

Let's get started!

All requirements for the NIH Conference, Administrative, and Travel Services Contract IV (NIHCATS IV) are fulfilled using task orders. **The first step towards initiating the task order process is completing a Task Order Request Package (TORP).** The TORP will provide details of the specific services requested. This document will guide you through the information required for manual creation of a TORP for NIHCATS IV. *Please refer to the NIHCATS Website (*[*http://NIHCATS.olao.od.nih.gov*](http://NIHCATS.olao.od.nih.gov)*) to view the complete Task Order Guidelines. Contact the NIHCATS IV Support Team (NIHCATSIV@mail.nih.gov) for additional information.*

When NIH or a Federal agency determines a need exists for a conference, meeting, or travel services, a Task Order (TO) Contracting Officer’s Representative (COR) must be identified. The Task Order COR may or may not be the requestor for services, but must be FAC-COR certified. The Task Order COR completes the TORP and is responsible for all technical aspects of the task order.

**For NIH ICs:** All required conference/meeting forms and waivers based upon [NIH’s most recent policy guidance](http://oamp.od.nih.gov/news/NIH-efficient-spending-policy) 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 IV Support Team.



Do you have everything?

The TORP form collects standardized information and supporting documentation from all customers. A complete TORP will include:

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|  | **Released to Contractors** |
|  | Completed TORP form |
|  | Statement of Work (SOW) providing a description of work required and any other specific information related to the task order |
|  | **Not Released to Contractors** |
|  | Independent Government Cost Estimate (IGCE) |
|  | Required conference/meeting forms and waivers ([if applicable](http://oamp.od.nih.gov/news/NIH-efficient-spending-policy)) with approvals |
|  | Funding Document if less $250,000 or Acquisition Plan if over $250,000 (certifying the availability of funds to cover the estimated cost of the task order) |
|  | Determination & Findings (if applicable) |



Time to submit for review!

After confirming all information and fields of the TORP are complete, **the Task Order COR will submit the TORP to the Task Order Contracting Officer (CO) for review. Upon approval, the Task Order CO will forward the TORP to the NIHCATS IV Support Team via e-mail (**[NIHCATSIV@mail.nih.gov](mailto:NIHCATSIV@mail.nih.gov)**)**.

The NIHCATS IV Support Team will assign a TORP number, review the TORP for scope and completeness, and will contact the Task Order CO with any questions, if necessary. Upon approval of the TORP, the NIHCATS IV Support Team will release the TORP to the contractors.

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| **TORP Number** *(To be completed by the NIHCATS IV Support Team):* |

This form will guide you through the required information and fields for creation of a TORP Form under the NIH Conference, Administrative, and Travel Services IV (NIHCATS IV) Contracts.

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| **Requestor Information** |

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| Requesting NIH IC/Federal Agency: |  |  |
| Requestor Name: |  |  |
| Requestor Email Address: |  |  |
| Requestor Phone Number: |  |  |
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| Task Order Contracting Officer’s Representative (COR) Name: |  |  |
| Verify that the Task Order COR is “FAC-COR certified”. |  | Place an “X” in the box to confirm that the Task Order COR is “FAC-COR certified”. |
| Task Order COR Email Address: |  |  |
| Task Order COR Phone Number: |  |  |
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| TO Contracting Officer Name: |  |  |
| Verify that the Task Order CO is “FAC-CO” certified”. |  | Place an “X” in the box to confirm that the Task Order CO is “FAC-CO certified”. |
| Task Order CO Email Address: |  |  |
| Task Order CO Phone Number: |  |  |

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| **Task Order Title** |

Customers should create a meaningful title for their task order. The task order title will be viewable by contractors when opening the TORP.

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| **Task Areas** |

*Please place an “X” in the box next the NIHCATS IV task areas relevant to the statement of work.*

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|  | Task Area 1 – Travel Support |
|  | Task Area 2 – Meeting and Conference Support |
|  | Task Area 3 – Documentation Support |
|  | Task Area 4 – Administrative Support |
|  | Task Area 5 – Website Design, Development, and Maintenance / Internet Support |

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| **Contract Type** |

This task order will be performed on a:

*Please place an “X” in the box next the contract type that you will be using.*

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|  | Fixed Price Basis |
|  | Time and Materials Basis  (For Time and Materials task orders, please submit the required D&F) |
|  | Hybrid of Fixed Price and Time and Materials  (For Hybrid task orders, please submit the required D&F) |

*Task order type may be designated as either Fixed Price AND/OR Time and Materials. Though Fixed Price type task orders are preferred, Time and Materials are permitted with a signed Determinations and Findings (D&F) justifying the use of Time and Materials in accordance with FAR 16.6. Time and Materials type task orders should only be used if Fixed Price type task orders are not suitable for the designated task order.*

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| **Fair Opportunity** |

Is this task order an exception to the fair opportunity procedures?

*In accordance with the Federal Acquisition Regulations (FAR), Part 16.505 (b), all thirteen (13) contractors will be given an opportunity to respond to each TORP that is released, unless an exception to the fair opportunity procedures is approved.*

*Please place an “X” next to the option that fits your task order. The default response is "No." If "Yes," briefly describe the justification for an exception and attach the approval of the TO Contracting Officer.*

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|  | No |
|  | Yes: |

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| **Conference Approval** |

Does this task order require any conference/meeting forms or waivers based on the services being requested?

*Please place an “X” next to the option that fits your task order.*

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|  | No – *If No, please explain* |
|  | Yes – *If Yes, please provide the signed conference approval form prior to award* |

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| **Place of Performance** |

This task order requires the contractor to provide services from:

*Please place an “X” in the box next the one that applies.*

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|  | Contractor-Owned Facilities |
|  | Government-Owned/Leased Facilities\* |

*\*If the contractor is required to provide services from Government-Owned/Leased Facilities, please describe the place of performance, as appropriate.*

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| **Period of Performance** |

Enter the estimated period of performance in the space below.

*Please identify the base period and any option periods.*

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| **Information Security** |

All information security clauses outlined in the NIHCATS IV contracts are hereby incorporated by reference. The following security-related information is specific to this task order.

1. Position Sensitivity Designations

(1) The following position sensitivity designations, associated clearance, and investigation requirements apply under this task order.

*Check all position sensitivity designations that apply. If more than one of the below designations apply to the task order, the Task Order Contracting Officer (CO), Task Order Contracting Officer’s Representative (COR), and Information Systems Security Officer (ISSO) may wish to consider whether there is a need to identify specific Contractor Position Titles with the applicable sensitivity designations.*

*For additional information and assistance for this security clause, please see Table 2, Position Sensitivity Designations for Individuals Accessing Agency Information at:* <https://ocio.nih.gov/table-2-position-sensitivity-designations-individuals-accessing-agency-information>*.*

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|  | Level 6: Public Trust - High Risk (Requires Suitability Determination with a Background Investigation (BI)). Contractor employees assigned to a Level 6 position are subject to a BI. |
|  | Level 5: Public Trust - Moderate Risk (Requires Suitability Determination with National Agency Check and Inquiry Investigation plus a Credit Check (NACIC), a Minimum Background Investigation (MBI), and/or a Limited Background Investigation (LBI)). Contractor employees assigned to a Level 5 position with no previous investigation and approval shall undergo a NACIC, MBI, and/or LBI. |
|  | Level 1: Non Sensitive (Requires Suitability Determination with a National Agency Check and Inquiry Investigation (NACI)). Contractor employees assigned to a Level 1 position are subject to a NACI. |

*(Optional) Use the space below if you wish to provide additional context for any of the levels checked above.*

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(2) Contractor/subcontractor employees shall comply with the HHS criteria for the assigned position sensitivity designations prior to performing any work under this task order. The following exceptions apply:

Levels 5 and 1: Contractor/subcontractor employees may begin work under the task order after the contractor has submitted the name, position and responsibility of the employee to the Task Order COR.

Level 6: In special circumstances the Task Order COR may request a waiver of the pre-appointment investigation. If the waiver is granted, the Task Order COR will provide written authorization for the contractor/subcontractor employee to work under the task order.

1. Information Security Training

HHS policy requires contractors/subcontractors receive security training commensurate with their responsibilities for performing work under the terms and conditions of their contractual agreements. The contractor shall ensure that each contractor/subcontractor employee has completed the NIH Computer Security Awareness Training course at: <http://irtsectraining.nih.gov/> prior to performing any task order work, and thereafter completing the NIH-specified fiscal year refresher course during the period of performance of the task order.

The contractor shall maintain a listing by name and title of each contractor/ subcontractor employee working under this task order that has completed the required training. Any additional security training completed by contractor and subcontractor staff shall be included on this listing.

*If the SOW requires that contractor staff take additional security training, please list the additional training requirements in the below box. Otherwise, leave the box empty.*

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1. Rules of Behavior

The contractor/subcontractor employees shall comply with the National Institutes of Health (NIH) Information Technology General Rules of Behavior

1. Personnel Security Responsibilities

The contractor shall perform, adhere to, and document the actions and responsibilities identified in the "Employee Separation Checklist" (<http://ocio.nih.gov/nihsecurity/Emp-sep-checklist.pdf)> when a contractor/ subcontractor employee terminates work under this contract. All documentation shall be made available to the Task Order COR and/or Task Order CO upon request.

1. Commitment to Protect Non-Public Departmental Information Systems and Data

(1) Contractor Agreement

The contractor and its subcontractors performing under this SOW shall not release, publish, or disclose non-public Departmental information to unauthorized personnel, and shall protect such information in accordance with provisions of the following laws and any other pertinent laws and regulations governing the confidentiality of such information:

- 18 U.S.C. 641 (Criminal Code: Public Money, Property or Records)

- 18 U.S.C. 1905 (Criminal Code: Disclosure of Confidential Information)

- Public Law 96-511 (Paperwork Reduction Act)

(2) Contractor-Employee Non-Disclosure Agreements

Each contractor/subcontractor employee who may have access to non-public Department information under this task order shall complete the Commitment to Protect Non-Public Information - Contractor Agreement (<https://ocio.nih.gov/aboutus/publicinfosecurity/acquisition/Documents/Nondisclosure.pdf>). A copy of each signed and witnessed Non-Disclosure agreement shall be submitted to the Task Order COR prior to performing any work under the contract.

1. Confidential Treatment of Sensitive Information

*Include this subsection if the contractor will have access to sensitive information/data during the performance of the task order that needs to be handled confidentially by the contractor, but including the clause at HHSAR352.224-70, Confidentiality of Information, would be inappropriate.*

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|  | *Place an “X” here if Subsection f "Confidential Treatment of Sensitive Information" is APPLICABLE to this task order.* |

The contractor shall guarantee strict confidentiality of the information/data that it is provided by the Government during the performance of the task order. The Government has determined that the information/data that the contractor will be provided during the performance of the task order is of a sensitive nature.

Disclosure of the information/data, in whole or in part, by the contractor can only be made after the contractor receives prior written approval from the Task Order CO. Whenever the contractor is uncertain with regard to the proper handling of information/data under the contract, the contractor shall obtain a written determination from the Task Order CO.

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| **Government Furnished Equipment (GFE)/Government Furnished Information (GFI)** |

Please place an “X” in the box that applies to this task order.

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|  | Government furnished property will not be provided for the performance of this task order. |
|  | Government will provide: |

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| **Evaluation Criteria** |

See Statement of Work (SOW) for evaluation criteria.

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| **Response Instructions** |

See Statement of Work (SOW) for response instructions.

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| **Order Processing Schedule** |

Enter the desired order processing schedule (subject to NIHCATS IV Support Team approval).

*The QUESTIONS DEADLINE is the day that closes the period that contractors have to submit questions.*

Questions Deadline: **Noon on**

*The PROPOSAL DEADLINE is the day when contractors are required to email their technical and business proposals to the Task Order CO. The Task Order CO will establish a solicitation response time that will afford contractors a reasonable opportunity to respond to the requirement. When establishing the solicitation response time, Task Order CO will consider the circumstances of the individual acquisition and account for factors such as the complexity, availability, and value of the requirement.*

Proposal Deadline: **Noon on**