

EXPRESS

TASK ORDER PROCESS HANDBOOK

{NOTICE: This handbook is provided as a guide to acquiring advisory and assistance services under the EXPRESS program and is not intended to take precedence over any aspects of the Blanket Purchase Agreement(s) (BPAs). In the event of any conflict between the information in this handbook and the terms and conditions of the BPAs, the BPA is the binding document.}

CCAM-OS-0

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SECTION 1: WHAT IS THE EXPRESS PROGRAM?

DEFINITION: EXPRESS represents a cooperative initiative between AMCOM and its requiring organizations to develop and implement a contracted advisory and assistance services program based upon the use of BPAs issued against Multiple Award Schedules (MAS) with Federal Supply Schedule (FSS) contractors. The program will provide program executive offices, program managers and functional organizations with a broad range of expertise to satisfy requirements. The program will provide Team Redstone a contractual vehicle to acquire responsive, high quality, cost effective advisory and assistance services in a timely and efficient manner.

DOMAINS: The EXPRESS program consists of 31 prime/team leaders and approximately 1200 team members and subcontractors that provide advisory and assistance services in four domains:

- Business & Analytical
- Logistics
- Programmatic
- Technical

CONTRACTORS: Prime Contractors/Team Leaders are as follows:

PRIME CONTRACTOR/TEAM LEADER	BSN SIZE	BPA #
BUSINESS & ANALYTICAL		
ANALYTICAL SERVICES, INC. (ASI)	LB	W31P4Q-05-A-0017
DELTA SOLUTIONS & STRATEGIES, LLC	WOSB	W31P4Q-09-A-0007
NAVIGATOR DEVELOPMENT GROUP, INC.	LB	W31P4Q-05-A-0018
PERKINS TECHNICAL SERVICES, INC.	WOSB	W31P4Q-05-A-0019
QUANTITECH, INC.	WOSB	W31P4Q-09-A-0008

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LOGISTICS	<i>BSN SIZE</i>	<i>BPA #</i>
ADVANCED ENGINEERING & PLANNING CORP (AEPKO)	LB	W31P4Q-05-A-0020
BELZON, INC	SDVO SB	W31P4Q-05-A-0021
ELEIT TECHNOLOGY, INC.	SDB WOSB HZ	W31P4Q-09-A-0009
LOGICORE CORPORATION	8A WOSB	W31P4Q-09-A-0010
METTERS INDUSTRIES, INC.	SDVO SB	W31P4Q-05-A-0022
MILLENNIUM SYSTEMS SERVICES, INC.	8A SDVO	W31P4Q-09-A-0011
PROGRAMMATIC	<i>BSN SIZE</i>	<i>BPA #</i>
3D RESEARCH CORPORATION	LB	W31P4Q-05-A-0023
CAS, INC.	LB	W31P4Q-05-A-0024
DIGIFLIGHT, INC.	SB VOSB 8A	W31P4Q-09-A-0012
INTUITIVE RESEARCH AND TECHNOLOGY	8A SDB	W31PRQ-05-A-0025
MICROTECHNOLOGIES, LLC	SDVO 8A	W31P4Q-09-A-0013
SIGMATECH, INC.	SB	W31P4Q-05-A-0026
TOTAL COMPUTER SOLUTIONS, INC.	SB	W31P4Q-09-A-0014
TECHNICAL		
AVIATION & MISSILE SOLUTIONS, LLC (AMS)	LB	W31P4Q-05-A-0027

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COMPUTER SCIENCES CORP, INC. (CSC)	LB	W31P4Q-05-A-0028
DCS CORPORATION	SB	W31P4Q-09-A-0015
INTUITIVE RESEARCH & TECHNOLOGY CORPORATION	SB 8A	W31P4Q-09-A-0016
MADISON RESEARCH CORPORATION	LB	W31P4Q-05-A-0029
MORGAN RESEARCH CORPORATION	LB	W31P4Q-05-A-0030
QUANTUM RESEARCH INTERNATIONAL, INC.	SB	W31P4Q-09-A-0017
RADIANCE TECHNOLOGIES, INC.	SB	W31P4Q-09-A-0018
SCIENCE APPLICATIONS INTERNATIONAL CORPORATION (SAIC)	LB	W31P4Q-05-A-0031
SIGMATECH, INC.	SB	W31P4Q-09-A-0020
SYSTEMS, STUDIES & SIMULATION, INC. (S ³)	WOSB	W31P4Q-09-A-0019
TORCH TECHNOLOGIES, INC.	SB	W31P4Q-09-A-0021
WESTAR AEROSPACE AND DEFENSE GROUP, INC.	LB	W31P4Q-05-A-0032

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CONTRACTUAL ASPECTS

- Multiple task order pricing arrangements available
 - Fixed Rate Level of Effort (LOE) or Firm Fixed Price LOE
 - Firm Fixed Price (Completion)
 - Time & Materials
 - Labor Hour
- Multiple year task orders with options permissible
- Competitive Task Orders

SCOPE

The EXPRESS Statements of Work (SOWs) for each domain and a list of Team Redstone Supported Systems/Equipment are located on the EXPRESS website at:

https://ams8.redstone.army.mil/acweb/acwebdba.acweb_systems_public2?p_system_id=1&p_link_id=83

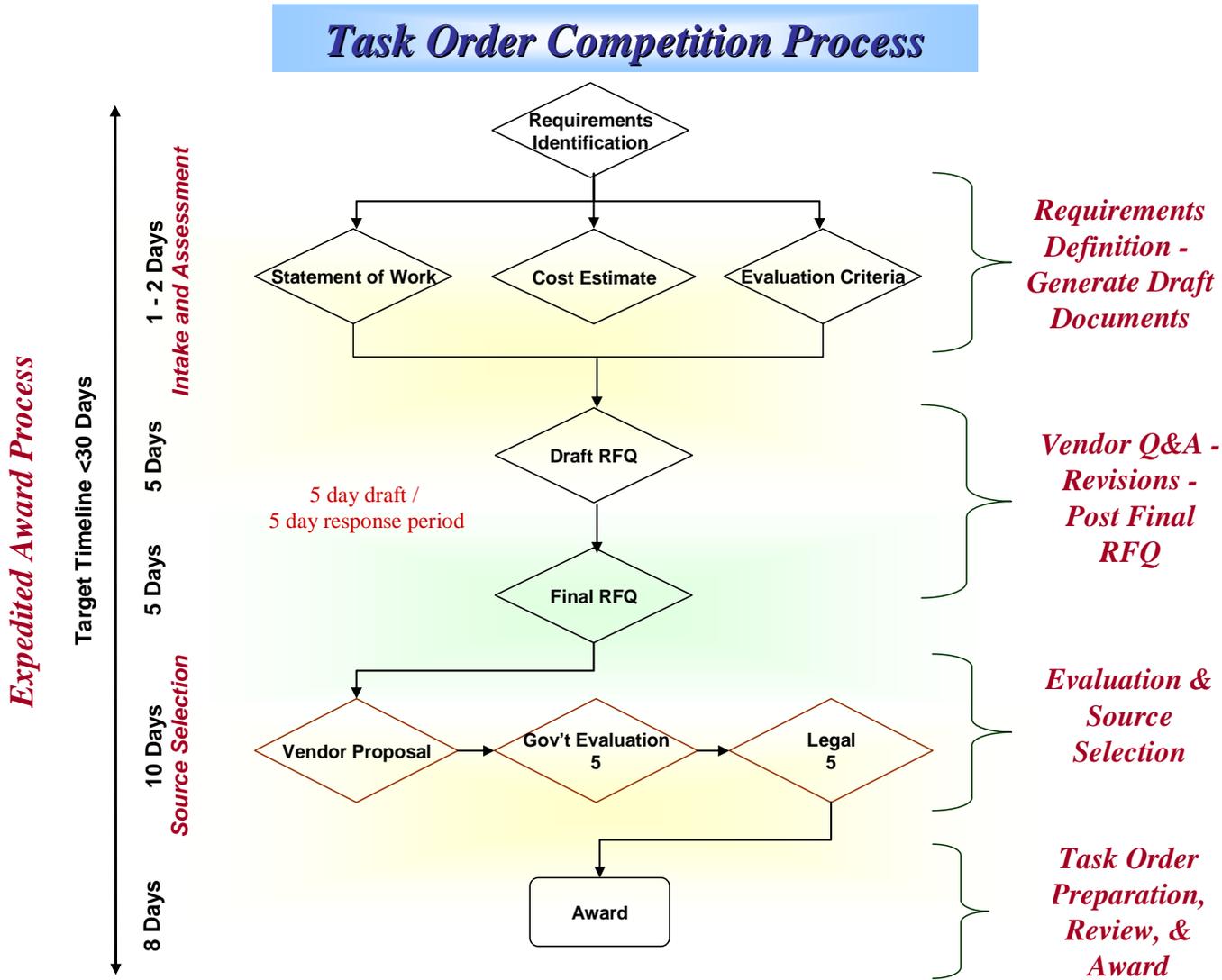
EXPRESS TASK ORDER COMPETITION

All BPA awardees within each domain will be given the opportunity to compete for task orders within that domain unless one of the exceptions at FAR 16.505(b)(2)(i)-(iv) apply or a Statute expressly authorizes or requires that the purchase be made from a specified source.

SECTION 2: MAKING THE EXPRESS PROCESS WORK

A. OVERVIEW OF THE EXPRESS ACQUISITION PROCESS

EXPRESS provides a streamlined approach to enable requirees to acquire advisory and assistance services in an efficient and effective manner. This section of the handbook provides an overview of the competitive task order process with detailed explanation of each step of the acquisition process.



STEP 1: REQUIREMENTS IDENTIFICATION

The Contracting Office is available to assist and discuss all aspects of preparation of the task order requirements package as well as review and comment on draft documents. The following EXPRESS Contracting Office POCs are available to discuss any questions the requiring organization may have pertaining to this process:

EXPRESS Program Coordinator/Customer Service Representative:
 (All Domains) Ms. Marcia Tully 842-7409 marcia.tully@us.army.mil

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EXPRESS Contracting Officers (by Domain):

<i>(B&A Domain)</i>	<i>Mr. Ronald Haws</i>	<i>876-7321</i>	<u>ronald.haws@us.army.mil</u>
<i>(Log Domain)</i>	<i>Mr. William Greene</i>	<i>876-4097</i>	<u>william.d.greene@us.army.mil</u>
<i>(Prog Domain)</i>	<i>Ms. Sherry Miller</i>	<i>842-0736</i>	<u>sherry.miller@us.army.mil</u>
<i>(Tech Domain/AMRDEC)</i>	<i>Ms. Valorie Ritchey</i>	<i>876-1299</i>	<u>valorie.ritchey@us.army.mil</u>
<i>(Tech Domain/Non-AMRDEC)</i>	<i>Ms. Detra Battle-Blue</i>	<i>842-0737</i>	<u>detra.battleblue@us.army.mil</u>

Once a requirement is identified, the requiring organization must enter it into the Competition Advocate's Shopping List (CASL) through the following link: http://www.redstone.army.mil/cgi-bin/cmo_main/casl.pl. The requiring organization will then utilize the templates on the EXPRESS website/database to prepare draft documents for review. Logins to EXPRESS-Net may be obtained by contacting the EXPRESS Program Coordinator. The requiring organization will email a Performance Work Statement (PWS), Contract Data Requirements List (CDRL), and Procurement Work Directive (PWD) to the Contracting Officer identified above.

The Contracting Officer will review these draft documents and forward comments to the Legal Office for further review. The Legal Office will review the documents and provide comments back to the requiring organization. The requiring organization will make the requested revisions and submit the Task Order Requirements Package to the Contracting Office via EXPRESS-Net. ***The Task Order Request for Quotation (TORFQ) will not be processed until the complete requirements package is submitted.***

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The **EXPRESS Task Order Requirements Package** consists of completing the service request information in the EXPRESS-Net database. The EXPRESS-Net Training Guide is located on the EXPRESS website and provides specific instructions for obtaining an EXPRESS Control Number, initiating a task order request, and preparing/uploading requirements information. The following completed documentation is required **PRIOR** to uploading in EXPRESS-Net:

Initiating Competitive Task Orders		
* See Below For Detailed Instructions	Initiate through EXPRESS Net Secure Website	Standard Format:
A *	Upload Performance Work Statement (PWS) OR Statement of Work And Approval for Non-Performance Based Acquisition <u>(The requiring organization uploads the PWS into EXPRESS Net after all Contracting Officer and Legal revisions have been incorporated into the PWS.)</u>	<p style="text-align: center;">PWS Format (6 MAY 2005) https://redstoneappsrv1.redstone.army.mil/acweb/acweb_download?p_file=F5980/PWS%20format.doc</p>
B *	Complete Task Order Data Requirements (DD 1423) (Select, download, and complete from approved CDRL List)	<p style="text-align: center;">B&A CDRL Format (6 MAY 2005) https://redstoneappsrv1.redstone.army.mil/acweb/acweb_download?p_file=F810/BA%20CDRLS.doc</p> <p style="text-align: center;">Logistics CDRL Format (6 MAY 2005) https://redstoneappsrv1.redstone.army.mil/acweb/acweb_download?p_file=F854/Log%20CDRLS.doc</p> <p style="text-align: center;">Programmatic CDRL Format (6 MAY 2005) https://redstoneappsrv1.redstone.army.mil/acweb/acweb_download?p_file=F26337/Prog%20CDRLS.doc</p> <p style="text-align: center;">Technical CDRL Format (6 MAY 2005) https://redstoneappsrv1.redstone.army.mil/acweb/acweb_download?p_file=F23444/Tech%20CDRLS.doc</p>
C *	Generate Task Order Independent Government Estimate	Template Available from the Domain Contracting Officer
D *	Upload Certified or Planning Procurement Work Directive	
E *	Identification of COR/TM & Evidence of Training/Qualifications	
F*	Garrison Approval <i>(if task order performance is on-site)</i>	https://redstoneappsrv1.redstone.army.mil/acweb/acwebdba.acweb_home_child?p_link_id=83
G*	Contract Security Classification Specification (DD Form 254)	

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H*	Service Contract Approval	
I*	Evaluator/SSA Listing	
J	Hard Copy of CASL Input	

What is NOT required to initiate an EXPRESS Task Order:

- Acquisition Plan
- Evaluation Plan
- Synopsis
- Approval for Use of Non-DOD Contract
- A task order MDD is not required for individual task order requirements from approved organizations containing the listed approved EOR Codes.

A Class Management Decision Document (MDD) has been approved for the EXPRESS program for the following organizations: AMCOM organizations; PEO, Air, Space and Missile; PEO, Aviation; PEO, Tactical Missiles; PEO, Command, Control, Communications Tactical; LOGSA; PEO, Intelligence, Electronic Warfare, and Sensors, TRADOC Futures Center (Technical Domain only), PEO, Soldier, Army Materiel Command (AMC) Headquarters; Redstone Technical Test Center; PM, Force Protection Systems; and Missile Defense Agency/Ground-Based Midcourse Defense (MDA/GMD) Joint Project Office (Business & Analytical Domain only). **The Element of Resource Code (EOR) identified in the Class MDD for each domain are as follows:**

	<u>EOR</u>
Business & Analytical	2512
Logistics	2512
Programmatic	2512
Technical	2516

DETAILED INSTRUCTIONS FOR DOCUMENTATION:

A. Performance Work Statement (PWS)

Unless approved in accordance with DFARS 237.170, all EXPRESS task orders will be performance based. A standard Quality Assurance Surveillance Plan, including performance objectives, metrics, and incentives, has been developed for utilization under EXPRESS task orders. Utilization of different objectives/metrics will require the development of a separate task order Quality Assurance Surveillance Plan. The format for the PWS, including standard performance objectives, metrics, and incentives, is provided on the EXPRESS website. (Submit through “Upload SOW” button in EXPRESS-Net.) MIL-HDBK-245D, 3 April 1996,

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Department of Defense Handbook for Preparation of Statement of Work (SOW) may also be used as a reference in drafting your PWS. This handbook can be accessed by clicking on the following link: http://www.acqnet.gov/comp/seven_steps/library/DODhandbook.pdf Pages 25 – 26 of the handbook list non-specific words and phrases that should never be used in the PWS. Pages 32 – 35 (APPENDIX A & APPENDIX B) of the handbook list acronyms and work words/product word list. Pages 36-37 (APPENDIX C) list phrases having multiple meanings that should be avoided in the PWS.

B. Task Order Data Requirements (CDRLS, DD1423)

A list of CDRLs (DD Forms 1423) available for each domain are provided in the EXPRESS-Net system. The Document Summary List for approved CDRLs, by Domain, is provided on the EXPRESS website. The CDRLs annotated (established and approved in the EXPRESS preaward stage) are available for use as required by the performance work statement in individual task orders. Each approved CDRL utilized for an individual task order must be completed (blocks 5-16) to include information specific to an individual task order added in the appropriate blocks. **CDRL A003, Contractor’s Progress, Status, and Management Report (DID DI-MGMT-80227) is required for every task order and shall be submitted electronically in Microsoft Office suite of software through EXPRESS-Net.** The task order CDRL sequence numbers must adhere to those in the BPA (Exhibit A). Include all applicable completed CDRLs (DD Forms 1423) with the EXPRESS Task Order Requirements Package. *(Submit through “Upload CDRL” button in EXPRESS-Net. May combine and upload all required task order CDRLs in one document or may upload each CDRL individually.)*

C. Task Order Independent Government Estimate (TO-IGE)

Provide Task Order estimated total dollar value, including options. The TO-IGE format to calculate the estimated task order value, including options, may be obtained by contacting the Domain Contracting Officer. The requiring organization shall separate the estimated labor mix and hours for the basic effort and the option period. The TO-IGE format is based on historical labor categories and average EXPRESS rates for each domain. Historical labor categories, including minimum education/qualifications, are located on the EXPRESS website.

Specific IGE instructions are as follows:

The Excel security setting must be set to Medium to enable the macros. To accomplish this, open Excel, select Tools/Macros/Security, then choose “Medium”. When the IGE file opens, the system will alert that there are macros included in this file. Select “enable macros” or the file will not compute.

After the IGE format has been opened and the macros enabled, select the Data Input worksheet. If there is already data there, you may delete it by highlighting the data area with your cursor, then striking the DELETE key. DO NOT erase old data by physically deleting rows via Edit/Delete.

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Column A of the Data Input Sheet is for a task title. For example, use Basic Effort (for the basic effort portion of the spreadsheet) and Option (for the option portion of the spreadsheet). Column B is filled via a drop-down list. Use the subtotal choice to get intermediate subtotals in your printout, otherwise select the appropriate On- or Off-Site designation. Column C is also filled via drop-down, and is the cost element designation (choose from historical labor categories, ODC/materials, and/or travel). Columns E, F, G, H, I, and J are the by-year input of hours (for labor estimates) or dollars (for ODC/material and travel). If there is no input in one of the years, you may either enter a 0, or leave the cell blank. No other data is required. When you are finished, click the red square labeled “COMPUTE” to generate your output.

(Submit completed TO-IGE through “Upload IGE” button in EXPRESS-Net.)

D. Certified or Planning Procurement Work Directive (PWD)

The requiring organization is responsible for providing certified funding that is appropriate based on the scope of work and IAW applicable funding regulations. If a certified funding document is not available when package is forwarded, provide a Planning PWD.

The applicable Element of Resource Code (EOR) should be utilized on the funding document for the individual domain requirements:

	<u>EOR</u>
Business & Analytical	2512
Logistics	2512
Programmatic	2512
Technical	2516

NOTE: A task order may be solicited with a Planning PWD (pending availability of funds), but may not be awarded until the appropriate certified funding documents are provided. No performance may commence until a task order is awarded. *(Submit through “Upload PWD” button in EXPRESS-Net.)*

E. Evidence of COR Training/Qualifications

In accordance with Memorandum, Office of the Assistant Secretary of the Army (Acquisition, Logistics and Technology), ASA ALT, 9 Feb 2007, Subject: Contract Administration and Surveillance for Service Contracts, individuals cited for appointment as a COR must complete the on-line training course, CLC-106, “COR With A Mission Focus.” In addition, the cited memorandum requires the person being nominated to be designated as a COR will have their COR duties and/or contributions addressed as a part of their performance appraisal. In order to verify this, they must include a statement in the COR nomination request that this will be done. All contracting officers are required, annually, to have their CORs verify compliance therewith. Evidence of training/other qualifications, and a verification that COR duties will be addressed as a part of their performance appraisal, must be included for identified task order COR if not already on file. *(Submit through “Upload other documentation” button in EXPRESS-Net. Provide title of document (Evidence of COR Training) in appropriate space.)*

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F. Garrison Approval

Pursuant to AMCOM Supplement 1 to AR 405-70 and IAW AMCOMR 715-25, a memo supporting the need for on-site performance must be coordinated with Garrison for approval of Contractor Personnel Use of Government Facilities. EXPRESS Requiring organizations identifying on-site performance in the EXPRESS-Net system are certifying the need for on-site performance and that Garrison approval was obtained prior to submission of EXPRESS Task Order Requirements Package. (No upload documentation required. Identification of on-site (Government site) performance and clicking “yes” in the EXPRESS-Net certification block acknowledges Garrison Approval for on-site contractor support has been obtained).

G. Contract Security Classification Specification (DD FORM 254)

If the PWS includes security requirements and/or Security Classification Guides for task order performance, an individual task order DD254 is required. (*Reference BPA DD254*)

H. Service Contract Approval

Reference Memorandum, Secretary of the Army, January 7, 2005, subject: Accounting for Contract Services and Memorandum, Secretary of the Army, February 23, 2006, subject: Civilian Hiring and Initiation/Continuation of Contracts for Service Personnel and Memorandum, Secretary of the Army, June 5, 2006, subject: Implementation of Army Policy for Civilian Hiring and Initiation/Continuation of Contracts for Service Personnel, a Request for Service Contract Approval must be initiated by the requiring activity for requirements that will result in individual task orders and delivery orders and modifications under existing contracts. Service contract approval is not applicable to service requirements received from outside of the U.S. Army. Services “are defined as identifiable tasks to be performed, rather than the delivery of an end-item for supply.”

<u>Approving Official</u>	<u>Dollar Threshold</u>
Senior leader (GO or SES)	<\$25M
Military Deputy (MilDep)	\$25M - \$50M
ASA (ALT)	Greater than \$50M

HQs, AMC has issued new guidance for approval of contract services and hiring in keeping with the intent of the Sec Army Policy. Reference Memorandum, Chief of Staff, dated October 5, 2006, subject: New Format Guidance for Contract Services and Hiring Approval form Secretary of the Army (SecArmy) for further guidance on processing Service Contract Approvals.

I. Evaluator/SSA Listing

A listing of evaluators and identification of the Source Selection Authority (SSA), along with their grade level, shall be provided as a part of the requirements package. The evaluation team

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typically will consist of a minimum of three individuals designated by the requiring organization. The source selection authority will be from the requiring organization and shall be at a level of seniority commensurate with the dollar value and complexity of the task requirement, normally a level above the evaluation team. At a minimum, the SSA will be at or above the level of the Contracting Officer signing the order (up to \$25M: GS-13, over \$25M: NH-IV/GM-14). The SSA will not evaluate. The SSA and each member of the evaluation team will be required to complete a non-disclosure certification prior to receiving access to the vendor's quotation(s) and/or the evaluation results.

(Submit through "Upload other documentation" button in EXPRESS-Net. Provide title of document (Evaluator/SSA Listing) in appropriate space.)

STEP 2: TASK ORDER REQUEST FOR QUOTATION (TORFQ)

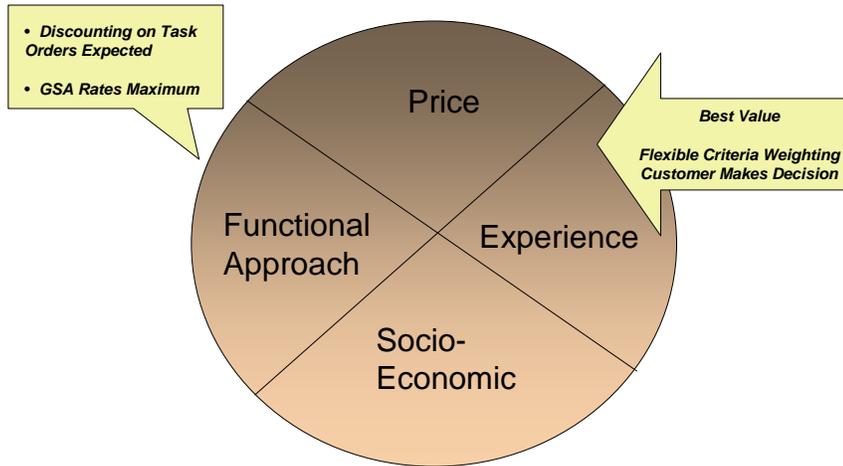
When the Government has a requirement for services to be performed under this BPA, the Contracting Officer shall issue a TORFQ via EXPRESS-Net. The Contracting Officer intends to post draft task order requirements on EXPRESS-Net for five days to promote a fair opportunity for consideration. During this period, contractors will be afforded the opportunity to submit questions, or comments regarding the draft requirement. At the conclusion of this five-day period a final TORFQ will be issued. In addition to written responses, the contracting office will consider other innovative means to accomplish efficient awards, such as Oral Presentations. Specific oral presentation instructions will be provided in TORFQs, as applicable.

In the event of an urgent requirement, the Contracting Officer may omit posting of the draft task order requirements.

Task orders processed utilizing competitive procedures will use standard evaluation criteria consisting of experience, functional approach, price, and socio-economic support. Exceptions to use of the standard criteria are not anticipated, but may be considered and approved on a case-by-case basis, with appropriate justification. The requiring organization will choose the relative importance of the criteria in the EXPRESS-Net system by clicking the appropriate button. Requiring organizations shall consider weighting price more heavily within the task order evaluation criteria to encourage the selection of lower priced offers as appropriate for mission accomplishment. Also, the requiring organization will identify if the experience criteria should be evaluated on functional experience only or also include system specific experience. The Requiring organization may obtain the standard evaluation criteria and quotation contents by contacting the Domain Contracting Officer. Any special source selection instructions may be submitted in a separate memo. Unless otherwise instructed in the EXPRESS-Net comments block by the requiring organization, the vendor will be instructed to provide 3 experience examples in response to each TORFQ. TORFQ Transmittal to Contractor(s) in designated Domain will be accomplished via EXPRESS-Net secure website.

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Standard Task Order Evaluation Criteria



STEP 3: VENDOR QUOTATION

Contractor Quotation Preparation

Upon issuance of a competitive TORFQ, each domain contractor has the opportunity to provide a quotation in accordance with the TORFQ. The proposed Task Order rates may not exceed the established rates on the GSA schedule contract, less any proposed discount at the BPA level. In addition, the contractor shall submit an Organizational Conflict of Interest Certification in response to each TORFQ.

The following applies to all EXPRESS quotations: Quotations shall contain a minimum 1 inch margin and a 12-point font style using “Arial” or “Times New Roman” except for tables or illustrations which should not be less than 8-point. All quotation pages shall be standard letter size (8 ½ x 11).

Quotations will be transmitted by the domain prime/team leaders to the contracting office via EXPRESS-Net secure website.

STEP 4: GOVERNMENT EVALUATION

In accordance with the EXPRESS Task Order Competition Process, five days will normally be allowed for completion of the evaluation. A conference room will be provided in the Acquisition Center (AC) to fully maintain a focused, timely evaluation process; to take full advantage of EXPRESS Team assistance; and to preclude accidental disclosure of Source Selection Information to contractor personnel who may be working in the customer’s location.

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In accordance with BPA paragraph 24 (i), TO awards will normally be made to the contractor or BPA holder who is determined to best meet the needs of the Government after consideration of all evaluation criteria. In making the best value determination, it is possible that after conducting a tradeoff analysis, the lowest priced response may not necessarily represent the best value. For AMCOM organizations, all best value analyses which would result in an award at a price premium of 10% or more above a lower priced and otherwise satisfactory offer will reflect the concurrence of the senior management of the requiring organization (Director or Deputy level) prior to final decision. Other organizations are encouraged to follow this process as well.

Quotations will be evaluated utilizing the EXPRESS-Net secure website. The requiring organization TORFQ evaluation team will utilize a common set of adjectival ratings (OUTSTANDING, VERY GOOD, SATISFACTORY, and MARGINAL) to evaluate evaluation areas of Experience and Functional Approach. The EXPRESS Office will evaluate Socio-Economic Support, which will be evaluated using only three of these ratings (OUTSTANDING, SATISFACTORY and MARGINAL). The EXPRESS Office will also evaluate Price to ensure proposed rates are in accordance with the BPA as discussed in Step 3 above.

After responses have been evaluated in accordance with the criteria identified in the TORFQ, and the contractor's rates have been verified, the order will be placed with the contractor that represents the best value to meet the Government's needs. The source selection decision will be subject to review and concurrence by the attorney advisor and the Contracting Officer.

STEP 5: AWARD OF TASK ORDER

Award will be announced and the award document will be distributed via the EXPRESS-Net secure website.

SECTION 3: OTHER RELEVANT INFORMATION

GUIDANCE ON MATERIALS/OTHER DIRECT COSTS (ODCs):

The TORFQ and the resulting task order must specifically state and define the material/ODC requirements. The materials/ODCs must be in direct support of the task order PWS, enter directly into the deliverables or be used or consumed directly in connection with the furnishing of the deliverables. A not-to-exceed amount will be specified.

The following types of materials/ODCs represent a sampling of those things that are considered to be a standard cost of doing business, and are generally not allowable under EXPRESS (This list is not all-inclusive): Consumable office supplies (paper, pens, staples, tape, printer cartridges, etc.), general-purpose computers, printers, fax machines, copy machines, general-purpose software (MS Office, publishing software, etc.), phone service, etc.

1. Computer Hardware/Software

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If computer hardware/software (other than that identified above) is required for performance under EXPRESS, the requiring organization must first search the Computer Hardware, Enterprise Software and Solutions (CHES) website for the product.

AR 25-1 and DA PAM 25-1-1 designate ASCP as the primary source for the purchase of *COTS software, desktops, and notebook computers regardless of dollar value, and for all other Information Technology (IT) purchases greater than \$25K*. If the ASCP office is incapable of fulfilling a request, a waiver may be granted allowing the purchaser to acquire IT hardware, software, and services from another approved source.

The requiring organization must verify that the product is not on a CHES contract or DoD Enterprise License Agreement.

The website for CHES is: <https://chess.army.mil/ascp/commerce/staticPages/sitemap404.jsp>

- Step 1. Search IT E-mart;
- Step 2. Input Request Information;
- Step 3. Input Waiver Requirements.

Click on - Army Small Computer Program

Click on - Request a Waiver

The waiver must be provided to the EXPRESS office as a part of the requirements package.

2. Cell Phones/Blackberries

If cell phone/blackberry service is required by the contractor for performance under EXPRESS, it shall be obtained by the requiring organization under the existing BPA with Verizon Wireless, managed by the Operations and Services Directorate, Base Operations Division. The wireless devices and related services may then be provided to the contractor by the requiring organization as Government Furnished Equipment (GFE). The BPA is available Government-wide for the purpose of providing wireless handheld devices, services and related accessories at the best possible prices. The BPA is intended to support wireless requirements for government employees and DOD government contractors.

3. Training

Paragraph (32) of the EXPRESS BPAs, entitled TRAINING OF CONTRACTOR EMPLOYEES states "The Contractor shall provide only fully trained, experienced and technically proficient personnel. The Contractor shall not bill for labor hours or travel costs associated with Contractor employee training unless specifically required and authorized in a task order..."

Therefore, training not specifically called out and authorized in the task order PWS will not be allowed. Before training can be specifically called out and authorized in a task order, it must be required to provide the services ordered under the task order. Reimbursement for the cost of general-purpose, commercial type training will normally not be allowed. Security-related training is required to be provided by the contractor IAW the Contract Security Classification Guide (DD Form 254) and the National Industrial Security Program Operating Manual

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(NISPOM), Chapter 3, and is not allowable for reimbursement under the task order. Contractors may elect to attend government-sponsored training however, if that training is deemed not allowable under the task order, the contractor is prohibited from billing for the labor hours expended during training time.

Authorization for training under a task order can be given only by the Contracting Officer on a case-by-case basis. CORs, Technical Monitors, or other Government personnel do not have the authority to approve training for a contractor.

When material/ODCs are estimated to be at least 10% of the labor cost for a task, the requiring organization shall provide a separate material justification. The information contained in the justification must clearly show that the primary purpose of the task is for the purchase of advisory and assistance services and not for an end item. Material/ODCs for a task shall not exceed the labor cost for that task.

A separate CLIN/SLIN will normally be established for materials and other direct costs on a cost reimbursable, no fee basis or in accordance with the provisions of the Federal Supply Schedule (as applicable).

Due to the ATA/Pyxis decisions, coordination will be required for open market/non-schedule item purchases exceeding \$3,000. At a minimum, open market/non-schedule items must be separately identified on the task order and price reasonableness must have been determined by the Contracting Officer. As the ordering agency, AMCOM must comply with all applicable acquisition regulations for open market/non-schedule items.

If open market/non-schedule items can be identified in advance of an option exercise, the option requirements package must include certain documentation *generated by the contractor* except as otherwise noted below:

Under \$3K	Basis for price reasonableness
\$3K - \$25K	3 quotes, or a single quote & sole source justification
>\$25K - \$100K	3 quotes, or a single quote & sole source justification A synopsis will be published by the Contracting Office.
>\$100K	3 quotes, or a single quote & sole source justification (Requiring Organization must also provide J&A). A synopsis will be published by the Contracting Office.
>\$650K	3 quotes, or a single quote & sole source justification (Requiring Organization must also provide a J&A), Cost & Pricing Data per FAR 15.403-4

If significant open market/non-schedule item requirements are anticipated and can be identified in advance, it is recommended that the requiring organization consider a separate procurement. If the requirements are recurring, the contractor should consider modifying its GSA schedule to include the non-schedule items.

In furnishing materials/ODCs, contractors may provide GSA Schedule items in accordance with task order requirements, without additional documentation/coordination. The contractor may

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furnish GSA schedule material/ODCs via subcontract, team member or in accordance with 52.251-1 (Government Supply Sources).

OBTAINING BADGES

The contractor shall coordinate through the COR, with the Provost Marshal Office prior to task order on-site performance in order to obtain contractor employee badging and vehicle registration in accordance with AR 600-8-14. Contractor shall wear their badges at all times when performing on-site (Redstone Arsenal or in Government facilities) work under this BPA.

PERFORMANCE EVALUATIONS

For performance-based task orders, performance metrics will be identified in each task order. Task order performance will be evaluated based upon the identified metrics. The requiring activity shall be responsible for assessing the contractor's performance in achieving these objectives and shall utilize the standards, acceptable quality levels, surveillance methods, and performance incentives described in the task order PWS.

Contractor performance on Task Orders exceeding \$1,000,000 (not to exceed amount including ceiling/options) will be assessed under this BPA. For task orders with a period of performance of 12 months or less, a single and final assessment shall be performed when the task order is physically complete. For task orders with a period of performance longer than 18 months, an interim assessment will be prepared every 12 months; a final assessment will be prepared when the order is physically complete. The requirer, the Contract Administration Office, or any other Government source deemed appropriate will provide to the Procuring Contracting Officer (PCO) information relative to the contractor's performance in the following areas: Quality of Product/Service; Schedule; Cost Control; and Business Relations and Management of Key Personnel. The assessment /review will be accomplished using the Contractor Performance Assessment Review System (CPARS) data base. The completed evaluations shall not be released to other than government personnel and the contractor whose performance is being evaluated.

TECHNICAL INSTRUCTIONS (TIs)

Technical direction to perform effort under the Task Order PWS may be given by means of TIs issued in numerical sequence. TIs may be provided to the Contracting Office with the initial Task Order Requirements Package, or with option exercise requests to describe the effort to be performed. A TI may be modified, cancelled, or superseded any time by issuance of a new TI. TIs may be issued during the course of task order performance to provide technical direction that may more closely reflect new information or changed priorities within the TO PWS

Each TI shall establish the effort to be expended for its performance and may include the number of manhours, travel, direct material, and/or other direct costs. The TI shall identify the PWS paragraph number(s) under which the TI effort is covered. The TI shall clearly be tied to the applicable TO SLIN (if applicable) under which the effort is to be performed. If the TI is used to

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identify the price of that individual effort, in no event shall the total number of labor hours and price issued under a series of TIs exceed those labor hours and price set forth in section B of the specific task order for a particular SLIN.

TIs are not intended to replace informal direct communication or nondirective information between the contractor, the contractor's team members/subcontractors, and government personnel. A TI shall not, in any event, alter or modify the scope or terms of either the specific task order, the BPA or the Federal Supply Schedule (FSS).

A TI shall only be transmitted to the contractor by the Contracting Officer, and will normally be issued as an attachment to task order modifications.

TASK ORDER MODIFICATIONS:

1. Option Exercises

For option exercises under EXPRESS, the requiring organization is requested to coordinate the tasks in advance with the contractors so there is a mutual understanding of what is required to accomplish the effort.

EXPRESS allows for unilateral exercise of options. The Government selects the labor mix, and the contractor must maintain the capability to commence work on any option exercise within 3 working days.

Requiring organizations shall submit an option estimate spreadsheet detailing the labor mix, material, travel and material/ODC required for the requested option exercise. When an option exercise request contains material, the guidance under "MATERIAL/ODCs" shall be followed. Requiring organizations shall assure that the labor categories requested for the option exercise are available on the task order rate table, and that the correct labor rate is used for the period of performance specified. Requiring organizations shall also submit a funding document and a TI (if applicable). See "TECHNICAL INSTRUCTIONS (TIs)" for additional information.

2. Realignments

The BPA requires the contractor to notify the Government when a variance in the labor mix is required.

Approval levels for variances are specified in the BPA. As a result of the advance coordination, it is not expected that there will be a need for realignment except in cases where something unforeseen arises, or in a case where the effort is new and there is no prior history, resulting in a guess on the part of both parties. In addition, if the contractor is not given an opportunity for advance input, and the labor mix received is unworkable, the contractor shall notify the Contracting Officer as soon as possible after receipt of the option exercise. Realignments may also be requested on a case-by-case basis for other reasons. For variances requiring a realignment modification by the Contracting Officer, the following guidance is provided:

Requests for realignment shall be made by the contractor.

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Requests for realignment based on personnel changes will not be considered.

Requests for realignment must be justified based on unforeseen circumstances, new effort with no prior history, lack of opportunity for advance input, or other justifiable reasons.

Realignments on the base effort are generally not allowable. The source selection decision for EXPRESS task order awards is made in part, based on the mix of resources quoted by the successful contractor on the base effort, and their functional approach for accomplishing that effort. Authorizing a change in the quoted mix may jeopardize the basis for the source selection decision.

Approved realignments which result in the utilization of fewer labor hours, or less travel or material/ODCs than originally exercised will not affect the option pool (i.e., the difference cannot be put back into the pool for future use). Contractors are cautioned that realignments of this type will consume the option pools at a faster rate.

Realignments requiring a task order modification are not official until a modification incorporating the realignment has been signed by the Contracting Officer. A contractor who elects to work a different mix than what is previously authorized shall do so at their own risk.

All realignments will be taken into consideration as a part of the contractor's annual assessment.

3. Period of Performance Extensions

Requests for period of performance extensions shall be made by the contractor.

Requests for period of performance extensions will be considered on a case-by-case basis, with appropriate justification. Basis for the extension must include a specific reason for the required extension. Non-specific reasons such as "to complete the effort" will not be considered.

Requests for period of performance extensions which are made after the performance date specified in the task order will normally not be considered.

Approval of period of performance extensions are subject to funding availability and COR concurrence, and are not official until a modification incorporating said extension is signed by the Contracting Officer. CORs are not authorized to approve period of performance extensions. A contractor who elects to continue working without an official extension shall do so at their own risk.

All period of performance extensions will be taken into consideration as a part of the contractor's annual assessment.