The National Institutes of Health (NIH) Business and Professional Services contract (NIHBPSS) award mechanism is intended to assist NIH and its component Institutes and Centers (ICs) to achieve and maintain high quality performance in the areas of Business and Professional Support Services. The NIHBPSS vehicle is structured as 3 Indefinite Delivery / Indefinite Quantity (IDIQ) contracts. Task orders are to be issued under the 3 contracts to acquire services as desired.
The Standard Operating Procedures (SOP) herein contain guidelines for utilizing the NIHBPSS contract vehicle, covering the roles and responsibilities of all involved parties, including Vendor personnel.

The task orders will be awarded under the Federal Acquisition Streamlining Act (FASA) which requires that the prime vendors be given a Fair-Opportunity-to-be-Considered (FOC) for task order awards.

Please refer to the NIHBPSS Website (http://NIHBPSS.olao.od.nih.gov) and/or contact the NIHBPSS Program Support Team (NIHBPSS@mail.nih.gov) if you have any questions, need additional information, and/or require official documentation and administration related to task order establishment.

The NIHBPSS award mechanism will operate using the NIHBPSS electronic Government Ordering System (eGOS), when available and implemented. This SOP will be updated at that time to provide specific, streamlined guidance on how to use eGOS in placing a task order.

Task Order Guidelines are subject to change; please refer to the latest version in effect. The latest version will supersede all earlier versions.
ACRONYMS

The following is a list of acronyms used throughout this document.

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<td>CO</td>
<td>Contracting Officer</td>
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<td>Consolidated Operations Acquisitions Centers</td>
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<td>Contracting Officer's Representative</td>
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<td>D&amp;F</td>
<td>Determinations and Findings</td>
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NIHBPSS ORGANIZATIONAL CHART

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1 GENERAL INFORMATION

The National Institutes of Health Business and Professional Support Services (NIHBPSS) Contract is an acquisition vehicle available to all Institutes and Centers (ICs) and offices within the National Institutes of Health (NIH) to purchase business operation and professional support services. This multiple award contract with 3 vendors will be used by NIH to procure business and professional support services on a task order (TO) basis. In technical terms, NIHBPSS is an Indefinite Delivery/Indefinite Quantity (IDIQ) contract, which affords customers the ability to order services after requirements materialize, providing NIH with flexibility in both quantities and delivery scheduling. Additional information including the scope, labor categories, and services related to NIHBPSS can be found in the following sections.

The contract period of performance will consist of a base year performance period and four one-year option periods.

1.1 Non-Personal Services

Pursuant to FAR 37.1, no personal services shall be performed under this contract. All work requirements shall flow only from the Contracting Officer’s Representative (COR) to the contractor’s Project Manager. No contractor employee will be directly supervised by the Government. All individual employee assignments, and daily work direction, shall be given by the applicable employee supervisor. If the contractor believes any Government action or communication has been given that would create a personal services relationship between the Government and any contractor employee, the contractor shall promptly notify the Contracting Officer of this communication or action.

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

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

1.2 Labor Categories

The contractor shall maintain a management structure with overall task order control and authority for the performance of the work. At a minimum, the contractor’s management structure shall be responsible for the following throughout the life of each task order:

   a) Deploying a technically proficient and professionally capable staff.
b) Keeping personnel turnover to a minimum and ensuring individuals are motivated to achieve excellent performance.

c) Ensuring problems are minimized and unavoidable problems are resolved with minimal disruption to the activities performed under the task order.

d) Obtaining continuous feedback on performance from appropriate Government personnel and disseminating feedback to vendor personnel on all areas of task order performance.

e) Continually monitoring the quality of all products and services provided for purposes of identifying and implementing performance improvements; and

f) Ensuring that all resources necessary to perform the task order are identified with clearly defined roles and deployed on schedule.

Support under this contract will include the following labor categories:

1. PROJECT MANAGER

   **Functional Responsibility**: Manages multiple projects and project managers. Serves as the overall lead or director on complex projects and multiple agency contracts and serves as the principal liaison between the contractor and multiple government agencies. The Senior Project Manager is responsible for ensuring that all tasking associated with a Government-funded program or project is completed effectively and efficiently, on time. Manages associated technical project issues. Assures quality control programs are in place and consistent on all programs assigned.

   **Education**: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
   **Experience**: No less than 1 to 2 years of relevant experience*

2 ASSISTANT PROJECT MANAGER

   **Functional Responsibility**: Serves as a lead on complex projects and multiple agency contracts and serves as the principal liaison between the contractor and multiple government agencies. The Project Manager is responsible for ensuring that all tasking associated with a Government-funded program or project is completed effectively and efficiently, on time. Coordinates manpower and resources for multiple projects. Manages associated technical project issues. Assures quality control programs are in place and consistent on all programs assigned.

   **Education**: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
   **Experience**: No less than 1 to 2 years of relevant experience*

3. ADMINISTRATIVE ASSISTANT

   **Functional Responsibility**: In direct support of professional positions, conducts a variety of clerical and administrative activities. Maintains office files, provides word processing, spread sheets and graphics as desired; other duties as assigned.

   **Education**: High school degree
Experience: No less than 1 to 2 years of relevant experience*

4. WEB PROJECT MANAGER

**Functional Responsibility:** Responsible for web strategy and operations. Develops business plan and annual budget for website function. Accountable for budget, staff planning, management, and products and service delivery. Oversees operational activities of the website(s) with specific attention aimed at content creation and website maintenance.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
**Experience:** No less than 1 to 2 years of relevant experience*

5. WEB DESIGNER

**Functional Responsibility:** Under general supervision, designs and develops user interface features, site animation, and special-effects elements. Contributes to the design group’s efforts to enhance the look and feel of the organization’s online offerings. Designs the website to support the organization’s strategies and goals relative to external communications. Develops applications based on current, new and future net-based applications. Requires significant graphics and design experience as well as HTML knowledge.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
**Experience:** No less than 1 to 2 years of relevant experience*

6. WEB SOFTWARE DEVELOPER

**Functional Responsibility:** Experienced in the design and development, testing, deployment, and maintenance of web or web applications constructed in a business application or survey application mode. Experienced in developing 508-compliant web applications for relational database and/or data retrieval systems.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
**Experience:** No less than 1 to 2 years of relevant experience*

7. WEB CONTENT ADMINISTRATOR

**Functional Responsibility:** Responsible for developing and providing content that will motivate and entertain users so that they regularly access the website and utilize it as a major source for information and decision-making. Responsible for managing/performing website editorial activities including gathering and researching information that enhances the value of the site. Locates, negotiates, and pursues content. Seeks out customers to gather feedback for website improvement and enhancements. Requires experience in production management, web page design, HTML, and web graphics types and standards.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
**Experience:** No less than 1 to 2 years of relevant experience*
8. BUDGET ANALYST

**Functional Responsibility:** Work with program and project managers to develop the organization’s budget. Review budget proposals for completeness, accuracy, and compliance with laws and other regulations. Explain their recommendations for funding requests to other organization, legislators, and the public. Analyze proposed plans and find alternatives if the projected results are unsatisfactory. Monitor organizational spending to ensure that it is within budget. Inform program managers of the status and availability of funds. Estimate future financial needs.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.

**Experience:** No less than 1 to 2 years of relevant experience*

9. ACCOUNTING ANALYST

**Functional Responsibility:** Evaluates public company financial statements. Public companies issue (10-k) annual financial statements as required by the Security and Exchange Commission. The statements include the balance sheet, the income statement, the statement of cash flows and the notes to the financial statements. Specifically, the notes to the financial statements contain considerable quantitative detail supporting the financial statements along with narrative information.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.

**Experience:** No less than 1 to 2 years of relevant experience*

In addition, the analyst will most likely hold the Chartered Certified Accountant (ACCA) or Certified Public Accountant (CPA) or Chartered Account (CA or ACA) description.

**Experience:** Has extensive training in understanding financial accounting principles for public companies based on generally accepted accounting principles as provided by the Financial Accounting Standards Board. Or, he/she may have additional experience in applying international accounting standards based on the rules put out by the International Accounting Standards Board.

10. FINANCIAL MANAGER

**Functional Responsibility:** Responsible for the financial health of an organization. They produce financial reports, direct investment activities. And develop strategies and plans for the long term financial goals of their organization. Prepare financial statements, business activity reports, and forecasts. Monitor financial details to ensure the legal requirements are met. Supervise employees who do financial reporting and budgeting. Review company financial reports and seek ways to reduce costs. Help management make financial decisions.

**Education:** MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.

**Experience:** No less than 1 to 2 years of relevant experience*

11. PROCUREMENT SPECIALIST

**Functional Responsibility:** Ensures that the items and services to build and maintain advanced technology products are purchased from specified suppliers and are delivered according to agreed
terms and conditions. An important aspect of this role is seeking maximum value for the company through time and cost agreements while working with technology advanced products. Reviews planned orders, creates requisitions for purchased items, and manage approval process. Tracks order acknowledgement, prepares and communicates shortage and backlog reports, and provides visibility of potential interruptions to internal customers. Reviews, updates, and maintains purchase orders until they are closed.

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: No less than 1 to 2 years of relevant experience*

12. SUBJECT MATTER EXPERT

Functional Responsibility: Experience in utilizing new methodologies for solving problems and ensuring that systems are in compliance with organizational requirements. Analyzes user needs to determine functional requirements, performs functional allocation to identify required tasks and their interrelationships. Develops recommendations for the organizational process changes to include new technology, identifies resources required for each task.

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: No less than 1 to 2 years of relevant experience*

13. LOGISTICAL/TECHNICAL SUPPORT SPECIALIST

Functional Responsibility: Performs logistics tasks associated with logistics engineering, scientific or general data processing functions within Governmental and/or civil development. Acquisition, sustainment and/or operational environments, interfaces with individual users to resolve operational and/or business processes, and/or routine technical, problems. Coordinates tasks with other employees, trains and assists less-experienced personnel. Participates as individual contributor and as member of multiple cross functional integrated product teams and/or functional area teams.

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: No less than 1 to 2 years of relevant experience*

14. FUNCTIONAL SPECIALIST

Functional Responsibility: A functional specialist is an expert in a specific discipline, such as human resources, finance, marketing, information technology or continuous improvement. A specialist can either manage a department or take a key role in one area of the department. For example, a marketing specialist might oversee the research, distribution, sales, advertising, promotions, social media or public relations of a small business. At a large company, she might specialize by handling one of those duties. A specialist might not be able to handle all of the tasks in her area, but knows enough about them to manage others. For example, an advertising specialist will be familiar with media buying, layout and design, pay-per-click strategies and copywriting. While she might not have advanced layout and design skills, she understands the basics of graphic design and can direct a graphic artist. Respond to queries from students on the particular subject.

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: No less than 1 to 2 years of relevant experience*

15. SUBJECT MATTER EXPERT INSTRUCTOR

Functional Responsibility: Experienced practitioners that can develop and/or teach in a stimulating and participative learning environment for students. Work with other team members, such as Programmers, Graphic Designers, Writers, and Instructional Designers in order to produce effective learning modules in context with the implementation of self-learning methodologies. Develop model exam questions, including solutions and explanations. Create interactive exercises and activities to support learning outcomes.

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: Not less than 2 years of relevant experience*

16. BUSINESS PROCESS REENGINEERING SPECIALIST

Functional Responsibility: Applies business process improvement practices to reengineer methodologies, principles, and business process modernization projects.

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: No less than 1 to 2 years of relevant experience*

17. SOFTWARE ARCHITECT

Functional Responsibility: Designs and develops new software products or major enhancements to existing software. Addresses problems of system integration compatibility, and multiple platforms. Responsible for project completion. Performs feasibility analysis on potential future projects to management

Education: MA/MS desired; a minimum of a Bachelor’s Degree in relevant area.
Experience: No less than 1 to 2 years of relevant experience*

*NOTE: SUBSTITUTION OF EDUCATION FOR SPECIALIZED EXPERIENCE
Two full academic years of progressively higher level graduate education, masters, graduate, or professional degree may be substituted for one year of relevant experience.

1.3 Contract and Task Order Management

Contract and task order management is a mandatory element for all task orders placed under the NIHBPSS contract vehicle. The objective of contract and task order management is to provide the program management, project control, and contract administration support needed to manage a high volume, multiple contract task order process. The application of processes that support task order management are encouraged to ensure that cost, schedule, and quality requirements of each order are tracked, communicated to the government, and ultimately attained.

1.4 Principal Task Areas

The following categories will cover the total scope of services for the NIHBPSS contract:
(Task Order 1) Financial Analysis, Business Solutions, and Acquisition Life-cycle Support,

(Task Order 2) Business Process Improvement and Organizational Assessment

(Task Order 3) Communication and Training

(Task Order 4) Program Planning and Management Services

(Task Order 5) Supply Chain Management

(Task Order 6) Asset Management

(Task Order 7) Policy Development, Implementation, and Administration

(Task Order 8) System Integration Work for the NIH.

1.4.1 (Task Area 1) Financial Analysis, Business Solutions, and Acquisition Lifecycle Support

The contractor shall use existing NIH Financial systems and data, to conduct in depth financial analyses and make recommendations on financial improvements. The contractor shall provide a full range of acquisition support services at the request of the Task Order (TO) COR.

A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Provide financial and inventory management analytics.

b) Provide support for logistics management activities, including: revenue forecasting, supply/demand analysis, and breakeven analysis.

c) Work in collaboration with the TO COR to develop inventory, transportation, property, and other metrics.

d) Provide support for traffic management, and data warehousing.

e) Work in collaboration with the TO COR to track actual and budgeted costs.

f) Work in collaboration with the TO COR to perform cost allocations.

g) Work in collaboration with the TO COR to track supply chain activity costs.

h) Work in collaboration with the TO COR to identify resource burdens, and determine specific areas for improvement.

i) Provide cradle to grave acquisition assistance for the full acquisition lifecycle, including pre-solicitation, contract administration and contract closeout support.
1.4.2  (Task Area 2) Business Process Improvement and Organizational Assessment

The Contractor shall work in collaboration with the TO COR to apply business process improvement methodologies, including Lean Six Sigma (LSS), in order to identify opportunities for process improvement initiatives and organizational and cultural change processes.

A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Work in collaboration with NIH staff to develop the Strategic Plan.

b) Work with the TO COR to identify, select, and align business process improvement projects to strategic objectives.

c) Train NIH personnel in LSS, including Project Sponsor, Executive Awareness, Black Belt, Green Belt, and White Belt modules.

d) Serve on a LSS certification board.

e) Coach and mentor Black Belt, and Green Belt candidates through certification.

f) Lead selected complex business process improvement efforts, including LSS projects, at the request of the TO COR.

g) Conduct post LSS training evaluation and reinforcement projects.

h) Lead LSS user groups, electronic forums, and brown bag sessions

1.4.3  (Task Area 3) Communication and Training

The Contractor shall provide expert communications, outreach, and training support. Any applicable communication, outreach, and training materials will be provided to the Government in both paper and soft copy.

A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Work in collaboration with the TO COR to develop and implement an outreach strategy and plan.

b) Plan and conduct branding initiatives at the request of the TO COR.

c) Work in collaboration with the TO COR to develop target messages and strategies.

d) Plan and facilitate work sessions at the request of the TO COR.

e) Work in collaboration with the TO COR to develop training plans and supporting business cases.

f) Conduct staff training needs assessments and competency identification projects; design, develop, and conduct training; design and develop course materials.
g) Work in collaboration with the TO COR in the selection of delivery methods (classroom, workplace, and e-learning).

h) Work in collaboration with the TO COR to identify low-cost or no-cost training opportunities; plan, develop, and conduct professional development brown bag sessions.

i) Work in collaboration with the TO COR to develop training designs, communication plans, implementation plans, and training calendars; conduct training reviews and evaluations.

j) Work in collaboration with the TO COR to develop strategy, including prioritized needs based on mission; timeframe/milestones; assessment of the gap between available free training and need.

k) Work in collaboration with the TO COR to conduct in depth cost analyses.

l) Work in collaboration with the TO COR to develop strategy-based metrics.

1.4.4 (Task Area 4) Program Planning and Management Services

The Contractor shall provide program planning and management support at the request of the COR. The Contractor shall also provide performance management, and analytics and studies support. A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Provide program planning, development and evaluation services.

b) Provide workforce planning, resource management, and risk management support.

c) Work in collaboration with the TO COR to develop, manage and evaluate the NIH Succession Management Program.

d) Provide conference and meeting services.

e) Provide project management support services.

f) Provide tracking and monitoring support.

g) Perform coordination activities.

h) Provide survey services.

1.4.5 (Task Area 5) Supply Chain Management

The Contractor shall provide a full range of supply chain management support. A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Provide supply chain and transportation management advice and support.
b) Work in collaboration with the TO COR to manage supply operations.

c) Work in collaboration with the TO COR in integrating supply chain processes including e-commerce, e-business, information technologies, warehousing and distribution channel management to enhance efficiencies and customer value.

d) Implement a set of integrated supply chain capabilities that support the "Supplier of Choice" strategy.

e) Work in collaboration with TO COR to ensure high levels of customer service, appropriate use of capacity, management of obsolete inventory, and integration with other functional areas including inventory management and acquisitions.

f) Provide support for sourcing and supplier management.

g) Provide inventory management support.

h) Provide support for supplier performance monitoring as well as supplier diversity to maintain compliance with NIH acquisition policies.

i) Design, implement, and execute a formalized sales and operations planning process to efficiently improve demand forecast accuracy, identify organizational 'trade-off' decisions, publish performance indicators and targets, and develop clear policies to guide planning decisions and standardization.

j) Evaluate, recommend, and implement supporting technologies.

1.4.6 (Task Area 6) Asset Management

The Contractor shall work in collaboration with the TO COR in the management of all aspects of the NIH personal property program. A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Work in collaboration with the TO COR to develop and recommend property policies and procedures.

b) Work in collaboration with the TO COR in the resolution of audit reports.

c) Work in collaboration with the TO COR to define customer requirements.

d) Design and develop various goal-based project plans.

e) Work with the TO COR to develop a strategy to measure customer satisfaction.

f) Conduct in depth financial analyses.

g) Conduct various property management studies including qualitative and quantitative studies to assess effectiveness and to identify non-value added operations, interactions, bottlenecks and control strategies.
h) Work in collaboration with the TO COR to monitor the Government Performance and Results Act (GPRA) goals.

i) Work in collaboration with the TO COR in the coordination of decentralized personal property management activities including IC property management evaluations.

j) Work in collaboration with the TO COR to conduct NIH logistics Functional Reviews in all areas of property.

1.4.7 (Task Area 7) Policy Development, Implementation, and Administration
The contractor shall provide written policy development support at the request of the TO COR. A non-exhaustive list of examples of the type of work to be performed under this task area is:

a) Work in collaboration with the TO COR to identify policy needs, issues, and problems.

b) Recommend policy actions and assist in policy implementation, administration, and oversight. Policy oversight shall include an evaluative component to ensure that policies accomplish established goals. Policies shall be stated with room for adjustment to fit special circumstances.

c) Examine existing policies in order to make recommendations for revisions and improvements.

d) Perform additional policy development tasks at the request of the TO COR.

1.4.8 (Task Area 8) System Integration Work
The Contractor shall coordinate with all elements of NIH in order to ensure successful system integration of any new enhancements. The Contractor shall also provide personnel proficient in Oracle to identify system gaps, make recommendations and coordinate fixes as needed.

The contractor shall help the NIH implement administrative improvements and workflow automation establishing an agile IT platform that is scalable to meet the needs of large organizations, highly-distributed business operations, and diverse user communities. The team will take an enterprise approach including clearly understanding the broad business drivers and strategic vision of the organization as part of defining technical requirements and assessing appropriate tools and technologies to support workflow automation and organizational change. From this vantage point, they will assist the NIH in deploying the most appropriate technology solution(s) that: 1) establishes a digitized process development platform that supports workflow design and enhancements; 2) provides business intelligence and performance metrics for effective decision-making; and 3) integrates with existing (and future) IT investments across the enterprise.
1.5 Task Orders
All requirements will be fulfilled under task orders (TOs). The task order will provide detail of the specific services that will be required. Task orders may be Time and Materials, or Labor Hour type contracts.

Time and Materials and Labor Hour type task orders require a signed Determinations and Findings (D&F) report. If the task order is in excess of 3 years, the D&F must be signed by the NIH Head of Contracting Activity.

1.6 NIHBPSS Resources
There are NIHBPSS resources available to help work with this vehicle, including an informational website located at http://NIHBPS.olao.od.nih.gov, an electronic Government Ordering System (eGOS) located at http://NIHBPS.egos.nih.gov to assist users in creating a TORP in the future, and a NIHBPSS Program Support Team that can be reached at NIHBPSS@mail.nih.gov.

1.7 Classified Material
A TORP will contain only unclassified material, regardless of the level of classification of the work to be performed under the task order.

The IC Task Order Team is responsible for ensuring that proprietary information contained in the vendors’ proposals is protected from unauthorized disclosure. It is the vendors’ responsibility to ensure that all proprietary information is appropriately marked.

1.8 Supporting Documentation Submission
The preferred channel for delivery of all correspondence to the NIHBPSS Contracting Officer is electronic via e-mail (NIHBPS@mail.nih.gov). Microsoft Word (.doc or .docx) is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel (.xls) format.

1.9 NIHBPSS Usage Assessments
All agencies external to the NIH will be assessed for using the NIHBPSS Contract. The assessment will be collected through an Interagency Agreement (IAA).

For unassisted orders, there will be a 1% assessment. For assisted orders, there will be an additional 2% assessed. This is a percentage of the estimated dollar amount of award.

An assisted order would be a task order administrated by this office, meaning NIH/OLAO would serve as the contracting shop/contracting officer. An unassisted order is one where the requesting agency uses its own contracting shop/contracting officer (this includes HHS/PSC). The assessment for an unassisted order is 1%. The assessment for an assisted order is 3% (1% to use the vehicle + 2% for NIH/OLAO serving as the contracting shop/contracting officer).

The IAA will cover only the 1% assessment in the case of an unassisted order. In the case of an assisted order, in which the Contracting Officer for the parent contract serves as the Contracting Officer for the task
order, the IAA will cover the dollars obligated for the requirement in addition to the 1% assessment and a 2% assessment for services provided by the NIHBPSS CO (for a total of 3%).

Our office requests the Memorandum of Understanding (MOU) and Interagency Agreement (IAA) forms 7600 A and B in order to begin the task order process. This is to be provided to the NIHBPSS office with the submission of the Task Order Request for Proposal (TORP) Package in eGOS. Your TORP will be released to the contractors once a complete package (including the MOU and 7600 A and B forms) is received. This will not delay the start of the TORP process. The IAA will need to be completed, with all documents signed and CAN numbers received, prior to the award of the task order.
2 ROLES AND RESPONSIBILITIES

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

- NIHBPSS Program Support Team
  - NIHBPSS Contracting Officer (CO)
  - NIHBPSS Contracting Officer Technical Representative (COR)

- IC Task Order Team
  - Consolidated Operations Acquisition Center (COAC) Contracting Officials
    - COAC Contracting Officer (CO)
    - COAC Contracting Specialist (CS)
  - IC Task Order Project Officer

Each representative involved will play a significant role in the maintenance of the NIHBPSS contract as well as the initiation, tracking, and close-out of each task order. Responsibilities are outlined in the following sections and again later in the task order procedures.
2.1 NIHBPSS Program Support Team

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

2.1.1 NIHBPSS Contracting Officer

The NIHBPSS Contracting Officer within OLAO will have the authority to act as an agent of the Government under this contract. Only the NIHBPSS Contracting Officer has authority to:

- direct or negotiate any changes in the Statement of Work or specifications of the NIHBPSS contract vehicle;
- modify or extend the period of performance;
- change the delivery schedule;
- otherwise change any terms and conditions of this contract;
- concur with any exceptions to the Fair Opportunity Process; and
- perform contract administration duties such as exercising option years and contract close-out functions.

Other responsibilities of the NIHBPSS Contracting Officer include, but are not limited to:

- receiving TORP packages from NIHBPSS customers;
Standard Operating Procedures

- reviewing TORPs and releasing TORPs to all vendors; and
- acting as the point of contact for contractual issues related to the NIHBPS contract.

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

2.1.2 NIHBPS Contracting Officer Technical Representative (COR)

NIHBPS COR

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

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

The NIHBPS COR shall act as the NIHBPS Contracting Officer's Representative for the purpose of the NIHBPS contract vehicle. The NIHBPS COR is responsible for:

- monitoring the vendor’s technical progress, including the surveillance and assessment of performance;
- recommending changes in requirements to the NIHBPS Contracting Officer;
- interpreting the Statement of Work and any other technical performance requirements;
- performing technical evaluations as required;
- performing technical inspections and acceptance required by this contract; and
- assisting in the resolution of technical problems encountered during performance.

Other responsibilities of the NIHBPS COR include, but are not limited to:

- logging and maintaining records of all task orders; and
- tracking and guiding contract performance over the life of the NIHBPS contract vehicle.
2.2 IC Task Order Team

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

2.2.1 COAC Contracting Officials

COAC Contracting Officials may be either Contract Specialists or appropriately warranted Contracting Officers. These officials will be representatives of an NIH Consolidated Operations Acquisition Center and will have the authority to act as an agent of the Government under a particular task order.

The COAC Contracting Official is responsible for:

- directing or negotiating any changes in the Statement of Work or specifications of a task order;
- modifying or extending the period of performance of the task order, subject to the period of performance of the task order;
- changing the delivery schedule;
- otherwise changing any terms and conditions of a particular task order; and
- creating and gaining approval for the exceptions to the Fair Opportunity Process.

Other responsibilities of the COAC Contracting Official include, but are not limited to:

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

- collaborating with the IC Task Order COR in the evaluation of proposals;
- signing the Selection Recommendation Document (SRD);
- creating and awarding a task order;
- announcing award decisions to all vendors;
- reviewing modifications to the task order;
- monitoring and assessing the vendor's task order performance; and
- signing acceptance of the final product or completed statement, and performing general task order initiation and close-out tasks.

- assigning Task Order in CPARS to Task Order COR so they may enter contractor performance

2.2.2 IC Contracting Officer’s Representative (COR)

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

IC Task Order COR

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

Primary Responsibilities:
- Monitor the vendor's task order progress
- Interface with vendor management staff
- Complete vendor performance evaluations
- Develop TORP
The IC Task Order COR is responsible for:

- monitoring the vendor’s technical progress on a task order;
- collaborating with COAC Contracting Officials in the evaluation of proposals;
- completing formal vendor performance evaluations as required by the NIHBPSS Program Support Team;
- interpreting the Statement of Work and any other technical performance requirements of a task order;
- performing technical evaluations as required;
- performing technical inspections and acceptance required by a task order; and
- assisting in the resolution of technical problems encountered during performance.

Other responsibilities of the IC Task Order COR include, but are not limited to:

- working with COAC Contracting Officials to draft the Task Order Request Package (TORP);
- signing the Selection Recommendation Document (SRD);
- providing direction to the vendor’s management staff to facilitate task order performance; and
- monitoring performance over the life of the task order.
- entering contractor performance into CPARS
3 TASK ORDER GUIDELINES

Task orders will need to be issued to procure services under the NIHBPSS contract. This section describes the details of the task order creation, award, and management processes.

The NIHBPSS award mechanism will operate using the NIHBPSS electronic Government Ordering System (eGOS), when available and implemented. This SOP will be updated at that time to provide specific, streamlined guidance on how to use eGOS in placing a task order.

Task Order Guidelines are subject to change; refer to latest version in effect. The latest version will supersede all earlier versions.

Please refer to the NIHBPSS Website at http://NIHBPSS.olao.od.nih.gov and/or contact the NIHBPSS Program Support Team (NIHBPSS@mail.nih.gov) for additional information.

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

The figure below charts the Task Order Process Flow from initiation of the requirement through task order close-out, mapping each step to the party primarily responsible for completing the required activities. A more detailed description of the activities occurring at each step is provided in subsequent sections of these guidelines.
IC Task Order Team
The Task Order Contracting Officer (CO) and the Task Order Contracting Officer’s Representative (COR) develop the Task Order Request Package (TORP), collect and respond to questions, evaluate proposals, prepare a Selection Recommendation Document (SRD), process task order awards, and monitor overall task order activities.

Step 1
Task Order COR develops TORP and sends it to the Task Order CO for review

Step 2
Task Order CO reviews the TORP and sends it to the NIHBPSS CO and COR

Step 3
NIHBPS CO receives the TORP and assigns a TORP number

NIHBPSS CO and COR
The NIHBPSS Contracting Officer (CO) and Contracting Officer’s Representative (COR) develop the TORP, collect and respond to questions, evaluate proposals, prepare a SRD, process task order awards, and monitor overall task order activities.

Step 4
NIHBPS CO and COR review and release the TORP

Step 5
Contractors review TORP and submit questions. If necessary to the Task Order CO (copying the NIHBPSS email address)

Step 6
Task Order CO works with the Task Order COR to collect and answer questions

Questions

Step 7
Task Order CO sends questions and answers to NIHBPSS CO and COR

Questions and Answers

Step 8
NIHBPS CO releases questions and answers to the contractors

Proposal or “No Response”

Step 9
Contractors respond to the TORP

Step 10
Task Order CO and COR evaluate the proposals and select an Awardee

Approved SRD signed by Task Order CO

Step 11
NIHBPS CO reviews and concurs on the SRD

Step 12
Task Order CO processes the task order award

NIHBPS CO releases award letter to Awardee, Task Order CO, and Task Order COR announcing the task order award

Award Letter and Signed Task Order Award

Step 13
NIHBPS CO and COR evaluate the proposals and select an Awardee

Step 14
Contractor implements Task Order

Statement of Completion

Final Invoice

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

When an IC determines a need exists for public information and communication services, an IC Task Order COR will first be identified. The Task Order COR may or may not be the requestor for services, but must be a certified COR. The Task Order COR will work with a COAC Contracting Official to create a Task Order Request Package (TORP) using the TORP form. The NIHBPSS Program Support Team will be available to support IC Task Order Teams throughout the TORP development process as needed.

The TORP will include (1) a Statement of Work (SOW), (2) the anticipated period of performance, (3) any applicable Government Furnished Property (GFP), (4) evaluation criteria, (5) a procurement sensitive Independent Government Cost Estimate (IGCE) (not released to vendors), (6) funding memo and any (7) procurement sensitive security clearances (if required) (8) D&F memo.

The Task Order COR will submit the TORP to the Task Order CO for review.

3.2 Step 2 - NIHBPSS Program Support Team reviews the TORP

Upon review and acceptance, the Task Order CO will send the TORP to the NIHBPSS CO and COR for review using the NIHBPSS Program Support Team email (NIHBPSS@mail.nih.gov).

3.3 Step 3 - NIHBPSS CO receives the TORP and assigns a TORP number

The BPSS CO will assign the TORP an official number prior to review. The TORP number will serve as the task order tracking number. When submitting or sending any documents or emails, vendors shall reference the TORP number (e.g., subject line for emails, headers for documents).
3.4 Step 4 - NIHBPSS CO and COR review and release the TORP

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

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

Upon receipt of the TORP, all contractors will have the opportunity to review the requirement and submit questions requiring clarification. Contractors shall submit all questions to the Task Order CO and COR via e-mail (copying the NIHBPSS email address NIHBPSS@mail.nih.gov) by the date indicated in the TORP.

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

The Task Order CO will work with the Task Order COR to sufficiently respond to any questions submitted by the contractors. Technical related questions will be answered by the Task Order COR; contractual questions will be answered by the Task Order CO.

3.7 Step 7 - Task Order CO sends questions and answers to the NIHBPSS CO and COR

All questions and answers will be compiled by the Task Order CO and sent to the NIHBPSS CO and COR via the NIHBPSS e-mail address (NIHBPSS@mail.nih.gov).

3.8 Step 8 - NIHBPSS CO releases questions and answers to the contractors

Questions and answers will be released simultaneously to all contractors by the NIHBPSS CO.

3.9 Step 9 - Contractors respond to the TORP

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

3.9.1 Proposals

Proposals shall be submitted electronically via e-mail to the Task Order CO and COR, copying the NIHBPSS e-mail address (NIHBPSS@mail.nih.gov). Oral proposals will not be accepted. Proposals will consist of two parts: a technical proposal and a business proposal. The contractors shall prepare a proposal with as much detail as requested by the TORP. Please note that these proposals may be quite
brief unless additional information is required. If price/cost is the only evaluation factor listed, award will be made to the lowest price.

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

**Business Proposals** shall include an estimated ceiling (not to exceed) amount specifying labor and other related fees and expenses. Contractors shall propose a specific handling charge percentage for that task order. The hourly rates for the proposed task order labor categories may not exceed, but may be less than, the rates stated in the associated NIHBPSS contract. All proposed rates are subject to review by the NIHBPSS CO for compliance with the associated NIHBPSS contract.

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

3.9.2 *"No Response"* Statements

A *"No Response"* statement shall be submitted if a contractor is unable or otherwise cannot perform a requirement. This shall be submitted electronically via e-mail to the Task Order CO and COR copying the NIHBPSS e-mail address.

All *"No Response"* statements shall include a brief statement as to why the contractor has elected to forego the opportunity.
3.10 Step 10 - Task Order CO and Task Order COR evaluate the proposals and select an Awardee

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

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

After completion of the evaluation, negotiations are conducted, and any revised proposals evaluated. After selection of the Awardee, the Task Order COR will complete a Selection Recommendation Document (SRD) describing the review process and detailing the reason that award to the recommended contractor is in the best interest of the Federal government in accordance with FAR 16.505(b). An SRD template may be found on the Resources page of the NIHBPSS Website (http://NIHBPSS.olao.od.nih.gov).

The SRD must include (1) the selection criteria/methodology for evaluating submitted proposals as originally defined in the TORP package, (2) a list of the contractors that responded to the TORP, (3) rationale for the recommendation of the task order Awardee, including a summary of evaluation results, any negotiations conducted, price analysis, and award analysis (rationale for the recommendation of the Awardee), and (4) signature of the Task Order CO.

The Task Order CO will forward the SRD to the NIHBPSS CO (via the NIHBPSS e-mail NIHBPSS@mail.nih.gov) for review and concurrence.
3.11 Step 11 - NIHBPSS CO reviews and concurs on the SRD

After reviewing and concurring with the SRD, the NIHBPSS CO will notify the Task Order CO via e-mail to begin processing the task order award.

3.12 Step 12 - Task Order CO processes the task order award

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

The **task order** will contain:

- contract number (for the NIHBPSS contractor selected),
- task order number,
- order date,
- point of contact for billing purposes,
- statement of work (SOW),
- appropriation/funding citation,
- amount of funds obligated,
- billing and delivery addresses, and
- period of performance.
NIH customers will work in conjunction with their respective COAC to process an OF-347 Purchase Order Form. A copy of the signed OF-347 must be provided to the NIHBPSS CO the same day the award is signed by the Government.

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

3.13 Step 13 - NIHBPSS CO releases the award letter
The NIHBPSS CO will release the signed task order award document along with an award letter to the Awardee and Task Order CO and Task Order COR announcing the task order award.

3.14 Step 14 - Contractor implements the task order
The contractor is authorized to start work on the period of performance start date indicated in the task order award document.

The contractor will submit all task order invoices to the billing address indicated in Article G.4 (Invoice Submission) of their NIHBPSS contract. All invoices shall include both current and cumulative billing and clearly cite the funds remaining. The Task Order COR is responsible for reviewing/approving these invoices and ensuring that appropriate receiving is entered.

3.15 Step 15 - Task order close-out
After the Task Order has expired, the Task Order COR will, in conjunction with the Task Order CO, assess the quality of services received by completing a performance survey (available on the NIHBPSS Website at http://NIHBPSS.olao.od.nih.gov), and ensure that all task order requirements were met. The Task Order CO will send the performance survey and a copy of the final Close-Out form to the NIHBPSS CO via e-mail.
The contractor shall also submit the final invoice to the Task Order COR including a statement indicating that all work has been completed and all costs have been accounted for and billed. The contractor shall forward a copy of the final invoice to the NIHBPSS CO when the task order has been completed.

3.16 Task Order Award Timelines

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

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

4 CONTRACT AND TASK ORDER MANAGEMENT

As outlined in Section 2 of this document, the Office of Logistics and Acquisition Operations (OLAO) will provide contract-level management and oversight for the NIHBPSS contract vehicle through the NIHBPSS Program Support Team. The IC Task Order COR will perform day-to-day management and oversight for each task order with support from COAC Contracting Officials.

4.1 Contract Management

The NIHBPSS Contracting Officer will perform contract administration duties while the NIHBPSS COR will track and guide contract performance over the life of the contract. The NIHBPSS Program Support Team employs several methods and tools to assist this effort, in close concert with performance monitoring and evaluation efforts. These tools include the following.

4.1.1 Contract Files

The NIHBPSS Program Support Team maintains a central file for each of the contracts. The file contains the contract and all documentation; all contract modifications, correspondence, and performance evaluation reports, as well as copies of task orders, task order documentation, and task order modifications. It is required that the COAC Contracting Official also maintain a task order file for his/her own record.

4.1.2 Training

The NIHBPSS Program Support Team will prepare and conduct training presentations to assist NIHBPSS customers and vendors in understanding and using the NIHBPSS contract vehicle. Training sessions will also be held with the vendors to improve their understanding of the task order process. Training all parties involved will facilitate adherence to the task order procedures. In addition, materials such as this SOP document, FAQs, templates, and other supporting documents are available on the NIHBPSS Program
Support Team’s website at http://NIHBPSS.olao.od.nih.gov. To request training for your office or IC, contact the NIHBPSS Solutions Center at (NIHBPSS@mail.nih.gov).

4.2 Task Order Management

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

4.2.1 Initiation and Close-Out of Task Orders

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

4.2.2 Day-to-Day Oversight and Management

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

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

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

4.2.3 Acceptance of Services

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

4.3 Task Order Modifications

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

4.3.1 No Cost Modifications

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

Copies of any task order modification executed are required to be sent to the NIHBPSS CO and COR via the NIHBPSS Program Support Team e-mail (NIHBPSS@mail.nih.gov).
4.3.2 Addition of Funds

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

Copies of any task order modification executed are required to be sent to the NIHBPSS CO and COR via the NIH Program Support Team e-mail (NIHBPSS@mail.nih.gov).

4.3.3 Additional Work / Additional Time

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