

## **PART I - THE SCHEDULE**

### **DESCRIPTION/SPECIFICATION/STATEMENT OF WORK**

#### **C. Introduction**

The National Institutes of Health (NIH), Office of Logistics and Acquisitions Operations (OLA), through this procurement, intends to award multiple Indefinite Delivery, Indefinite Quantity (IDIQ) contracts for acquiring a wide range of conference, administrative, and travel support (domestic and international) services for the NIH and other Federal agencies. The Contractor shall provide all the necessary services, qualified personnel, facilities and financial capability needed to perform the services required in this Statement of Work (SOW). Through this procurement, the NIHCATS III contracts will provide customers with improved response time and equitable and reasonable rates. The geographic scope of this requirement includes the United States and abroad.

#### **C.1 Scope**

This contract is intended to cover a broad range of services including support for Meetings and Conferences, and related Travel, Documentation, Administrative support, and Website Design, Development, and Maintenance and any other activities supporting meetings and conferences. Task Orders with specific requirements will be issued against these IDIQ contracts. Contractors shall have the ability to operate and provide support for attendees at remote locations worldwide.

This is an Indefinite Delivery/Indefinite Quantity (IDIQ) contract offering Firm Fixed Price (FFP), Time and Materials (T&M), or a hybrid of FFP and T&M type task orders. These contracts will be used primarily by the NIH, but are available to other Federal agencies as well.

This SOW outlines the general services to be provided by contractors under NIHCATS III. Specific details of task assignments, deliverables, documentation, applicable government/department standards, and other supporting information, will be provided at the task order level. Below are the task areas for this contract and examples of the types of services that may be obtained under each task area. One Task Order may be comprised of one or more task areas.

#### **C.1.1 Contract and Task Order Management**

Contract and task order management is a mandatory element for all task orders placed under the NIHCATS III contracts. The objective of contract and task order management is to provide the program management, project control, and contract administration necessary to manage a high volume of task orders for a large, diversified team so that services, cost, schedule and quality requirements of each task order are tracked, communicated to the government, and ultimately attained. The application of expertise on processes and metrics that support task order management is encouraged to achieve quicker access, improved accuracy, and enhanced accessibility for contractors/clients, and also facilitate real-time monitoring of status/deliverables, tracking the quality of support service and gauging overall customer satisfaction.

#### **C.2 Task Areas**

The task areas to be authorized by Task Orders based on Government need are described below:

##### **C.2.1 Travel Support (Task Area 1)**

The objective of the travel support task is to arrange and provide for travel (domestic and international) assistance for program participants, escort services, translation and preparation of program documents, accommodations, subsistence allowances for participants, and varied assistance at workshops and

## Statement of Work (SOW)

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 is:

- a) Develop detailed travel itineraries.
- b) Provide guidance and assistance to U.S. and foreign travelers in obtaining passports and/or visas.
- c) Provide simple/complex domestic and international travel arrangements.
- d) Provide prepaid tickets in advance of travel.

Purchase economy class (or business or first class if specified by the Contracting Officer's Representative (COR)) air fare or other tickets for domestic or international travel. The purchase of 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.
- e) Provide attendees with knowledge of the Federal Government's travel rules and regulations.
- f) Purchase and 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.
- g) Arrange hotel or other lodging accommodations, in the United States 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.
- h) Pre-pay appropriate subsistence allowance as specified by the COR.
- i) 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.
- j) Provide the U.S. traveler or visitor, host, and COR with a typed day-to-day itinerary listing 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; ground transportation arrangements; air travel schedules indicating flight times, airlines, and airports; information regarding invitations, conferences participants orientation plans, special functions, general travel tips, and emergency points of contact information for all participants and attendees.
- k) Provide reimbursement upon receipt of expense statement 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.
- l) Provide highly skilled interpreters who provide simultaneous foreign language interpretation. However, due to complexity, 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 the foreign visitors. Travel to a remote location may be required at a short notice. The contractor shall be responsible for making these arrangements.

- m) 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 meet a foreign visitor upon arrival at a port of entry. Services provided by this escort shall include, but not be limited to, the following:
- Assist with customs, immigration concerns, and luggage.
  - Assist with connecting flight, if the visitor is not staying in the city of entry.
  - Accompany the visitor to the hotel, assist with check-in procedures and alert hotel staff regarding any special accommodations.
  - Assist in all financial arrangements including pre-payments and explain all subsistence procedures.
  - 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.
  - Provide orientation of surroundings, including personal care requirements, area restaurants, and public transportation.
  - Provide orientation regarding American culture, i.e., customs, colloquialisms, and trends.
  - 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 visit progresses.
  - Assist with check-out procedures prior to departure and verify that all incidentals are paid and cleared and that the bill is handled in accordance with the hotel reservations and rules.
  - Confirm return air reservations with airlines and traveler.

### **C.2.2 Meeting and Conference Support (Task Area 2)**

The contractor shall provide logistical support for conferences, meetings, seminars, and workshops held in the United States and abroad. The contractor shall also provide support for the writing, production, and distribution of conference materials.

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

- a) Analyze conference center agreements.
- b) Analyze hotel agreements.
- c) Design and develop meeting website, graphics, etc.
- d) Design registration and abstract submission forms.
- e) Facilitate online abstract review process.
- f) Provide on-site coordination, registration, logistical, and technical support.
- g) Prepare post conference summary.
- h) Provide status reports (progress, budget, etc.).
- i) Perform a site search in an effort to secure adequate and appropriate housing for conference participants.
- j) Provide meeting rooms, audio visual equipment, supplies, and services incidental to the conduct of conferences.
- k) Prepare and distribute invitations.
- l) Coordinate registration fees and pre-conference distributions, with the ability to handle online registrations.
- m) Establish message centers.
- n) Provide evaluation and statistical analysis support.
- o) Record and transcribe proceedings.
- p) Provide and operate audiovisual equipment.

## Statement of Work (SOW)

- q) Provide simultaneous foreign language interpreters as requested with an immediate response time.
- r) Provide coordination and implementation of third party participation as requested at the task order level.
- s) Provide collection management of third party payment\*.

**Note:** The contractor shall pay all upfront charges (e.g., 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 <https://oamp.od.nih.gov/news/NIH-efficient-spending-policy>)** For the asterisked (\*) items of this Task Area, collection of third party payments can only be performed in accordance with the Task Order IC/Agency policies, procedures and authority. All IC/Agency approvals must be obtained prior to the collection of third party payments. The Task Order COR shall be provided a expense report between the contractor and recipient for all upfront charges. This report is to be provided to the Task Order COR within thirty (30) days of each transaction. The report will be reviewed and filed in the task order file for audit and review purposes. The expense report must include documentation that was forwarded to the IC, higher level officials or Agency Director for approval for the upfront charges. This documentation must be divided into four parts, 1) Issue, 2) Discussion, 3) Recommendation, and 4) Decision. The individual agency's task orders must 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. The contractor is required to pay for all appropriate services in a timely manner in accordance with regulations.

**Definitions: HHS "local travel area"** - When a temporary duty site is outside of the "official duty station" area (see below), but within the vicinity surrounding it; and the site is a minimum driving distance of less than 50 miles, by the most direct route, from the employee's office/permanent duty station, the site is considered to be a part of the "local travel area".

**"Official duty station"** - The corporate limits of the city or town in which the employee's office/permanent duty station is situated. (See NIH Manual Issuance 1500-06-01 - Per Diem Allowances in the Local Travel Area)

### C.2.3 Documentation Support (Task Area 3)

The contractor shall provide documentation services in support of meetings, conferences, seminars, and workshops held in the United States and abroad.

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

- a) 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.
- b) 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.).
- c) 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.
- d) Provide services such as creating docs, collating, editing, reproduction, and delivery and mailings.
- e) Assist with preparation of abstract papers and/or publication of proceedings.
- f) Arrange for translation of documents, negotiate contracts for translators, English and foreign languages as well as verification of accuracy and equivalency in translation.

### **C.2.4 Administrative Support (Task Area 4)**

The objective of the administrative support task is to provide services in direct support of conferences and meetings to assist the scientific program staff and other government agencies in accomplishing a variety of research and administrative responsibilities. This contract will not be used for temporary services or unrelated administrative support services. All services are to be in direct support of conferences or meetings.

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

- a) Provide administrative support for conferences.
- b) Provide administrative support for workshops.
- c) Provide administrative support for symposiums.
- d) Provide administrative support for focus groups.
- e) Provide administrative support for scientific meetings.
- f) Provide administrative support for site visits.
- g) Perform editing and publishing of newsletters, brochures, and pamphlets.
- h) Design graphics for newsletters, invitations, brochures, pamphlets, etc.
- i) Assist with the distribution of letters, documents, or other materials by e-mail, FAX, postal service, or courier service.

### **C.2.5 Website Design, Development, and Maintenance Support/Internet Support (Task Area 5)**

The Contractor shall provide Internet and Intranet support. The contractor will provide initial design, development, management, and conduct usability testing to evaluate effectiveness and ease of use of the website. This task area shall only be used in support of a conference, meeting, focus groups, etc.

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

- a) Design, develop, and maintain websites on the Internet, as required.
- b) Work with the Task Order COR to determine any IT security violations, the site content, site concept, target audience, site goals and ideas for conference and meeting presentations.
- c) Provide text and graphic design/conversion for conference and meeting support only.
- d) Use documents/graphics provided by NIH and other Federal agencies or write or edit new documents/graphics for inclusion on the sites. All new documents shall be edited and proofread by editorial staff to ensure the highest quality control.
- e) Create new art, integrated into sites using HTML (hypertext markup language), record and digitalize audio, and program and integrate databases for the design.
- f) Convert images, audio, or video as requested for services that require databases. Work with the Web Site Manager/Task Order COR to design databases. (The Contractor shall be able to use current technology to make it platform independent such as creating databases, JAVA and CGI scripts, and templates or cascading style sheets to create or redesign web pages. The Contractor shall keep up-to-date and apply new technologies to the websites when these features are available to all browsers.
- g) 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.

**NOTE: ALL OF THE ABOVE SERVICES SHALL BE USED ONLY IN DIRECT SUPPORT OF CONFERENCE AND MEETING SERVICES (RELATING TO TASK AREA 2)**

### C.3 - Additional Requirements

1. This contract will require frequent communication and interaction between the Contractor and the COR. To insure that required services, 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.
2. Individual task orders may require a specified level of close and continuous communication. Task orders may require a specific Project Manager for the period of performance who will serve as the principal point of contact to the Government and who shall be the individual held responsible for production and oversight of all reports and plans, for the direct supervision and coordination of project staff and consultants, for issuing work assignments, for monitoring the progress of this Task Order and provision of deliverables, and for maintaining cost control.
3. Contractors shall provide plans to insure 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.
4. 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 of 25,000 production units. In cases where quantities do exceed this limitation, the NIH will provide the Contractor with the required materials for distribution.
5. The nature of the 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, transportations costs, etc. The small business contractors awarded an IDIQ contract under NIHCATS III are required to pay the costs and expenses related to performing the services required by a task order statement of work and invoicing the Government for those costs afterward. Due to this aspect of the contract vehicle, it is important that the small businesses are financially sound and have the available funds to cover these upfront costs.