

PART I - THE SCHEDULE

DESCRIPTION/SPECIFICATION/STATEMENT OF WORK

C. Introduction

The National Institutes of Health (NIH), Office of Logistics and Acquisitions Operations (OLAO), 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 this contract is designed for use by NIH, HHS OPDIV's and STAFDIV's, 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 IV 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, conference related Travel, Documentation, Administrative support, 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 may be available to other HHS OPDIV's and STAFDIV's, and other federal agencies who express interest in using this contract.

This SOW outlines the general services to be provided by contractors under NIHCATS IV. 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 IV 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 to 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 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 the location in terms of commuting, safety, and cost effectiveness. In most instances, the 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 shortnotice. 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) Develop event planning tools and processes (e.g., registration sheets, agendas, etc.)
- f) Facilitate online abstract review process.
- g) Provide on-site coordination, registration, logistical, and technical support.
- h) Prepare post conference summary, to include a summary of the event, logistics requirements, lessons-learned, feedback, expenditure reports and other relevant information.
- i) Provide post-meeting electronic file containing event participation, final agenda used, participation rosters, presentations, notes and other relevant documentation.
- j) Provide status reports (progress, budget, etc.).
- k) Perform a site search in an effort to secure adequate and appropriate housing for conference participants.
- l) Provide meeting rooms, audio visual equipment, supplies, and services incidental to the conduct of conferences.
- m) Prepare and distribute invitations.
- n) Coordinate registration fees and pre-conference distributions, with the ability to handle online

- registrations.
- o) Manage pre-event processes such as: participant registrations, RSVP processes, hotel and flight bookings and agreements, website management.
 - p) Establish message centers.
 - q) Provide evaluation and statistical analysis support.
 - r) Record and transcribe proceedings.
 - s) Provide and operate audiovisual equipment.
 - t) Propose virtual event strategies with capabilities for live meetings, breakout rooms of any size indicated, and combination of live broadcast and pre-recorded sessions.
 - u) Expertise working with various virtual platforms (e.g., MS Teams, WebEx, Zoom, etc.)
 - v) Propose and oversee best technology platform based on requirement needs, ensuring quality and functionality.
 - w) Coordinate planning for virtual meetings ensuring participants have access to electronic agendas, program schedules, and online registration.
 - x) Assist participants with technology difficulties as it pertains to any meeting platform and virtual meeting environment (e.g., websites, mobile applications, etc.)
 - y) Coordinate and set up virtual round table discussions.
 - z) Provide simultaneous foreign language interpreters as requested with an immediate responsetime.
 - aa) Provide coordination and implementation of third-party participation as requested at the taskorder level.
 - bb) Provide collection management of third-party payment*.
 - cc) Adherence to coronavirus protocols and preventative measures as applicable.

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 an 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. All documents shall be 508 Compliant.

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. All websites shall be 508 Compliant.

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.
- h) Develop mobile web application that may serve as a hub for presentations, registrations, meeting content, and any other relevant information.
- i) Maintain the mobile application and ensure functionality.

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 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.
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 IV 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 IV 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.

C.4 – HHS Force Majeure Clause

HHS Conference hosts and contract service providers acting on HHS's behalf must use the approved, required Force

Majeure clause below in venue contract to limit HHS's liability for cancellation and other damages.

- Responsibility of the Contractor:

Prior to entering into a third-party contract (the hotel) for venues, the prime contractor shall submit the proposed contract to the Contracting Officer for review. The prime contractor, on its own, cannot obligate the Government.

- Cancellation Matrix:

The prime contractor shall include terms and conditions in the third-party venue (hotel) contract that reduce or eliminate the Government's liability in the event of cancellation. The cancellation fees shall not exceed the following percentages:

- Up to 30 days prior to the event: Cancellation permitted with no (0%) penalty.
- 15 to 29 days prior to the event: Contractor (and therefore the government) will be liable for: no more than 75% of the total costs (meeting rooms and audiovisual equipment).
- 14 days prior to the event: Contractor (and therefore the government) will be liable for no more than 100% of the total costs (meeting rooms and audiovisual equipment).

When a Government cancellation results in penalty, the contractor shall promptly contact the third party venue (hotel) to ensure every effort is made to offer the cancelled space to other parties to reduce the Government's penalty. The contractor shall only be reimbursed for actual penalties paid by the contractor.

The Government shall not be charged for cancellations of room blocks. All third-party contracts for lodging (hotel room blocks) shall cancel automatically within 48 hours of the check-in-date for rooms that are not guaranteed by the task order/contract order or the individual federal employee's government travel card.

- Excusable Delays:

The performance of this contract is subject to cancellation without penalty or fee upon the occurrence of any circumstance beyond the control of either party, excusable delays include, but not are limited to: acts of God, war, weather driven, acts of terrorism, government shut down, U.S. congress, government regulations, natural disasters, strikes, civil disorder, or curtailment of transportation facilities – to the extent that such circumstances make it illegal or impossible for the hotel to provide, or for groups in general to use the hotel facilities.

- Good Faith Effort

In the event of cancellation, less than 29 days prior to the event by the government, under the provisions of this contract, if the third party (hotel) resells the sleeping rooms, function space or any portion thereof, the charges will be applied against the cancellation fee. The contractor agrees to ensure the third party (hotel) accepts the responsibility to minimize any actual monetary harm or damages it may otherwise incur or suffer from unused sleeping rooms, or related revenue. Therefore, the contractor will ensure the third party (hotel) will make a good faith effort to book additional groups or organized business meetings or otherwise sell the sleeping rooms and related accommodations made available by the cancellation. Should the third party (hotel) replace the group with another group, all or a portion of the cancellation fee will be refunded based upon the replacement value to the mutual agreement of the government and the contractor.

C.4.1 – Other Standard Terms and Conditions

Terms to Prohibit Acceptance of Gifts: Persons doing business with the government shall not offer nor shall any government employee or family members, or person acting on behalf of the government or their family members solicit, accept or receive directly or indirectly whether in the form of complimentary rooms, room upgrades, guest passes, food, or other gifts, gratuities and services.

Special Needs: Identify in advance any special needs of any disabled guests who are requiring accommodation including hearing and sight impaired individuals by the Hotel and notify the Hotel of the need for such accommodation in writing to the Sales Department as soon as possible. Any expenditures or services necessary to accommodate any such guest(s) may be at the expense of the guest.

C.5 – Key Personnel

The Contractor shall provide personnel with the necessary skills and level of expertise required to support the tasks to be performed under the SOW. The contractor shall be responsible for identifying a qualified candidate to meet the Government requirements and that the Government personnel (i.e., Task Order CO and Task Order COR will not be responsible for choosing an individual).

This contract requires at least one (1) Program Manager and one (1) Deputy Program Manager to be considered Key Personnel. Additional, non-key Deputy Program Managers may be utilized as deemed necessary by the Contractor over the life of the contract depending on Task Order requirements. Although the additional Deputy Program managers are not key personnel, they must still meet the educational requirements of the key Deputy Program Manager.

The Key Personnel qualifications listed below are a requirement for contract award. Failure to provide a proposal that offers key personnel with these qualifications will negatively impact your evaluation which may render the proposal unacceptable and ineligible for award.

Labor Category: Program Manager (PM): The Program Manager will be responsible for the overall performance objectives, contract deliverables, quality control (QC), and the placement of qualified personnel on this contract. The PM will serve as the Contractor's authorized point of contact with NIH and shall ensure contract compliance and satisfactory performance. This person requires a college degree and at least five (5) years of relevant experience or a high school diploma and ten (10) years of relevant experience. Relevant experience required for this position involves program management performing tasks such as staffing, budgeting, scheduling, and client interaction. Experience in a scientific research or clinical environment or a Federal agency is preferred.

Labor Category: Deputy Program Manager (DPM): The Deputy Program Manager will manage one or more Task Orders, depending on the Contractor's management structure. The DPM must have a working knowledge of the contract and some degree of authority to perform the PM's role for limited periods of time when the Program Manager is unavailable. The DPM requires a college degree and at least four (4) years of relevant experience or a high school diploma and eight (8) years of relevant experience. Relevant experience required for this position involves project management experience performing tasks such as staffing, budgeting, and scheduling is required in this role. Experience in a scientific research or clinical environment or a Federal agency is preferred.

The Contractor shall manage their employees, approve their leave, interview potential qualified candidates, approve their time, and other business aspects in an employee/employer relationship.

The PM and one (1) DPM shall be available for assignment to this contract on the effective date of the first Task Order award and remain in their respective positions a minimum of twelve months. However, the Program Manager and the Deputy Program Manager are not required to be designated full-time on this contract (when off-site). The number of Contractor personnel and workload required shall determine the extent of time the Program

Manager and Deputy Program Manager dedicate to this contract. Either the Program Manager or the Deputy Program Manager shall be available for consultation during regular business hours.

The personnel listed above are considered essential to the work being performed under this acquisition. Before removing or replacing any of the listed or specified personnel, the Contractor shall (1) notify the Government (the NIHCATS IV Contracting Officer) using company letterhead, reasonably in advance and (2) provide a detailed explanation of the circumstances necessitating the proposed substitution, a complete resume for the proposed substitute, and any other information requested by the Government necessary to approve or disapprove the proposed substitution. The Government will evaluate such requests and promptly notify the Contractor of approval or disapproval in writing. All proposed substitutions shall be determined by NIH to have qualifications and job status equivalent to the person being replaced. Discussions about the replacement may be required by NIH to further assess the qualifications of the candidate.