



## **Attachment B**

### **SCOPE OF WORK**

#### **I. Definitions**

The following definitions apply to this solicitation. Attachment A RFP Terms and Conditions and Attachment D Sample Master Agreement also contain definitions of terms used in this solicitation.

- A. **Action Plan** is the comprehensive research summary completed by the Contractor which outlines the insights found and provides the steps needed to convert an organization's current structure and processes into a Category Management structure.
- B. **A la carte basis** means a separate price for each service offered by the Contractor.
- C. **Best value** as defined for purposes of this solicitation means the most advantageous offer determined by evaluating and comparing all relevant criteria in addition to price so that the offer meeting the overall combination that best serves the Lead State is selected. These criteria may include, in addition to others, the total cost of ownership, performance history of the vendor, quality of goods or services, delivery and proposed technical performance.
- D. **Contract Administrator** representative of the Lead State who is responsible for the functions that are performed after all parties have signed a contract, including any modifications to the contract.
- E. **Contract Manager**: A representative of the Lead State or awarded vendor who ensures compliance with the contract terms and conditions while giving attention to the achievement of the stated output and outcome of the contract.
- F. **Construction** means the process of building, altering, repairing, improving, or demolishing any public structure or building, or other public improvements of any kind to any public real property. The term includes the routine operation, routine repair, or routine maintenance of existing structures, buildings, or real property. **NOTE: ANY RESULTING CONTRACT TO THIS RFP WILL NOT INCLUDE SERVICES TO SUPPORT CONSTRUCTION PROCUREMENT.**
- G. **Contractor** means the person having a contract with a governmental body.
- H. **Fixed-price basis** means an established price agreed upon by the Contractor and Purchasing Entity, by agreement or by authority, as the price to be charged for a specified number of services.
- I. **Goods** means all property, including but not limited to equipment, equipment leases, materials, supplies, printing, insurance, and processes, including computer systems and software, excluding land or a permanent interest in land, leases of real property, and office rentals.
- J. **Governmental body** means any department, commission, council, board, bureau, authority, committee, institution, legislative body, agency, government corporation, or other establishment or office of the executive, legislative, or judicial branch, city or county of any U.S. State.
- K. **Grant** means 1. A transfer of federal government funds to state or local governments to support



- or stimulate programs authorized by federal or state laws in order to accomplish objectives that are locally defined and managed under a broad federal or state program. 2. The furnishing of assistance by a jurisdiction, whether financial or otherwise, to any person to support a program authorized by law; does not include an award whose primary purpose is to procure supplies, services, or construction.
- L. **Inherently Governmental Duties** means those duties which shall only be performed by a government employee.
- M. **IT Consulting Services** means services provided by firms who focus on providing the following services: writing, testing and supporting custom software; planning and designing integrated hardware, software and communication infrastructure; and on-site management of computer systems and data processing facilities.
- N. **Key Performance Indicator (KPI)** means how a quantifiable measure is utilized to assess the success of a Contractor in meeting strategic goals and objectives for performance.
- O. **Lead State** means the State conducting this cooperative procurement, evaluation, and award, which for this procurement is North Carolina.
- P. **Market Research** means the gathering and studying of data relating to consumer preferences and purchasing power. In relation to the procurement life cycle, Market Research means the examination of available sources of information to find available sources of supply to meet the needs of any given procurement.
- Q. **Market Research Plan** means the process that one will follow to gather, analyze, and interpret information about a particular market. The plan would define market research approaches and include different types of market research to undertake for maximum impact.
- R. **Offeror** means the company or firm who submits a proposal in response to this Request for Proposal.
- S. **Prime Contractor** means the Contractor awarded a contract in either award category, PASS or IT RAC.
- T. **Proposal** means the official written response submitted by an Offeror in response to this Request for Proposals.
- U. **Proposer** has the same meaning as Offeror.
- V. **Request for Proposals or "RFP"** means the entire solicitation document, including all parts, sections, exhibits, attachments, and Addenda.
- W. **Statement of Work** defines the services to be delivered by the Contractor. Note: For the purposes of this RFP, statement of work describes the services within a Task Order when requesting quotes from awarded Contractor(s).

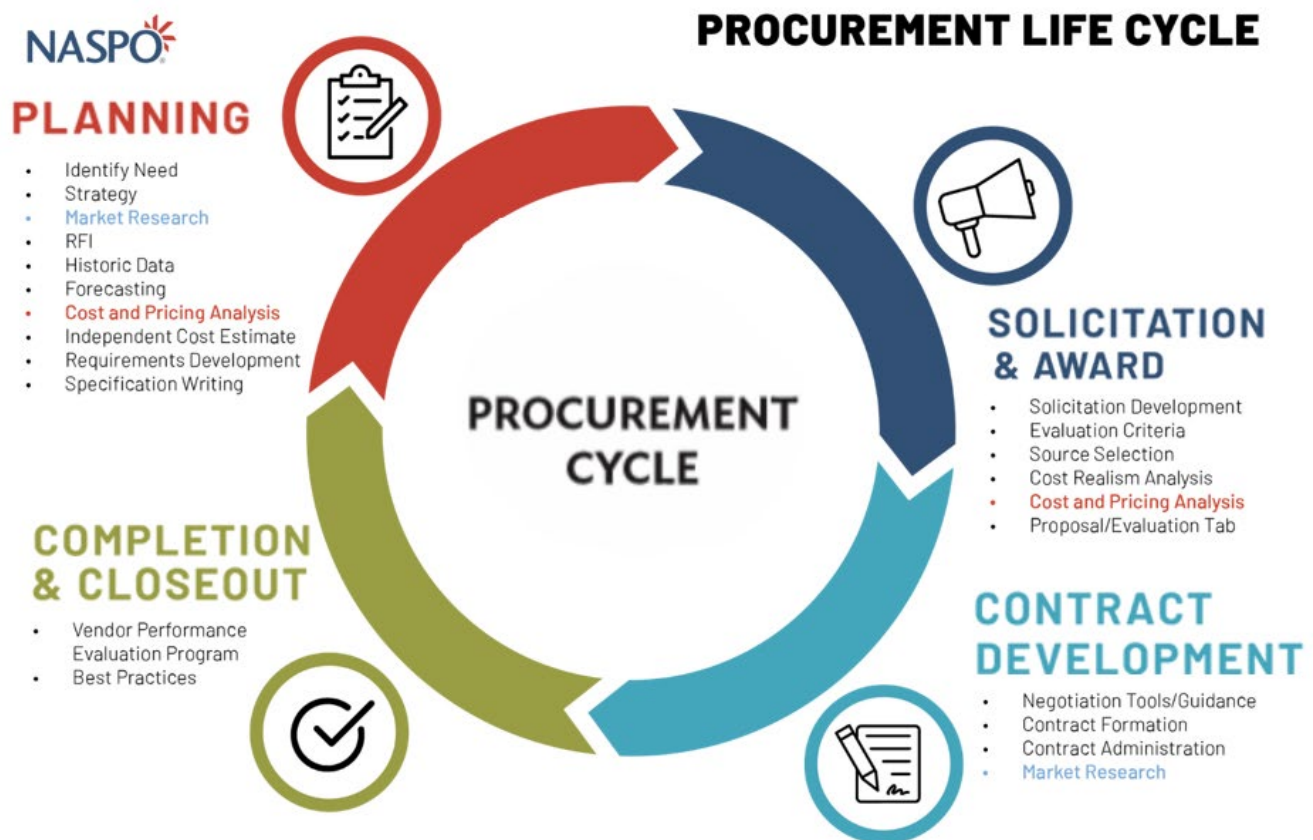


- X. **Subcontractor** means a Contractor contracted for work by the Prime Contractor.
- Y. **Target Market** means a particular group of consumers at which a product or service is aimed.
- Z. **Task Order** means work needed by a Participating Entity to be performed by the Contractor. The Task Order document contains information about the expected performance of services (Statement of Work), timeline and deliverable(s).

## II. Introduction

The State of North Carolina's Department of Administration (DOA) on behalf of the participating NASPO ValuePoint states plans to establish a vendor list for procurement assistance and support services and IT research, advisory, and consulting services. The objective is to provide a wide range of professional procurement support services to North Carolina and any of the other forty-nine states, District of Columbia, and US territories (that choose to participate) in the areas of planning and market research; pre-award and source selection; post-award contract management; policy support; category management; and vendor performance review planning and other support services.

The diagram below depicts services that support procurement activities based on a general procurement lifecycle. The list of potential services within a procurement life cycle **includes but is not limited** to the following items:





This portfolio is intended to supplement resources to assist procurement personnel to obtain the desired goods and/or services. For example, if the agency has the need to procure IT consulting services, the Procurement Assistance and Support Services (PASS) Contractor(s) will assist in writing specifications and/or develop an RFP and/or provide any other procurement support services that will provide the Purchasing Entity with a resulting contract for such good or service.

It is important to recognize that the government/state/city organization has fundamental inherent government functions that should not be delegated to a Contractor. When it relates to procurement, government personnel should be making final decisions. Federal Procurement Law defines inherent functions as those to be performed only by government employees. The State of North Carolina, Department of Administration (DOA) recommends this guidance as a good procurement policy and considers the following responsibilities as inherently governmental functions:

- Determining what supplies or services are to be acquired by the Government;
- Approving any solicitation documents, to include documents defining requirements, specifications, incentives, and evaluation criteria;
- Negotiating;
- Awarding contracts;
- Approving post-award contract changes to include, but not limited to, ordering changes in contract scope, schedule, budget;
- Responding to evaluations of Contractor performance and accepting or rejecting Contractor products or services; and
- Terminating contracts.

It is the responsibility of the Purchasing Entity placing the order to make the determination if an action must be performed by the government or may be performed by a Contractor. Ordering activities must require prospective Contractors to identify potential conflicts of interest and address those, prior to task order award. For more information, see Attachment B Scope of Work.

### **III. Contractor Responsibility**

The Contractor shall be able to provide **all services in either Award Category 1 (PASS) or Award Category 2 (IT Research, Advisory, and Consulting Services)** described below. If the Contractor does not maintain the subject matter expert in-house, it will be their responsibility to secure the services needed as the Prime Contractor.

### **IV. General Requirements**

Contractors shall be responsible for meeting the general requirements applicable across all categories. These requirements include:

- Experience
- Customer Service
- Management
- Quality Control
- Personnel/Staffing



Contractors are expected to maintain the highest standards of these requirements throughout the life of the contract and must require all Subcontractors to attest to the same standards of service.

**V. Task Orders**

During the Master Agreement term, Contractor may be required to provide services for a particular project(s), which is agreed to via a Task Order(s). The Participating Entity shall define the specific objective(s) to be performed by the Contractor including but not limited to; the project scope of work, and implementation schedule milestone(s) including payment milestones.

**A. Participating Entity Initial Project Needs Assessment:**

1. Upon Participating Entity's request, Contractor shall schedule at a mutually agreed date and time, an initial Participating Entity needs assessment consultation meeting ("Needs Assessment Meeting").
2. Prior to the initial Needs Assessment Meeting, Participating Entity may provide Contractor an agenda including but not limited to, the following items:
  - a. An introduction of Participating Entity participants;
  - b. An overview of potential project scope(s) and/or statement of work deliverables, an overview of Participating Entity's intended outcomes, goals and objectives, an overview of post project management deliverables to ensure completion and/or implemented.
3. Within three (3) business days upon the completion of the Needs Assessment Meeting, Contractor shall provide Participating Entity a summary of the deliverables to be incorporated into a task order. The task order(s) document must include but not be limited to:
  - a. Identification of Participating Entity stakeholders and/or Participating Entity project management supervisor(s)
  - b. A breakdown of labor categories and hours. If requested, resumes of personnel assigned to the task order.
  - c. The proposed total cost pursuant to the Task Order; and
  - d. Specific anticipated benefits, cost savings, and anticipated outcomes for each Participating Entity approved service(s).

**B. Statement of Work Development:**

1. In collaboration with Contractor, Participating Entity shall finalize the statement of work.
2. Statement of Work requirements include, but are not limited to:
  - a. A description of the project objective(s), scope of work(s), timeline, milestone(s) and/or implementation schedule(s), total cost summary including in person training or virtual requirements as requested by Participating Entity.
  - b. Specific Contractor Deliverables including, but not limited to, reports, charts, graphs, presentations, and deliverables as required by the Participating Entity



c. Goal and outcome measures.

**C. Contract Services**

1. Status reports (as required by the Purchasing Entity): The Contractor shall provide, electronically, a Monthly Status Report (MSR). Distribution of this report will be determined by the Purchasing Entity. The MSR shall focus on contractual items, such as travel cost expenditures, performance, personnel, schedules, and recap all problems, issues, concerns, and actions taken over the report period. The format of the MSRs shall be agreed to by Purchasing Entity. The Contractor shall prepare a MSR that includes:
  - Overall status of services and capabilities
  - Schedule for new activities
  - Existing and potential problem areas and proposed resolution and timelines
  - Proposed recommendations for improvements/enhancements to service, capabilities, management procedures, as appropriate

Deliverable: The Contractor shall provide the Monthly Status Reports no later than the 15<sup>th</sup> day of each succeeding month, commencing no later than 45 days after contract award or as agreed by the Purchasing Entity.

2. Quarterly In-Process/Status Reviews (IPRs) (as requested by the purchasing entity): The Contractor shall organize and present quarterly (IPRs) as requested. The method and schedule for these reviews shall be in the Contractor's Program Management Plan approved by the purchasing entity. The objectives of these reviews are to track project progress, identify and resolve issues, and identify project risks and mitigation strategies. The Contractor shall submit to the purchasing entity an "Action Item Report" 15 days after the meeting has taken place that documents what was agreed to by the purchasing entity and Contractor and what the Contractor is doing to resolve outstanding issues, all of which would not impact the contract price or costs, schedule or terms and conditions of the contract.

The Contractor shall present the following at each review:

- a. Review of all open items and issues.
- b. Status of each outstanding task.
- c. Data collected from continuous evaluation of the work performed using benchmarks and metrics designed to improve its quality, user-satisfaction, and cost effectiveness, including information on "lessons learned" and best practices.
- d. Self-assessment of their performance against the performance measures delineated in the Performance Management Plan (PMP) to include the methods, metrics and data used
- e. Contractor recommendation to the Government on changes to the contract for improving the overall quality of services, to include implementation plans, schedules, savings, avoidances, benefits, and impacts associated with the recommendation(s).





**D. Services – Purchasing Entity Furnished Materials and Facilities**

Facilities, Supplies and Services - Work may be performed at a Purchasing entity provided facility, digital or telework (offsite). Basic facilities such as work space and its associated operating requirements (i.e., phones, desks, utilities, information technology, consumable and general-purpose office supplies) may be provided while working in a Purchasing Entity facility.

Information - The Purchasing Entity may provide information, material and forms unique to the Purchasing Entity for supporting the task. All Purchasing Entity unique information related to a requirement, which is necessary for Contractor performance, may be made available to the Contractor. The Purchasing Entity will identify the point of contact for identification of any required information to be supplied by the Purchasing Entity.

Documentation - All existing documentation, relevant to a task accomplishment, may be made available to the Contractor. The Contractor will be required to prepare documentation in accordance with defined guidelines provided by the Purchasing Entity.

**E. Travel**

The Contractor may be required to travel in performance of orders issued under this contract.

The Contractor shall be reimbursed actual cost of all travel conducted while providing the services in accordance with statements of work and respective Purchasing Entities' regulations. Allowable travel and State per diem charges will be agreed upon at the time work is requested. Thus, all travel shall be pre-approved.

The Contractor shall perform all travel necessary to accomplish the tasks contained in a task order. At a minimum, the Contractor shall be prepared to travel in conjunction with studies, vendor site visits, and to provide support at Purchasing Entity meetings. All travel requirements shall be approved in advance by the Purchasing Entity. The Contractor shall be responsible for making all travel arrangements.

Costs for transportation may be based upon mileage rates, actual costs incurred, or a combination thereof, provided the method used results in a reasonable charge. Travel costs shall be considered reasonable and allowable only to the extent that they do not exceed, on a daily basis, the maximum State per diem rates in effect at the time of the travel.

If the additional expenses are not justified and approved by the Participating Agency, Contractor will be responsible for paying the difference.

**F. Post Award Management Plan**

1. **Quality Control.** The Contractor shall provide quality services/products and management oversight of all processes. The Contractor shall provide accurate data/reports and meet task order objectives, with emphasis on overall success and positive impact to the acquisition program and organizational mission. The Contractor shall provide for the management and support of personnel, to include training, guidance, and supervision of qualified personnel to accomplish the task order.
2. **Performance Management Plan (PMP).** The Contractor shall develop and maintain throughout the contract, a Performance Management Plan (PMP), that shall be used as a



foundation for technical direction, resources management planning and the method of assuring quality performance during this contract. The plan shall include the approval process to replace any key personnel, when applicable.

3. The PMP shall include, but not be limited to, the following information:

- Planned initiatives and key events
- Staffing Plan
- Contractor/Government Organizational relationships, including Subcontractors and problem escalation process
- Subcontract Management (if applicable)

The PMP shall be approved by the Lead State Contract Administrator (CA), and there will be no deviation from the PMP, unless agreed to by the Contractor and CA. Where the Contractor identifies deviations from the plan, the Contractor shall provide the supporting rationale necessitating the deviation, in a written submission to the CA. It is the Contractor's responsibility to keep the PMP up-to-date.

Deliverable: The Performance Management Plan shall be submitted for approval to the CA no later than 90 days after contract award.

**G. Additional Contractor Requirements**

- Each Contractor shall:
  - Adhere to its Contract with the Lead State and Purchasing Entities;
  - Provide all labor, materials and equipment necessary to meet the RFP Requirements;
  - Communicate contract requirements to its Subcontractors' personnel and direct and coordinate project activities to ensure that the services progress efficiently and are completed on schedule;
  - Ensure that it is current with all payments and registration fees and similar financial obligations owed to the Lead State and Purchasing Entities during the term of its Contract with the Lead State and Purchasing Entities;
  - Fully cooperate and maintain effective communication with the Lead State and Purchasing Entities and cooperate in the resolution of problems, suspected problems or potential problems;
  - Comply with all required reporting both to NASPO as well as any State with an executed Participating Addendum.

**VI Service Expectations**

The following describes the expectations within each award category and expected outputs for each subcategory that are within the scope of work of the Master Agreement. These services are actions that may be utilized throughout the procurement lifecycle and may be required at any phase.





## Category 1 – PASS:

An Offeror may click on the hyperlink for each subcategory and will be taken to the corresponding location in the document for the applicable requirements.

Subcategory 1	<a href="#">Procurement Strategy/Strategy Plan</a>
Subcategory 2	<a href="#">Independent Government Cost Estimate</a>
Subcategory 3	<a href="#">Specifications/Scope of Work Review</a>
Subcategory 4	<a href="#">Market Research</a>
Subcategory 5	<a href="#">Cost &amp; Pricing Analysis</a>
Subcategory 6	<a href="#">Solicitation Review or Preparation</a>
Subcategory 7	<a href="#">Source Selection</a>
Subcategory 8	<a href="#">Cost Realism Analysis</a>
Subcategory 9	<a href="#">Contract Development/Contract Formation</a>
Subcategory 10	<a href="#">Contract Management</a>
Subcategory 11	<a href="#">Vendor Performance Evaluation Program</a>

### 1. Subcategory One – Procurement Strategy/Strategy Plan

The procurement team is made up of stakeholders that will participate in developing the procurement strategy plan. Stakeholders are individuals who have an interest in the needed goods or services. These individuals provide a significant contribution to the effort based on their subject matter expertise of the project scope or deliverables. Depending on the complexity of the procurement, support services may be needed to develop the plan. Services within this category are as follows:

1. Procurement Plan Development/Review. Contractor shall provide services to include advice and recommendations for all elements in the plan, including approaches, options, strategies, risks, contracting methods, competition, sources, cost, milestone schedule, etc. If not available in-house, the subject-matter-expert(s) shall be obtained/contracted by the awarded Contractor(s) for this category. The plan should contain the following information:

#### Acquisition Background

Description of Requirement/Statement of Need  
 Conditions  
 Background and Contract History  
 Contract Type: Unit costs or lump sum  
 Performance Period  
 Capability and capacity of Performance  
 Estimated Schedule  
 Estimated cost/budget

#### Plan of Action

Service Description  
 Potential Sources  
 Market Research Results/Interested Sources  
 Acquisition Approach  
 Competition  
 Source Selection Procedures



Contracting Considerations or Incentives  
Other Considerations

**Contract Administration**

Surveillance:   Monitoring timelines with milestones  
                      Monitoring performance during contract period  
                      Verifying contractor's performance of SOW through checklist(s)

2. **Research/Reports.** The Contractor shall research existing Government-wide contracts for available products and services. Contractor shall evaluate different approaches to and sources for acquisition support. Contractor shall research available suppliers and compare the services and costs of obtaining support from different providers. Information gathered shall be provided in a report form for use in the development of a procurement plan.

Contractor shall provide advice and recommendation for all elements in procurement plans, including approaches, options, strategies, risks, contracting methods, competition, sources, cost, milestone schedule, etc. Research existing Government-wide contracts for available products and services. Evaluate different approaches to and sources for procurement support. Research available suppliers and compare services and costs of obtaining support from the different providers.

Outputs: Written acquisition/procurement plans.

## **2. Subcategory Two – Independent Government Cost Estimate**

An Independent Government Cost Estimate (IGCE) is a tool developed by government personnel to estimate the costs incurred by a Contractor in the performance of a contract. An IGCE is generated by the government, who may utilize and obtain input from an outside Contractor. Such Contractor remains confidential and will not be allowed to respond to a solicitation for which it participated in the IGCE in any manner whatsoever. The IGCE is an unbiased realistic cost estimate that reflects a clear understanding of the requirements. IGCEs serve various functions as:

- A projected, anticipated, or probable cost;
- A benchmark for establishing cost/price analysis;
- An analysis of reasonable and required resources to perform the contract; and
- A justification for decisions made throughout the procurement life cycle.

Specifically, IGCEs are used to project and reserve funds for acquisitions, determine if assumptions in a cost proposal are based on the same or similar assumptions, and determine fair and reasonable pricing.

This category of services is for **consultation and/or assistance in the development** of IGCEs. Government agencies do not always have sufficient resources or expertise to conduct these cost estimates on their own and may rely on third party Contractors to generate these reports on their behalf. Contractors providing these services under the resultant cooperative agreement shall be required to sign non-disclosure agreements and may not have a vested interest in the contract for which the Contractor is generating the estimate. Contractor must be unbiased and objective in its approach and methodologies.



Services within this category are as follows:

1. **Data Collection.** Contractor shall collaborate with the agency to gain a thorough understanding of the contract scope of work for which the IGCE is being generated. Contractor shall establish a plan that identifies stakeholders and other resource requirements necessary to generate the IGCE, including a schedule that specifies the start date and delivery date for the final report, and a list of all potential sources of information required to complete the cost estimate.

At a minimum, the Contractor shall request and receive the following information:

- Statement of Work (SOW) and supporting scope documents (solicitations, drawings, plans, etc.)
- Any agency-developed cost estimates or contractor cost proposal and technical approach.
- Basis of Estimate (BOE), including a description of the scope, methodologies, references and defining deliverables, assumptions and exclusions, clarifications, adjustments, and level of uncertainty.

Other documentation or information that is useful in performing an IGCE include, but are not limited to:

- Past purchases of similar products or services
  - Market research and knowledge of current economic conditions
  - Proposal narrative, including background
  - Work Breakdown Structure (WBS) and WBS Dictionary
  - Project schedule
  - Risk management plan
  - Rates for fees or other mark-ups
  - Lists of government-furnished property, equipment or services
  - Cost estimate back-up documentation such as contracted labor rates and associated mark-ups, subcontracted quotes, specification sheets, purchase orders, and catalog cut sheets
2. **Sufficiency Review.** Once all requested information has been received, Contractor shall review the information for sufficiency to ensure adequate quantity and quality of data exists to develop an accurate and effective IGCE. The Sufficiency Review serves to:
    - Determine all costs involved in performing the contract scope of work, including any direct and indirect costs as well as contractor profits and fees.
    - Examine the information to ensure that it meets the technical requirements for its intended purpose.
    - Determine whether the information is clearly documented, well organized, and presented at an appropriate level of detail, and that summary documents are traceable to the supporting documentation.
    - Look at the depth and breadth of the supporting documents, and data contained therein.



The Sufficiency Review may determine that certain documentation is insufficient for proceeding with the cost estimate. In such instances, Contractor shall notify the agency, provide a list of the documents that are insufficient, and provide reasons for the finding or specific information needed to make the document acceptable.

3. Data Analysis. Data Analysis consists of two components: review and analysis. The review component consists of an in-depth examination and qualitative analysis of all the sufficient information requested and received as part of Data Collection. Contractor shall conduct a thorough review of the SOW, agency-developed cost estimates or contractor-developed cost estimate or proposal, BOE, and any other sufficient information received. Contractor shall apply the appropriate estimating methodologies to the data to generate the IGCE.

Once the IGCE is generated, the estimate must be validated. Contractor shall employ the appropriate cost-validation techniques to test the cost estimate and determine whether it is reasonable and includes all necessary costs. Some commonly-accepted techniques include spot checking and preparing a check estimate. Offerors shall detail in their proposals the cost-validation techniques they utilize to validate cost estimates.

4. Results Reporting. Contractor shall prepare an in-depth IGCE report detailing its findings. The IGCE report prepared by the Contractor shall describe the BOE and provide the agency with recommendations based on the findings to assist in decision-making throughout the procurement life cycle. Contractor may be required to update the IGCE report as the acquisition progresses through the different phases of the procurement life cycle.

Contractor shall provide services that may include but are not limited to research and analysis of past purchases of similar products or services, current market value of the products or services, or other agency purchases of similar products and services.

Outputs: IGCEs.

### 3. Subcategory Three – Specifications/Scope of Work Review

After a need is determined, the quality, price and the performance of a product or service depend almost entirely on the purchase description used to communicate the requirement. If a specification was used as a method of describing the requirement, which mostly happens for services, that specification must be clear and concise. Challenges by potential suppliers, costly delays in completing a project or unnecessary problems further down the line are, in most instances, attributed to an improper, inadequate description of definition or requirements. The additional effort spent at the beginning of the procurement lifecycle increases the probability of full satisfaction in meeting the needs of the end-user, procurement and contract specialist and Contractor/supplier.

This category of services is for the **review and/or assistance in development** of a scope of work (SOW) or specification(s). If not available in-house, the technical specification development by a subject-matter-expert shall be obtained/contracted by the awarded Contractor(s) for this category. Services within this category are as follows:

1. Review Services. Provide recommendation to amend/develop specifications/SOW to produce



correct, clear, and concise obligations of all parties with respect to the needed goods or services. Review services shall include verification, validation, and recommendation so that the SOW/specifications for needed goods and/or service clearly identify how the specification/SOW may be amended/changed to reflect the following:

- The wording of the scope shall be precise.
  - The overall message should be clear and understandable.
  - The specification should simplify the process.
  - The tolerances should be reasonable.
  - The scope/specification should provide a relatively easy process to verify acceptance or rejection.
  - The specification should be exact.
  - The specification should not be restrictive, but be broad enough to allow competition. If, however, there is justification for a restrictive specification/SOW, the report/recommendation shall provide a clear explanation for the need of the restrictive specification.
  - The specification/SOW should provide some built-in flexibility that is applicable to the industry.
2. Requirement Analysis. Requirement analysis is value analysis applicable to the writing of specifications or SOW to eliminate products and services that are not cost effective. The Contractor shall identify and make recommendations to specifications or SOW to ensure that an agency will obtain the best products or services that are available in the market at fair and reasonable prices. Requirement analysis services shall include review, analysis and recommendation and clearly identify how the specification/scope of work may be amended/changed to reflect the following, as applicable:
- Eliminate a requirement that is not cost effective.
  - Improve the quality level without impacting the cost(s).
  - Describe requirement(s) of quality standards to increase the service life.
  - Achieve total value, i.e. not only initial expense as the award factor.
3. Specification Writing (Technical). Contractors' support team members shall possess strong communication skills and expertise in needed topics and programs. In addition, technical writers must have the skills to research and effectively interview subject matter experts (SMEs), if they are not the SMEs themselves. The technical writer should gather information and communicate complicated ideas in a clear and informative manner.

Contractor(s) shall be able to provide specification writing services for all types of specifications, such as design, specifications, performance specifications, or market grades to name a few.

The Contractor shall assist in the development and preparation of pre-award Request for Information (RFI), Statements of Work (SOW), Statements of Objective (SOO) and other requirements documents. This effort includes assisting in researching and drafting specifications and standards, including Performance-based Work Statements (PWS); developing performance measures, providing consultation and recommendations; and coordinating requirements documents. Note: State to state may vary on what they call SOW, i.e. statement of work, statement of need, scope of work, etc.



Outputs: SOWs; SOOs; PWSs; and related documents, i.e. restrictive specifications justification.

Surveillance:   Monitoring timelines with milestones  
                      Monitoring performance during contract period  
                      Verifying contractor's performance of SOW through checklist(s)

#### **4. Subcategory Four – Market Research**

Market Research is a necessary step to identify available sources to meet the needs of any given solicitation. Market research refers to the examination of available sources to find the available sources of supply which may identify critical business requirements. Due to limited resources or timing, agencies may require the assistance of an outside Contractor to provide necessary data to develop a solicitation that will reach the widest distribution possible.

This category of services is for **consultation and/or assistance with market research services**. Services within this category are as follows:

Market Research Services – Contractor shall research available suppliers and compare the services and costs of obtaining goods or services from different providers. Information gathered shall be provided in a report form for use in the development of a competitive solicitation. The Contractor shall provide advice and recommendation for all elements in market research, including approaches, options, strategies, risks, methods, competition, sources, cost, milestone, etc. Research existing Government-wide contracts for available products and services. Research available suppliers and compare services and costs of obtaining support from the different providers.

The market research team should consider the following:

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- The overall budget for the project should be clearly stated and the funding source should be identified prior to commencement of services.
- The Market Research Plan should be agreed upon by all parties before any commencement of services.
- The methodology to be used should be clearly specified and agreed upon by all parties.
- The research should have a simplified process.
- The target markets should be clearly identified.
- The research should be broad enough to capture the largest possible data set.
- The research should not be overly restrictive.
- The research should provide some built-in flexibility that is applicable to industry.

Outputs: Market research documentation.

#### **5. Subcategory Five – Cost & Pricing Analysis**

A Cost & Pricing Analysis conducted before a Request for Proposal (RFP) is released will assist a State in determining how to capture all costs related to a project, determine which method is best for evaluating cost, and if the budget for said project is realistic. Cost & Pricing Analysis is a key component to predicting the viability of a project. Because of limited resources or timing, agencies may require the assistance of an outside Contractor to assist with a Cost & Pricing Analysis for stakeholder review.





Cost & Pricing Analysis may also be conducted after BAFOs are received. Cost & Pricing Analysis may also be conducted post award for contract renewals, modifications, or assistance in determination of termination due to non-compliance with contract terms.

This category of services is for **consultation and/or assistance with cost & pricing analysis services**. Services within this category are as follows:

Cost & Pricing Analysis – Contractor shall assist in developing estimated cost and price elements for the work to be performed to prepare analyses for Stakeholders to make sound decisions on the financial viability of a project.

Cost & Pricing Analysis services shall include, but are not limited to:

- Developing plans and alternatives for effective price competition
- Informing states of impact of budget on technical, contract, and pricing outcomes
- Developing approach for State's/Stakeholder' budget planning
- Developing cost proposal solicitation documents to aid states in the development of the RFP
- Analyzing contracts/programs to assess price competitiveness
- Providing alternatives and research for stakeholders
- Providing estimates (case-by-case based on need of State/Stakeholder).
- Demonstrating value of RFP and/or new system/product to State/Stakeholder
- Providing a Make-or-buy analysis
- Providing a Go, no-go analysis
- Developing and analyzing BAFO requests
- Determining that the prices submitted by Offerors are acceptable, fair and reasonable
- Providing cost analysis during RFP evaluation – services performed to help States/Stakeholders analyze the cost proposals of several vendors to find best value
- Developing evaluation support documentation to help States/Stakeholders validate the reasonableness of proposed labor rates as well as indirect rates (fringe, overhead, general and administrative, and materials)
- Performing independent review of each cost element within an Offeror's cost proposal
- Providing post-award services (contract renewals, modifications, assistance in determination of termination if not in compliance with contract terms)
- Burn Rate Analysis
- Analysis of Change Orders & Modifications
- Award fee/incentive fee analysis
- Closeout payment analysis

Outputs: Cost and pricing analyses.

## **6. Subcategory Six – Solicitation Review or Preparation**

The solicitation document is the official document inviting the vendor community to respond to the needs of the government entity. The solicitation should foster competition and ensure fair and equitable treatment of interested parties. Competition has multiple levels. Competition exists not only in prices



but also in the technical competence of the vendors and in the quality of their products or services. The request for proposal process allows the opportunity for vendors to submit innovative solutions, increasing the Government's latitude of choice and assuring the reasonableness of costs.

This category of services is for the **review and/or development** of a solicitation document. Services within this category would be as follows:

1. Review Services Contractor shall provide recommendation to amend/develop any part of the solicitation document to produce correct, clear, and concise obligations of all parties with respect to the needed goods or services. Review services shall include verification, validation, recommendation to improve at minimum the following sections of the solicitation:
  - Scope of work, statement of work or specifications.
  - Standard bid/proposal clauses such as bid guarantee, indemnification, intellectual property rights, insurance, etc.
  - Evaluation criteria.
  - Bidder/Offeror qualifications.
  - Proposal format.
  - Administrative and Technical Response Requirements.
  - Price and Cost sheets.
  - Contract administration, post award.
  - Payment terms.
2. RFP Development. Contractor shall develop and prepare the solicitation document, which may be a request for quotes (RFQ), request for proposals (RFP), including two-step process solicitation or any other hybrid solicitation within the system of that State. The solicitation shall include all appropriate solicitation terms and conditions applicable

Outputs: Solicitations

## **7. Subcategory Seven – Source Selection**

The nature of the source selection planning process, the techniques for obtaining information, the procedures used in evaluation, and the decision-making methods vary from procurement to procurement. Source selection planning entails: preparing to receive bids or proposals, preparing to apply evaluation criteria, and determining standards to select a Contractor. Proposals are often separated into technical and price sections with each evaluated separately. Evaluation may be complex, requiring a panel of experts. Some proposal evaluation may require a consultant's assistance. The Source Selection Plan (SSP) should include: evaluation criteria, evaluation standards, weighting system, screening system, and source selection process.

This category of services is for **assistance in preparation of a source selection plan and source selection activities**. Services within this category are as follows:

Source Selection – Contractor shall develop and prepare source selection plans, in accordance with State statute and rules; instruct evaluation team members on roles and responsibilities; act in the capacity of an advisory role during the evaluation, which may include cost estimating or technical subject matter



expertise; ensure Conflict of Interest/Nondisclosure forms are signed; prepare evaluation sheets or score sheets; and prepare draft of source selection decision memorandum.

Outputs: Source Selection Plans (SSP), Evaluation Sheets

## **8. Subcategory Eight – Cost Realism Analysis**

Cost Realism Analysis is usually conducted after cost proposals have been received in response to a RFP. Cost Realism Analysis may be requested by States to determine if all components of cost have been contemplated from all vendors. Determining if cost proposals are acceptable and fair will assist States in a successful evaluation and award of a contract which is in the best interest of the State. Cost realism is about the system of logic, the assumptions about the future, and the reasonableness of the historical basis of the estimate. It's about the estimating information (cost data) that makes up the foundation of the estimate.

This category of services is for **consultation and/or assistance with cost realism analysis services**. Services within this category are as follows:

**Cost Realism** – The Contractor shall independently review and evaluate specific elements of each Offeror's proposed cost estimate to determine whether the cost estimate is realistic for the work to be performed; reflects a clear understanding of the requirements; and is consistent with the unique methods of performance and materials described in the Offeror's technical proposal. Cost realism analysis is conducted by evaluating the supportive data that form the bases of the individual elements of cost to determine probable cost of the performance. The probable cost shall be used for the purposes of evaluation to determine the best value. The probable cost is determined by adjusting each Offeror's proposed cost, and fee when appropriate, to reflect any additions or reductions in cost elements to realistic levels based on the results of the cost realism analysis.

**Probable Cost Estimate:** is the Purchasing Entity's estimate of what it will cost for the Offeror to complete the contract based on the Purchasing Entity's evaluation of the offeror's technical proposal and proposed costs. This estimate is complimentary with and must be performed in conjunction with all cost realism analyses and is a principal product of the Purchasing Entity in the source selection evaluation process.

Cost Realism services shall include, but are not limited to:

- Determining the Offeror's price is realistic for the work proposed
- Understanding and implementation of contract risk factors
- Developing a Purchasing Entity's probable cost estimate
- Conducting cost to technical realism analysis

Outputs: Cost realism analyses.

## **9. Subcategory Nine - Contract Development/Contract Formation**

The goal of contract development is to reduce in writing contract goals, contract type and contract elements. Identification of contract goals include the description of goods or services; delivery



information (if applicable); protection of the financial interests of the agency; and any potential areas of dispute such as defining acceptance, handling wrong product, delays, personality conflicts, breach, payment or changes in a contract. The goals also include change order procedures.

The Contractor shall provide assistance to the government entity in the formulation of the contract between the awarded vendor and government entity.

This category of services is for **consultation and/or assistance with contract development**. Services within this category are as follows:

#### Contract Development

Requirements of the contractor, and/or their sub-contractor will include:

- A general working knowledge of each individual state's procurement rules and regulations.
- A general working knowledge of the entity's General Terms and Conditions.
- Appropriate staff with the level of experience to handle the different needs or difficulties of the contract.
- To be able to work with the state entity to develop a schedule for completion of the contract.
- Must have existing legal staff available to vet the contract for each entity's legal requirements.
- Must be able to interact with the awarded vendor's attorney to produce a contract that is amicable to both parties.
- Must be able to format the contract to the entity's preference.
- Must provide pricing for the different levels of staffing that will provide service.
- Will be required to be available to administer and manage supplemental agreements or legal issues that arise out of the formation of the contract for the duration of the contract.

Outputs: Contract documentation.

### **10. Subcategory Ten – Contract Management**

**Contract management refers to post-award type activities, such as contract implementation, contract administration, measurement of work completion and payment computation.** Moreover, it involves the monitoring of a contract, making important changes and modifications to the contract and dealing with related problems. Activities in contract management facilitate a positive working relationship between the government customer, procurement staff, and the contractor for the successful implementation of the contract award. Acquisition consultants can assist the government procurement staff and program managers in various capacities of administration and facilitation with the contractor, not including any inherent governmental duties.

Services within this category are as follows:



1. **Contract Administration.** Manage the relationship between the Contractor and end user, including the monitoring contract fulfillment on the part of government agencies. Development of the Contract Administration Plan (CAP) which will define how the contract will be administered. Monitor contractor compliance with terms of the contract, including site visits and labor interviews.

The CAP provides a mechanism to reconcile the various contract documents and the order of precedence into a management tool that can be used to focus and govern implementation activities. The plan itself will vary based on the complexity, risk, and scope along with the requirements of each contract. In many cases a CAP should only be developed for high-risk or highly complex procurements. The frame of the plan should focus on the Who, What, When, Where, and How of contract administration. CAPs generally address a common set of topics, with particular emphasis on process, output and outcome. In government contract management, there may be less emphasis on the “process” the contractor uses to achieve the goals of the contract than of the achievement of the expected outputs and outcomes.

While Contract Administration Plans generally share a similar structure, the inclusion of each topic into the CAP should be chosen based on necessity rather than out of formality. Contract Administration Plan topics may include:

- Project description
- Period of performance
- Schedule, critical milestones and/or delivery dates
- Critical path tasks and deliverables
- Roles and responsibilities
- Data and reporting
- Inspection and acceptance
- Personnel requirements
- Testing
- Warranty provisions
- Watch list items
- Special terms and conditions
- Insurance
- Process for managing change and issue resolution

Outputs: Performance Workplan or CAP; Documentation of Contract Performance such as Observation Record, Compliance Record, Discrepancy Record, Unsatisfactory Performance Report, Summary Evaluation Report, Contractor Status Report.

2. **Vendor Performance Plan Development/Review.** The Contractor shall have experience drafting comprehensive plans outlining the agency and vendor responsibilities and requirements in an easy to understand document. The plan must describe processes needed and recommend tools that will guide the contracting agency through the vendor performance evaluation. The plan shall include, but not be limited to, how to:
  - Improve communication between buyers and vendors regarding performance
  - Encourage better performance and accountability through incentives and penalties



- Enable performance analysis through Key Performance Indicators (KPI) and benchmarking
- Capture performance data
- Identify strategic priorities and set targets
- Capture performance data
- Meet strategic priorities and improve programs

The plan shall include the method for scoring and weighting the evaluation criteria and how scores shall be tied to an award or incentive fee determination along with penalties. The plan shall explain how Contractors must receive evaluation criteria, be informed of their performance during the contract, be debriefed at the end of the contract and deal with appeals.

3. Contract Modifications. Assist in the preparation of incentive and award fees. Incentive fees are typically dependent upon the performance over a given period and are usually taken in relation to a benchmark index. Award fees provides an additional profit or fee amount that may be awarded, in whole or in part, based upon periodic evaluations of ongoing contractor performance. Assist in review of directed changes, formal changes to the original contract resulting from the buyer's actions or directions that impact the cost or schedule for performance. Determine if a constructive change has occurred, that is, any action or inaction on the part of the agency that have not been made through a formal change order, which causes the Contractor to perform additional work outside the scope of the original contract. Contractor can assist government procurement staff and program managers in review and recommendation to make the appropriate contract modification.

Outputs: Award or incentive fee determinations; contract modification determination.

## **11. Subcategory Eleven – Vendor Performance Evaluation Program**

Contract closeout involves several activities. Unlike a purchase order where receipt of the items ordered and subsequent payment constitute closure, a contract requires documentation to the contract file that includes a written report with the description and analysis of the Contractor's performance. A quality vendor performance review (aka performance evaluation) assesses how the vendor is performing against Key Performance Indicators (KPI)'s and Service Level Agreements (SLA)'s established in the vendor's contract. However, it can also show non-contractual performance issues, such as incidents that aren't measured by a service level.

This category for services is for the assistance in the development and implementation of a Vendor Performance Evaluation Program. This does not include vendor performance evaluation for construction contracts. Services within this category are as follows:

Evaluation Program. The contractor shall understand and have insights into the requirements needed to develop a vendor performance evaluation program. The contractor shall work with the contracting agency to determine information that is useful in creating a vendor performance evaluation to include, but not limited to:

- When the vendor performance evaluation is needed and how often it should be measured.





- The KPI's, such as contract compliance, customer satisfaction, cost competitiveness, cost control, continuous improvements, and timeliness should be clearly identified along with formulation of templates for the evaluation which shall become standardized.

Output: Key Performance Indicators, Vendor Performance Evaluation Program.

## **Category 2 – IT Research, Advisory, and Consulting Services**

At a minimum, an Offeror responding for Award Category 2, should be able to meet the following:

Contractor will provide Information Technology Research, Consulting, and Advisory services. Information Technology topics may include, but are not limited to, the following:

IT business advice, objective IT research, and IT data that is thematic, prescriptive, and executable, and that provides a comprehensive perspective on the rapidly changing IT environment. Sponsors of research must be identified. Access to an online database containing IT research articles. The database should contain at least 1,000 articles or more including white papers, research reports, webinars, bulletins, summaries, and any other IT research oriented documents published within the last five years.

Response to over-the-phone inquiries regarding published articles and direction on other available resources. Advisory services regarding strategic and tactical planning for customer's IT policy development. On-site workshops, advisory engagements, and conferences on IT related topics.

IT topics may include, but are not limited to, the following:

- Planning and establishing IT policies, procedures, and best practices
- Establishing and implementing IT governance
- Review of new and emerging Information Technologies
- Assistance with IT Procurement and acquisition decisions for IT hardware and software
- Software licensing and Asset Management
- Application/system development
- Data analytics, data management, and business intelligence
- Information security
- Strategic planning and Enterprise Architecture
- Evaluations of industry issues, products, and major trends in the marketplace
- IT Benchmarking
- Digital transformation and Digital Government Services
- IT talent, recruiting, and retention
- TelCom, IP telephony, and call center solutions
- Disaster recovery and business continuity
- Cloud computing
- Mobile device strategy and management
- Emergency response and radio communications
- Enterprise CRM



## Value Add/Support Services

Listed below are examples of additional value add services Offeror may provide under any resulting Master Agreement. These services are optional. Should an Offeror wish to provide these services on a resulting Master Agreement, they must submit a list of additional value add services they offer and prices for these services.

The list of value add services includes but is not limited to the following items:

<b>Value Add 1</b>	<a href="#">Procurement Policy and Digital Procurement Transformation</a>
<b>Value Add 2</b>	<a href="#">Category Management</a>
<b>Value Add 3</b>	<a href="#">Change Management and Procurement Transformation Assistance</a>
<b>Value Add 4</b>	<a href="#">Procurement Training</a>
<b>Value Add 5</b>	<a href="#">Project Management</a>
<b>Value Add 6</b>	<a href="#">Grants Assistance and Management</a>

### 1. Value Add 1 – Procurement Policy and Digital Procurement Transformation

A Purchasing Entity is governed by its states' procurement statutes and rules. Each departmental head is responsible for planning his/her projected procurement needs on an annual basis. A departmental procurement policy provides guidance a purchasing entity should follow to comply with its procurement code. Assistance may be necessary in preparing guidelines and for future planning/implementation for digital transformation.

Services within this category are as follows:

Procurement Policy Writing – Contractor shall assist in developing a high-level overall plan embracing the general goals and acceptable procedures as it relates to the expenditure of governmental funds.

Procurement Policy services shall include, but not be limited to, writing procedures for:

- Appointing and paying consultants
- Appointing and paying temporary staff
- Appointing and paying casual workers
- Procurement planning for good and services
- Vendor Selection, to include:
  - Selection criteria
  - Use of dealers and sole suppliers
  - Recurring purchases
- Procurement Processes
- Procurement Controls

Digital Procurement Transformation Assistance. – Contractor shall assist in researching opportunities for digital procurement transformation, which may include radical reconceptualization and reorganization of procurement strategy, processes, people, skill sets and support systems, triggered by new and emerging digital technologies. Assistance may include, but not be limited to, studying the following areas of digital transformation:



- Business Model Transformation
- Process Transformation
- Domain Transformation
- Organization Transformation – see Category Fourteen

Outputs: Policy analysis and briefings. Policy guides and handbooks. Transformation analysis and white paper.

## 2. Value Add 2 – Category Management

Category management is a strategic approach to purchasing that allocates a government's procurement resources into specific categories of spending to be analyzed by category managers and aligned with the marketplace through in-depth spend and market analyses.

The main objective of Category management is to build efficiencies and maximize purchasing decisions across the agency by reducing duplication in the contracting process; better leveraging the government's buying power, and promoting the use of innovative and best in class solutions.

By consolidating purchases into main areas of spend, category management serves to move the government away from managing purchases and evaluating prices individually across multiple purchasing units to more directly managing entire categories of common spend to deliver better value for the entire agency.

This category for services is for the **assistance in development and implementation of** an action plan for Category Management or Product and Service Catalogs. If not available in-house, the action plan development or implementation by a subject-matter-expert shall be obtained/contracted by the awarded contractor(s) for this category. Services within this category are as follows:

1. Data analysis. The Contractor shall have knowledge of principles and practices in public procurement including category management and have a clear understanding of various types of commodities and government services. Contractor shall be well versed in data analysis including the collecting of historical procurement data and analyzing agency spend data and procurement needs. The contractor shall also conduct in depth spend analysis using the agency's existing code structure (NIGP, NAICS, UNSPC or other). If no code structure exists, the vendor will help to consolidate minor categories and identify major categories of spending.
2. Supplier analysis. The Contractor shall have in-depth knowledge of the supplier marketplace and current economic conditions. The contractor will conduct market analysis to align the identified major categories of spending with the marketplace. Suppliers in the marketplace will be analyzed on their market share, historical changes and overall business health. Emphasis will be put on identifying suppliers that are looking to gain market share and can be leveraged for best prices; and identifying overlaps in suppliers to consolidate categories.
3. Action plan development. The Contractor shall have experience developing specifications and scopes of work aimed at creating efficiencies and reducing costs, developing and executing procurement strategies, driving process improvements and effectively instituting key performance metrics. The contractor shall develop, draft and assist in the execution of an action



plan that details the findings of the data and supplier analyses and provide recommendations for implementing category management organization/agency-wide. Action plans should be inclusive of procurement organization and process changes, including timelines and flow charts of how the organization will move from its existing purchasing structure into a category management structure.

The action plan shall include but not be limited to:

- The purpose, strategic mission and vision associated with the new organization direction and structure of the organization/agency.
  - The development of an ongoing program to analyze purchasing trends, develop options to reduce costs, improve timely delivery, and enhance the purchasing agencies supplier management strategies, including; performance tracking, benchmarking and planning for future category adjustments.
  - The development of a system by which the agency can monitor and track spending data including but not limited to information pertaining to what the agency buys, who it buys it from and what it pays.
  - The step-by-step walkthrough and explanation of requirements for a phased in approach to reorganizing the existing workforce and hiring additional employees to successfully implement a Category Management organization/agency/office structure.
4. Organizational restructure. The contractor shall have knowledge of staffing and management practices as it relates to structuring and organizing a workforce for Category Management. The contractor will be responsible for identifying, communicating and working with stakeholders to identify category managers, category workforce and acquisition workforce. As these stakeholders are identified, the contractor shall collaborate to share the knowledge of the analyses, create insights and trainings designed to serve all stakeholders and align staff with the strategic vision. The contractor will assist in overseeing all hiring and management decisions during implementation to ensure that staffing choices align with the Category Management structure. The contractor will assist in the development of staff evaluations designed to encourage performance and competency within the organization/agency. Upon completion of the restructuring the contractor shall conduct "a lessons learned" and benchmark/milestones presentation to empower the organization/agency to move forward without the need of continuing assistance or consultation.
5. Product and Service Catalogs. The contractor shall have knowledge and experience in e-sourcing and strategic sourcing, including the building of catalogs to consolidate purchasing categories and create ease of access for purchasing agencies. The Contractor shall follow the steps for category management including data and supplier analysis and the creation of an action plan designed for the implementation of organization/agency wide electronic catalog services. The contractor may assist in the development of specifications and evaluation metrics for selecting an appropriate e-catalog provider. The contractor shall also assist in the creation of data collection procedures to track catalog purchases and consolidate catalog categories.



The Contractor shall assist in the planning and implementation of a Category Management procurement process and structure. This effort including assisting in data and supplier analysis as well as the restructuring and staffing of the workforce needed to meet the need of a Category Management system. The contractor may rely on third party tools, methods and best practices to properly empower the contracted organization. All information and insights gathered including the best perceived path forward will be summarized in an action plan, the overarching document for this category that explains all necessary steps to move forward. After the delivery and acceptance of the action plan, the contractor may assist agencies in implementing the changes proposed, including, but not limited to, establishing measurements to track and grow the categories. This includes coming up with benchmarks, projecting future opportunities for efficiencies and category streamlining, creating dashboards and data analytic tools to track the progress of category spend against the benchmarks and creating supplier performance metrics to evaluate suppliers as the categories mature.

Organizations/Agencies may contract through this category for the development of a Product and Services Catalog. The catalog service can be contracted as a stand-alone service or in addition to the Category Management system. Contractors shall deliver an action plan similar to that required for Category Management outlining the steps needed to implement an online Catalog. After delivery and acceptance of the action plan, the contractor may assist in the implementation of the Product and Services Catalog including but not limited to the acquisition of required software and the rollout of the Catalog to the vendor community.

Outputs: Action Plan, Dashboards and other Data Tracking Tools, Product and Services Catalog

### **3. Value Add 3 – Change Management/Procurement Transformation Assistance**

Change management in procurement is a process of adapting changes to a department's way of conducting business. The change could be through new leadership, changes in the procurement law, or digitalization/technology driven. When introducing and managing change, it requires integration, retirement of an old system or process, while adopting new procedures, processes, and workflow. The first step is to prepare a business case, which may include an executive summary, the purpose of the project, option and risks for accomplishing goals, estimated effort and cost of change(s), and timescale for completion. The second step is to assess vendors, users and processes. The third step is to implement changes. And last is to manage the changes. All this information would be described in the organizational change management plan.

The Contractor may not only assist in developing the plan but assist throughout the process by implementing and managing the plan and steps to reach the final goal.

The Contractor shall assist in the process of implementing changes and improvements to the way an organization procures goods and services. For digital procurement transformation see Category Twelve.

Outputs: Organizational Change Management Plan: Business Case; Vendor, User and Process Assessment; Solution.



#### **4. Value Add 4 – Procurement Training**

The Scope of Services provided may include training for any phase of the Procurement Life Cycle and cannot stand alone. In other words, a task order cannot be only for training. Training services resulting from this contract will be available on an as needed basis.

The Contractor must provide a separate line-item pricing for the training.

Unless otherwise agreed upon between the Participating Entity and any Contractor, the Participating Entity will be responsible for providing the following:

1. Training Area: Participating Entity will provide or make available; training locations as may be necessary or appropriate for the Contractor to perform the obligations, inclusive of a virtual platform. Pricing will not be based on a subscription as in content creation or LMS.
2. Equipment: All Equipment necessary to conduct training, if applicable, and as specified in any Task Order.

Outputs: Training Guidance/Manual; Training Videos; Tool Kits

#### **5. Value Add 5 – Project Management**

Contractor shall provide project management services inclusive of planning and execution of a particular public sector procurement project(s) and deliverables pursuant to the Participating Entity's Task Order. Project management in procurement is further defined as tangible actions, processes, outcomes and deliverables performed by Contractor's Project Manager I and/or Project Manager II pursuant to Participating Entity's Task Order with the exception of information technology procurement activities which are prohibited.

At a minimum, and in addition to the minimum required qualifications of Contractor's Project Manager I and Project Manager II labor categories, Contractor staff in these positions shall possess extensive knowledge and experience in the design, development, active oversight and management, administration including development and presenting of procurement project management reports as required by the Participating Entity.

The Contractor shall develop, maintain, and provide Participating Entity a PMP per the Contractor performance metric specified below. The PMP shall include but is not limited to the following elements:

##### **1. Planning, Logistics and Performance Oversight:**

- a. Structure of Contractor management and oversight of all Project Manager I and/or Project Manager II positions deployed per Task Order
- b. Delineation of responsibilities of Project Manager I and/or Project Manager II positions deployed per Task Order
- c. Resume of Project Manager I and/or Project Manager II positions deployed per Task Order





- d. Letters of commitment of Project Manager I and/or Project Manager II positions deployed per Task Order
- e. Determination of onsite versus offsite performance. If onsite, start date and equipment available for Project Manager I and/or Project Manager II positions deployed per Task Order
- f. Oversight of Project Manager I and/or Project Manager II positions deployed per Task Order
- g. The Contractor shall describe its plan to manage offsite and onsite Contractor Parties without Participating Entity direct supervisor or interference throughout the Task Order term and/or periods of Performance. Contractor shall provide a description of quality control processes and procedures planned (to include any certifications and quality management systems used), as well as the quantitative metrics intended, to execute and monitor compliance with Contract requirements and Deliverables. Contractor shall provide a strategy to address retention of Contractor Parties and necessary equipment throughout the Task Order Term and/or periods of Performance. Contractor shall include a plan to include but not limited to; address assigning Contractor Parties by the Notice to Proceed date, mitigation of the unavailability of equipment, overall Contractor readiness, availability, scalability and logistical deployment of Contractor Parties and equipment.
- h. Quality Control, Assurance and Compliance Plan ("QCP")
- i. Contractor's QCP plan and strategy overview for PMP activities performed per Task Order
- j. Other as directed by Participating Entity per Task Order.

Upon review, the Participating Entity reserves the right to direct changes to this plan and request subsequent plans at no additional cost.

Outputs: Project Management Plan ("PMP"):

## **6. Value Add 6— Grants Assistance and Management**

Contractors shall provide consulting services and/or training related to procurement using federal funding and/or federal grant requirements. This shall include uniform guidance under 2 CFR 200, Build America, Buy America (BABA) requirements, or specific federal requirements related to grants by:

- US Department of Defense (DoD)
- Federal Aviation Administration (FAA)
- Federal Transit Administration (FTA)
- Center for Medicaid Services (CMS)
- Federal Highway Administration (FHWA)
- National Highway Transportation Safety Administration (NHTSA)
- Federal Motor Carrier Safety Administration (FMCSA)
- US Department of Agriculture (USDA)



- Housing and Urban Development (HUD)
- Other federal programs as identified in a specific SOW

Contractors may assist with grant application, inclusive of writing scope of work. Contractors may assist with project and subrecipient management/administration. Contractors may assist with reports on outcomes and grant closeout. Assistance with managing federal grant funds provide compliance with Federal grant rules and analysis of procurement standards, financial management standards, subawards and subrecipient relationship management, allowable costs and cost allocation systems, property management, and audit management and resolution.

Outputs: Grant Application; Grant Reports ; Grant Management Report

## **VII. Minimum Qualifications of Labor Categories**

1. Whether specifically stated, all labor categories shall exhibit the following qualities:
  - i. Proficiency in MS Office (Word, Excel, PowerPoint and Outlook).
  - ii. Effective oral and written communication skills.
  - iii. Ability to work independently or in a team environment.
  - iv. Exhibit a high degree of professionalism in the production of deliverables and in interactions with fellow employees and client personnel.
2. Selected Labor Categories are consolidations and serve multiple specialties that fulfill the needed services in the acquisition lifecycle.
3. The Minimum Qualifications are not intended to be exhaustive or all inclusive. They are intended to allow placement of appropriately skilled personnel.
4. Additional duties may also be included per Labor Categories that are not specifically listed, (i.e., Other duties as assigned).
5. Experience for degrees is acceptable on a year-to-year equivalent basis.

**There are sixteen (16) Labor Categories for Procurement Assistance Support Services (PASS) and eight (8) Labor Categories for IT Research, Advisory, and Consulting Services.**

PASS Labor Categories highlighted in **BLUE**

IT Research, Advisory, and Consulting Services highlighted in **GREEN**



<b>PASS LABOR CATEGORIES</b>	
<b>Labor Category</b>	<b>Minimum Qualification(s)</b>
<b>Program Director (Key Personnel)</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Ten (10) or more years of progressive experience in managing significant projects and processes.</li> <li>• Must have the ability to manage and direct large and complex project tasks covering contract administration which may include acquisition planning, RFP/IFB preparation, market research, cost and price analysis, evaluation of performance, contract termination, and contract closeout.</li> <li>• Ability to research and define multiple project scopes, schedules, and targets.</li> <li>• Provides expert advice and guidance to agency senior level staff members.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Project Management certification</li> <li>• Master's Degree or higher</li> </ul>
<b>Program Manager</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Eight (8) or more years of providing management for multiple projects/tasks and ongoing operational efforts</li> <li>• Must have the ability to provide technical knowledge on the effectiveness and efficiency of government programs.</li> <li>• Able to apply advanced or specialized knowledge of the nature of agency programs and activities, agency policies and objectives</li> <li>• Possessing the analytical and evaluative methods and techniques for assessing program development and execution.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Project Management certification</li> <li>• Master's Degree or higher</li> </ul>



<p><b>Subject Matter Expert III</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Fifteen (15) or more years of progressive experience and possess extensive knowledge when advising on large and high complex project/programs.</li> <li>• Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs.</li> <li>• Able to provide highly technical and specialized guidance concerning solutions to complex problems.</li> <li>• Demonstrates executive decision-making skills and judgment.</li> <li>• Applies principles and methods of the subject matter to specialized solutions.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Project Management certification</li> <li>• Master's Degree or higher</li> </ul>
<p><b>Subject Matter Expert II</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Eight (8) or more years of progressive experience and possess extensive knowledge when advising on large and high complex project/programs.</li> <li>• Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs.</li> <li>• Able to provide highly technical and specialized guidance concerning solutions to complex problems.</li> <li>• Demonstrates executive decision-making skills and judgment.</li> <li>• Applies principles and methods of the subject matter to specialized solutions.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Project Management certification</li> <li>• Master's Degree or higher</li> </ul>



<p><b>Subject Matter Expert I</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Five (5) or more years of progressive experience</li> <li>• Must have the ability to analyze project requirements and develop strategic solutions and plans to meet agency's needs.</li> <li>• Able to provide highly technical and specialized guidance concerning solutions to complex problems.</li> <li>• Applies principles and methods of the subject matter to specialized solutions.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Project Management certification</li> <li>• Master's Degree or higher</li> </ul>
<p><b>Acquisition Support Specialist III (Key Personnel)</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Eight (8) or more years of providing a broad range of complex acquisition management support services.</li> <li>• Must have the ability read and interpret each State's acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities described in the Statement of Work (SOW.)</li> <li>• Able to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Certification from a nationally recognized organization such as NCMA, UPPCC or DAU.</li> <li>• Master's Degree or higher in Business Administration, Business Law, or Public Administration</li> </ul>



<p><b>Acquisition Support Specialist II</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Five (5) or more years of providing a broad range of complex acquisition management support services.</li> <li>• Must have the ability read and interpret each State's acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities described in the Statement of Work (SOW.)</li> <li>• Able to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Certification from a nationally recognized organization such as NCMA, UPPCC or DAU.</li> <li>• Master's Degree or higher in Business Administration, Business Law, or Public Administration</li> </ul>
<p><b>Acquisition Support Specialist I</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Three (3) or more years of providing a broad range of complex acquisition management support services.</li> <li>• Must have the ability read and interpret each State's acquisition policy, regulations, and directives and apply those interpretations fully and legally to all activities described in the Statement of Work (SOW.)</li> <li>• Able to analyze cost and pricing data, assistance in proposal evaluations, and assistance in preparing contract negotiations.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Certification from a nationally recognized organization such as NCMA, UPPCC or DAU.</li> <li>• Master's Degree or higher in Business Administration, Business Law, or Public Administration</li> </ul>



<p><b>Analyst III</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Seven (7) or more years of relevant experience in developing and applying analytic methodologies.</li> <li>• Ability to lead the application of analytic techniques and assist in defining the project objectives, methodologies, and principles.</li> <li>• Perform a wide variety of analytical tasks with the continuous improvement of processes, personnel, organization, system, or training.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Business Data Analytics Certificate, Cost Estimator/Analyst Certification, CPA License</li> <li>• Master's Degree</li> </ul>
<p><b>Analyst II</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Five (5) or more years of relevant experience in developing and applying analytic methodologies.</li> <li>• Ability to lead the application of analytic techniques and assist in defining the project objectives, methodologies, and principles.</li> <li>• Perform a wide variety of analytical tasks with the continuous improvement of processes, personnel, organization, system, or training.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Business Data Analytics Certificate, Cost Estimator/Analyst Certification, CPA License</li> <li>• Master's Degree</li> </ul>
<p><b>Analyst I</b></p>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university in a related field.</li> <li>• Three (3) or more years of relevant experience in developing and applying analytic methodologies.</li> <li>• Ability to lead the application of analytic techniques and assist in defining the project objectives, methodologies, and principles.</li> <li>• Perform a wide variety of analytical tasks with the continuous improvement of processes, personnel, organization, system, or training.</li> </ul>





	<p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Business Data Analytics Certificate, Cost Estimator/Analyst Certification, CPA License</li> </ul>
<b>Project Manager II</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university.</li> <li>• Eight (8) or more years of relevant experience in leading discussions; contributing questions and answers; raising issues, risks, and concerns; and developing and giving presentations.</li> <li>• Organizes, directs, and coordinates the planning and production of all contracts and/or task support activities. Prepares project estimates and work plans using best practices and principles. Ensures success project completion through responsibilities associated with staffing, project planning, project financials, risk management, and staff direction and oversight. Manages and oversees work performance on large size task orders or manages as a senior project manager. Prepares and maintains the project schedule and budget. Prepares and delivers status reports to the client. Serves as the primary point of contact for the client on any sized project. Manages staff, budget, and prioritization of tasks.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>• Bachelor's degree and eight (8) years of general experience or fourteen (14) years of general experience with a high school diploma or G.E.D.</li> <li>• Demonstrates strong interpersonal and communication skills.</li> </ul>
<b>Project Manager I</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>• Bachelor's Degree or higher from an accredited college or university.</li> <li>• Five (5) years of experience in a related field.</li> <li>• Performs day-to-day management of a single project or significant task assigned on a larger program. Manages and oversees work performance on small to medium size task orders or manages a portion of a larger task under the guidance of a more senior project manager. Assists in preparing and maintaining the project schedule and budget. Assist in preparing and delivering status reports to the client. For small to medium-size projects, can serve as the primary point of contact for the client. Assists in managing staff, budget, and prioritization of tasks.</li> </ul> <p><b>Preferred Qualifications</b></p>



	<ul style="list-style-type: none"> <li>Bachelor's degree and five (5) years of general experience or eleven (11) years of general experience with a high school diploma or G.E.D.</li> </ul>
<b>Instructor/Trainer II</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>Associate degree and five (5) years of experience in the field of teaching processes, instruction and/or operational experience.</li> <li>Provides services as an instructor/trainer to include facilitating and providing, in an academic environment, platform instruction and applied training in specific areas of curriculum.</li> <li>Coordinate and monitor presentations for missions, exercises, and experiments.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>Associate's degree and five (5) years of experience in the field of teaching processes, instruction and/or operational experience or nine (9) years of experience in the field of teaching processes, instruction and/or operational experience with a high school diploma or G.E.D.</li> </ul>
<b>Instructor/Trainer I</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>Associates degree and two (2) years of experience in the field of teaching processes, instruction and/or operational experience.</li> <li>Assist with providing services as an instructor/trainer to include facilitating and providing, in an academic environment, platform instruction and applied training in specific areas of curriculum.</li> <li>Assist with coordinating and monitoring presentations for missions, exercises, and experiments.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>Associates degree and two (2) years of experience in the field of teaching processes, instruction and/or operational experience or seven (7) years of experience in the field of teaching processes, instruction and/or operational experience with a high school diploma or G.E.D.</li> </ul>
<b>Administrative</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>High school diploma + eight (8) years of experience.</li> <li>Experience in administrative support positions.</li> <li>Arranges meetings, copies, and produces deliverables, etc.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>Associates degree + four (4) years of experience</li> </ul>



IT RESEARCH, ADVISORY AND CONSULTING LABOR CATEGORIES	
Labor Category	Minimum Qualification(s)
<b>Project Manager</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>Bachelor's Degree or higher from an accredited college or university.</li> <li>Five (5) years in a related field.</li> <li>Performs day-to-day management of a single project or significant task on a larger program. Manages and oversees work performance on small to medium size task orders or manages a portion of a larger task under the guidance of a more senior project manager. Assists in preparing and delivering status reports to the client. For small to medium-size projects, can serve as the primary point of contact for the client. Assists in managing staff, budget, and prioritization of tasks.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>Bachelor's degree and five (5) years of general experience or eleven (11) years of general experience with a high school diploma or G.E.D.</li> </ul>
<b>System Architect (Software/Data/Database)</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>Bachelor's degree in computer science, software engineering, or a relevant field.</li> <li>Three (3) years of experience as a software developer, system analyst.</li> <li>Has knowledge of system architecture principles and design patterns, experience with software development methodologies, understands database concepts and data modeling, and proficiency in at least one programming language.</li> </ul> <p><b>Preferred Qualifications</b></p> <ul style="list-style-type: none"> <li>Master's degree in computer science or related field.</li> <li>Eight (8) years of experience as a software developer or systems analyst.</li> <li>Professional-level certifications (AWS Certified Solutions Architect or other applicable).</li> </ul>
<b>Cloud Subject Matter Expert</b>	<p><b>Must have at a minimum:</b></p> <ul style="list-style-type: none"> <li>Bachelor's degree in computer science, information technology, or a related field.</li> <li>Five (5) years working in cloud computer platforms.</li> <li>Has a demonstrated ability to design, implement, and manage cloud-based solutions. Hands-on experience with core cloud services like compute, storage, networking, and security.</li> </ul>



IT RESEARCH, ADVISORY AND CONSULTING LABOR CATEGORIES	
Labor Category	Minimum Qualification(s)
	<b>Preferred Qualifications</b> <ul style="list-style-type: none"> <li>Professional-level certification such as AWS Certified Solutions Architect, Azure Certified Solutions Architect Expert, or GCP Certified Professional Cloud Architect or other.</li> </ul>
IT Subject Matter Expert	<b>Must have at a minimum:</b> <ul style="list-style-type: none"> <li>Bachelor's degree in computer science, information technology, or a related field.</li> <li>Five (5) years of practical experience in a specific IT domain, demonstrating in-depth knowledge of relevant technologies and practices.</li> <li>Proficient in the specific IT tools, systems, and plays relevant to their area of expertise.</li> </ul> <b>Preferred Qualifications</b> <ul style="list-style-type: none"> <li>Extensive knowledge and understanding of complex IT concepts, including industry best practices and emerging trends.</li> </ul>
Technology Consultant I	<b>Must have at a minimum:</b> <ul style="list-style-type: none"> <li>Bachelor's degree in computer science, information technology, or a related field.</li> <li>Three (3) years of experience as an IT consultant, preferably in a technology-based company or firm.</li> </ul> <b>Preferred Qualifications</b> <ul style="list-style-type: none"> <li>Bachelor's degree in computer science, information technology, or a related field and five (5) years of experience as an IT consultant.</li> </ul>
Technology Consultant II	<b>Must have at a minimum:</b> <ul style="list-style-type: none"> <li>Bachelor's degree in computer science, information technology, or a related field.</li> <li>Eight (8) or more years of experience as an IT consultant, preferably in a technology-based company or firm.</li> <li>Additional training in computer programming, computer engineering, and mathematics.</li> </ul>



IT RESEARCH, ADVISORY AND CONSULTING LABOR CATEGORIES	
Labor Category	Minimum Qualification(s)
	<b>Preferred Qualifications</b> <ul style="list-style-type: none"> <li>Master's degree in computer science, information technology, or a related field.</li> </ul>
<b>Cyber Security Specialist</b>	<b>Must have at a minimum:</b> <ul style="list-style-type: none"> <li>Bachelor's degree in a computer-related or technology field.</li> <li>Three (3) or more years in a cybersecurity role, such as network administration, security analysis, or penetration testing.</li> <li>Ability to analyze complex situations, identify potential threats, and devise solutions. Understand core cybersecurity concepts like network security, access controls, threat analysis, and common vulnerabilities.</li> </ul> <b>Preferred Qualifications</b> <ul style="list-style-type: none"> <li>Professional certification such as CISSP, Certified Ethical Hacker (CEH), CompTIA Security+.</li> </ul>
<b>Administrative</b>	<b>Must have at a minimum:</b> <ul style="list-style-type: none"> <li>High school diploma + eight (8) years of experience.</li> <li>Experience in administrative support positions.</li> <li>Arranges meetings, copies, and produces deliverables, etc.</li> </ul> <b>Preferred Qualifications</b> <ul style="list-style-type: none"> <li>Associates degree + four (4) years of experience</li> </ul>