FTE | Full Time Equivalent |
| FTR | Final Technical Report |
| GFE | Government Furnished Equipment |
| GFI | Government Furnished Information |
| GFP | Government Furnished Property |
| IAC | Information Analysis Center |
| IAW | In Accordance With |
| LOE | Level of Effort |
| MAC | Multiple Award Contract |
| MIPR | Military Interdepartmental Purchase Request |
| MSR | Monthly Status Report |
| NA | Not Applicable |
| ODC | Other Direct Cost |
| O&M | Operations and Maintenance |
| PAB | Post-Award Brief |
| PDF | Portable Document Format |
| PMP | Project Management Plan |
| POC | Point of Contact |
| PoP | Period of Performance |
| PWS | Performance Work Statement |
| RA | Requiring Activity  |
| R&D | Research and Development |
| RDT&E | Research, Development, Test, and Evaluation |
| R&E | Research and Engineering |
| RR | Receiving Report |
| SF | Standard Form |
| SLIN | Sub-Line Item Number |
| SPOT | Synchronized Predeployment and Operational Tracker |
| S&T | Science and Technology |
| STI | Scientific and Technical Information |
| TO | Task Order |
| UIC | Unit Identification Code |
| U.S. | United States |
| WAWF | Wide Area Workflow |

**TO POCs at Award**

|  |  |  |
| --- | --- | --- |
|  | **RA** | **ACOR** |
| **Organization** |  |  |
| **Directorate** |  |  |
| **Office Symbol** |  |  |
| **Attention Line** |  |  |
| **Street Address** |  |  |
| **City, State, Zip** |  |  |
| **Phone** |  |  |
| **E-mail** |  |  |
| **Department of Defense Activity Address Code (DODAAC)** |  |  |
| **Unit Identification Code (UIC)** |  |  |