

**ORDER FOR SUPPLIES OR SERVICES**

PAGE OF PAGES

1 32

**IMPORTANT: Mark all packages and papers with contract and/or order numbers.**

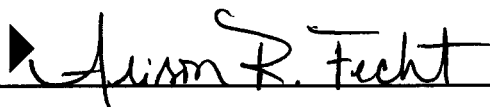
1. DATE OF ORDER 02/18/2009		2. CONTRACT NO. (If any) DTRT57-09-D-30002		6. SHIP TO:	
3. ORDER NO. DTRTV-T9001		4. REQUISITION/REFERENCE NO. 6D3-7024		a. NAME OF CONSIGNEE U.S. DOT/RITA/Volpe Center	
5. ISSUING OFFICE (Address correspondence to) USDOT/RITA/Volpe Center Contracts & Tech Support Services 55 Broadway RVP-32 Cambridge MA 02142-1001				b. STREET ADDRESS 125 Munroe Street Receiving Dock	
d. CITY Washington		e. STATE DC	f. ZIP CODE 20006-3324	c. CITY Cambridge	e. ZIP CODE 02142-1001
7. TO: BingsongFang, Sr. Vice President				f. SHIP VIA	
a. NAME OF CONTRACTOR MacroSys Research and Technology				8. TYPE OF ORDER	
b. COMPANY NAME				<input type="checkbox"/> a. PURCHASE <input checked="" type="checkbox"/> b. DELIVERY	
c. STREET ADDRESS 888 17th Street, NW, Suite 312				REFERENCE YOUR:  Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
9. ACCOUNTING AND APPROPRIATION DATA WE094 C230A 25505V \$315,137.09				10. REQUISITIONING OFFICE USDOT/RITA/Volpe Center	
11. BUSINESS CLASSIFICATION (Check appropriate box(es))				12. F.O.B. POINT Destination	
<input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input checked="" type="checkbox"/> c. DISADVANTAGED <input type="checkbox"/> g. SERVICE-DISABLED VETERAN-OWNED <input type="checkbox"/> d. WOMEN-OWNED <input type="checkbox"/> e. HUBZone <input type="checkbox"/> f. EMERGING SMALL BUSINESS					
13. PLACE OF		14. GOVERNMENT B/L NO.		15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date) Multiple	
a. INSPECTION Destination	b. ACCEPTANCE Destination			16. DISCOUNT TERMS Net 30	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	Volpe Transportation Operations Research Analysis and Communications (V-TRAC) Support Services  SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS Continued ...					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOTAL (Cont. pages)
21. MAIL INVOICE TO:						
a. NAME		DOT/FAA Enterprise Services Center			\$68,147,067.22	▲
b. STREET ADDRESS (or P.O. Box)		Volpeinvoices@faa.gov				
c. CITY		d. STATE	e. ZIP CODE	\$68,147,067.22		17(i) GRAND TOTAL ▲

22. UNITED STATES OF AMERICA BY (Signature)			23. NAME (Typed) Alison R. Fecht TITLE: CONTRACTING/ORDERING OFFICER			
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**SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS**

**B.1 TASK ORDER TYPE/PRICING METHOD**

Contract Line Item Number (CLIN) 0001 of the task order will be issued on a Firm-Fixed-Price basis in accordance with CLIN 0001AA of the master contract. CLINs 0002 and 0003 of the task order will be issued as Cost-Plus-Award-Fee (CPAF) type line items in accordance with CLIN 0001AB of the master contract.

CLIN	Supplies/Services	Qty	Unit	Unit Price	Amount
0001	Transition in accordance with Section C.3	1	JOB	Firm-Fixed-Price	\$ 315,137.09
0002	Task Order Management and Administration in accordance with Section C.4	1	JOB	Est. Cost Base Fee Award Fee	<i>\$ (Redacted)</i> <i>\$ (Redacted)</i> <i>\$ (Redacted)</i>
				Total Cost Plus Award Fee (CPAF)	\$ 6,531,816.67
0003	Operations Research Analysis (ORA) and Communications Support tasks in accordance with Section C.5 to be performed through individual Job Orders as specified in Section J, Attachment J.1 - Job Order System Procedures	1	JOB	Est. Cost Base Fee Award Fee	<i>\$ (Redacted)</i> <i>\$ (Redacted)</i> <i>\$ (Redacted)</i>
				Total Cost Plus Award Fee (CPAF)	\$61,300,113.46

**B.2 LEVEL OF EFFORT (Applicable to CLIN 0003)**

The total level of effort (LOE) estimated to be performed during the term of this task order under CLIN 0003 is 673,920 labor hours of direct labor, including authorized subcontract labor. The level of effort is expected to be performed evenly over the task order term. **The Contractor is not authorized to deliver beyond the stated LOE.** The estimated composition of direct labor, by classification, is as follows:

Labor Category	RFP Total
Professional Analyst	112,320
Professional Specialist	74,880
Senior Analyst	112,320
Senior Specialist	93,600
Senior Engineer	28,080
Middle Analyst	74,880
Middle Specialist	56,160
Middle Engineer	9,360
Junior Analyst	18,720
Junior Specialist	74,880
Junior Engineer	9,360
Administrative Specialist	9,360
<b>Total</b>	<b>673,920</b>

## **SECTION C – DESCRIPTION/SPECIFICATIONS/STATEMENT OF WORK**

### **TRANSPORTATION OPERATIONS RESEARCH ANALYSIS (ORA) AND COMMUNICATIONS SUPPORT SERVICES**

#### **C.1. INTRODUCTION**

This task order will provide Volpe Transportation Operations Research Analysis (ORA) and Communications (V-TRAC) support services on site at the Volpe National Transportation Systems Center (Volpe Center). For this task order, the scope of work also includes important requirements for Management and Administration and for Transition.

ORA and Communications support services have historically been provided through the utilization of on-site and off-site technical support services contracts. An important requirement for on-site ORA and Communications services is currently being met by the Transportation Research Analysis and Communications Expertise (TRACX) Contract, No. DTRS57-04-D-30043. This task order will provide services in a manner and scope similar to the existing TRACX contract.

#### **C.2 SCOPE OF WORK**

The objectives of this task order are to:

- Transition from the existing TRACX contract to this task order with minimal disruption (CLIN 0001);
- Provide Management and Administration of ORA and Communications support services required for effective task order performance (CLIN 0002), and
- Provide ORA and Communications support services to meet the Volpe Center's transportation and logistics project requirements (CLIN 0003).

#### **C.3 TRANSITION (CLIN 0001)**

This requirement is to transition work from the existing on-site TRACX support services contract to this task order with minimal disruption. On a Firm-Fixed-Price basis, the Contractor shall perform the necessary tasks during the specified transition period to ensure that the Contractor can achieve satisfactory performance on the first day of the initial performance period.

#### **DELIVERABLE:**

##### **TRANSITION PLAN**

The Contractor shall provide to the Administrative Contracting Officer (ACO) and Task Order Contracting Officer's Technical Representative (TOCOTR) a detailed Transition Plan, based upon the draft transition plan provided in the Contractor's task order proposal, within two weeks after task order award, covering the following:

1. Key transition personnel;
2. Schedule of activities;
3. Understanding of current workload and milestones;
4. Minimizing disruption to ongoing projects and mitigating any potential disruptions;
5. Staffing projects, including retention of existing staff;

6. Communication with key stakeholders (e.g., incumbent contractor management and staff, TOCOTR, ACO, and Volpe Center project managers);
7. Project management reporting and tracking; and
8. Cost recovery.

#### **C.4 MANAGEMENT AND ADMINISTRATION (CLIN 0002)**

##### **C.4.A. MANAGEMENT AND ADMINISTRATION**

This requirement is for overall management and administration of the work performed under this task order. The Contractor shall provide a management and administration structure capable of performing the necessary technical and administrative management functions required for effective performance. The Contractor shall provide effective planning, management, quality control, direction, and supervision of the work activities involved and the personnel needed to perform these activities. The Contractor shall provide overall management and administrative support services and a team capable of performing the necessary functions required for effective performance. Skills required in support of Management and Administration include, but are not limited to, technical leadership, project management, financial management, staffing, human resources, and administrative support.

##### **TASK ORDER MANAGEMENT**

The Contractor shall provide technical support and leadership in ORA and Communication expertise that will (1) provide effective project planning, management, guidance, and resources that add technical value to projects and tasks; (2) provide task order-level guidance and oversight to meet project goals on time and with a quality product in accordance with project requirements; (3) manage to budget and satisfy technical initiators' performance metrics; and (4) provide a strong ORA and Communications capability to support Volpe Center projects (current and future).

The Contractor shall be responsible for assuring technical excellence in all work performed in support of the Volpe Center projects. The Contractor shall establish effective communication mechanisms to define and document the requirements of the Volpe Center's technical initiators to ensure that work is being performed to a level of quality, schedule, and cost that is consistent with the requirements of the Volpe Center. The Contractor shall have a quality control program to support all aspects of the work to be carried out under this task order. The quality control effort shall include quality goals, objective quality measures, organizational responsibilities, and reporting requirements for each task as applicable. The Contractor shall maintain documented standards for tracking quality, definition of measures, and quality program policies and procedures.

The Contractor shall maintain the necessary staffing level and labor mix to meet the requirements set forth in the task order and to be flexible enough to respond to shifts in program emphasis and direction with minimal downtime. The Contractor shall acquire an understanding of the nature of Volpe Center project staffing requirements and shall commit resources as necessary to support Volpe Center projects. The Contractor shall ensure that all Volpe Center requirements are met with appropriately skilled professionals and ensure optimum utilization of its staff members by planning for staff transition from one project to another with minimal downtime between tasks. This task order shall be managed so that the workforce can be scaled up or down in accordance with changing project requirements. The Contractor shall carry out regular evaluations of staff performance, hire and discharge staff as necessary, arrange for appropriate staff training to ensure skills remain current, and fulfill such other organizational development and subcontracting administration functions as necessary to maintain a highly qualified and motivated workforce to support Volpe Center tasks.

The Contractor shall identify an individual within its management team to act as the primary interface with the Government on all task order related matters. The Contractor shall prepare and submit invoices and company correspondence; provide appropriate interface with Contractor corporate offices; prepare and submit subcontract consent requests; and negotiate, execute, and administer subcontracts.

**DELIVERABLES:**

**PROGRAM REVIEWS**

Program Reviews shall be presented approximately twice per year for each Volpe Center organizational unit, to be further defined upon award. Program Reviews will focus on work being performed on this task order for the technical organizational unit. A Wrap-Up briefing shall be provided at a minimum to the TOCOTR and ACO at the conclusion of the Program Reviews. Further information on Program Review content and participation will be provided by the TOCOTR.

**QUALITY CONTROL PLAN**

The Contractor shall provide to the TOCOTR an initial written description of its Quality Control Program within 45 calendar days after task order award. An updated Quality Control Plan, along with a cover memorandum identifying changes, shall be submitted to the TOCOTR within 30 calendar days of any changes being made to the original submitted plan. A revision to the content and format of the quality assurance plan may be requested by the ACO and/or the TOCOTR.

**STAFF PROFILE REPORT**

Within 10 business days of task order award, the Contractor shall submit electronically a “Staff Profile Report” to the ACO and TOCOTR, identifying the employees performing work under the task order, including subcontractor support. The Contractor shall update this report as changes occur. An updated report shall be submitted by the 10th calendar day of each month. The report will include, but is not limited to, the following:

- a. Name, office location, telephone number, labor category, and hire date of all employees;
- b. List of individuals with authorized on-site parking;
- c. Total task order personnel count;
- d. Task order personnel count by company;
- e. Task order personnel by labor category;
- f. Turnover rates;
- g. Name, labor category, and departure date of employees leaving the task order; and
- h. Open requisition and staffing information.

The content, format, and schedule for submission of the report may be modified at the direction of the ACO and/or the TOCOTR.

**STAFF RESUMES**

The Contractor shall maintain an electronic file of resumes for all employees performing work under the task order, which shall be made available to the Government when requested by the ACO and/or TOCOTR.

## **2. PROJECT MANAGEMENT**

The Contractor shall provide strong project planning and management capabilities and establish processes for coordinating the activities and results of multi-disciplinary teams. The Volpe Center manages its projects under this task order through a job order system. All work to be performed by the Contractor shall be in the form of approved job orders. For every job order request received, the Contractor shall produce a job order with appropriate supporting documentation, authorization, and certifications.

The Contractor shall establish efficient and effective project management procedures that assure immediate processing and prompt certification of all job orders, as well as provide accurate tracking and visibility into project scope, cost, schedule and deliverables. The Contractor shall maintain and operate a job order cost accounting system that will accumulate costs incurred by labor category and other direct costs for each job order.

The Contractor shall maintain a complete electronic central file of all approved job orders issued, which shall be made available for Government review whenever requested by the AO and/or the TOCOTR. The Contractor shall ensure that charges against approved job orders do not exceed authorized funding levels and shall issue specific appropriate notification, separate from Initiator Funding Requests, to technical initiators when approaching 75 percent funding limits. (Note: notification to Job Order Initiators under this paragraph does not relieve the Contractor of its responsibility to notify the Contracting Officer (CO) under the Limitation of Costs or Funds Clauses incorporated in Section I of the master contract.)

The Contractor shall provide a high-level assessment of its activities for each project supported during the fiscal year. The primary purpose of project assessments is to encourage communication among the Contractor, Job Order Initiators, TOCOTR, and Volpe Center management. The attributes assessed include, but are not limited to, scope, funding, cost, schedule, quality and risk. The Contractor shall utilize Status Reports and Green-Yellow-Red (GYR) Reports as a means of validating progress between the Contractor and the Job Order Initiator and as an indicator of Contractor performance to the TOCOTR and Volpe Center management.

### **DELIVERABLES:**

#### **FORM Zs AND JOB ORDER PLANS**

The Contractor shall develop Form Zs and/or job order plans, as required, for each job order issued under the job order system. Job order plans and Form Zs will follow the guidelines of the job order system detailed in Section J, Attachment J.1 - Job Order System Procedures, and shall be created at the beginning of each Government fiscal year, in addition to updating plans when changes are made during the fiscal year.

#### **CENTRAL JOB ORDER FILE**

The Contractor shall maintain a central job order file for all job orders issued. The file shall contain a complete record of all activity and support provided under that job order, including Form Zs and job order plans (original and revisions), status reports, memos, reports, and an inventory of all software and other deliverables. The file shall be made available when requested by the ACO or TOCOTR and shall be turned over to the Government at the expiration of the task order.

## **STATUS REPORTS**

For each job order issued under the task order, the Contractor shall submit Status Reports in electronic format, in accordance with guidelines detailed in Section J, Attachment J.6 of the master contract. In addition to other information specified in the job order, Status Reports shall contain the following in narrative form:

- a. A brief description of project and job order objectives;
- b. Highlights of work accomplished, including a self-assessment of performance relative to the measures established in the original job order plan;
- c. Significant findings, problems, delays, events, trends, etc. during the reporting period that affected performance of the job order to date and may affect performance of remaining work;
- d. Specific action(s) requested by the Government to assist in the resolution of any problems identified;
- e. Modifications to the job order and job order plan, including changes to objectives, services to be provided, assumptions, deliverables, major milestone schedule, cost estimate, and performance measures; and
- f. Items of special interest as requested by the TOCOTR and/or Job Order Initiator.

Status Reports shall be submitted to the Job Order Initiator and TOCOTR at intervals as specified in the job order, but at a minimum as follows:

For the period of May, June, and July by the 20<sup>th</sup> of August;  
For the period of August and September by the 20<sup>th</sup> of October;  
For the period of October, November, December, and January by the 20<sup>th</sup> of February; and  
For the period of February, March, and April by the 20<sup>th</sup> of May

## **GREEN-YELLOW-RED (GYR) REPORTS**

GYR Reports will assess the progress and results of each job order in all aspects of the project, including, but not limited to, scope, funding, cost, schedule, and quality. GYR Reports covering all projects shall be submitted to the TOCOTR in electronic format in accordance with guidelines detailed in Section J, Attachment J.3 - Green-Yellow-Red Reports. GYR Reports for specific projects, after verification with Job Order Initiators, shall be electronically submitted to the appropriate Job Order Initiator in accordance with guidelines detailed in Section J, Attachment J.3 – Green-Yellow-Red Reports.

GYR Reports are due:

For the period of May, June, and July by the 20<sup>th</sup> of August;  
For the period of August and September by the 20<sup>th</sup> of October;  
For the period of October, November, December, and January by the 20<sup>th</sup> of February; and  
For the period of February, March, and April by the 20<sup>th</sup> of May.

## **3. ADMINISTRATIVE AND FINANCIAL MANAGEMENT**

The Contractor shall provide administrative support and services essential to meet overall task order requirements and project performance requirements. These services include, but are not limited to, managing requests for network desktop support and telephone service, travel and overtime arrangements, property management, storage and retrieval of classified material, security clearances, employee entrance/exit processing, shipping and receiving, and acquisition of office supplies and necessary

telecommunications devices and services (e.g., cell phones, pagers) to perform work (official business only) under the task order.

The Contractor will be provided one or more accounts for Management and Administration activities covered by Section C.4 and for activities covered by Section C.5 that are not appropriately charged as direct project labor (e.g. downtime, all employee meetings). These Management and Administration accounts will be established by the TOCOTR at the beginning of each fiscal year in accordance with Management and Administration Job Order Plans submitted by the Contractor and approved by the TOCOTR. The Contractor shall track actual and projected account expenditures for the Management and Administration accounts and shall report to the TOCOTR against the job order plans as part of its cost recovery reporting.

This task order shall be funded through cost recovery from users of the technical labor. The Contractor shall provide a financial management capability to oversee the administration and management of task order costs and provide data and methodologies for estimating annual costs, demand for labor, and labor category rate setting. The Contractor shall track task order costs, including subcontractor costs, as well as project cost recovery, analyze cost and labor utilization variances, support both task order and fiscal year financial reporting, and report financial projections to the TOCOTR. The Contractor is required to manage its costs effectively so that all costs involved in the operation of this task order during Federal Government fiscal years (October 1 – September 30) are recovered through labor category rates and other direct costs (ODCs).

The Contractor shall reconcile all invoiced costs for labor, travel, training, and overtime premium with the User Accountability System (UAS). This will coincide with preparation and verification of the UAS input files.

#### **DELIVERABLES:**

#### **PROPERTY REPORTS**

At the beginning of the task order, the Contractor will be provided with a master schedule of all Government-Furnished Property (GFP) turned over to its control, as detailed in Section J.5 - Government-Furnished Property List. The Contractor shall maintain a current property listing and shall perform an annual physical inventory. By September 15<sup>th</sup> of each year, the Contractor shall provide to the ACO and the TOCOTR the resulting, reconciled inventory schedule of all GFP under the Contractor's control, together with explanations of changes (e.g., additions, deletions) from the original or annually updated master schedule. When applicable, explanations of changes shall comply with FAR Clause 52.245-1, Government Property, located in Section I of the master contract.

#### **MANAGEMENT AND ADMINISTRATION JOB ORDER PLANS**

At least 14 calendar days prior to the beginning of each Government fiscal year, Management and Administration Job Order Plans shall be submitted to the TOCOTR in electronic format in accordance with guidelines detailed in Attachment J.6 to the master contract. The plans shall detail activities to be charged to the Management and Administration accounts in accordance with Section C.4 and activities covered by Section C.5 that are not appropriately charged as direct project labor (e.g., downtime, all-employee meetings). The job order plans shall propose an estimated number of hours and dollars to be allocated to the accounts for the upcoming fiscal year and their intended purpose. All activities and time charged to these accounts shall be in accordance with the approved job order plans; deviations from the plans shall have prior approval of the TOCOTR.



## **COST RECOVERY REPORTS**

The Contractor shall track cost recovery and report to the TOCOTR in electronic format in accordance with guidelines detailed in Section J, Attachment J.6 of the master contract within 30 calendar days after the end of Government fiscal quarters one and two. More frequent estimates may be requested during the last six months of the fiscal year.

## **INITIATOR FUNDING REPORT**

On a weekly basis, the Contractor shall electronically submit to all Volpe Center Job Order Initiators a Funding Report that provides the status of their job order(s). The Funding Report shall be sent via e-mail to Volpe Center Job Order Initiators and shall provide the job order number, job order title, name of Contractor lead, job order cost estimate, expenditures to date, remaining balance, percentage complete, and estimated weekly and monthly burn rates on the job order(s).

## **UAS INPUT FILES**

The Volpe Center will manage the operation of an automated UAS for identification and reporting of all resources planned and expended against job orders issued under the task order. The Contractor shall provide the necessary input files for processing on a weekly basis in accordance with the specifications provided by the Volpe Center UAS Manager as detailed in Section J, Attachment J.2 - UAS Formats and Reports.

## **C.5 OPERATIONS RESEARCH ANALYSIS (ORA) AND COMMUNICATIONS SUPPORT SERVICES (CLIN 0003)**

ORA and Communications Support Services provide a very broad project base covering every mode of transportation, and a wide variety of sponsoring organizations and sub-areas. Projects generally address issues of national importance, requiring an appreciation of local, national, and international transportation issues and trends; a multi-modal perspective; and an appreciation for the various public and private interests at work within these areas.

ORA services broadly address the analysis and assessment of transportation systems and issues from a variety of perspectives. These perspectives include system performance and effectiveness, web development, safety assessments, supply and demand forecasts, impact analysis, socio-economic analysis, industry analysis, policy and regulatory development, strategic planning, operations and maintenance assessment, risk assessments, capital investment needs, infrastructure and equipment management, metrics development, and critical technologies planning and evaluation. Skill sets required to support ORA technical requirements include, but are not limited to, transportation planning and policy, operations research analysis, engineering, and mathematical and social science disciplines. The specific projects requiring support will vary depending on the national transportation priorities during the life of the task order.

Communications services address business and technical writing and editing services to support Volpe Center projects and programs, conference planning, graphic arts design, web design and development, and production support. The Volpe Center supports and typically utilizes Microsoft Office Suite products; however, projects may necessitate knowledge and use of other computer platforms and operating systems, including Mac Operating System (OS), and software packages, including Adobe Acrobat, Illustrator, Quark, Photoshop, Visio, and others as appropriate. Skill sets required to support the Communications functional area include but are not limited to graphic arts design, web design and development, communications media design, and technical writing and editing.

## **C.5.A ORA SUPPORT SERVICES**

The following sub-areas are included as part of the overall ORA support covered by this requirement.

- System Analysis and Policy Impacts
- Industry Analysis
- System Operational Performance
- Technological Advances
- Financial and Administrative Program Support
- Strategic Framework
- Engineering Support

The descriptions that follow outline the general work requirements typical in each sub-area, not actual tasks.

### **1. System Analysis and Policy Impacts: Analysis of Impacts of Transportation/Logistics Systems and Policies**

This sub-area covers analyses of the impacts of the flow of people and goods and/or transportation and logistics systems and operations on society and the environment. In addition, this area covers the impact of Government regulation on the transportation industry and commercial enterprise. Work in this area may include safety and environmental impact and risk analyses of transportation and logistics systems and components as they relate to health and welfare, land and energy use, material consumption, noise, air quality, pollution, climate change, alternative fuel policies, quality of life issues, and social objectives. The work may also include analyses of public policy options and their impact on domestic intermodal competition, international competitiveness, socioeconomic policy, and/or environmental quality. Work under this area may also include analyses of the impact of proposed public policy options or regulatory changes on private and public carriers, users, the transportation supply industry, and governments. Analyses may be at the macro or micro level, depending on the scale and breadth of the subject matter.

### **2. Industry Analysis: Collection of Transportation-Related Data and Assessment of Business and Economic Factors within the Transportation Industry**

This sub-area covers analyses of the business and economic aspects of the transportation industry, including issues of finance, business case analysis, market analysis, supply and demand forecasting, regulatory analysis, and productivity analysis. Included in this area are the gathering, compilation, and analysis of transportation-related data and statistics. Work may encompass economic analyses of alternative transportation investments, estimating demand for transportation services in selected markets, analysis and evaluation of transportation user charges, cost-benefit analysis and capital budget estimating for systems and infrastructure renewal, transportation operator and supply industry analysis, and financial planning. The work may also encompass development of systems to manage and monitor industry processes and activities.

### **3. System Operational Performance: Assessment of Transportation/Logistics System Performance and Improvement of System Effectiveness**

This sub-area includes the application of theoretical and practical analysis techniques to existing and anticipated issues relating to large-scale transportation and logistics systems. Work may involve analysis of transportation and logistics system issues (such as supply and demand for services, infrastructure, vehicle performance, evaluation of one or multiple transportation modes, asset management, traffic flow

and demographics, operator performance, fleet mix, safety, security, timeliness, cost, and other performance metrics) and the definition of new or modified operation concepts that satisfy requirements and enhance performance. Tasks may involve delay analysis, arrival and trip time variability analyses, web database design and development, and design and testing of new or enhanced processes to improve system performance (e.g., operation procedures, safety procedures, and automated information systems for decision support).

#### **4. Technological Advances: Assessment of Transportation/Logistics Technologies and Research and Development Needs and Policies**

This sub-area includes the application of theoretical and practical analysis techniques to the assessment of transportation and logistics-related technology. Work in this area may include the assessment and selection of appropriate technologies available to improve current transportation and logistics operations, including vehicle, guide way, command and control, maintenance, supply, scheduling, system security, and distribution systems. The work may include technology forecasting, technology assessments, and cost-benefit studies requiring knowledge of existing transportation and logistics practices and software. This area also covers the study and assessment of transportation research and development issues, programs, and activities for the purpose of making and furthering transportation public policy.

#### **5. Financial and Administrative Program Support**

This sub-area includes general and specialized program and administrative management support, cost and risk analysis, project planning and scheduling, and strategic and operational planning. Work in this area may include maintaining and documenting the results of program and project reviews; review and analysis of progress reports; generation of cost, budget, and financial analyses; and assistance in the documentation, planning, scheduling, maintenance, and tracking of projects.

#### **6. Strategic Framework: Strategic Planning and Organizational Structures and Processes**

This sub-area covers strategic transportation system planning. Tasks may involve present systems and technologies; policy guidance concerning future system directions; system synthesis and analysis; and a number of economic, legal, and management factors. In general, these efforts will assist top Government officials in making decisions concerning the need for, timing of, and expected adequacy of proposed transportation and logistics systems and programs. This task area also includes activities whose primary purpose is to develop groups and organizations in ways that increase their effectiveness. Such activities may be in direct support of strategic planning initiatives or other organizational improvement efforts. Activities are focused at a variety of organizational levels and customers and typically involve providing assistance to a customer organization of the Volpe Center in one or more aspects of managing transitions from a current to a desired future state.

#### **7. Engineering Support**

This sub-area covers several engineering disciplines in support of a variety of analytical engineering efforts across the broad range of activities described above. Typically, engineering skills and expertise will be part of multi-disciplinary project teams. Engineering support includes, but is not limited to, the disciplines of electronics, chemical, mechanical, environmental, civil, network, telecommunications, industrial, marine, navigation, security, and engineering psychology.

## **C.5.B COMMUNICATIONS SUPPORT SERVICES**

The following functional sub-areas are included as part of the overall Communications support covered by this requirement.

- Writing and Editing
- Graphics
- Web Design and Development
- Conference Planning and Logistics
- Printing and Production Support

The descriptions that follow outline the general work requirements typical in each sub-area, not actual tasks.

### **1. Writing and Editing**

The Volpe Center produces a wide variety of written products in support of its projects and programs; for example:

- Interim and final reports
- Journal articles
- Reference and training manuals
- User guides
- Scripts for videos or presentations
- Newsletters and brochures
- Marketing materials
- Web site text

Work in this area may require the Contractor to prepare original written products to support project requirements as well as editing services to support the production of final written and/or web products from text generated by others. Writing and editing will be in English and will require a full command of the language and grammar as well as an understanding of transportation and technical terminology, familiarity with Federal Government terminology, and knowledge of industry best practices for the production of written products. The Contractor shall have familiarity with the U.S. Government Printing Office (GPO) Style Manual and other recognized style guides and applicable specifications and standards. On occasion, the Contractor will be asked to provide translation services for business and technical documents. Translations may be from a foreign language into English and/or from English into a foreign language.

### **2. Graphics**

Work in this area shall provide graphic arts design and production services to support Volpe Center projects and programs. For tasks performed on site at the Volpe Center, the Government shall furnish equipment and software necessary to provide and produce graphic arts design and production services. These services typically include, but are not limited to, the following:

- Electronic/desktop publishing
- Graphics design
- Computer-aided design and drafting
- Technical illustration

Work in this area may require the Contractor to design and produce graphics for a wide variety of products, including, but not limited to, printed material, projected visuals, exhibit and display components, multi-media presentations, and video titling and transitions. Graphics are generally produced using computer application software. The Contractor will be expected to maintain familiarity with computer graphics software and hardware being used by Volpe Center technical initiators in order to originate figures and convert initiator-supplied electronic graphic files into formats that can be modified and/or integrated into electronic documents using electronic publishing systems.

### **3. Web Design and Development**

Work in this area shall provide web design and development services to support Volpe Center projects and programs. These services typically include, but are not limited to, the following:

- Web page/site design for public and password-protected sites
- Coding of web pages

Work in this area shall include design and development of web pages for a wide variety of technical projects. Web pages shall be designed using industry and Government best practices to optimize site usability and accessibility. Specific guidelines include but are not limited to the Department of Transportation's (DOT) Departmental Information Resource Management Manual (DIRMM), Section 508 of the Rehabilitation Act, Office of Management and Budget (OMB) Policies for Federal Agency Public Websites, and Research-Based Web Design and Usability Guidelines.

### **4. Conference Planning and Logistics**

Work in this area shall include planning, organizing, executing, and/or recording conferences, meetings, webinars, or symposia. Conferences range in size from 20 to 400 attendees and are for periods of several hours to several days. The typical conference lasts one day and has 50 attendees. Conference planning and logistics support may require significant travel and may require coordination with Volpe Center staff, other Contractors, and conference facility personnel to arrange conferences, meetings, workshops, etc. Conference planning and logistics services typically include, but are not limited to, the following:

- Planning, scheduling, managing, and cost estimation
- Development and maintenance of mailing lists
- Selection and provision of conference facilities and meeting rooms
- Provision and coordination of audio-visual, transcription, and other required support
- Development of conference literature or graphics, including programs, signs, photography, name badges, and specialty items such as abstracts
- Preparation and distribution of invitations and registration packages
- Preparation of advertising, transportation, lodging, and other logistics
- Processing of participant registrations (including but not limited to web registration)
- Preparing minutes and/or proceedings for final publication
- Processing of invitational travel

### **5. Printing and Production Support**

Work in this area shall include providing color printing and reproduction services and the associated binding and distribution. Color reproduction services shall include the ability to create color copies from black and white copies. Since the Volpe Center is a customer-focused organization, the Contractor must have the ability to provide such services quickly and efficiently and adjust to changing workflows and

customer priorities. Incoming jobs may be in hard copy, network electronic files, or removable electronic media such as compact disks (CDs), digital video disks (DVDs), or optical disks. The Contractor shall provide advice on production, binding, publication, and distribution options; their associated pros and cons; and estimated costs. The Contractor shall arrange for documents to be printed through the GPO and shall serve as the Volpe Center's GPO liaison. All printing and work shall be accomplished in conformance with Title 44, United States Codes, regulations of the U.S. Government's Joint Committee on Printing (JCP); applicable provisions of appropriation acts; applicable regulations issued by the DOT, the GPO, and the U.S. Postal Service; and with copyright laws. The Contractor shall maintain paper stocks that comply with JCP Paper Specification Standards and Executive Orders requiring the use of recycled fiber content.

#### **SECTION D - PACKAGING AND MARKING**

The Contractor shall comply with the terms and conditions identified in Section D of the master contract.

#### **SECTION E – INSPECTION AND ACCEPTANCE**

The Contractor shall comply with the terms and conditions identified in Section E of the master contract.

#### **SECTION F – DELIVERIES OR PERFORMANCE**

The Contractor shall comply with the terms and conditions identified in Section F of the master contract and the following terms and conditions:

##### **F.1 TRANSITION PERIOD**

The transition period shall be for up to 90 calendar days immediately following task order award in accordance with the Contractor's transition plan as accepted by the Government (See Section C.3., CLIN 0001).

##### **F.2 PERFORMANCE PERIOD**

This task order shall become effective on the date the Contracting Officer (CO) signs the task order. The ordering period will begin on the date of task order award and will continue after the completion of the Transition Period through September 30, 2013. Also see the clause in Section I.1 of the master contract titled, "Ordering" (FAR 52.216-18).

##### **F.3 PLACE OF PERFORMANCE (JULY 2004)**

The services to be provided under this task order shall be provided at the following locations:

- 1) DOT/Research and Innovative Technology Administration (RITA)/Volpe National Transportation Systems Center  
55 Broadway  
Cambridge, MA 02142-1001
- 2) Other locations as designated in individual job orders.

#### F.4 DELIVERABLE AND REPORTING REQUIREMENTS

<b>Deliverable</b>	<b>Schedule</b>	<b>Deliver To</b>
1. Transition Plan	Within two weeks of task order award, Section C.3	ACO & TOCOTR
2. Program Reviews	Twice yearly as scheduled by TOCOTR, Section C.4.A.1	TOCOTR
3. Quality Control Plan	Within 45 calendar days after the issuance of the task order, and no later than 30 days for any changes made to the plan, Section C.4.A.1	TOCOTR
4. Staff Profile Report	Within 10 days of task order award and by the 10 <sup>th</sup> calendar day of each month, Section C.4.A.1	ACO & TOCOTR
5. Staff Resumes	As requested by the Government, Section C.4.A.1	ACO & TOCOTR
6. Form Zs and Job Order Plans	As job orders are generated and by October 15 <sup>th</sup> of each year, Section C.4.A.2	ACO, TOCOTR & Job Order Initiators
7. Central Job Order Files	As job orders are generated, as requested by the Government, and at the conclusion of the task order, Section C.4.A.2	ACO & TOCOTR
8. Job Order Deliverables	As specified in Job Order Plans and Form Zs, Section C.4.A.2 and Section J, Attachment J.1	Job Order Initiators
9. Status Reports	As specified in job order plans and quarterly, as specified in Section C.4.A.2	Job Order Initiators & TOCOTR
10. Green-Yellow-Red (GYR) Reports	As specified in Section C.4.A.2	TOCOTR & Job Order Initiators
11. Property Reports	By September 15 <sup>th</sup> of each calendar year, Section C.4.A.3 and Section I of the master contract	ACO & TOCOTR
12. Management and Administration Job Order Plans	Within 14 calendar days prior to the beginning of each government fiscal year, Section C.4.A.3	TOCOTR
13. Cost Recovery Reports	Within 30 calendar days after the end of fiscal quarters 1 and 2, and as requested in the last six months of each fiscal year, Section C.4.A.3	TOCOTR
14. Initiator Funding Report	Weekly via e-mail, Section C.4.A.3	Job Order Initiators
15. UAS Input Files – Preliminary	Weekly, preliminary files for the previous week's activity are due by close of business (COB) Monday (Section C.4.A.3 and Section J., Attachment J.2)	UAS Manager
16. UAS Input Files – Final	Weekly, final files for the previous week's activity are due by noon on Wednesday, or as requested by UAS Manager, Section C.4.A.3 and Section J, Attachment J.2	UAS Manager
17. Designation of On-Site Safety Representatives	Within 10 calendar days of task order award and whenever changed, Section H of the master contract	ACO
18. Certificates of Insurance Policies	Within 10 days of task order award, Section H of the master contract	ACO
19. IT Security Plan	Within 30 calendar days of task order award, Section H of the master contract	ACO

**SECTION G - CONTRACT ADMINISTRATION DATA**

The Contractor shall comply with the terms and conditions identified in Section G of the master contract and the following terms and conditions:

**G.1 LIMITATION OF LIABILITY – INCREMENTAL FUNDING**

**1) INCREMENTAL FUNDING**

The amount available for payment for this incrementally funded task order is \$315,137.09

The incremental funding provided herein is estimated to be adequate for services performed through April 30, 2009.

**2) ACCOUNTING AND APPROPRIATION DATA**

The accounting and appropriation data applicable to this allotted amount is as follows:

WE094 C230A 25505V \$315,137.09

**G.2 PAYMENT AND CONSIDERATION**

**CONSIDERATION - FIXED PRICE (CLIN 0001)**

Upon delivery and acceptance of the required services, the Contractor shall be paid at the fixed price specified in Block 9 of the OF 347 for this task order (page 1).

**CONSIDERATION - COST-PLUS-AWARD-FEE (CLIN 0002)**

- 1) Subject to FAR 52.232-20, "Limitation of Cost", and FAR 52.216-7, "Allowable Cost and Payment," the total allowable cost of this task order shall not exceed \$6,074,642.24, which is the total estimated cost of the Contractor's performance hereunder exclusive of base fee. In addition, the Government shall pay the Contractor a base fee of \$(Redacted) for the performance of this task order.
- 2) The Contractor shall be provisionally reimbursed indirect expenses on the basis of billing rates approved by the Cognizant Federal Agency (CFA) pending establishment of final indirect rates.
- 3) The final indirect expense rate pertaining to the contract shall be those determined for the appropriate fiscal year in accordance with FAR 42.705 and FAR 52.216-7.
- 4) The award fee provided for in this task order is \$(Redacted) and is subject to the terms of the "Determination of Award Fee" and "Distribution of Award Fee" clauses located in Section I of the master contract. The estimated cost, base fee (if applicable), and available award fee are as follows:

Estimated Cost:	<u>\$ (Redacted)</u>
Base Fee:	<u>\$ (Redacted)</u>
Available Award Fee:	<u>\$ (Redacted)</u>
Maximum Available CPAF:	<u>\$ 6,531,816.67</u>



- 5) The amount of the award fee earned shall be based on a subjective evaluation by the Government of the quality of the Contractor's performance judged in light of the nature of the work involved and any other factors that are considered relevant to the determination in accordance with the "Performance Evaluation Plan" clause (see Section I, Paragraph I.8 of the master contract).
- 6) Base fee, if applicable, shall not exceed 3%.

**CONSIDERATION - COST-PLUS-AWARD-FEE (CLIN 0003)**

- 1) Subject to FAR 52.232-20, "Limitation of Cost", and FAR 52.216-7, "Allowable Cost and Payment," the total allowable cost of this task order shall not exceed \$57,318,164.30, which is the total estimated cost of the Contractor's performance hereunder exclusive of base fee. In addition, the Government shall pay the Contractor a base fee of \$(Redacted) for the performance of this task order.
- 2) The Contractor shall be provisionally reimbursed indirect expenses on the basis of billing rates approved by the Cognizant Federal Agency (CFA) pending establishment of final indirect rates.
- 3) The final indirect expense rate pertaining to the contract shall be those determined for the appropriate fiscal year in accordance with FAR 42.705 and FAR 52.216-7.
- 4) The award fee provided for in this task order is \$(Redacted) and is subject to the terms of the "Determination of Award Fee" and "Distribution of Award Fee" clauses located in Section I of the master contract. The estimated cost, base fee (if applicable), and available award fee are as follows:

Estimated Cost:	<u>\$ (Redacted)</u>
Base Fee:	<u>\$ (Redacted)</u>
Available Award Fee:	<u>\$ (Redacted)</u>
Maximum Available CPAF:	<u>\$ 61,300,113.46</u>

- 5) The amount of the award fee earned shall be based on a subjective evaluation by the Government of the quality of the Contractor's performance judged in light of the nature of the work involved and any other factors that are considered relevant to the determination in accordance with the "Performance Evaluation Plan" clause (see Section I, Paragraph I.8 of the master contract).
- 6) Base fee, if applicable, shall not exceed 3%.

**G.3 TRAVEL AND PER DIEM**

All travel performed under this task order shall be performed in accordance with Federal Travel Regulations (FTR) and must be approved in writing by the Job Order Initiator in advance of travel taking place. The actual costs for lodging, meals, and incidentals will be considered reasonable and allowable if they do not exceed the maximum per diem rates in effect at the time of travel as set forth in the FTR. In accordance with FAR Subpart 31.205-46, a written justification must be provided for higher amounts in special or unusual circumstances. Travel will be reimbursed at actual costs (with a copy of the receipts for expenses) in the following categories:

- 1.) Airline Tickets (commercial rates)
- 2.) Hotel Expenses (Government rates unless pre-approved by the TOCOTR and/or Job Order Initiator).
- 3.) All Other Modes of Transportation (Taxi receipts are not required if less than \$50.00)

Food and other miscellaneous expenses will be reimbursed at the prevailing FTR reimbursement rates.

**SECTION H - SPECIAL TASK ORDER REQUIREMENTS**

The Contractor shall comply with the terms and conditions identified in Section H of the master contract and the following terms and conditions.

**H.1 PARKING**

At the time of task order award, the Government will provide on-site parking spaces for up to 45 percent of the Contractor personnel assigned to work on the task order at 55 Broadway, Cambridge, Massachusetts, during the Volpe Center's hours of operation between 6:30 a.m. and 6:30 p.m. Contractor personnel assigned to non-standard business hour shifts will not be considered part of the 45 percent allocation and will receive parking. These allocations are subject to change at the discretion of the Government.

**H.2 EXTENDED WORK WEEK AUTHORIZATION**

The Contractor shall submit requests for an extended work week applicable to CLIN 0003 to the TOCOTR for approval. All requests must be supported in writing by the appropriate Job Order Initiator and include the impact on job order cost estimates. (NOTE: This extended work week approval process does not replace or supersede the requirements of either FAR Clause 52.222-2 "Payment for Overtime Premium" or FAR Clause 52.222-41 "Service Contract Act of 1965, as Amended," both of which are contained in Section I of the master contract.)

**H.3 INDIRECT COST RATE CEILINGS**

<b>Contract Period</b>	<b>Contractor Fiscal Year (CFY)</b>	<b>Fringe Benefits</b>	<b>Government Site Overhead</b>	<b>Home Office Overhead</b>	<b>Material Handling</b>	<b>G&amp;A</b>	<b>Other</b>
Period 1	CFY2009	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
	CFY2010	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
Period 2	CFY2010	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
	CFY2011	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
Period 3	CFY2011	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
	CFY2012	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
Period 4	CFY2012	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
	CFY2013	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
Period 5	CFY2013	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>
	CFY2014	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>	<i>(Redacted)</i>

<b>Allocation Base</b>	
<b>Fringe Benefits</b>	<i>(Redacted)</i>
<b>Government Site Overhead</b>	<i>(Redacted)</i>
<b>Home Office Overhead</b>	<i>(Redacted)</i>
<b>Material Handling</b>	<i>(Redacted)</i>
<b>G&amp;A</b>	<i>(Redacted)</i>
<b>Other</b>	<i>(Redacted)</i>

**H.4 OTHER DIRECT COSTS (ODC)**

Reimbursement of ODCs will be limited to those cost elements and amounts that are proposed by task order year without prior approval by the CO. The table below will be completed at time of award.

ODC Proposed	Amount				
	Period 1	Period 2	Period 3	Period 4	Period 5
CLIN 0002	(Redacted)	(Redacted)	(Redacted)	(Redacted)	(Redacted)
CLIN 0003	(Redacted)	(Redacted)	(Redacted)	(Redacted)	(Redacted)

**SECTION I - CONTRACT CLAUSES**

The Contractor shall comply with the terms and conditions identified in Section I of the master contract and the following terms and conditions:

**I.1 TAR 1252.237-73 KEY PERSONNEL (APR 2005)**

(a) The personnel as specified below are considered essential to the work being performed under this task order and may, with the consent of the contracting parties, be changed from time to time during the course of the task order by adding or deleting personnel, as appropriate.

(b) Before removing, replacing, or diverting any of the specified individuals, the Contractor shall notify the Contracting Officer, in writing, before the change becomes effective. The Contractor shall submit information to support the proposed action to enable the Contracting officer to evaluate the potential impact of the change on the task order. The Contractor shall not remove or replace personnel under this task order until the Contracting Officer approves the change.

The Key Personnel under this task order are:

CLIN	Organization Position or Labor Category	Key Personnel
0001	Transition Manager	(Redacted)
0002	Task Order Program Manager	(Redacted)
0002	Financial Manager	(Redacted)
0002	ORA Subject Matter Expert	(Redacted)
0002	Communications Subject Matter Expert	(Redacted)
0002	Human Resource Manager	(Redacted)
0002	Contract/Subcontract Manager	(Redacted)
0002	Senior Advisor	(Redacted)
0002	Team Lead	(Redacted)
0003	Professional Analyst	(Redacted)
0003	Professional Analyst	(Redacted)
0003	Professional Specialist	(Redacted)
0003	Professional Specialist	(Redacted)

**I.2 TAR 1252.216-71 DETERMINATION OF AWARD FEE (APR 2005)**

a) The Government shall evaluate Contractor performance at the end of each specified evaluation period to determine the amount of award. The Contractor agrees that the amount of award and the award fee methodology are unilateral decisions to be made at the sole discretion of the Government.

b) Contractor performance shall be evaluated according to a Performance Evaluation Plan. The Contractor shall be periodically informed of the quality of its performance and areas in which improvements are expected.

c) The Contractor shall be promptly advised, in writing, of the determination and reasons why the award fee was or was not earned. The Contractor may submit a performance self-evaluation for each evaluation period. The amount of award is at the sole discretion of the Government but any self-evaluation received within 30 days after the end of the current evaluation period will be given such consideration, as may be deemed appropriate by the Government.

d) The amount of award fee which can be awarded in each evaluation period is limited to the amounts set forth in Paragraph I.4, TAR 1252.216-73, "Distribution of Award Fee." Award fee which is not earned in an evaluation period cannot be reallocated to future evaluation periods.

**I.3 TAR 1252.216-72 PERFORMANCE EVALUATION PLAN (OCT 1994)**

a) A Performance Evaluation Plan shall be unilaterally established by the Government based on the criteria stated in the task order and used for the determination of award fee. This plan shall include the criteria used to evaluate each area and the percentage of award fee (if any) available for each area. A copy of the plan shall be provided to the Contractor within 45 calendar days prior to the start of the first evaluation period.

b) The criteria contained within the Performance Evaluation Plan may relate to: (1) Technical (including schedule) requirements, if appropriate; (2) Management; and (3) Cost.

c) The Performance Evaluation Plan may, consistent with the task order, be revised unilaterally by the Government at any time during the period of performance. Notification of such changes shall be provided to the Contractor within 45 calendar days prior to the start of the evaluation period to which the change will apply.

<b>Performance Evaluation Factors and Weights</b>		
<b>Applicable CLIN</b>	<b>Evaluation Plan</b>	<b>Weights</b>
CLIN 0002	Management and Administration, including task order management, project management and administrative and financial management.	100%
CLIN 0003	Operations Research Analysis and Communications Support Services, including quality of deliverables, timeliness of deliverables, cost estimation and control, and project staffing and planning.	100%

**I.4 TAR 1252.216-73 DISTRIBUTION OF AWARD FEE (APR 2005)**

a) The total amount of award fee available under this task order is assigned according to the following evaluation periods and amounts:

<b>Performance Period Number</b>	<b>Start Date</b>	<b>End Date</b>	<b>Maximum Available Award Fee</b>
1A	05/01/2009	10/31/2009	<i>(Redacted)</i>
1B	11/01/2009	04/30/2010	<i>(Redacted)</i>
2A	05/01/2010	10/31/2010	<i>(Redacted)</i>
2B	11/01/2010	04/30/2011	<i>(Redacted)</i>
3A	05/01/2011	10/31/2011	<i>(Redacted)</i>
3B	11/01/2011	04/30/2012	<i>(Redacted)</i>
4A	05/01/2012	10/31/2012	<i>(Redacted)</i>
4B	11/01/2012	04/30/2013	<i>(Redacted)</i>
5A	05/01/2013	09/30/2013	<i>(Redacted)</i>

b) After the Contractor has been paid 85 percent of the base fee (if applicable) and potential award fee, the Government may withhold further payment of the base fee and award fee until a reserve is set aside in an amount that the Government considers necessary to protect its interest. This reserve shall not exceed 15 percent of the total base fee and potential award fee or \$100,000, whichever is less. Thereafter, base fee and award fee payments may continue.

c) In the event of contract termination, either in whole or in part, the amount of award fee available shall represent a prorata distribution associated with evaluation period activities or events as determined by the Government.

d) The Government will promptly make payment of any award fee upon the submission by the Contractor to the Contracting Officer's authorized representative, of a public voucher or invoice in the amount of the total fee earned for the period evaluated. Payment may be made without using a contract modification.

**SECTION J - LIST OF ATTACHMENTS**

- J.1 JOB ORDER SYSTEM PROCEDURES
- J.2 USER ACCOUNTABILITY SYSTEM (UAS) FORMATS AND REPORTS
- J.3 GREEN-YELLOW-RED REPORTS
- J.4 PERFORMANCE EVALUATION PLAN
- J.5 GOVERNMENT-FURNISHED PROPERTY LIST

## **ATTACHMENT J.1 JOB ORDER SYSTEM PROCEDURES**

### **A. INTRODUCTION**

The Volpe Center has a portfolio of 400 plus transportation and logistics projects that vary in number, scope, and substance over the course of any year. The Volpe Center's project management strategy uses a combination of Federal and contractor resources to meet the broad range and quantity of skills needed to accomplish project objectives. This task order provides Volpe Transportation Research Analysis and Communications (V-TRAC) capabilities to be used in meeting the Volpe Center's programmatic requirements.

### **B. PROJECT CHARACTERISTICS**

The Contractor shall provide resources capable of completing results-oriented, performance-based actions in response to job orders presented by a variety of Volpe Center project leaders. Job order scope, range of resources, cost estimates, deliverables, and performance periods vary widely. Periods of performance can range from several hours to the length of the task order.

### **C. THE JOB ORDER SYSTEM**

The Volpe Center monitors and tracks work performed on this task order through a job order system. All work performed under this task order must be initiated and completed through use of a performance-based job order with appropriate supporting documentation, authorization, and certifications. The User Accountability System (UAS) is the automated information system that supports the job order system.

#### **1. Initiation of a Task**

"Contact persons" on the Contractor's staff will be identified as the primary point of contact for each major functional area and/or user organization at the Volpe Center. This individual is a senior-level management employee who is thoroughly familiar with the task order scope and special provisions. Contact persons will be charged with communicating with the Volpe Center organizations to ensure that overall requirements are well understood and to advise those Volpe organization users on the full range of capabilities and expertise available under the task order. When necessary, the contact persons can seek the guidance and/or participation of the Task Order Contracting Officer's Technical Representative (TOCOTR).

To begin the process of obtaining project support under this task order, the Volpe Center project manager (i.e., Job Order Initiator) shall complete Part I of the V-TRAC Job Order Initiation Form, Form Z (see Figure 1). This action requires the Job Order Initiator to describe the support needed by means of a Statement of Objectives, detailing the desired/required outcomes for this project support. The project support requirements must be expressed in terms of results to be accomplished rather than level-of-effort hours to be provided. The Job Order Initiator will then e-mail an electronic copy of this document to the appropriate Contractor point of contact for further action. Electronic copies shall also be sent concurrently to the Administrative Contracting Officer (ACO) and TOCOTR for review and process tracking.

Thereafter, the Contractor will contact the Job Order Initiator to schedule a brief discussion of the project performance requirements, leading to completion of the Contractor's response to the Statement of Objectives, including cost, schedule, and delivery components (Form Z, Part II), along with assignment of a job order number and title.

The Contractor and Job Order Initiator will then collaboratively identify the appropriate performance metrics associated with accomplishment of this job order expressed in terms of quality, schedule, and cost considerations (Form Z, Part III). At this point, the Job Order Initiator shall specify the monitoring method(s) that will be used to confirm Contractor performance (Form Z, Part IV). The Job Order Initiator and the appropriate Contractor manager sign a paper copy of this Form Z. This signed Form Z is combined with a Job Request Form, the Form A (Figure 2), which is prepared by the Contractor and forwarded to Volpe Center management for approval.

Once approvals are obtained from the project organization, the Contractor shall e-mail an electronic copy of the completed Form Z to the ACO, the TOCOTR, and the Job Order Initiator. The ACO is responsible for reviewing the Form Z for appropriateness, accuracy, and completeness within 24 hours of receipt of the e-mail from the Contractor.

In addition, a UAS number is assigned to the Form Z, and the completed Form A is forwarded to the Volpe Center's Finance Division for certification and obligation of project funds. The UAS number(s) and associated information is entered into the UAS to establish a record against which Contractor labor, travel, and other direct costs associated with the work effort are reported.

If no notification has been received from the CO of issues with the Form Z, and the total estimated value of the effort is \$25,000 or less (i.e. cost estimate in Part II of the Form Z), the Contractor will proceed to completion of the job order as fully described by the Form Z, as well as other reporting requirements contained within Section C.4, Management and Administration.

If no notification has been received from the CO of issues with the Form Z, and the total estimated value of the effort exceeds \$25,000 (i.e. cost estimate in Part II of the Form Z), the contractor will proceed to the next phase of the job order process, which is completion of a detailed performance-based Job Order Plan for accomplishment of the required effort. Routing, review, and approval of the Job Order Plan will follow the same cycle as previously described for the job order initiation process. A Job Order Plan must be submitted within thirty (30) days of job order approval.

## **2. Support of a Job Order**

Once the job order is underway, the contractor will maintain contact with the Job Order Initiator to keep him/her aware of the progress and status of the task. This is done through periodic meetings with the Job Order Initiator and via status reports that are submitted to the Job Order Initiator and the TOCOTR. These status reports are submitted at intervals as specified in the job order and are part of the Contractor's reporting requirements. Contents of these status reports are specified in Section C.3.B.2. When appropriate, the Contractor will hold technical discussions with the Job Order Initiator to review intermediate results and clarify any problems that may arise.

If the job order objectives and/or cost estimates, milestone schedules, or deliverables change significantly during the support of a job order, the Contractor must develop and submit for approval the new job order specification/requirements. The procedures in such a case are the same as those set forth in developing a new job order specification, including the fundamental requirement that all such changes must be described in terms of performance-based actions.

Every six months and upon completion of the final phase of any job order, the Job Order Initiator and the Contractor will complete the respective performance assessment portions of the V-TRAC Job Order Initiation Form (Form Z, Part V) and deliver a signed copy to the TOCOTR. Evaluation at the 6-month period shall represent performance assessment to date on the job order; assessments at the conclusion of the job order shall represent performance assessment of the complete job order.





## **ATTACHMENT J.2 USER ACCOUNTABILITY SYSTEM (UAS) FORMATS AND REPORTS**

### **A. INTRODUCTION**

The User Accountability System (UAS) is an automated information system that will be utilized to support this task order. The objective of the system is to provide Job Order Initiators with weekly reports reflecting current cost estimates and utilization; provide the TOCOTR with data essential to monitoring the task order; generate reports used by the Contractor's management staff to manage and administer job order activity; and provide for automatic generation and input of charges into Volpe Center's Financial System. The UAS is dependent upon two main sources of input: Form As and the Contractor's labor charges.

### **B. INPUT TO UAS**

#### **1. Form A**

The UAS Form A (Figure 2) is the source document for establishing a job order under the task order. The controlling element is the Job Number. The information from this form is entered into the UAS to create or update a job order record. This form is also used to revise, modify, or delete a job order once it has been established. Additionally, the Finance Division uses this form as the official document for obligation of program funds once the appropriate approvals have been obtained. The detailed specifications and descriptions of the job order are provided in the Form Z and attached to the Form A.

#### **2. Contractor Labor Charges**

Each week, the Contractor provides the Volpe Center's UAS Manager with an electronic file containing a breakdown of hours used in support of each job order. This information is entered into the UAS, and the time and cost figures are updated for each job order according to a pre-established labor rate structure.

### **C. SCHEDULE FOR INPUT TO UAS**

Input is made to update the UAS twice a week. The first run is a preliminary run to enter weekly Contractor labor charges, travel charges, and adjustments. This system update is scheduled for close of business (COB) each Monday but no later than Tuesday COB. It is the Contractor's responsibility to provide the UAS Manager with a preliminary weekly labor file by COB each Monday. The second run that takes place each Wednesday processes labor adjustments and/or any other type of additional charges, if any. It is the Contractor's responsibility to provide the UAS Manager with a final weekly labor file by noon each Wednesday. During this run, files and reports are produced for the Finance Division that are used to update the Volpe Center's financial systems. These files and reports are turned over to the Volpe Center's Finance Division on Thursday of each week.

Deviations to due dates for weekly labor files may be made and communicated by the UAS Manager at fiscal year end and to accommodate Federal holidays and/or requests from the Volpe Center's Finance Division. **The Contractor is required to provide a labor file ending September 30 of each year.**

#### **D. OUTPUT FROM UAS**

Multiple reports are generated by the UAS for the administration and monitoring of the operation and performance of this task order. Reports are designed to satisfy the specific needs of functional areas and to provide current technical and financial information to Job Order Initiators, Volpe Center managers and the Task Order Contracting Officer's Technical Representative (TOCOTR).

The UAS provides reports on a weekly basis. As a rule, weekly closings are on Wednesday of each week, and monthly closings are made as of the last Saturday of each month. Closings generate official UAS reports and data. UAS reports and data, generated by the preliminary runs, are not official and only serve as an aid in the function of monitoring project activity.

#### **E. UAS MANAGER**

The UAS Manager assigned to this task order is:

Gary Pugliese, RVP-40  
USDOT/RITA/Volpe National Transportation Systems Center  
55 Broadway  
Cambridge, MA 02142  
(617) 494-2232

## FIGURE 2 – USER ACCOUNTABILITY SYSTEM (UAS) FORM A STRUCTURE

**NOTE:** THIS FORM IS GENERATED ON-LINE USING THE FORMS MODULE OF THE UAS. THIS MODULE IS ACCESSIBLE BY CONTRACTOR PERSONNEL WHO HAVE BEEN AUTHORIZED BY THE UAS SYSTEM MANAGER. USERS MAY COMPLETE A HARD COPY OF THE FORM AND SUBMIT IT TO AN APPROPRIATE CONTRACTOR REPRESENTATIVE FOR PROCESSING.

<b><u>BLOCKS ACROSS</u></b>	<b><u>BLOCK DESCRIPTION</u></b>
<b>1. UAS JOB</b>	THESE FOUR ELEMENTS ARE TO BE COMPLETED BY THE APPROPRIATE CONTRACTOR REPRESENTATIVE.
<b>2. ACCOUNTING CERTIFICATION</b>	TO BE COMPLETED BY VOLPE ACCOUNTING OFFICE
<b>3. INITIATOR</b>	ENTER FIRST PART OF INITIATOR'S LAST NAME AND SYSTEM WILL FILL IN THE REST. INITIATOR'S NAME MUST CURRENTLY RESIDE ON THE PERSONNEL FILE.
<b>4. ACCOUNTING JOB ORDER</b>	ENTER THE ACCOUNTING JOB ORDER NUMBER AND THE SYSTEM WILL FILL IN THE REST. THE ACCOUNTING JOB ORDER NUMBER MUST CURRENTLY RESIDE ON THE ACCOUNTING JOB ORDER FILE.
<b>5. START DATE/EST COMP DATE</b>	ENTER THE DAY THE PROJECT IS TO START AND THE DAY THE PROJECT IS ESTIMATED TO BE COMPLETE.
<b>6. USER COMMENT</b>	DATA WHICH CAN BE ENTERED FOR TRACKING PURPOSES.
<b>7. JOB TITLE</b>	ENTER THE TITLE OF THE JOB ORDER (MAX OF 72).
<b>8. ACCEPTED BY</b>	THIS AREA WILL BE FILLED IN AUTOMATICALLY.
<b>9. AUTHORIZATION SIGNATURES</b>	THOSE SIGNATURES ARE REQUIRED ACCORDING TO THE VOLPE CENTER DIRECTIVE DETAILING DELEGATIONS OF AUTHORITY.
<b>10. CONTRACTOR LABOR</b>	FOR CONTRACTOR INFORMATION AND TRACKING.
<b>11. REGULAR LABOR</b>	ENTER CONTRACTOR LABOR CODES AND COST ESTIMATES (MAXIMUM OF TWELVE CATEGORIES).
<b>12. OVERTIME</b>	IF OVERTIME IS AUTHORIZED THEN ENTER HOURS AND COST.
<b>13. TRAVEL/TRAINING/ODCS/SUPPLIES</b>	IF TRAVEL OR TRAINING IS AUTHORIZED THEN ENTER CODE AND COST.
<b>14. TOTAL LABOR</b>	THIS FIELD IS SYSTEM GENERATED.
<b>15. TOTAL JOB COST</b>	THIS FIELD IS SYSTEM GENERATED.

## ATTACHMENT J.3 GREEN-YELLOW-RED (GYR) REPORTS

### A. Introduction

The Contractor is required to provide a high-level assessment of its activities for each project supported during the fiscal year. The primary purpose of these project assessments is to encourage communication among the Contractor, Job Order Initiators, TOCOTR, and Volpe Center management. The attributes assessed (technical content, schedule, cost, staffing, and quality) provide a limited view of the status of work performed. This report is best used as a means of validating progress between the Contractor and the Job Order Initiator and as an indicator of Contractor performance to the TOCOTR and Volpe Center management. Indicators need to be examined more closely to verify the exact nature of the performance issue.

### B. Data Elements

For each entry, the following information will be reported using the data from the UAS for the previous month:

- Project Number;
- Project Title;
- Volpe Center organizational units supported;
- Total obligations as recorded in UAS;
- Total expenditures as recorded in UAS;
- Total hours as recorded in UAS; and
- Total level-of-effort calculated by dividing the total hours delivered by the number of hours available; i.e., number of elapsed weeks in the Government fiscal year multiplied by 40 hours per week.

For each project, status assessments will be made for the following attributes:

- Technical Content: are technical issues well defined, clearly understood, and under control
- Schedule: are deliverables being provided on time and in accordance with job order schedules
- Cost: are costs running at or below approved budgets contained in job order plans
- Staffing: are appropriately skilled, motivated individuals provided as required to support the project
- Quality: are high quality products and services being delivered according to job order specifications.

### C. Assessment Scheme

One sheet will be prepared for each Volpe Center organizational unit, to be further defined upon award, based on project and/or job order level. Assessments are made using a color scheme. **Green** indicates that all items are proceeding in accordance with the approved plan. **Yellow** indicates that a minor problem or risk either does or may exist. **Red** indicates that a significant problem and/or risk either does or will exist. Any item assessed as Red or Yellow must be footnoted with an explanation.

#### **D. Report Formats and Schedules**

Specific report formats shall be discussed and approved by the TOCOTR upon task order award. The Contractor is required to submit GYR reports in accordance with the guidelines specified in Section C and delivery schedules stated in Section F. Modifications to the report format may be requested by the TOCOTR during the performance of the task order.

**ATTACHMENT J.4      PERFORMANCE EVALUATION PLAN**

As stated in Section I.3 of the task order; a Performance Evaluation Plan shall be unilaterally established by the Government based on the criteria stated in the task order and used for the determination of award fee. This plan shall include the criteria used to evaluate CLINs 0002 and 0003 and the percentage of award fee available by performance period for CLINs 0002 and 0003. A copy of the plan shall be provided to the Contractor 30 calendar days prior to the start of the first evaluation period.

**ATTACHMENT J.5      GOVERNMENT-FURNISHED PROPERTY LIST**

(To be provided upon the commencement of CLIN 0001, Transition)