Office of Logistics and Acquisition Operations

NIHCATS III
Standard Operating Procedures

National Institutes of Health

Last Updated: November 2, 2020

FOREWORD

This Standard Operating Procedure (SOP) document contains guidelines for utilizing the National Institutes of Health Conference, Administrative, and Travel Services III, or NIHCATS III, contract vehicle to obtain a wide range of administrative, meeting, conference, and travel support services across the National Institutes of Health (NIH) and Operating Divisions (OPDIVs) within the Department of Health and Human Services (HHS).

The NIHCATS III contract vehicle is structured as 13 Indefinite Delivery/Indefinite Quantity contracts, using task orders for acquisition of specified services. The task orders will be awarded under the Federal Acquisition Streamlining Act, which requires that the prime contractors be given a fair-opportunity-to-be-considered for task order awards.

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

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

ACRONYMS

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

Abbreviation	Full Name
CO:	Contracting Officer
COR:	Contracting Officer's Representative
D&F:	Determination & Findings
eGOS:	Electronic Government Ordering System
FAR:	Federal Acquisitions Regulation (http://www.acquisition.gov/far)
FASA:	Federal Acquisition Streamlining Act
FP:	Fixed Price
IC:	Institutes and Centers
ID/IQ:	Indefinite Delivery/Indefinite Quantity
IGCE:	Independent Government Cost Estimate
NIHCATS:	NIH Conference, Administrative, and Travel Services
NIH:	National Institutes of Health
OLAO:	Office of Logistics and Acquisition Operations
SOW:	Statement of Work
SRD:	Selection Recommendation Document
T&M:	Time & Materials
TO:	Task Order
TORP:	Task Order Request Package

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1 GENERAL INFORMATION

The National Institutes of Health Conference, Administrative, and Travel Services III (NIHCATS III) provide all the necessary services, qualified personnel and facilities, not otherwise provided by or available to the Government, for domestic and international travel, meetings and conference management, and administrative support services for the National Institutes of Health (NIH) and other Federal agencies. The NIHCATS III contracts are multiple award, non-mandatory Indefinite Delivery/Indefinite Quantity (ID/IQ) contracts using Task Orders, which provide improved response time at equitable and reasonable prices to customers.

The geographic scope of these contracts includes the continental United States and abroad. Contractors shall have the ability to operate and provide support for attendees at remote locations worldwide. Personnel could potentially be assigned to remote locations for a period of performance ranging from one month to one year or longer.

The NIHCATS III master contracts' period of performance consists of a base performance period plus four one-year option periods.

1.1 Non-Personal Services and Inherently Government Functions

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

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

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

1.2 Labor Categories

Please see Appendix 1 for a full list and descriptions of management and support services labor categories that will support the NIHCATS III contracts.

1.3 Contract and Task Order Management

Contract and task order management are mandatory elements for all task orders placed under the NIHCATS III contract vehicle.

The objective of contract management is to provide the program management, project control, and contract administration support needed to manage a high volume, multiple contract task order process.

The application of processes that support task order management are encouraged to ensure that cost, schedule, and quality requirements of each task order are tracked, communicated to the government, and ultimately attained.

1.4   Task Areas

The following categories cover the total scope of services for the NIHCATS III contracts:

1. Travel Support

2. Meeting and Conference Support

3. Documentation Support

4. Administrative Support

5. Website Design, Development, and Maintenance Support

1.4.1   Task Area 1: Travel Support

Under Task Area 1, contractors arrange and assist program participants with domestic and international travel arrangements, escort services, translation and preparation of program documents, accommodations, subsistence allowances, and varied assistance at workshops and conferences. Contractors must have the ability to operate and provide support for personnel in remote locations worldwide.

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

Travel Support (Task Area 1)
Develop detailed travel itineraries
Provide guidance and assistance to U.S. and foreign travelers in obtaining passports and/or visas
Provide simple/complex domestic and international travel arrangements
Provide prepaid tickets in advance of travel Purchase economy class (or business or first class if specified by the COR) air fare or other tickets for domestic or international travel. The purchase of anything other than economy fares is restricted unless authorized by the Institute/Center Director or higher level authority with a written justification to ensure compliance with Federal Regulations.
Provide attendees with knowledge of the Federal Government's travel rules and regulations.
Purchase or arrange ground transportation as required (e.g., taxi cabs, shuttle service, limousine service, rental car, etc.). The contractor must be able to provide rapid response to changes in programs and unanticipated events. Response time may be less than one hour notice for a transportation need.
Arrange hotel or other lodging accommodations in the U.S. and abroad. All accommodations should be of moderate to above-average facilities. In those instances when the visitor is to remain at a location on travel status for an extended period of time, the contractor shall recommend and/or obtain suitable lodging in the form of a furnished house, apartment, university housing, etc. The contractor shall consider convenience of location in terms of commuting, safety, and cost effectiveness. In most instances, contractor shall pay lodging costs directly to hotel or lessor in advance or as identified in the Task Order. Late arrivals must be guaranteed.

Pre-pay appropriate subsistence allowance as specified by the COR.

Make direct contact with the host and/or traveler to ensure that all arrangements are mutually understood concerning arrival times, accommodations, addresses, official functions, special events, and any other special information that impacts the visit. All such arrangements must be approved and confirmed by the COR.

Provide the U.S. traveler or visitor, host, and COR with a typed day-to-day itinerary, listing the following items

- accommodations with addresses and telephone numbers

- dates and times of appointments with addresses and telephone numbers

- field representative (escort) names, emails and telephone numbers

- program coordinator's name, email and home and office telephone numbers

- air and ground transportation arrangements including flight times, airlines, airports, etc.

- information regarding invitations, conferences participants orientation plans, special functions, general travel tips

- emergency points of contact information for all participants and attendees.

Provide reimbursement upon receipt of expense statements for:

- Charges for storing baggage and equipment not required during portions of traveler's trip in baggage rooms or terminal lockers.

- Charges for local and long-distance telephone calls concerning official business only.

- Passport and visa fees, costs of passport and visa photographs, fees for affidavits, charges for required inoculations, etc.

- Fees for entry into foreign countries, port taxes, etc., and all other allowable travel costs and expenses incurred as authorized by Federal Government Travel Regulations and Agency Policies and Procedures.

- Written instructions for expense statements shall be prepared by the contractor and shall be provided to the traveler and the Task Order COR.

Provide highly skilled interpreters who provide simultaneous foreign language interpretation.

However, special provisions may be required at the task order level. When an interpreter has been assigned to a delegation, the interpreter also acts as an escort during the entire duration at all times and will require travel arrangements per diem and lodging at the same level and rate as foreign visitors.

Travel to a remote location may be required at a short notice. The contractor shall be responsible for making these arrangements.

Provide escort services. Services of a multi-lingual escort may be necessary as directed by Task Order requirements. When requested by the Task Order COR, a field representative (escort) shall

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meet a foreign visitor upon arrival at a port of entry. The field representative shall provide the following non-exhaustive list of services:

- o Assist with customs, immigration concerns, and luggage.

- o Assist with connecting flight, if the visitor is not staying in the city of entry.

- o Accompany the visitor to the hotel, assist with check-in procedures and alert hotel staff regarding any special accommodations.

- o Assist in all financial arrangements including pre-payments and explain all subsistence procedures.

- o Review itinerary with the visitor and determine if there are any concerns or problems that require immediate attention. Notify Task Order COR and resolve problems as deemed necessary and in an expeditious manner or specified time frame.

- o Provide orientation regarding American culture, i.e., customs, colloquialisms, and trends.

- o Be available at all times during a visitor's stay to accompany him/her to meetings, conferences, and appointments and to provide for all necessary changes in itinerary and other changes as the visit progresses.

- o Assist with check-out procedures prior to departure and verify that all incidentals are paid and cleared and that the bill is handed in accordance with the hotel reservations and rules.

- o Confirm return air reservations with airlines and traveler.

For additional information regarding the type of work included under Travel Support (Task Area 1), please refer to the Statement of Work (SOW).

1.4.2 Task Area 2: Meeting and Conference Support

Under Task Area 2, contractors provide logistical support for conferences, meetings, seminars, and workshops held in the U.S. and abroad. The contractors also provide support for the production and distribution of conference materials.

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

Meeting and Conference Support (Task Area 2)
Analyze conference center agreements.
Analyze hotel agreements.
Design and develop meeting website, graphics, etc.
Design registration and abstract submission forms.
Facilitate online abstract review process.

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Provide on-site coordination, registration, logistical, and technical support.
Prepare post-conference summary.
Provide status reports (progress, budget, etc.).
Perform a site search in an effort to secure adequate and appropriate housing for conference participants.
Provide meeting rooms, audio visual equipment, supplies, and services incidental to the conduct of conferences.
Prepare and distribute invitations.
Coordinate registration fees and pre-conference distributions, with the ability to handle online registrations.
Establish message centers.
Provide evaluation and statistical analysis support.
Record and transcribe proceedings.
Provide and operate audiovisual equipment.
Provide simultaneous foreign language interpreters as required with an immediate response time.
Provide coordination and implementation of third party participation as requested at the task order level.
Provide collection management if third party payment*

*Collection of third party payments can only be performed in accordance with the Task Order IC/Agency current policies, procedures and authority. All IC/Agency approvals must be obtained prior to the collection of third party payments.

Note: The contractor shall pay all upfront charges. For example, the contractor will be responsible for funding the reservation of conference space, and/or hotel accommodations after the required approvals have been obtained.

This task area prohibits and restricts the use of any meals for Federal Government employees (See effective Efficient Spending Policy)

The Task Order COR is responsible for obtaining a financial report between the contractor and recipient for all upfront charges. This report is to be provided to the Task Order Contracting Officer within **30** days of each transaction. The report will be reviewed and filed in the task order file for audit and review purposes. The financial report must include documentation that was forwarded to the IC, higher level officials or Agency Director for approval for the upfront charges. It must be divided into four parts:

1) Issue

2) Discussion

3) Recommendation

4) Decision

The individual agency's task orders will have to provide additional information on responsibility for payment. The report must include the recipient's name, date received, funding distribution copy, invoice date and number and the amount of the task order.

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The contractor is required to pay for all appropriate services in a timely manner in accordance with regulations.

For additional information regarding the type of work included under Meeting and Conference Support (Task Area 2), please refer to the SOW.

1.4.3   Task Area 3: Documentation Support

Under Task Area 3, contractors provide documentation services in support of meetings, conferences, seminars, and workshops held in the United States and in foreign countries.

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

Documentation Support (Task Area 3)
Prepare materials for distribution prior to the conference, which may include briefing materials, spreadsheets, power point presentations, preliminary agenda, travel and hotel data, and instructions concerning financial arrangements.
Prepare materials for distribution at the conference, which may include the final agenda, list of participants, notices of special functions, name badges, reference materials, program booklets negotiated contracts (hotels, interpreter, transportation, etc.).
Assist with preparation of program documentation. Program documentation ranges from simple agendas, negotiation documents, progress reports, summary reports of meetings to bilingual briefing books containing proceedings of working meetings and background biographical data on program participants.
Provide services such as creating, collating, editing, reproducing, and delivering documents.
Assist with preparation of abstract papers and/or publication of proceedings.
Arrange for translation of documents and negotiate contracts for translators.

For additional information regarding the type of work included under Documentation Support (Task Area 3), please refer to the SOW.

1.4.4   Task Area 4: Administrative Support

Under Task Area 4, contractors provide direct administrative support of conferences and meetings with the goal of assisting the scientific program staff and other government agencies in accomplishing a variety of research and administrative responsibilities.

This contract cannot be used for temporary administrative services or administrative services unrelated to conferences/meetings. If these are the type of services you are interested in, please visit the LTASC II website.

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

Administrative Support (Task Area 4)
Provide administrative support for conferences, workshops, symposiums, focus groups, meetings, and site visits.
Perform editing and publishing of newsletters, brochures, and pamphlets.
Design graphics for newsletters, invitations, brochures, pamphlets for research, etc.

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Assist with the distribution of letters, documents, or other materials by e-mail, fax, postal service, or courier service

For additional information regarding the type of work included under Administrative Support (Task Area 4), please refer to the SOW.

1.4.5   Task Area 5: Website Design, Development, and Maintenance / Internet Support

Under Task Area 5, contractors provide for Internet and Intranet support, which includes initial website design, development, and management, as well as conducting usability testing to evaluate effectiveness and user-friendliness.

This task area shall only be used in support of a conference, meeting, focus groups, scientific research, studies, etc.

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

Website Design, Development, and Maintenance Support/Internet Support (Task Area 5)
Design, develop, and maintain websites on the Internet, as required.
Work with the Task Order COR to determine any IT security violations, site content, site concept, target audience, site goals and ideas for conference and meeting presentations.
Provide text and graphic design/conversion for conference and meeting support only.
Use documents/graphics provided by NIH and other Federal agencies or create new documents and graphics for inclusion on the sites. All new documents shall be edited and proofread by editorial staff to ensure the highest quality control.
Create new art, integrate into site using HTML (hypertext markup language), record and digitalize audio, and program and integrate databases for the design.
Convert images, audio, or video as requested. Work with the Web Site Manager/Task Order COR to design databases. The Contractor shall be able to use current technology to create or redesign web pages. The Contractor shall keep up-to-date and apply new technologies to websites when these features are available to all browsers.
Provide technical support for site maintenance and tracking. This shall include validation of code and links; testing site on the most frequently used browsers and various platforms; publicity of site through search engines and metatags; and tracking of site usage and accessibility with daily user statistics and online surveys.

For additional information regarding the type of work included under Website Design, Development, and Maintenance / Internet Support (Task Area 5), please refer to the SOW.

1.4.6   Additional Notes

- This contract will require frequent communication and interaction between the contractor and the COR. To insure that required services are fulfilled, face-to-face meetings and daily document transfer are possible on a practical and cost-effective basis. The offeror shall submit plans to demonstrate how the necessary interactions can be successfully accomplished.

- Individual task orders may require a specified level of close and continuous communication. Task orders may require a specific PM for the period of performance who will serve as the principal point of contact to the Government and who shall be held responsible for production and oversight of all reports and plans, the direct supervision and coordination of project staff and consultants, issuing work assignments, monitoring the progress of this Task Order and provision of deliverables, and maintaining cost control.

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- Contractors shall provide plans to ensure that no confidential or proprietary information recorded via notes, media or transcript during the conduct of a closed meeting or closed meeting session will be kept in files open to the public nor shall be accessible to anyone but those contracted employees directly engaged in the project. Plans shall include the disposition of finalized hardcopy and/or media containing finalized summaries, minutes, reports, etc. For some specific meetings where such information is disclosed, the subsequent Contractor may be required to sign a confidentiality agreement. Any such form will be identical to that which is concurrently signed by the Government.

- Materials produced by the Contractor shall not exceed the limitations imposed by the "Government Printing and Binding Regulations" published by the Joint Committee on Printing, Congress of the United States. The limitation is 5,000 reproductions of any page; documents consisting of multiple pages may not exceed an aggregate for 25,000 production units. In cases where quantities do exceed this limitation, the NIH will provide the Contractor with the required materials for distribution.

- The nature of this NIHCATS III contract vehicle requires that payment be made upfront for costs such as reservation fees, deposits, and the like for hotel rooms and space, airline tickets, transportation costs, etc. The small business contractors awarded an ID/IQ contract under NIHCATS III are required to pay the costs and expenses related to performing the services required by a task order SOW and invoicing the Government for those costs afterward. Due to this aspect of the contract vehicle, it is important that the small businesses remain financially sound and have the available funds to cover these upfront costs.

1.5   Task Orders

Customers will use task orders to define and obtain services under the NIHCATS III contracts. Each task order is expected to have differing requirements based on the unique needs of the customer. Task orders may be either Firm Fixed Price (FFP) and/or Time & Materials (T&M). Though FFP task orders are preferred, T&M are permitted but require a signed Determinations and Findings (D&F), per FAR 16.6 and any agency procedures. T&M should only be used if FFP is not suitable.

Details describing the process for initiating a task order are described in Section 3.

1.6   Classified Material

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

The Task Order CO and Task Order COR must ensure that proprietary information contained in the contractors' task order proposals is protected from unauthorized disclosure. Contractors must ensure that all proprietary information is appropriately marked.

Fixed Firm Price (FFP)

The President's Memorandum of March 4, 2009, on "Government Contracting" established a preference for fixed-price contracts. Fixed-price contracts (FAR Subpart 16.2):

- provide maximum incentive for the contractor to control costs and perform effectively
- impose a minimum burden upon the contracting parties
- expose the government to the least risk
- accommodate market fluctuations or other contingencies, when appropriate, using economic price adjustments

1.7   NIHCATS III Usage Assessments

This contract is designed for use by NIH, HHS OPDIV's and STAFDIV's, and other federal agencies. For external customers (outside of NIH) to use the NIHCATS III Contracts, there will be an assessment collected via an Interagency Agreement (IAA) between the requesting agency and the NIH. The assessment, which will be a percentage of the estimated dollar amount of award, will be determined by whether the order is unassisted or assisted.

An unassisted order is one where the requesting agency uses its own contracting shop/contracting officer (this includes HHS/PSC). The assessment for an unassisted order is .5%.

An assisted order would be a task order administrated by this office, meaning NIH/OLAO would serve as the contracting shop/contracting officer. For assisted orders, there will be an additional 2% assessed making the total

assessment for an assisted order 2.5% (.5% to use the vehicle + 2% for NIH/OLAO serving as the contracting shop/contracting officer).

Our office requests the Memorandum of Understanding (MOU) and Interagency Agreement (IAA) forms 7600 A and B in order to begin the task order process. Please provide the MOU and IAA to the NIHCATS III Support Team when you submit the Task Order Request Package (TORP). Your TORP will be released to the contractors once a complete package (including the MOU and draft 7600 A and B forms) is received.

The IAA will need to be fully executed, with all documents signed and CAN numbers received, prior to the award of the task order.

1.8 Supporting Documentation Submission

The preferred method for communicating with the NIHCATS III CO is via e-mail at NIHCATSIII@mail.nih.gov.

Microsoft Word is the preferred format for all text documents.

All spreadsheets should be submitted in Microsoft Excel. PDF's are also acceptable.

Documents related to the competition of a particular TORP will be handled through the electronic Government Ordering System (eGOS).

2   ROLES AND RESPONSIBILITIES

The primary roles supporting the NIHCATS III contracts and task orders on behalf of the NIH and other Federal agencies are:

- NIHCATS III Program Support Team
    - NIHCATS III CO
    - NIHCATS III COR

- Customer (NIH/other Federal agency)
    - Task Order CO
    - Task Order COR

The stakeholders above will play a significant role in the maintenance of the NIHCATS III contracts as well as the initiation, award, administration, tracking, and close-out of each task order. Responsibilities are outlined in the following sections and again later in the task order procedures.
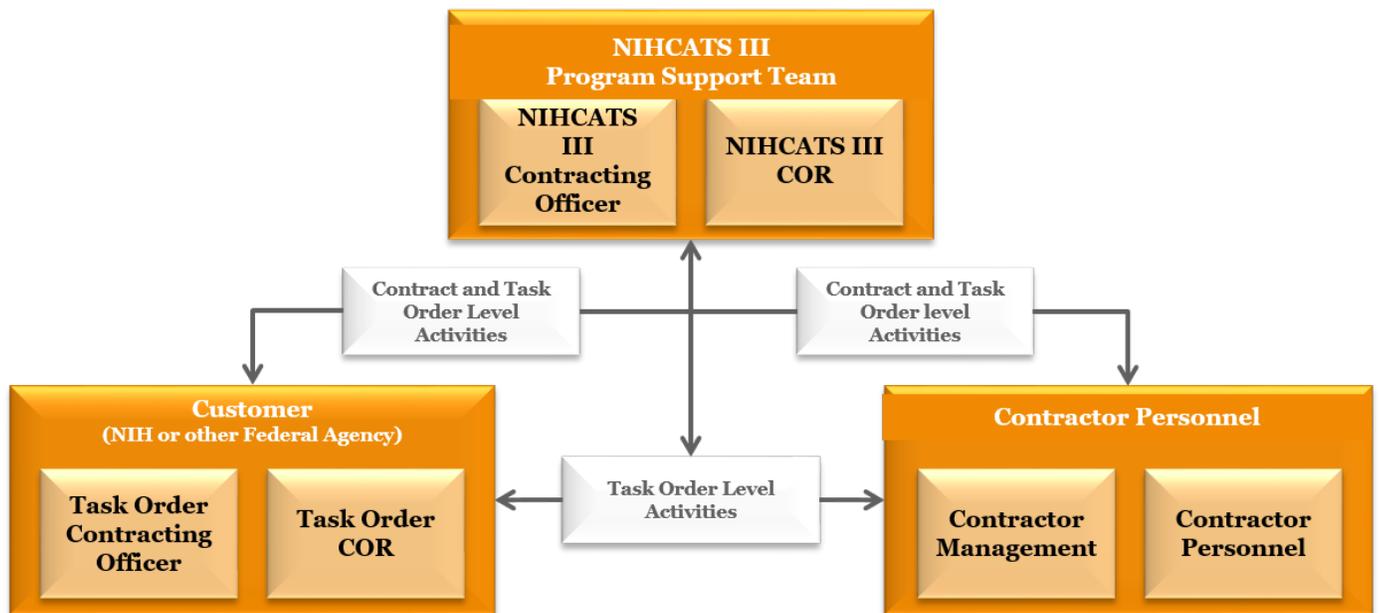
2.1   NIHCATS III Program Support Team

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

2.1.1 NIHCATS III Contracting Officer

NIHCATS III CO

Role: Authorized to negotiate changes to the SOW, delivery schedule, and Period of Performance for the NIHCATS III Master Contracts

Primary Responsibilities:
- Point of contact for contractual issues
- Review, approve, and release TORPs
- Coordinate and liaison between vendors and customers
- Announce task orders awards

The NIHCATS III CO will serve as the primary point of contact for this contract. The NIHCATS III CO has the authority to act as an agent of the Government under the NIHCATS III Master Contracts. Only the NIHCATS III CO has authority to:

(1) direct or negotiate any changes in the SOW or specifications of the **NIHCATS III Master Contracts**;

(2) modify or extend the period of performance;

(3) change the delivery schedule;

(4) otherwise change any terms and conditions of the contracts;

(5) concur with any exceptions to the Fair Opportunity Process; and

(6) perform contract administration duties such as exercising option years and contract close-out functions.

The NIHCATS III CO is responsible for:

(1) receiving TORP packages from NIHCATS III customers;

(2) reviewing TORPs and releasing TORPs to all contractors;

(3) reviewing Q&A and releasing Q&A to all contractors;

(4) concurring on Selection Recommendation Documents (SRDs);

(5) announcing task order awards; and

(6) acting as the primary point of contact for contractual issues related to the NIHCATS III contracts.

2.1.2 NIHCATS III Contracting Officer's Representative

The NIHCATS III COR within OLAO shall act as the NIHCATS III COR for the purpose of the NIHCATS III Master Contracts. The NIHCATS III COR is responsible for:

(1) monitoring the contractor's technical progress, including the surveillance and assessment of performance;

(2) recommending changes in requirements to the NIHCATS III CO;

(3) interpreting the SOW and any other technical performance requirements;

(4) performing technical evaluations as required;

(5) performing technical inspections and acceptance required by this contract; and

(6) assisting in the resolution of technical problems encountered during performance.

Other responsibilities of the NIHCATS III COR include but are not limited to:

(1) logging and maintaining records of all task orders; and

(2) tracking and guiding contract performance over the life of the NIHCATS III contract vehicle.

2.2 Customer (NIH/other Federal agency)

Task orders will be used to define and obtain services under the NIHCATS III contract vehicle. Requirements in each task order will differ according to the unique needs of the customer. The roles listed below describe those who will be responsible for the **procurement and oversight of task orders**. People in these roles are considered to be "customers" of the NIHCATS III contract vehicle.

2.2.1 Task Order Contracting Officer (CO)

The Task Order Contracting Officer (CO) will have the authority to act as an agent of the Government under a particular task order. For NIH customers, the Task Order CO would be a warranted CO from their respective Acquisition Office or from their ordering office, when applicable. For customers at external agencies, the Task Order CO would be a warranted CO from their respective procurement office.
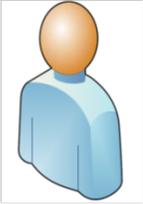
Task Order CO

Role: Authorized to act as an agent of the Government under a particular task order and to negotiate changes to the SOW

Primary Responsibilities:
· Submit TORP in eGOS
· Assist in the task order proposal evaluation
· Monitor and assess task order performance
· Manage all pre-award, award, administration, and close-out activities
· Must be FAC-C Certified

Task Order CO

The Task Order CO has authority to:

(1) direct or negotiate any changes in the SOW or specifications of a **task order**;

(2) modify or extend the period of performance of the task order; as long as the period of performance of the task order does not exceed the period of performance of NIHCATS III contract;

(3) change the delivery schedule;

(4) otherwise change any terms and conditions of a particular task order; and

(5) create and gain approval for exception to the Fair Opportunity Process.

The Task Order CO is responsible for:

(1) submitting the TORP to the NIHCATS III Contracting Officer

(2) executing the D&F per FAR 16.602 for each task order placed on a T&M basis*;

(3) collaborating with the Task Order COR in the evaluation of proposals;

(4) signing the Selection Recommendation Document (SRD);

(5) creating and signing a task order award;

(6) submitting award documents to the NIHCATS III Program Support Team;

(7) processing modifications to the task order;

(8) monitoring and assessing the contractor's task order performance;

(9) signing acceptance of the final deliverables and/or statement that the work has been completed in accordance with the task order SOW; and

(10) performing close-out tasks.

Additional approval is required for contracts expected to extend beyond 3 years

2.2.2 Task Order Contracting Officer's Representative (COR)

The Task Order COR is a certified professional who will typically be the individual requiring the services offered under the NIHCATS III vehicle. The Task Order COR may be a designee within the IC or non-NIH customer requiring the

service. With assistance from Task Order CO, the Task Order COR will develop the requirement and will represent the Government as the main interface between NIH and the contractor during the delivery of services.

The Task Order COR is responsible for:

 (1) monitoring the contractor's technical progress on a task order;

 (2) collaborating with the Task Order CO in the evaluation of proposals

 (3) completing formal contractor performance evaluations as required by the NIHCATS III Program Support Team;

 (4) interpreting the SOW and any other technical performance requirements of a task order;

 (5) performing technical evaluation required by a task order;

 (6) performing technical inspections and acceptance required by a task order; and

 (7) assisting in the resolution of technical problems encountered during performance.

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

 (1) working with the Task Order Contracting Officer to draft the TORP

 (2) serving as the only Government point of contact that provides direction to the contractor's management staff to facilitate task order performance; and

 (3) monitoring performance over the life of the task order.

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3   TASK ORDER PROCEDURES

Task orders are issued to procure services under the NIHCATS III contract vehicle. The following section describes the details of task order creation, award, and management. Additional steps and/or actions may be needed for non-NIH customers; these are highlighted in the process.

Per the Federal Acquisition Streamlining Act (FASA) and FAR section 16.505(b), each contractor will have a fair opportunity to be considered for each order in excess of $3,500 unless one of the exceptions in FAR 16.505(b)(2) applies.

The figure below charts the Task Order Process Flow from initiation of the requirement through task order close-out, mapping each step to the party primarily responsible for completing the required activities. A more detailed description of the activities occurring at each step is provided in subsequent sections of these guidelines.

NIHCATS III Task Order Procedure

Task Order CO & COR	NIHCATS III CO & COR	Contractor Personnel

1 Task Order COR develops TORP in eGOS

2 Task Order CO reviews the TORP and submits it to the NIHCATS III CO and COR in eGOS

TORP

3 Catalog the TORP

4 Review the TORP

Revise TORP per NIHCATS III CO and COR's feedback

TORP ←No— Does the TORP fulfill all the requirements?

Yes

Release the TORP → TORP → **5** Review TORP and submit questions in eGOS

6 Answer contractors' questions in eGOS ← Questions

7 Task Order CO reviews the Q&A and submits to the NIHCATS III CO and COR

Q&A → **8** Review Q&A

Revise Q&A per NIHCATS III CO and COR feedback ← Q&A ←No— Does the Q&A pass review?

Yes

9 Release Q&A to contractors via eGOS → Q&A → Continued on next page

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Task Order CO & COR	NIHCATS III CO & COR	Contractor Personnel

Continued from previous page

Will the contractor respond to the TORP?

No → Submit "No Response" statement in eGOS

Yes → Submit proposal in eGOS → Proposal

10 Evaluate proposals, complete SRD, and submit to NIHCATS III CO and COR in eGOS → Approved SRD (signed by Task Order CO) → **11** Review SRD

Does the NIHCATS III team concur with the SRD?

No → SRD → Revise SRD per NIHCATS III CO and COR's feedback

Yes

12 Task Order CO processes the task order award and submits it to the NIHCATS III CO and COR in eGOS → Signed Task Order Award → **13** Email award letter and award document to selected contractor → Signed Award Letter/ Signed Task Order Award → **14** Implement task order

When Task Order Period of Performance Ends

Send Statement of Completion and Final Invoice to Task Order CO → Statement of Completion and Final Invoice → **15** Task Order COR completes task order performance survey → Close out Task Order

National Institutes of Health

Presolicitation

3.1 Step 1: Task Order Contracting Officer's Representative (COR) develops TORP Form

When NIH or another Federal agency determines a need exists for conference, meeting, or travel services, a Task Order COR and Task Order CO will first be identified. The Task Order COR may or may not be the requestor for services but must be Federal Acquisition Certification (FAC)-COR certified. Similarly, the Task Order CO must be FAC-C certified. Before creating a TORP, the Task Order COR and CO should review the NIHCATS III Contract.

All Task Order CORs must coordinate the internal administrative review and management of their respective task orders as defined within these procedures with their Task Order COs.

A completed **TORP** will include the following:

1. a completed eGOS TORP Form

2. a SOW

3. Independent Government Cost Estimate (IGCE) (not released to contractors)

4. funding memo (not released to contractors) for task orders with a total value (base year plus option years) less than $250,000

5. Acquisition Plan for task orders with a total value greater than $250,000

6. all required conference/meeting approval request forms and waivers with approvals (if applicable) (not released to contractors)

7. for customers outside of NIH, also include completed 7600 A and B forms as well as the MOU for the assessment (not released to contractors).

The customer may set their own evaluation criteria, however, cost/price must be considered. For more information on these elements of the TORP, please visit the NIHCATS III website (http://NIHCATS.olao.od.nih.gov/resources.html).

NOTE:

For NIH ICs: All required conference/meeting forms and waivers based upon NIH's most recent policy guidance must be approved and submitted prior to TORP award. If the customer does not have the required conference/meeting form to submit initially with the TORP, it must be submitted with the Selection Recommendation Document (SRD).

For External Customers(Agencies outside of the NIH): All required conference/meeting forms and waivers based upon the Agency/OPDIV's most recent policy guidance must be approved and submitted to the NIHCATS III Office. The forms must be submitted prior to solicitation or award, per the Agency/OPDIV's most recent policy guidance. If an HHS OPDIV does not have a specific policy, then the HHS Policy will be followed. HHS Policy requires conference/meeting approval forms prior to TORP award. If the customer does not have the required conference/meeting form to submit initially with the TORP, it will be submitted with the SRD.

3.2 Step 2: Task Order CO reviews the TORP and submits it to the NIHCATS III CO and COR via email

Upon review and acceptance, the Task Order CO will review the TORP to make sure it is complete, per the list in Step 1, and submit a complete TORP via eGOS. Only the Task Order CO can submit the TORP via eGOS.

3.3 Step 3: NIHCATS III CO and COR catalogue the TORP

The NIHCATS III CO and COR will catalogue the TORP. The TORP number assigned by the eGOS system will serve as the task order tracking number. <u>When submitting or sending any documents or e-mails, the Task Order CO shall reference the TORP number (e.g., subject line for e-mails, headers for documents).</u>

Solicitation and Award

3.4 Step 4: NIHCATS III CO and COR review and release the TORP via email

The NIHCATS III CO and COR will review the TORP for completion and scope. Any issues with the TORP will be resolved with the Task Order CO and COR. TORPs requiring revisions will be returned by the NIHCATS III CO and COR via eGOS. After review and approval, the NIHCATS III CO and COR will release the TORP to all contractors via eGOS.

The TORP <u>does not</u> commit NIH to pay any costs incurred in the submission of any proposal, nor does it commit NIH to award a task order for such services. NIH intends for each TORP to be negotiated into a resulting task order. However, there is no guarantee that a task order will be issued in every case.

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

Upon notification of the TORP release, all contractors will have the opportunity to review the requirement and submit questions requiring clarification. Contractors shall submit all questions via eGOS, by the date and time indicated in the TORP.

3.6 Step 6: Task Order CO works with the Task Order COR to answer questions

The Task Order CO will work with the Task Order COR to compile and respond to any questions contractors submitted. The Task Order COR will answer technical-related questions; the Task Order CO will answer contractual questions. **In accordance with fair competition guidelines, all answers to submitted questions must be announced to all contractors collectively.**

3.7 Step 7: Task Order CO emails NIHCATS III CO and COR when Q&A is ready for review

After answering all questions submitted in eGOS, the Task Order CO will notify the NIHCATS III CO and COR through eGOS that responses are ready for review. **The Task Order CO must review and submit questions and responses in eGOS.**

3.8 Step 8: NIHCATS III CO and COR review and release Q&A

The NIHCATS III CO will review and upon approval release questions and answers simultaneously to all contractors in eGOS

3.9 Step 9: Contractors respond to the TORP

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

3.9.1 Proposals

Proposals shall be submitted electronically via eGOS or otherwise will not be accepted. Oral proposals will not be accepted. Proposals will consist of two parts: a technical proposal and a business proposal. The contractors shall prepare a proposal with as much detail as requested by the TORP.

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Please note that these proposals may be quite brief unless additional information is required. If price is the only evaluation factor listed, award will be made to the lowest price.

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

Business Proposals shall include an estimated ceiling amount specifying the limit of labor and other related fees and expenses. The hourly rates for the proposed task order labor categories may be equal to or less than the rates stated in the associated NIHCATS III contract, but may not exceed those rates. All proposed rates are subject to review by the NIHCATS III CO for compliance with the associated NIHCATS III contract.

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

3.9.2 "No Response" Statements

A contractor shall submit a "No Response" statement via eGOS to the Task Order CO if a contractor is unable or otherwise cannot perform a requirement.

All **"No Response" statements** shall include a brief statement as to why the contractor has elected to forego the opportunity.
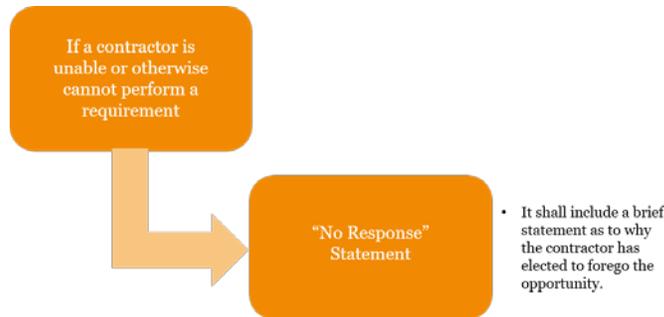

3.10 Step 10: Task Order CO and COR evaluate proposals; submit SRD

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

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

After completion of the evaluation, an Awardee is selected. The Task Order COR will complete a Selection Recommendation Document (SRD) documenting the review process and detailing the reason why the Awardee selected is in the best interest of the Federal government in accordance with FAR 16.505(b). An SRD template may

be found on the 'Resources' page of the NIHCATS III Website. **Please note all proposals submitted must be fully evaluated in justification and selection of the Awardee.**
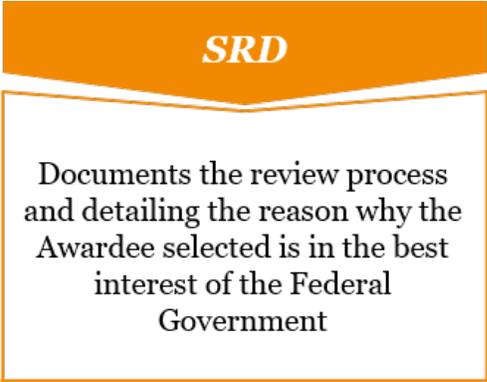
The SRD must include the following:

(1) the selection criteria/methodology for evaluating submitted proposals as originally defined in the TORP package

(2) a list of the contractors that responded to the TORP, and

(3) rationale for the recommendation of the task order Awardee, including a summary of evaluation results, any negotiations conducted, price analysis, and award analysis (rationale for the recommendation of the Awardee).

The Task Order CO will upload the SRD electronically in the eGOS 'Selection' screen and submit to the NIHCATS III CO and COR for review and concurrence. **The Task Order CO cannot process the award until concurrence is received.**

3.11 Step 11: NIHCATS III CO and COR review SRD and return concurrence

After reviewing and concurring with the SRD, the NIHCATS III CO and COR will notify the Task Order CO via eGOS to begin processing the task order award. **This step must be completed before any award can be processed.**

3.12 Step 12: Task Order CO processes and sends the task order award via email

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

The **task order** will contain the following:

- contract number (for the NIHCATS III contractor selected),
- task order number,
- order date,
- point of contact for billing purposes,
- SOW,
- appropriation/funding citation,
- amount of funds obligated,
- billing and delivery addresses, and
- period of performance.
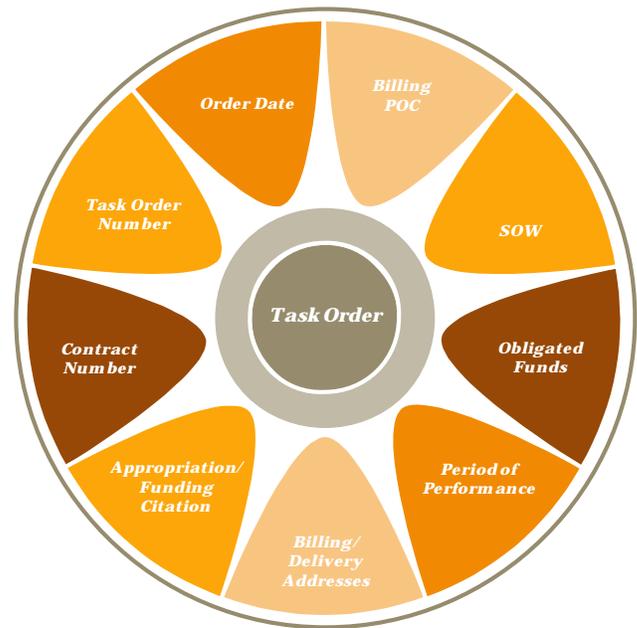
The Task Order CO will process the award (e.g. OF 347). Federal agencies outside of NIH will work with their procurement office to process an approved award document form used by that agency. A copy of the signed award document, and DCIS report must be uploaded electronically in the eGOS 'Selection' screen alongside the approved

SRD. Please note, following upload of the award document and DCIS report, the Task Order CO must click submit again on the 'Selection' screen.

External customers will also need a finalized Interagency Agreement (IAA) prior to award. For more information, please see Section 1.7.

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

3.13 Step 13: NIHCATS III CO and COR release the award notice via email

The NIHCATS III CO and COR will announce the task order award by emailing the contract award along with an award letter to the winning contractor. The Task Order CO and COR will be copied on this email.

Upon approval of the award selection in eGOS, the system will release a notification to the unsuccessful offerors that submitted a proposal but did not win the task order.

According to the FAR, Task Order COs must provide a debriefing for all task orders exceeding $5.5M to offerors that request one within 3 days of being notified. For task orders less than $5.5M, providing a debriefing will be at the discretion of the Task Order CO.

Once the award selection is approved in eGOS, the NIHCATS III Support Team will email an award notice to all NIHCATS III contractors informing them of the task order award. In addition, contractors will be able to access the NIHCATS III eGOS to see which company won a particular task order.

Note: All internal debrief requests for any task order will be coordinated by the Task Order CO and Contractor. A summary of the debriefing proceedings are to be forwarded to the NIHCATS III CO within three days of the meeting for filing/audit purposes.

Administration

3.14 Step 14: Contractor implements the task order

The contractor must contact the Task Order COR to start the work.

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

3.15 Step 15: Task Order CO or COR completes a task order performance survey

After the Task Order has expired, the Task Order COR and the Task Order CO will assess the quality of services received by completing a contractor performance survey (available on the NIHCATS III Website at http://NIHCATS.olao.od.nih.gov, and ensure that all task order requirements were met.

The contractor shall submit the final invoice to the Task Order COR, including a statement indicating that all work has been completed and all costs have been accounted for and billed. The contractor shall forward a copy of the final invoice to the NIHCATS III CO via email (NIHCATSIII@mail.nih.gov) when the task order has been completed.

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3.16 Task Order Award Timelines

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

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

4   CONTRACT AND TASK ORDER MANAGEMENT

As outlined in Section 2 of this document, OLAO will provide contract-level management and oversight for the NIHCATS III contracts through the NIHCATS III Program Support Team. The Task Order CO and Task Order COR will perform day-to-day management and oversight for each task order.

4.1   Contract Management

The NIHCATS III CO will perform contract administration duties while the NIHCATS III COR will track and guide contract performance over the life of the contract. The NIHCATS III Program Support Team employs several methods and tools to assist this effort, in close concert with performance monitoring and evaluation efforts. These tools include contract file maintenance and training.

4.1.1   Contract File Maintenance

The NIHCATS III Program Support Team maintains a central file for each of the contracts. The file contains the contract and all documentation – all contract modifications, correspondence performance evaluation reports, copies of task orders, task order documentation, and task order modifications.

4.1.2   Training

The NIHCATS III Program Support Team will prepare and conduct training presentations to support NIHCATS III customers and contractors in understanding and using the NIHCATS III contracts. Training sessions will also be held with contractors to improve their understanding of the task order process. Training all parties involved will facilitate adherence to the task order procedures. In addition, materials, such as this Standard Operating Procedure document, FAQs, templates, and other supporting documents, are available on the NIHCATS III Website. To request training for your office or IC, please complete the Training Request Form.

4.2   Task Order Management

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

4.2.1   Initiation and Close-out of Task Orders

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

4.3   Day-to-Day Oversight and Management

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

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

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

4.3.1   Acceptance of Services

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

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4.4 Task Order Modifications

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

4.4.1   No-Cost Modifications

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

Copies of any task order modification executed must be sent to the NIHCATS III CO and COR via the NIHCATS III Program Support Team e-mail (NIHCATSIII@mail.nih.gov).

4.4.2   Addition of Funds

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

Copies of any task order modification executed must be sent to the NIHCATS III CO and COR via the NIHCATS III Program Support Team e-mail (NIHCATSIII@mail.nih.gov).

4.4.3   Additional Work / Additional Time

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

5   APPENDIX 1: NIHCATS III LABOR CATEGORIES

Labor Category	Functional Responsibility	Education	Experience
Project Manager (PM)	✓ The principal liaison between the contractor and multiple government agencies ✓ Serves as the overall lead or director on complex projects and multiple agency contracts ✓ Manages multiple projects, project managers and associated technical project issues ✓ Responsible for ensuring that all tasking associated with a Government-funded program or project is completed effectively, efficiently, and on time ✓ Assures quality control programs are in place and consistent on all programs assigned	📖 **Desired:** MA/MS 📖 **Required:** BA/BS	✎ 5 or more years of relevant experience
Assistant Project Manager	✓ The principal liaison between the contractor and multiple government agencies ✓ Serves as a lead on complex projects and multiple agency contracts ✓ Responsible for ensuring that all tasking associated with a Government-funded program or project is completed effectively, efficiently, and on time ✓ Coordinates manpower and resources for multiple projects ✓ Manages associated technical project issues ✓ Assures quality control programs are in place and consistent on all programs assigned	📖 **Desired:** MA/MS 📖 **Required:** BA/BS	✎ 3 or more years of relevant experience
Administrative Assistant	✓ Conducts a variety of clerical, administrative activities and other duties as assigned in direct support of professional positions ✓ Maintains office files ✓ Provides word processing, spreadsheets and graphics as desired	📖 **Required:** High school degree	✎ 2 or more years of relevant experience
Web Project Manager	✓ Responsible for web strategy and operations ✓ Develops business plan and annual budget for website function ✓ Accountable for budget, staff planning, management, and products and service delivery	📖 **Required:** BA/BS	✎ 3 or more years of relevant experience

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Labor Category	Functional Responsibility	Education	Experience
	✓ Oversees operational activities of the website(s) with specific attention on content creation and website maintenance		
Web Designer	✓ Designs and develops user interface features, site animation, and special-effects elements under general supervision ✓ Contributes to the design group's efforts to enhance the look and feel of the organization's online offerings ✓ Designs the website to support the organization's strategies and goals relative to external communications ✓ Develops applications based on current, new and future net-based applications	📖 **Required:** BA/BS	✎ 3 or more years of relevant experience ✎ Requires significant graphics and design experience as well as HTML knowledge
Web Software Developer	✓ Designs, develops, tests, deploys and maintains web or web applications constructed in a business application or survey application mode ✓ Develops 508-compliant web applications for relational database and/or data retrieval systems	📖 **Required:** BA/BS required	✎ 3 or more years of relevant experience
Web Content Administrator	✓ Develops and provides content that will motivate and entertain users so that they regularly access the website and utilize it as a major source for information and decision-making ✓ Manages/performs website editorial activities including gathering and researching information that enhances the value of the site ✓ Locates, negotiates, and pursues content ✓ Seeks out customers to gather feedback for website improvement and enhancements	📖 **Required:** BA/BS required	✎ 3 or more years of relevant experience ✎ Requires experience in production management, web page design, HTML, and web graphics types and standards
Interpreter	✓ Possesses skills in a broad range of general interpreting assignments ✓ Used in general assignments, including but not limited to staff/business meetings, interviews, training courses, conferences and education classes	📖 **Required:** A minimum of an Associate's Degree in relevant area 📖 An additional two years of	✎ 3 or more years in interpreting services ✎ Interpreters must have demonstrated proficiency in

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Labor Category	Functional Responsibility	Education	Experience
		experience in the relevant area may be substituted for an Associate's Degree.	grammar and spelling
Tour Guide/Escort	✓ Escorts individuals or groups on sightseeing tours or through places of interest, such as industrial establishments, public buildings, and art galleries ✓ Speaks foreign languages to communicate with foreign visitors ✓ Possesses skill in speaking, active listening, social perceptiveness, service orientation, and reading comprehension ✓ Possesses ability for oral expression, oral comprehension, speech clarity, speech recognition, and problem sensitivity	📖 **Required:** Training in vocational schools, related on-the-job experience, or an Associate's degree 📖 Some may require a bachelor's degree	✎ Previous work-related skill, knowledge, or experience is required for these occupations ✎ For example, an electrician must have completed 3 or 4 years of apprenticeship or several years of vocational training, and often must have passed a licensing exam, in order to perform the job
Statistician	✓ Collects, classifies and analyzes quantified and statistical data in projects and special studies ✓ Develops study plans, determines data needs and statistical techniques to be applied, and prepares reports and studies	📖 **Required:** Master's degree in Finance or related field	✎ 8 or more years of relevant experience
Evaluation Specialist	✓ Supports evaluation efforts through extensive information gathering, report generation, and data analysis	📖 **Required:** BA/BS degrees	✎ 3 or more years of relevant experience
Audio/Visual Coordinator	✓ Provides videoconferencing services for various groups ✓ Receives requests for videoconferencing services, schedules events with videoconferencing coordinators, works with requesters concerning meeting requirements, sets up and tests equipment including peripherals, trains users as necessary, handles controls or peripheral equipment for high-profile meetings, breaks down and stores equipment between uses,	📖 **Required:** High school degree	✎ 2 or more years of relevant experience

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Labor Category	Functional Responsibility	Education	Experience
	and provides audio-visual assistance as requested ✓ Uses computer equipment and software for e-mail, videoconferencing scheduling, word processing, spreadsheets, databases, or Internet access ✓ Attends videoconferencing facilitator meetings and annual refresher seminars ✓ May perform work in video-related areas such as videotaping, photography, equipment maintenance, database updates, or equipment research		
Logistical/Technical Support Specialist	✓ Performs logistics tasks associated with logistics engineering, scientific or general data processing functions within Governmental and/or civil development, acquisition, sustainment, and/or operational environments ✓ Interfaces with individual users to resolve operational and/or business processes, and/or routine technical problems ✓ Coordinates tasks with other employees ✓ Trains and assists less-experienced personnel ✓ Participates as an individual contributor and as a member of multiple cross-functional integrated product teams and/or functional area teams	📖 **Required:** BA/BS degrees	✎ 3 or more years of relevant experience
Conference Management Director	✓ Provides oversight on conference management projects ✓ Serves as a lead on complex projects and multiple agency contracts and serves as the principal liaison between the contractor(s) and multiple government agencies ✓ Ensures that all tasking associated with a Government funded program or project is completed effectively, efficiently, on time, and within budget ✓ Coordinates manpower and resources for conference projects ✓ Assures quality control programs are in place and consistent on all projects assigned	📖 **Required:** BA/BS degrees	✎ 5 or more years of relevant experience

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Labor Category	Functional Responsibility	Education	Experience
Graphic Artist	✓ Prepares art and graphic design/illustration projects ✓ Conceptualizes designs and produces trade show booths and/or other types of exhibits and their accompanying materials ✓ Designs graphic materials for project presentations	📖 **Required:** Associate's degree, formal training in Graphic Design, or acknowledged mastery and recognition as a professional artist	✎ 3 or more years of relevant experience
Scientific Writer	✓ Combines an understanding of the sciences and an ability to write well ✓ Analyzes scientific data and translates the information into writing that readers can easily understand ✓ Composes a variety of documents about physical, medical, chemical, or biological sciences ✓ Writes for a variety of media, including periodicals, books, websites, and newspapers - Readers of these publications can be experts and laypeople, so science writers are responsible for conveying information to a wide audience successfully.	📖 **Required:** Bachelor's Degree as well as a background in a scientific field	✎ 3 to 5 years of relevant experience
Senior Writer	✓ Formulates and writes copies for projects including fact sheets, project summaries, monthly progress reports, informational packets, press releases, publications, and web content ✓ Provides technical writing, editing, and proofreading support for materials such as reports, news releases, fact sheets, web site text, and PSA scripts ✓ Collaborates with subject matter experts, researchers, and graphic artist to produce documents	📖 **Required:** Bachelor's degree in Journalism, Communication, English, or related field	✎ 5 or more years of experience
Junior Writer	✓ Provides technical writing support for project deliverables ✓ Conducts research, identifies subject matter experts, and conducts interviews	📖 **Required:** Bachelor's Degree in Journalism, Communication, English, or related field	✎ 3 or more years of technical/editing experience

Labor Category	Functional Responsibility	Education	Experience
	✓ Gathers data and collates and organizes facts for inclusion in written products ✓ Develops drafts and submits them for review ✓ Proofreads copy written by project team members and client ✓ Plans web and print products		
Subject Matter Expert	✓ Applies principles, methods, and knowledge of the functional area of capability to specific task order requirements	📖 **Required:** BA/BS in business, marketing, computer science, management, communication or related discipline	✎ 5 to 10 years of relevant experience ✎ Experience in applying expertise in the areas of conference, administrative, and travel services