



SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30				1. REQUISITION NUMBER RCS-R-2024-00015		PAGE OF 1 84						
2. CONTRACT NO. 86614624C00005		3. AWARD/ EFFECTIVE DATE 09/30/2024		4. ORDER NUMBER		5. SOLICITATION NUMBER 86614624Q00006		6. SOLICITATION ISSUE DATE 08/15/2024				
7. FOR SOLICITATION INFORMATION CALL: 		a. NAME TREVOR SIMON			b. TELEPHONE NUMBER (No collect calls)		8. OFFER DUE DATE/LOCAL TIME ET					
9. ISSUED BY CODE HUD-NFSF US DEPARTMENT OF HUD 307 W 7TH STREET SUITE 1000 FORT WORTH TX 76102				10. THIS ACQUISITION IS <input type="checkbox"/> UNRESTRICTED OR <input checked="" type="checkbox"/> SET ASIDE: 100.00 % FOR: <input checked="" type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS WOMEN-OWNED SMALL BUSINESS <input type="checkbox"/> (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM <input type="checkbox"/> EDWOSB NAICS: 541611 SIZE STANDARD: \$24.5								
11. DELIVERY FOR FOB DESTINA- TION UNLESS BLOCK IS MARKED <input checked="" type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS			<input type="checkbox"/> 13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)		13b. RATING					
15. DELIVER TO CODE HUD-R HUD-R 451 7TH STREET SW WASHINGTON DC 20410				16. ADMINISTERED BY CODE HUD-NFSF US DEPARTMENT OF HUD 307 W 7TH STREET SUITE 1000 FORT WORTH TX 76102								
17a. CONTRACTOR/ OFFEROR		CODE Q6ULESYWUAG6		FACILITY CODE		18a. PAYMENT WILL BE MADE BY CODE ARC/ASD/IPP						
SCHATZ PUBLISHING GROUP LLC 11950 WEST HIGHLAND AVE BLACKWELL OK 74631-6511				ARCASDIPP SUBMIT INVOICES VIA THE INVOICE PROCESSING PLATFORM AT WWWIPPGOV INQUIRIES CALL 304-480-8000 7								
TELEPHONE NO.				<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER					18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM			
19. ITEM NO.		20. SCHEDULE OF SUPPLIES/SERVICES			21. QUANTITY		22. UNIT		23. UNIT PRICE		24. AMOUNT	
		Tax ID Number: 73-1426183 DUNS Number: Not Available 86614624C00005 - Innovation in Affordable Housing Student Design and Planning Competition  The contractor shall provide services for the Innovation in Affordable Housing Student Design and Planning Competition for the U.S. Department of Housing and Urban Development (HUD) Housing Surveys, Office of Policy Development and Research (PD&R). The Contractor shall provide (Use Reverse and/or Attach Additional Sheets as Necessary)										
25. ACCOUNTING AND APPROPRIATION DATA See schedule						26. TOTAL AWARD AMOUNT (For Govt. Use Only) \$1,471,649.57						
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4, FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA						<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED.						
<input checked="" type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4, FAR 52.212-5 IS ATTACHED. ADDENDA						<input checked="" type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED.						
<input checked="" type="checkbox"/> 28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN 1 COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED.						<input type="checkbox"/> 29. AWARD OF CONTRACT: OFFER DATED . YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS:						
30a. SIGNATURE OF OFFEROR/CONTRACTOR 						31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)						
30b. NAME AND TITLE OF SIGNER (Type or print) Sheree Lewis, Manager			30c. DATE SIGNED 9/29/2024			31b. NAME OF CONTRACTING OFFICER (Type or print) CATHY J. BAKER			31c. DATE SIGNED			

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STANDARD FORM 1449 (REV. 2/2012)  
Prescribed by GSA - FAR (48 CFR) 53.212

19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
0001	PD&R with support in topical knowledge in housing and community development, planning, logistics, and outreach services for the award competition for graduate students. Period of Performance: 09/30/2024 to 09/29/2025  Base-Project Management-PWS Section C.5.1 Obligated Amount: \$22,308.87 Award Type: Firm-fixed-price  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000-XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$22,308.87				22,308.87
0001AA	Base-Orientation and Post-Award Meetings-PWS Section C.5.1.1 Qty 1 x \$699.30 = \$699.30  Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0001AB	Base-Management Plan-PWS Section C.5.1.2 Qty 1 x \$8,133.57 = \$8,133.57 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0001AC	Base-Monthly Progress Reports and Ongoing Continued ...	12	EA	NSP	NSP

32a. QUANTITY IN COLUMN 21 HAS BEEN

☐ RECEIVED    ☐ INSPECTED    ☐ ACCEPTED, AND CONFORMS TO THE CONTRACT, EXCEPT AS NOTED: \_\_\_\_\_

32b. SIGNATURE OF AUTHORIZED GOVERNMENT REPRESENTATIVE	32c. DATE	32d. PRINTED NAME AND TITLE OF AUTHORIZED GOVERNMENT REPRESENTATIVE
32e. MAILING ADDRESS OF AUTHORIZED GOVERNMENT REPRESENTATIVE		32f. TELEPHONE NUMBER OF AUTHORIZED GOVERNMENT REPRESENTATIVE
		32g. E-MAIL OF AUTHORIZED GOVERNMENT REPRESENTATIVE

33. SHIP NUMBER	34. VOUCHER NUMBER	35. AMOUNT VERIFIED CORRECT FOR	36. PAYMENT  <input type="checkbox"/> COMPLETE <input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL	37. CHECK NUMBER
<input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL				
38. S/R ACCOUNT NUMBER	39. S/R VOUCHER NUMBER	40. PAID BY		

41a. I CERTIFY THIS ACCOUNT IS CORRECT AND PROPER FOR PAYMENT	41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER	41c. DATE	42a. RECEIVED BY ( <i>Print</i> )
			42b. RECEIVED AT ( <i>Location</i> )
			42c. DATE REC'D (YY/MM/DD)
			42d. TOTAL CONTAINERS

NAME OF OFFEROR OR CONTRACTOR  
 SCHATZ PUBLISHING GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Communication Section C.5.1.3 Qty 12 x \$1,123.00 = \$13,476.00  Award Type: Firm-fixed-price (Not Separately Priced)				
0002	Base-Marketing and Competition Materials-PWS Section C.5.2 Qty 1 x \$40,706.55 = \$40,706.55 Award Type: Firm-fixed-price  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$28,706.55 Accounting Info: HUD0108DB2324XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$12,000.00	1	EA	40,706.55	40,706.55
0003	Base-Recruiting Partnering PHAs and Graduate Students-PWS Section C.5.3 Obligated Amount: \$15,383.34 Award Type: Firm-fixed-price  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$15,383.34				15,383.34
0003AA	Base-Student Team Recruitment-PWS Section C.5.3.1 Qty 1 x \$8,094.17 = \$8,094.17 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0003AB	Base-Public Housing Agency (PHA/TDHE)-PWS Section C.5.3.2 Qty 1 x \$7,289.17 = \$7,289.17 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0004	Base-Phase I and Juror Selection-PWS Section C.5.4 Obligated Amount: \$24,282.51 Award Type: Firm-fixed-price Continued ...				24,282.51

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$24,282.51				
0004AA	Base-PHA Selection and Competition Guidelines-PWS Section C.5.4.1 Qty 1 x \$8,094.17 = \$8,094.17 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0004AB	Base-Juror Selection-PWS Section C.5.4.2 Qty 1 x \$8,094.17 = \$8,094.17 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0004AC	Base-Selection of the Four Final Teams-PWS Section C.5.4.3 Qty 1 x \$8,094.17 = \$8,094.17 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0005	Base-PHA/TDHE and Site Visit Management-PWS Section C.5.5 Obligated Amount: \$10,602.72 Award Type: Firm-fixed-price  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$10,602.72				10,602.72
0005AA	Base-Site Visit (students)-PWS Section C.5.5.1 Qty 8 x \$1,325.34 = \$10,602.72 Award Type: Firm-fixed-price (Not Separately Priced)	8	EA	NSP	NSP
0006	Base-Final Event and Close-out-PWS Section C.5.6 Obligated Amount: \$85,841.25 Award Type: Firm-fixed-price  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX Continued ...				85,841.25

NAME OF OFFEROR OR CONTRACTOR
SCHATZ PUBLISHING GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$85,841.25				
0006AA	Base-Final Event (printed copies of programs)-PWS Section C.5.6.1 Qty 75 x \$162.52 = \$12,189.20 Award Type: Firm-fixed-price (Not Separately Priced)	75	EA	NSP	NSP
0006AB	Base-Prize and Honorarium-PWS Section C.5.6.2 Qty 1 x \$61,000.00 = \$61,000.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0006AC	Base-Close-out Activities-PWS Section C.5.6.3 Qty 1 x \$12,652.05 = \$12,652.05 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0007	Base-Final Summary Report-PWS Section C.5.7 Obligated Amount: \$19,275.13 Award Type: Firm-fixed-price  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$19,275.13				19,275.13
0007AA	Base-Draft Final Report-PWS Section C.5.7 Qty 1 x \$7,328.57 = \$7,328.57 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0007AB	Base-Final Report-PWS Section C.5.7 Qty 1 x \$4,871.57 = \$4,871.57 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0007AC	Base-Case Studies for winning and runner-up team-PWS Section C.5.7 Qty 1 x \$7,074.99 = \$7,074.99 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0008	Base-Travel Reimbursement-PWS Section C.5.8-for Continued ...	1	LO	80,000.00	80,000.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	C.5.2,C.5.3, and C.5.6 Qty 1 x \$80,000.00 = \$80,000.00 Obligated Amount: \$80,000.00 Award Type: Cost Total Estimated Cost: \$80,000.00  Accounting Info: HUD0108DB2425XX-2024-61000001-251001-HUDPD00000000 -XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XX XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX Funded: \$80,000.00				
0009	Option 1-Project Management-PWS Section C.5.1 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0009AA	Option 1-Monthly Progress Reports and Ongoing Communications-PWS Section C.5.1.3 Qty 12 x \$1,133.97 = \$13,607.64 (Option Line Item) (Not Separately Priced)	12	EA	NSP	0.00
0010	Option 1- Marketing and Competition Materials-PWS Section C.5.2 Qty 1 x \$41,114.31 = \$41,114.31 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0011	Option 1-Recruiting Partnering PHAs and Graduate Students-PWS Section C.5.3 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0011AA	Option 1-Student Team Recruitment-PWS Section C.5.3.1 Qty 1 x \$8,175.21 = \$8,175.21 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0011AB	Option 1-Public Housing Agency (PHA/TDHE)-PWS Section C.5.3.2 Qty 1 x \$7,362.19 = \$7,362.19 Continued ...	1	EA	NSP	0.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026				
0012	Option 1-Phase I and Juror Selection-PWS Section C.5.4 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0012AA	Option 1-PHA Selection and Competition Guidelines-PWS Section C.5.4.1 Qty 1 x \$8,175.25 = \$8,175.25 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0012AB	Option 1-Juror Selection-PWS Section C.5.4.2 Qty 1 x \$8,175.25 = \$8,175.25 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0012AC	Option 1-Selection of the Four Final Teams-PWS Section C.5.4.3 Qty 1 x \$8,175.25 = \$8,175.25 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0013	Option 1-PHA/TDHE and Site Visit Management-PWS Section C.5.5 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0013AA	Option 1-Site Visit (students)-PWS Section C.5.5.1 Qty 8 x \$1,338.84 = \$10,710.75 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026  Continued ...	8	EA	NSP	0.00

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0014	Option 1-Final Event and Close-out-PWS Section C.5.6 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0014AA	Option 1-Final Event (printed copies of programs)-PWS Section C.5.6.1 Qty 75 x \$164.15 = \$12,311.25 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	75	EA	NSP	0.00
0014AB	Option 1-Prize and Honorarium-PWS Section C.5.6.2 Qty 1 x \$61,000.00 = \$61,000.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0014AC	Option 1-Close-out Activities-PWS Section C.5.6.3 Qty 1 x \$12,778.75 = \$12,778.75 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0015	Option 1-Final Summary Report-PWS Section C.5.7 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0015AA	Option 1-Draft Final Report-PWS Section C.5.7 Qty 1 x \$7,402.00 = \$7,402.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0015AB	Option 1-Final Report-PWS Section C.5.7 Qty 1 x \$4,920.29 = \$4,920.29 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026  Continued ...	1	EA	NSP	0.00



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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
0015AC	Option 1-Case Studies for winning and runner-up team-PWS Section C.5.7 Qty 1 x \$7,145.84 = \$7,145.84 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	1	EA	NSP	0.00
0016	Option 1-Travel Reimbursement for C.5.2, C.5.5 and C.5.6 Qty 1 x \$80,000.00 = \$80,000.00 Award Type: Cost Total Estimated Cost: \$80,000.00 (Option Line Item) Period of Performance: 09/30/2025 to 09/29/2026				0.00
0017	Option 2-Project Management-PWS Section C.5.1 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0017AA	Option 2-Monthly Progress Reports and Ongoing Communications-PWS Section C.5.1.3 Qty 12 x \$1,144.35 = \$13,732.20 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	12	EA	NSP	0.00
0018	Option 2- Marketing and Competition Materials-PWS Section C.5.2 Qty 1 x \$41,525.64 = \$41,525.64 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0019	Option 2-Recruiting Partnering PHAs and Graduate Students-PWS Section C.5.3 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0019AA	Option 2-Student Team Recruitment-PWS Section C.5.3.1 Qty 1 x \$8,257.20 = \$8,257.20 Award Type: Firm-fixed-price (Option Line Item) Continued ...	1	EA	NSP	0.00

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	(Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027				
0019AB	Option 2-Public Housing Agency (PHA/TDHE)-PWS Section C.5.3.2 Qty 1 x \$7,436.02 = \$7,436.02 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0020	Option 2-Phase I and Juror Selection-PWS Section C.5.4 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0020AA	Option 2-PHA Selection and Competition Guidelines-PWS Section C.5.4.1 Qty 1 x \$8,257.21 = \$8,257.21 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0020AB	Option 2-Juror Selection-PWS Section C.5.4.2 Qty 1 x \$8,257.21 = \$8,257.21 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0020AC	Option 2-Selection of the Four Final Teams-PWS Section C.5.4.3 Qty 1 x \$8,257.21 = \$8,257.21 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0021	Option 2-PHA/TDHE and Site Visit Management-PWS Section C.5.5 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0021AA	Option 2-Site Visit (students)-PWS Section C.5.5.1 Continued ...	8	EA	NSP	0.00

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	Qty 8 x \$1,352.28 = \$10,818.21 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027				
0022	Option 2-Final Event and Close-out-PWS Section C.5.6 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0022AA	Option 2-Final Event (printed copies of programs)-PWS Section C.5.6.1 Qty 75 x \$165.79 = \$12,434.25 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	75	EA	NSP	0.00
0022AB	Option 2-Prize and Honorarium-PWS Section C.5.6.2 Qty 1 x \$61,000.00 = \$61,000.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0022AC	Option 2-Close-out Activities-PWS Section C.5.6.3 Qty 1 x \$12,907.42 = \$12,907.42 (Option Line Item) (Not Separately Priced)	1	EA	NSP	0.00
0023	Option 2-Final Summary Report-PWS Section C.5.7 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0023AA	Option 2-Draft Final Report-PWS Section C.5.7 Qty 1 x \$7,476.09 = \$7,476.09 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0023AB	Option 2-Final Report-PWS Section C.5.7 Qty 1 x \$4,969.72 = \$4,969.72 Award Type: Firm-fixed-price Continued ...	1	EA	NSP	0.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	(Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027				
0023AC	Option 2-Case Studies for winning and runner-up team-PWS Section C.5.7 Qty 1 x \$7,217.63 = \$7,217.63 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2026 to 09/29/2027	1	EA	NSP	0.00
0024	Option 2-Travel Reimbursement for C.5.2, C.5.5 and C.5.6 Qty 1 x \$80,000.00 = \$80,000.00 Award Type: Cost Total Estimated Cost: \$80,000.00 (Option Line Item) Period of Performance: 09/30/2026 to 09/29/2027				0.00
0025	Option 3-Project Management-PWS Section C.5.1 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0025AA	Option 3-Monthly Progress Reports and Ongoing Communications-PWS Section C.5.1.3 Qty 12 x \$1,155.62 = \$13,867.44 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	12	EA	NSP	0.00
0026	Option 3-Marketing and Competition Materials-PWS Section C.5.2 Qty 1 x \$41,941.07 = \$41,941.07 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0027	Option 3-Recruiting Partnering PHAs and Graduate Students-PWS Section C.5.3 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0027AA	Option 3-Student Team Recruitment-PWS Section Continued ...	1	EA	NSP	0.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	C.5.3.1 Qty 1 x \$8,340.46 = \$8,340.46 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028				
0027AB	Option 3-Public Housing Agency (PHA/TDHE)-PWS Section C.5.3.2 Qty 1 x \$7,510.44 = \$7,510.44 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0028	Option 3-Phase I and Juror Selection-PWS Section C.5.4 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0028AA	Option 3-PHA Selection and Competition Guidelines-PWS Section C.5.4.1 Qty 1 x \$8,340.15 = \$8,340.15 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0028AB	Option 3-Juror Selection-PWS Section C.5.4.2 Qty 1 x \$8,340.15 = \$8,340.15 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0028AC	Option 3-Selection of the Four Final Teams-PWS Section C.5.4.3 Qty 1 x \$8,340.15 = \$8,340.15 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0029	Option 3-PHA/TDHE and Site Visit Management-PWS Section C.5.5 Award Type: Firm-fixed-price Continued ...				0.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	(Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				
0029AA	Option 3-Site Visit (students)-PWS Section C.5.5.1 Qty 8 x \$1,365.87 = \$10,926.95 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	8	EA	NSP	0.00
0030	Option 3-Final Event and Close-out-PWS Section C.5.6 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0030AA	Option 3-Final Event (printed copies of programs)-PWS Section C.5.6.1 Qty 75 x \$167.45 = \$12,558.75 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	75	EA	NSP	0.00
0030AB	Option 3-Prize and Honorarium-PWS Section C.5.6.2 Qty 1 x \$61,000.00 = \$61,000.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0030AC	Option 3-Close-out Activities-PWS Section C.5.6.3 Qty 1 x \$13,037.60 = \$13,037.60 (Option Line Item) (Not Separately Priced)	1	EA	NSP	0.00
0031	Option 3-Final Summary Report-PWS Section C.5.7 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0031AA	Option 3-Draft Final Report-PWS Section C.5.7 Qty 1 x \$7,551.63 = \$7,551.63 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028 Continued ...	1	EA	NSP	0.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
0031AB	Option 3-Final Report-PWS Section C.5.7 Qty 1 x \$5,019.18 = \$5,019.18 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0031AC	Option 3-Case Studies for winning and runner-up team-PWS Section C.5.7 Qty 1 x \$7,290.25 = \$7,290.25 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028	1	EA	NSP	0.00
0032	Option 3-Travel Reimbursement for C.5.2, C.5.5 and C.5.6 Qty 1 x \$80,000.00 = \$80,000.00 Award Type: Cost Total Estimated Cost: \$80,000.00 (Option Line Item) Period of Performance: 09/30/2027 to 09/29/2028				0.00
0033	Option 4-Project Management-PWS Section C.5.1  Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029				0.00
0033AA	Option 4-Monthly Progress Reports and Ongoing Communications-PWS Section C.5.1.3 Qty 12 x \$1,166.70 = \$14,000.40 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	12	EA	NSP	0.00
0034	Option 4-Marketing and Competition Materials-PWS Section C.5.2.1 Qty 1 x \$42,360.51 = \$42,360.51 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029				0.00
0035	Option 4-Recruiting Partnering PHAs and Graduate Students-PWS Section C.5.3 Continued ...				0.00

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029				
0035AA	Option 4-Student Team Recruitment-PWS Section C.5.3.1 Qty 1 x \$8,422.85 = \$8,422.85 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0035AB	Option 4-Public Housing Agency (PHA/TDHE)-PWS Section C.5.3.2 Qty 1 x \$7,585.89 = \$7,585.89 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0036	Option 4-Phase I and Juror Selection-PWS Section C.5.4 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029				0.00
0036AA	Option 4-PHA Selection and Competition Guidelines-PWS Section C.5.4.1 Qty 1 x \$8,423.22 = \$8,423.22 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0036AB	Option 4-Juror Selection-PWS Section C.5.4.2 Qty 1 x \$8,423.22 = \$8,423.22 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0036AC	Option 4-Selection of the Four Final Teams-PWS Section C.5.4.3 Qty 1 x \$8,423.22 = \$8,423.22 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Continued ...	1	EA	NSP	0.00



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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Period of Performance: 09/30/2028 to 09/29/2029				
0037	Option 4-PHA/TDHE and Site Visit Management-PWS Section C.5.5 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029				0.00
0037AA	Option 4-Site Visit (students)-PWS Section C.5.5.1 Qty 8 x \$1,379.47 = \$11,035.72 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	8	EA	NSP	0.00
0038	Option 4-Final Event and Close-out-PWS Section C.5.6 Award Type: Firm-fixed-price (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029				0.00
0038AA	Option 4-Final Event (printed copies of programs)-PWS Section C.5.6.1 Qty 75 x \$169.12 = \$12,684.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	75	EA	NSP	0.00
0038AB	Option 4-Close-out Activities-PWS Section C.5.6.3 Qty 1 x \$61,000.00 = \$61,000.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0039	Option 4-Final Summary Report-PWS Section C.5.7 (Option Line Item)				0.00
0039AA	Option 4-Draft Final Report-PWS Section C.5.7 Qty 1 x \$7,626.69 = \$7,626.69 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0039AB	Option 4-Final Report-PWS Section C.5.7 Continued ...	1	EA	NSP	0.00

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NAME OF OFFEROR OR CONTRACTOR  
SCHATZ PUBLISHING GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Qty 1 x \$5,069.38 = \$5,069.38 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2027 to 09/29/2028				
0039AC	Option 4-Case Studies for winning and runner-up team-PWS Section C.5.7 Qty 1 x \$7,362.70 = \$7,362.70 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2028 to 09/29/2029	1	EA	NSP	0.00
0040	Option 4-Travel Reimbursement for C.5.2, C.5.5 and C.5.6 Qty 1 x \$80,000.00 = \$80,000.00 Award Type: Cost Total Estimated Cost: \$80,000.00 (Option Line Item) Period of Performance: 09/30/2028 to 09/29/2029  The obligated amount of award: \$298,400.37. The total for this award is shown in box 26.				0.00

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## PART I – THE SCHEDULE

## SECTION B - SUPPLIES OR SERVICES AND PRICES/COST

**B.1 Contract Definition**

This is a Firm-Fixed-Price (FFP) contract under the authority of **FAR Part 12 and 13.5- Simplified Procedures for Certain Commercial Products and Commercial Services** under NAICS Code **541611 – Administrative Management and General Management Consulting Services** for performance of the services stated in Section C, Performance Work Statement. **This is a Total Small Business set-aside.**

**This is a multiple-year contract. See Section F for period of performance.**

**B.2 Description of Services**

The contractor shall provide services for the Innovation in Affordable Housing Student Design and Planning Competition for the U.S. Department of Housing and Urban Development (HUD) Housing Surveys, Office of Policy Development and Research (PD&R). The Contractor shall provide PD&R with support in topical knowledge in housing and community development, planning, logistics, and outreach services for the award competition for graduate students.

The contractor shall have extensive knowledge of affordable housing, urban planning, and community planning with professional and academic expertise in planning/design, architecture, building technology, public policy, and economics to provide the logistical support for the planning, managing, and providing outreach services for the events of the competition involving students.

**B.3 Contract Line-Item Numbers and Prices**

The amount to be paid to the Contractor for a deliverable is described in Section G, paragraph G.1 of this contract. **The estimated quantities are estimates only. The Government is not obligated to order the estimated quantities. The Government is not obligated to pay the amount specified.**

**FP:** Fixed Price

**FP-FUR:** Fixed Price-Fixed Unit Rate

**LH:** Labor Hour

**TM:** Time and Material

**CR:** Cost Reimbursement – No Fee

**SECTION B -- SUPPLIES OR SERVICES AND PRICE/COSTS****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005****Base Year**

<b>CLIN</b>	<b>CLIN Type</b>	<b>PWS Section</b>	<b>Description – Base Year</b>	<b>Qty</b>	<b>Unit</b>	<b>Unit Price</b>	<b>Total Price</b>
<b>0001</b>		<b>C.5.1</b>	<b>Project Management</b>				
0001AA	FP	C.5.1.1	Orientation Meeting	1	EA	\$699.30	\$699.30
0001AB	FP	C.5.1.2	Management and Work Plan	1	EA	\$8,133.57	\$8,133.57
0001AC	FP-FUR	C.5.1.3	Monthly Progress Reports and Ongoing Communication	12	EA	\$1,123.00	\$13,476.00
<b>0002</b>		<b>C.5.2</b>	<b>Marketing and Competition Materials</b>	1	EA	\$40,706.55	\$40,706.55
<b>0003</b>		<b>C.5.3</b>	<b>Recruiting Partnering PHAs and Graduate Students</b>				
0003AA	FP	C.5.3.1	Student Team Recruitment	1	EA	\$8,094.17	\$8,094.17
0003AB	FP	C.5.3.2	Public Housing Agency (PHA/TDHE)	1	EA	\$7,289.17	\$7,289.17
<b>0004</b>		<b>C.5.4</b>	<b>Phase I and Juror Selection</b>				
0004AA	FP	C.5.4.1	PHA Selection and Competition Guidelines	1	EA	\$8,094.17	\$8,094.17
0004AB	FP	C.5.4.2	Juror Selection	1	EA	\$8,094.17	\$8,094.17
0004AC	FP	C.5.4.3	Selection of the Four Final Teams	1	EA	\$8,094.17	\$8,094.17
<b>0005</b>		<b>C.5.5</b>	<b>PHA/TDHE and Site Visit Management</b>				
0005AA	FP	C.5.5.1	Site Visit (students)	8	EA	\$1,325.34	\$10,602.72
<b>0006</b>		<b>C.5.6</b>	<b>Final Event and Close-out</b>				
0006AA	FP	C.5.6.1	Final Event (printed copies of programs)	75	EA	\$162.52	\$12,189.20
0006AB	FP	C.5.6.2	Prize and Honorarium	1	EA	\$61,000.00	\$61,000.00
0006AC	FP	C.5.6.3	Close-out Activities	1	EA	\$12,652.05	\$12,652.05
<b>0007</b>		<b>C.5.7</b>	<b>Final Summary Report</b>				
0007AA	FP	C.5.7	Draft Final Report	1	EA	\$7,328.57	\$7,328.57
0007AB	FP	C.5.7	Final Report	1	EA	\$4,871.57	\$4,871.57
0007AC	FP	C.5.7	Case Studies for winning and runner-up team	1	EA	\$7,074.99	\$7,074.99
<b>0008</b>	CR	C.5.8	Travel Reimbursement for C.5.2, C.5.5 and C.5.6	1	LOT	\$80,000.00	\$80,000.00
		<b>BASE YEAR TOTAL PRICE</b>					<b>\$ 298,400.37</b>

**SECTION B -- SUPPLIES OR SERVICES AND PRICE/COSTS**
**Innovation in Affordable Housing Student  
Design and Planning Competition**
**Policy Development and Research (PD&R)**
**86614624C00005**
**Option 1**

<b>CLIN</b>	<b>CLIN Type</b>	<b>PWS Section</b>	<b>Description – Option 1</b>	<b>Qty</b>	<b>Unit</b>	<b>Unit Price</b>	<b>Total Price</b>
<b>0009</b>		<b>C.5.1</b>	<b>Project Management</b>				
0009AA	FP-FUR	C.5.1.3	Monthly Progress Reports and Ongoing Communication	12	EA	\$1,133.97	\$13,607.64
<b>0010</b>		<b>C.5.2</b>	<b>Marketing and Competition Materials</b>	1	EA	\$41,114.31	<b>\$41,114.31</b>
<b>0011</b>		<b>C.5.3</b>	<b>Recruiting Partnering PHAs and Graduate Students</b>				<b>\$</b>
0011AA	FP	C.5.3.1	Student Team Recruitment	1	EA	\$8,175.21	\$8,175.21
0011AB	FP	C.5.3.2	Public Housing Agency (PHA/TDHE)	1	EA	\$7,362.19	\$7,362.19
<b>0012</b>		<b>C.5.4</b>	<b>Phase I and Juror Selection</b>				<b>\$</b>
0012AA	FP	C.5.4.1	PHA Selection and Competition Guidelines	1	EA	\$8,175.25	\$8,175.25
0012AB	FP	C.5.4.2	Juror Selection	1	EA	\$8,175.25	\$8,175.25
0012AC	FP	C.5.4.3	Selection of the Four Final Teams	1	EA	\$8,175.25	\$8,175.25
<b>0013</b>		<b>C.5.5</b>	<b>PHA/TDHE and Site Visit Management</b>				<b>\$</b>
0013AA	FP	C.5.5.1	Site Visit (students)	8	EA	\$1,338.84	\$10,710.75
<b>0014</b>		<b>C.5.6</b>	<b>Final Event and Close-out</b>				<b>\$</b>
0014AA	FP	C.5.6.1	Final Event (printed copies of programs)	75	EA	\$164.15	\$12,311.25
0014AB	FP	C.5.6.2	Prize and Honorarium	1	EA	\$61,000.00	\$61,000.00
0014AC	FP	C.5.6.3	Close-out Activities	1	EA	\$12,778.75	\$12,778.75
<b>0015</b>		<b>C.5.7</b>	<b>Final Summary Report</b>				<b>\$</b>
0015AA	FP	C.5.7	Draft Final Report	1	EA	\$7,402.00	\$7,402.00
0015AB	FP	C.5.7	Final Report	1	EA	\$4,920.29	\$4,920.29
0015AC	FP	C.5.7	Case Studies for winning and runner-up team	1	EA	\$7,145.84	\$7,145.84
0016	CR	C.5.8	Travel Reimbursement for C.5.2, C.5.5 and C.5.6	1	LO	\$80,000.00	\$80,000.00
		<b>OPTION 1 TOTAL PRICE</b>					<b>\$291,053.98</b>

**SECTION B -- SUPPLIES OR SERVICES AND PRICE/COSTS**

Policy Development and Research (PD&amp;R)

Innovation in Affordable Housing Student  
Design and Planning Competition

86614624C00005

**Option 2**

<b>CLIN</b>	<b>CLIN Type</b>	<b>PWS Section</b>	<b>Description – Option 2</b>	<b>Qty</b>	<b>Unit</b>	<b>Unit Price</b>	<b>Total Price</b>
<b>0017</b>		<b>C.5.1</b>	<b>Project Management</b>				
00017AA	FP-FUR	C.5.1.3	Monthly Progress Reports and Ongoing Communication	12	EA	\$1,144.35	\$13,732.20
<b>0018</b>		<b>C.5.2</b>	<b>Marketing and Competition Materials</b>	1	EA	\$41,525.64	\$41,525.64
<b>0019</b>		<b>C.5.3</b>	<b>Recruiting Partnering PHAs and Graduate Students</b>				
0019AA	FP	C.5.3.1	Student Team Recruitment	1	EA	\$8,257.20	\$8,257.20
0019AB	FP	C.5.3.2	Public Housing Agency (PHA/TDHE)	1	EA	\$7,436.02	\$7,436.02
<b>0020</b>		<b>C.5.4</b>	<b>Phase I and Juror Selection</b>				
0020AA	FP	C.5.4.1	PHA Selection and Competition Guidelines	1	EA	\$8,257.21	\$8,257.21
0020AB	FP	C.5.4.2	Juror Selection	1	EA	\$8,257.21	\$8,257.21
0020AC	FP	C.5.4.3	Selection of the Four Final Teams	1	EA	\$8,257.21	\$8,257.21
<b>0021</b>		<b>C.5.5</b>	<b>PHA/TDHE and Site Visit Management</b>				
0021AA	FP	C.5.5.1	Site Visit (students)	8	EA	\$1,352.28	\$10,818.21
<b>0022</b>		<b>C.5.6</b>	<b>Final Event and Close-out</b>				
0022AA	FP	C.5.6.1	Final Event (printed copies of programs)	75	EA	\$165.79	\$12,434.25
0022AB	FP	C.5.6.2	Prize and Honorarium	1	EA	\$61,000.00	\$61,000.00
0022AC	FP	C.5.6.3	Close-out Activities	1	EA	\$12,907.42	\$12,907.42
<b>0023</b>		<b>C.5.7</b>	<b>Final Summary Report</b>				\$
0023AA	FP	C.5.7	Draft Final Report	1	EA	\$7,476.09	\$7,476.09
0023AB	FP	C.5.7	Final Report	1	EA	\$4,969.72	\$4,969.72
0023AC	FP	C.5.7	Case Studies for winning and runner-up team	1	EA	\$7,217.63	\$7,217.63
<b>0024</b>	CR	C.5.8	Travel Reimbursement for C.5.2, C.5.5 and C.5.6	1	LO	\$80,000.00	\$80,000.00
		<b>OPTION 2 TOTAL PRICE</b>					<b>\$292,546.01</b>

**SECTION B -- SUPPLIES OR SERVICES AND PRICE/COSTS**

Policy Development and Research (PD&amp;R)

Innovation in Affordable Housing Student  
Design and Planning Competition

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**Option 3**

<b>CLIN</b>	<b>CLIN Type</b>	<b>PWS Section</b>	<b>Description – Option 3</b>	<b>Qty</b>	<b>Unit</b>	<b>Unit Price</b>	<b>Total Price</b>
<b>0025</b>		<b>C.5.1</b>	<b>Project Management</b>				
0025AA	FP-FUR	C.5.1.3	Monthly Progress Reports and Ongoing Communication	12	EA	\$1,155.62	\$13,867.44
<b>0026</b>		<b>C.5.2</b>	<b>Marketing and Competition Materials</b>	1	EA	\$41,941.07	\$41,941.07
<b>0027</b>		<b>C.5.3</b>	<b>Recruiting Partnering PHAs and Graduate Students</b>				
0027AA	FP	C.5.3.1	Student Team Recruitment	1	EA	\$8,340.46	\$8,340.46
0027AB	FP	C.5.3.2	Public Housing Agency (PHA/TDHE)	1	EA	\$7,510.44	\$7,510.44
<b>0028</b>		<b>C.5.4</b>	<b>Phase I and Juror Selection</b>				
0028AA	FP	C.5.4.1	PHA Selection and Competition Guidelines	1	EA	\$8,340.15	\$8,340.15
0028AB	FP	C.5.4.2	Juror Selection	1	EA	\$8,340.15	\$8,340.15
0028AC	FP	C.5.4.3	Selection of the Four Final Teams	1	EA	\$8,340.15	\$8,340.15
<b>0029</b>		<b>C.5.5</b>	<b>PHA/TDHE and Site Visit Management</b>				
0029AA	FP	C.5.5.1	Site Visit (students)	8	EA	\$1,365.87	\$10,926.95
<b>0030</b>		<b>C.5.6</b>	<b>Final Event and Close-out</b>				
0030AA	FP	C.5.6.1	Final Event (printed copies of programs)	75	EA	\$167.45	\$12,558.75
0030AB	FP	C.5.6.2	Prize and Honorarium	1	EA	\$61,000.00	\$61,000.00
0030AC	FP	C.5.6.3	Close-out Activities	1	EA	\$13,037.60	\$13,037.60
<b>0031</b>		<b>C.5.7</b>	<b>Final Summary Report</b>				
0031AA	FP	C.5.7	Draft Final Report	1	EA	\$7,551.63	\$7,551.63
0031AB	FP	C.5.7	Final Report	1	EA	\$5,019.18	\$5,019.18
0031AC	FP	C.5.7	Case Studies for winning and runner-up team	1	EA	\$7,290.25	\$7,290.25
<b>0032</b>	CR	C.5.8	Travel Reimbursement for C.5.2, C.5.5 and C.5.6	1	LO	\$80,000.00	\$80,000.00
		<b>OPTION 3 TOTAL PRICE</b>					<b>\$294,064.22</b>



**SECTION B -- SUPPLIES OR SERVICES AND PRICE/COSTS**

Policy Development and Research (PD&amp;R)

Innovation in Affordable Housing Student  
Design and Planning Competition

86614624C00005

**Option 4**

<b>CLIN</b>	<b>CLIN Type</b>	<b>PWS Section</b>	<b>Description – Option 4</b>	<b>Qty</b>	<b>Unit</b>	<b>Unit Price</b>	<b>Total Price</b>
<b>0033</b>		<b>C.5.1</b>	<b>Project Management</b>				
0033AA	FP-FUR	C.5.1.3	Monthly Progress Reports and Ongoing Communication	12	EA	\$1,166.70	\$14,000.40
<b>0034</b>		<b>C.5.2</b>	<b>Marketing and Competition Materials</b>	1	EA	\$42,360.51	\$42,360.51
<b>0035</b>		<b>C.5.3</b>	<b>Recruiting Partnering PHAs and Graduate Students</b>				
0035AA	FP	C.5.3.1	Student Team Recruitment	1	EA	\$8,422.85	\$8,422.85
0035AB	FP	C.5.3.2	Public Housing Agency (PHA/TDHE)	1	EA	\$7,585.89	\$7,585.89
<b>0036</b>		<b>C.5.4</b>	<b>Phase I and Juror Selection</b>				
0036AA	FP	C.5.4.1	PHA Selection and Competition Guidelines	1	EA	\$8,423.22	\$8,423.22
0036AB	FP	C.5.4.2	Juror Selection	1	EA	\$8,423.22	\$8,423.22
0036AC	FP	C.5.4.3	Selection of the Four Final Teams	1	EA	\$8,423.22	\$8,423.22
<b>0037</b>		<b>C.5.5</b>	<b>PHA/TDHE and Site Visit Management</b>				
0037AA	FP	C.5.5.1	Site Visit (students)	8	EA	\$1,379.47	\$11,035.72
<b>0038</b>		<b>C.5.6</b>	<b>Final Event and Close-out</b>				
0038AA	FP	C.5.6.1	Final Event (printed copies of programs)	75	EA	\$169.12	\$12,684.00
0038AB	FP	C.5.6.2	Prize and Honorarium	1	EA	\$61,000.00	\$61,000.00
0038AC	FP	C.5.6.3	Close-out Activities	1	EA	\$13,167.19	\$13,167.19
<b>0039</b>		<b>C.5.7</b>	<b>Final Summary Report</b>				
0039AA	FP	C.5.7	Draft Report	1	EA	\$7,626.69	\$7,626.69
0039AB	FP	C.5.7	Final Report	1	EA	\$5,069.18	\$5,069.38
0039AC	FP	C.5.7	Case Studies for winning and runner-up team	1	EA	\$7,362.70	\$7,363.70
<b>0040</b>	CR	C.5.8	Travel Reimbursement for C.5.2, C.5.5 and C.5.6	1	LO	\$80,000.00	\$80,000.00
		<b>OPTION 4 TOTAL PRICE</b>					<b>\$295,584.99</b>

**SECTION B -- SUPPLIES OR SERVICES AND PRICE/COSTS**Innovation in Affordable Housing Student  
Design and Planning Competition

Policy Development and Research (PD&amp;R)

86614624C00005

Description	Period of Performance	Contract Line Item (CLIN)	Total Estimated Amount
<b>Base Year</b>	September 30, 2024 to September 29, 2025	CLINs 0001 - 0008	<b>\$298,400.37</b>
<b>Option Period 1</b>	September 30, 2025 to September 29, 2026	CLINs 0009 - 0016	<b>\$291,053.98</b>
<b>Option Period 2</b>	September 30, 2026 to September 29, 2027	CLINs 0017 – 0024	<b>\$292,546.01</b>
<b>Option Period 3</b>	September 30, 2027 to September 29, 2028	CLINs 0025 – 0032	<b>\$294,064.22</b>
<b>Option Period 4</b>	September 30, 2028 to September 29, 2029	CLINs 0033 – 0040	<b>\$295,584.99</b>
<b>TOTAL: BASE + 4 OPTIONS EST VALUE</b>			<b>\$1,471,649.57</b>

**B.4 Travel - Cost Reimbursement – No Fee**

If cost reimbursable travel is required and approved, HUD will reimburse travel, meeting, and other travel related costs associated with Tasks under C.5.5 that are documented with proper receipts [that show evidence of payment and confirm use of services for all costs submitted for travelers] up to the not to exceed (NTE) amount designated on the Order. Claims in excess of \$75 must be substantiated by a receipt. Also Receipts for lodging, transportation, gas, rental cars, and baggage fees must always be submitted with the expense report regardless of the dollar amount.

The receipt must reflect the amount actually paid in full, for which reimbursement is requested and have acceptable supporting documentation. Acceptable supporting documentation may be Lodging Hotel Receipt, Boarding Pass for Airline Tickets, Airline Invoice, Car Rental Receipt, Paid Invoice Statements, or gasoline receipts. Hotel Itineraries, Confirmation Emails for hotels and/or car rentals, hotel parking or garage parking, and/or text message confirmation for airline tickets are not acceptable supporting documentation. If the Contractor elects to drive, mil will be paid at a rate that is in accordance with the “Privately Owned Vehicle (POV) Mileage Reimbursement Rate.” Mileage will be calculated using Google Maps, Yahoo Maps, AAA Maps, or other reputable mapping service.

Travel expenses (and subsistence) will be based on the most recent Federal Travel Regulations (FTR) as prescribed by the General Services Administration (GSA) with no mark ups to established FTR travel and subsistence rates for the geographic area involved. Travel costs will be reimbursed in accordance with the **HUDAR 2452.251-70 CONTRACTOR EMPLOYEE TRAVEL**. All travel must be approved by the Government and must be in accordance with contract terms.

**B.5 Labor Hour and Time & Material Contract Line Items**

Not Applicable

**SECTION C - DESCRIPTION/SPECIFICATIONS/WORK STATEMENT****HUD Innovation in Affordable Housing Student Design and Planning Competition****Vision Statement**

To organize and manage a graduate student award design and planning competition focused on innovative solutions to nationwide affordable housing challenges.

**1.0 General Information****1.1 Scope of Work**

The U.S. Department of Housing and Urban Development (HUD), Office of Policy Research and Development (PD&R) requires contractor support to assist and manage a graduate student design and planning award competition focused on developing creative solutions to affordable housing challenges. HUD seeks a Contractor with specialized expertise in areas such as urban planning, architecture, or urban design, where applicable, who will perform all tasks defined in this document under Section 5.0 Specific Tasks.

**Task Overview:****5.1 Project Management**

- 5.1.1 Orientation and Post-Award Meetings
- 5.1.2 Management Plan
- 5.1.3 Monthly Progress Reports and Ongoing Communications

**5.2 Marketing and Competition Materials****5.3 Recruiting Partnering PHAs and Graduate Students**

- 5.3.1 Student Team Recruitment
- 5.3.2 Public Housing Agency (PHA)/Indian Tribal Designed Entity (TDHE)

**5.4 Phase 1 and Juror Selection**

- 5.4.1 PHA Selection and Competition Guidelines
- 5.4.2 Juror Selection
- 5.4.3 Selection of the Four Final Teams

**5.5 PHA/TDHE and Site Visit Management**

- 5.5.1 Site Visit

**5.6 Final Event and Close-out**

- 5.6.1 Final Event
- 5.6.2 Prize and Honorarium
- 5.6.3 Close-out Activities

**5.7 Final Summary Report**

- 5.7.1 Draft Final Report
- 5.7.2 Final Report
- 5.7.3 Case Studies for winning and runner-up team

**5.8 Travel Reimbursement**

## **1.2 Background**

The Innovation in Affordable Housing Student Design and Planning Competition (IAH) was created in 2015. The purpose of the competition was to invite teams of graduate students from multiple disciplines to submit plans in response to a real-world affordable housing design issue identified by the HUD in coordination with a public housing authority (PHA), or other agency partners and stakeholders.

### Competition Goals:

The goals of the competition were:

1. To encourage research and innovation in affordable housing that improves the quality of life and strengthens the social and physical fabric of low—and moderate-income communities and neighborhoods.
2. To increase practitioner capacity to produce more livable and sustainable housing for low- and moderate-income communities through best building design and construction practices.
3. To foster cross-cutting and interdisciplinary teamwork within the design and community development process.

In previous years, the competition was opened to graduate students who formed teams, that included one faculty advisor. Each team consisted of three (3) to five (5) graduate students from varied disciplines, such as architecture or policy and real estate development. There were two phases of the competition.

### Phase I:

All teams were required to submit initial proposals, which included up to four (4) pages of narrative and two (2) design boards that illustrated innovative solutions along the following five policy domains:, covering five critical policy domains:

1. Planning context and analysis
2. Building solutions and technology
3. Community development solutions
4. Site-specific illustrations of new construction or redevelopment
5. Schedule and finances

Typically, HUD receives around forty (40) applications from student teams representing colleges and universities from across the country in response to the Departmental invitation.

A jury of housing industry experts then selected four semi-finalist teams that participated in a site visit hosted by the partnering PHA. During the site visit, the students engaged with PHA staff, local government officials, developers, and other relevant partners to learn more about the goals for the site.

### Phase II:

The four (4) finalist teams used insights from the site visit to refine their initial proposals. This phase culminated in the final awards event at HUD Headquarters. The final awards presentations and ceremony occurred during the second week of April. At this event, finalist teams presented their revised site plans and demonstrated how their project solutions were innovative and addressed the needs of the community. Following all four team presentations, the jury deliberated and selected the winning and runner-up teams.

Cash prizes were awarded to all student teams as follows:

### Awards and Prizes:

1. 1st Place (Winning team): \$25,000

2. 2nd Place (Runner-up team): \$15,000
3. 3rd Place: \$6,000
4. 4th Place: \$6,000
5. 5th through 10th Place: \$1,000/team

### **1.3 Constraints**

The services identified in this PWS adhere to the rules, regulations, laws, and standards established by the HUD and other relevant federal guidelines.

### **1.4 Non-Personal Services**

The Government will neither supervise Contractor employees nor control the method by which the Contractor performs the required tasks. Under no circumstances shall the Government assign tasks to, or prepare work schedules for, individual Contractor employees. It shall be the responsibility of the Contractor to manage its employees and to guard against any actions that are of the nature of personal services or give the perception of personal services.

If the Contractor believes that any actions constitute, or are perceived to constitute personal services, it shall be the Contractor's responsibility to notify the Contracting Officer (CO) immediately. These services shall not be used to perform work of a policy, decision making or management nature, i.e., inherently Government functions. All decisions relative to programs supported by the Contractor shall be the sole responsibility of the Government.

### **1.5 Period of Performance**

The period of performance shall encompass one (1) base year of twelve (12) months from the date of award, followed by four (4) consecutive 12-month option period.

### **1.6 Place of Performance**

The primary place of performance will be at the Contractor's facilities.

### **1.7 Hours of Operation**

The Contractor is responsible for providing services. Monday thru Friday . Government agencies will not be available during scheduled holidays, inclement weather, weekends, and after duty hours.

The Contractor shall maintain an adequate workforce for the uninterrupted performance of all tasks defined within the contract when the Government facility is not closed for the above reasons. When hiring personnel, the Contractor shall keep in mind that the stability and continuity of the workforce is essential.

### **1.8 Special Qualifications**

N/A

### **1.9 Post Award/Kickoff Conference**

The Contractor shall attend any post award conference convened by the contracting activity or contract administration office in accordance with FAR Subpart 42.5 and HUDAR 2452.237-79 Post-Award Conference.

### **1.10 Status Meetings**

The Contracting Officer, the Contracting Officer's Representative (COR) and other Government personnel, as appropriate may meet periodically with the Contractor to also review Contractor performance, requirement status, etc. At these meetings, the Contracting Officer will apprise the Contractor of how the Government views the Contractor's performance or progress of the requirement. The Contractor shall apprise the Government of problems, if any, being experienced. Appropriate action shall be taken to resolve outstanding issues. These

meetings shall be at no additional cost to the Government. Post award conference and subsequent meetings may be held via teleconference.

## 1.10 Contractor Travel

Prior to travel, the Contractor shall coordinate with and receive Government authorization from the COR for all travel. Reimbursement of travel costs will be in accordance with the Federal Travel Regulation and in accordance with FAR 31.205-46. The Contractor shall travel using the lower cost mode transportation commensurate with the mission requirements. When necessary to use air travel, the Contractor shall use the tourist class, economy class or similar lodging accommodations to the extent they are available and commensurate with the mission requirements. HUD will not reimburse Contractor's local travel.

## 1.12 Transition In

NA

## 1.13 Transition Out

NA

## 2.0 Definitions and Acronyms

### 2.1 Definitions

**Business/Work Days-** Every official work day or the week, which are days between and including Monday to Friday. This does not include public holidays and weekends.

**Calendar Day** - Any day of the week

**Contractor** - A supplier or vendor awarded a contract to provide specific supplies or service to the Government. The term used in this contract refers to the prime.

**Contracting Officer (CO)** - A person with authority to enter into, administer, and/or terminate contracts and make related determinations and findings on behalf of the Government. Note: the only individual who can legally bind the Government.

**Contracting Officer's Representative (COR)-** An employee of the U.S. Government appointed by the Contracting Officer to perform contract administration activities regarding technical issues. This individual has authority to provide technical direction to the Contractor if direction is within the scope of the contract, does not constitute a change and has no funding implications. This individual does NOT have authority to change the terms and conditions of the contract.

**Defective Service** - A service output that does not meet the standard of performance associated with the Performance Work Statement.

**Deliverable** - Anything that can be physically delivered but may include non-manufactured things such as meeting minutes or reports.

**Government Furnished Property (GFP)** - Government-furnished property is property in the possession of, or directly acquired by, the Government and subsequently furnished to the Contractor for performance of a contract. Government-furnished property includes, but is not limited to, spares and property furnished for repair,

maintenance, overhaul, or modification. Government-furnished property also includes contractor-acquired property if the contractor-acquired property is a deliverable under a cost contract when accepted by the Government for continued use under the contract.

**Performance Requirements Summary (PRS)**- A listing of the performance requirements under the contract that are to be evaluated by the Government on a regular basis, performance indicators for these requirements, performance standard for these requirements and surveillance methods to be used to determine if performance standards are met.

**Performance Standard**- The Contractor's performance level required by the Government.

**Performance Work Statement (PWS)** - A statement of work for performance-based acquisitions that describe the required results in clear, specific, and objective terms with measurable outcomes.

**Quality Assurance (QA)** - Policies and procedures adopted by the Government to ensure that supplies and services acquired under Government contracts conform to the contracts quality requirements.

**Quality Assurance Surveillance Plan (QASP)** - A plan describing how the agency will survey, observe, test, sample, evaluate and document the Contractor's performance in meeting critical performance standards identified in the contract.

**Quality Control (QC)** - All necessary measures taken by the Contractor to assure that the quality of an end product of service shall meet contract requirements.

**Subcontractor** - Any person, other than the prime Contractor, who offers to furnish or furnishes any supplies, material, equipment, or services of any kind under a prime contract or a subcontract entered into in connection with such prime contract, and any person who offers to furnish or furnishes general supplies to the prime contractor or a higher tier subcontractor. The Government does not have privity of contract with a subcontractor.

**Workday** - The number of hours per day the Contractor provides services in accordance with the contract.

**Work Week** - Monday through Friday, unless specified otherwise.

## 2.2 Acronyms

**AHRT** - Affordable Housing & Research Technology Division, HUD

**AQL** - Acceptable Quality Level.

**CFO or OCFO** - Office of the Chief Financial Officer of HUD.

**CFR** - Code of Federal Regulations.

**CIO or OCIO** - Office of the Chief Information Officer of HUD.

**CO** - Contracting Officer.

**COR** - Contracting Officer's Representative.

**COTS** - Commercial Off-the-Shelf.

**CS**- Contracting Specialist

**EA** - Each.

**EOP** - Executive Office of the President.

**EST** - Eastern Standard Time (US).

**ETC** - Estimate to Completion.

**FY** – Fiscal Year

**GAO** - Government Accountability Office.

**GPO** - Government Printing Office.

**HDAD** - Housing and Demographic Analysis Division.

**HUD** – United States Department of Housing and Urban Development.

**HUDAR** - HUD Acquisition Regulation.

**IG or OIG** - Inspector General (Office of).

**IPP**- Invoice Processing Platform

**IT** - Information Technology.

**MWP** – Management and Work Plan.

**IV&V** - Independent Validation and Verification.

**OCPO** - Office of the Chief Procurement Officer.

**OIG** - Office of Inspector General

**OMB** - Office of Management and Budget of EOP.

**PD&R** - Policy Development and Research (Office of).

**PG** - Page.

**PHA** – Public Housing Agency

**PL** - Public Law.

**PM** - Project Manager.

**POC** - Point of Contact.

**POP**- Period of Performance

**PPM** - Project Planning and Management.

**PWS**- Performance Work Statement

**QA** - Quality Assurance.

**QASP** - Quality Assurance Surveillance Plan.

**QC** - Quality Control.

**QCP** - Quality Control Plan.

**RD** - Rental Dynamics.

**RFP** - Request for Proposal.

**SCOR** - Subordinate Contracting Officers Representative.

**SF** - Standard Form.

**TBD** - To be determined.

**TDHE** - Tribally Designated Housing Entities

**U.S.C** - United States Code

### **3.0 Government-Furnished Property and Services**

#### **3.1 Government Services**

No services will be provided by the Government.

#### **3.2 Facilities**

No facilities will be provided by the Government. The Contractor shall ensure that all necessary facilities are available and suitable for the successful execution of the contract.

#### **3.3 Equipment**

The Contractor shall provide all equipment required for the completion of the contract. No equipment will be provided by the Government.

#### **3.4 Materials and Information**

See Section **H.2** HUDAR 2452.227-70 GOVERNMENT INFORMATION



### **3.5 Quality Assurance (QA)**

The Government shall evaluate the Contractor's performance under this contract in accordance with the Quality Assurance Surveillance Plan (QASP). This plan is primarily focused on what the Government must do to ensure that the Contractor has performed in accordance with the performance standards. It defines how the performance standards will be applied, the frequency of surveillance, and the minimum acceptable quality level.

## **4.0 Contractor-Furnished Items and Services**

### **4.1 Facilities**

The Contractor shall furnish the facilities required to perform the services under this contract.

### **4.2 Equipment**

The Contractor shall furnish all equipment required to perform the services under this contract.

### **4.3 Materials**

The Contractor shall furnish the materials required to perform the services under this contract.

### **4.4 Contractor Responsibilities**

The Contractor shall only conduct business with designated Government personnel listed as points of contact (POCs) under this contract. Names of authorized personnel shall be provided to the Contractor by the Government, in writing and updated as necessary throughout the contract period.

U.S. Government records, copies of original results and reports, verified original data, corrected data, and corrected supporting final reports which are maintained by the Contractor remain the property of the U.S. Government. These files/results must be surrendered to the COR.

### **4.5 Contractor Personnel**

See Sections:

**G.5 HUDAR 2452.237-70 KEY PERSONNEL**

**G.6 Key Personnel Minimum Experience and Education Requirements**

**G.7 Project Manager and Alternate Project Manager**

### **4.6 Identification of Contractor Employees**

All Contractor/subcontractor personnel shall wear company picture identification badges so as to distinguish themselves from Government employees. When conversing with Government personnel during business meeting, over the telephone or via electronic mail, Contractor/subcontractor personnel shall identify themselves as such to avoid situations arising where sensitive topics might be better discussed solely between Government employees.

Contractors/subcontractors shall identify themselves on any attendance sheet or any coordination documents they may review. Electronic mail signature blocks shall identify their company affiliation. Where practicable,

Contractor/subcontractors occupying collocated space with their Government program customer shall identify their workspace area with their name and company affiliation, or as a minimum, "Contractor" after name.

## **5.0 Specific Tasks**

### **5.1. Project Management**

#### **5.1.1 Orientation and Post-Award Meetings**

The Contracting Office Representative (COR) and the Contracting Officer/Specialist (CO/CS) will collaborate on the date for the Orientation Meeting and the Postaward meeting before notifying the Contractor.

The Contracting Office Representative (COR) will notify the Contractor and the CO/CS within two (2) business days after contract award to collaborate the schedule for the orientation meeting. The meeting shall be conducted within three weeks after contract award. The Contractor key personnel must participate in the meeting via teleconference, to establish a common understanding of the project objective. The meeting will also allow discussion to clarify any remaining questions and begin project activity. The meeting will include a discussion of the purpose and goals of the project, the tasks required, the project timetable, the roles and responsibilities of the COR and the Contractor, and the deliverables. The COR, Contractor, and Contract Specialist will prepare the agenda.

If the Post Award meeting is not conducted with the Orientation Meeting, the CO/CS will notify the Contractor and the COR within two (2) business days after contract award to collaborate the schedule for the Post Award meeting.

The Contractor shall submit a draft Agenda and Power Point Presentation summarizing the project implementation approach one (1) week after contract award. . The Government shall review the Agenda and Presentation and provide feedback within two (2) business days. The Contractor shall revise based on feedback from the COR. The Contractor shall submit the final Agenda and Presentation two (2) weeks after contract award .

The Contractor shall submit a meeting summary document one (1) week after the meeting. The meeting summary document shall summarize the meeting discussion including any action items.

The Contracting Officer Representative (COR) and the Contracting Officer/Specialist (CO/CS) shall collaborate to establish dates for both the Orientation Meeting and the Post Award Meeting before notifying the Contractor.

The Contracting Office Representative (COR) will notify the Contractor and the CO/CS within two (2) business days after contract award to collaborate the schedule for the orientation meeting. The meeting shall be conducted within three weeks after contract award. The Contractor key personnel must participate in the meeting via teleconference, to establish a common understanding of the project objective. The meeting will also allow discussion to clarify any remaining questions and begin project activity. The meeting will include a discussion of the purpose and goals of the project, the tasks required, the project timetable, the roles and responsibilities of the COR and the Contractor, and the deliverables. The COR, Contractor, and Contract Specialist will prepare the agenda.

If the Post Award meeting is not conducted with the Orientation Meeting, the CO/CS will notify the Contractor and the COR within two (2) business days after contract award to collaborate the schedule for the Post Award meeting.

The Contractor shall submit a draft Agenda and Power Point Presentation summarizing the project implementation approach one (1) week after contract award. The Government shall review the Agenda and Presentation and provide feedback within two (2) business days. The Contractor shall revise based on feedback from the COR. The Contractor shall submit the final Agenda and Presentation two (2) weeks after the contract is awarded.

The Contractor shall submit a meeting summary document one (1) week after the meeting. The meeting summary document shall summarize the meeting discussion including any action items.

#### Performance Standards

- a) Standard: Draft Agenda and PowerPoint presentation is submitted within one (1) week after contract award.
- b) Standard: Final Agenda and presentation are submitted two (2) weeks after contract award.
- c) Standard: Meeting Summary is submitted within one (1) week after the Orientation meeting.
- d) Standard: Orientation Meeting is conducted within three (3) weeks after contract award.

Acceptable Quality Level (AQL): Zero Deviation

#### Deliverables

- A001 Draft Agenda and PowerPoint Presentation
- A002 Final Agenda and PowerPoint Presentation
- A003 Meeting Summary Document

### **5.1.2 Management Plan**

The Contractor shall deliver the draft Management Plan to the COR and CO within four (4) weeks after contract award. HUD will review the draft and provide comments within one (1) week of receipt. The Contractor shall submit a final Management Plan incorporating HUD's comment within one (1) week after receiving HUD comments.

Subsequent revisions to the Management Plan shall be submitted to the COR and CO within fifteen (15) business days for approval. After acceptance of the Management Plan, the Contractor shall receive the CO's acceptance in writing of any proposed changes to the Plan

The Management Plan shall conform to the following criteria:

- A. The Management Plan shall be clear, concise, and demonstrate its capability to meet the objectives and requirements outlined in the PWS.
- B. The Management Plan shall identify the following:
  - 1. An outline of all key personnel roles and responsibilities.
  - 2. Any proposed subcontracting or teaming arrangements and reporting relationships of subcontractors and team members; including clearly identifying aspects of the work to be performed by the prime and detailing work aspects to be performed by each subcontractor.
  - 3. Schedules of all tasks and subtasks, meetings, and deliverables.
  - 4. A plan that demonstrates successful communication and coordination between the Contractor and the government personnel/roles.
  - 5. An organization chart with key personnel roles and names, including subcontractors and teaming partners. The chart shall demonstrate clear lines of authority from the top of the organization to all those working on this effort.

#### Performance Standards

- a) Standard: Draft is submitted four (4) weeks after contract award.

- b) Standard: Final is submitted one (1) week after receipt of HUD comments.

AQL: Zero Deviation

#### Deliverables

A004 Draft Management Plan

A005 Final Management Plan

### **5.1.3 Monthly Progress Reports and Ongoing Communications**

The Contractor shall provide the CO and COR progress reports with a summary of each task in the contract on a monthly basis. The monthly reports shall be submitted electronically as a Word document. The Contractor shall be available to discuss the deliverables and progress reports via teleconferences. The monthly summaries shall be submitted by the 15<sup>th</sup> day of each month and at the minimum each report shall cover the following:

1. A description of the work and specific progress made on each task;
2. Contract Deliverable Table with a column for date delivered and summary of deliverables;
3. Problems or /and any unforeseen occurrences and approach to solve the problems;
4. Activities for the next month;
5. Breakdown of monthly expenditures by CLIN types applicable in this contract:
  - X Fixed Priced - CLIN and SubCLIN contract prices and expenditures by Month and Total to Date expenditures.
  - NA TM and LH - CLIN and SubCLIN negotiated and actual expended labor hours, labor rates, labor costs, other direct costs, work completion percentage and funding expended percentage. Identify cost overruns and underruns by Month and Total to Date expenditures.
  - X Cost - CLIN and SubCLIN negotiated and actual expended labor hours, labor rates, labor costs, other direct costs, work completion percentage and funding expended percentage. Identify cost overruns and underruns by Month and Total to Date expenditures. Cost expenditures will also be submitted for cost reimbursable travel.
6. Any other significant concerns or issues.

The first monthly report shall be submitted on the 15<sup>th</sup> after the first full month of performance (Example- if the award is effective September 28, the first report will be due on November 15 and not October 15.)

The contractor and HUD shall also have regularly scheduled virtual meetings to discuss contract implementation and matters requiring attention or approval monthly at a minimum but may require additional ad hoc meetings if issues arise during contract performance.

**The Government and Contractor shall include the Contract Number and Project Title in the subject of all emails.** The Contractor shall also add a brief topic name of what the email is about (example -November Progress Report).

Subject: [Contract Number] - [Project Title] - [Brief Topic Description]

#### Performance Standards

- a) Standard: Timely - The Contractor shall submit monthly reports by the 15th day of each month, aligned with the timely submission of payment invoices. Monthly meetings must be conducted as agreed upon and established by the Contractor and the COR.

AQL: Zero Deviation

#### Deliverables

A006 Monthly Report and Meeting Summaries

## **5.2. Marketing Competition**

### **5.2.1 Marketing and Competition Materials**

The Contractor shall update the marketing and promotion brochures and application materials. The Contractor shall provide the COR with updated language for the IAH website. The Contractor shall create social media contents for the IAH competition through HUD's official social media accounts; however, the Contractor is not responsible for posting to these sites, which currently includes but is not limited to:

- a. Facebook (<https://www.facebook.com/hudusernews>),
- b. LinkedIn (<https://www.linkedin.com/company/huduser/>), and
- c. Twitter (<https://twitter.com/HUDUSERNEWS>).

The following marketing materials will be provided and updated as listed below:

- (1) Brochures (electronic and if applicable printed: The brochures shall be used to recruit students and shall be updated annually 8 weeks after award .
- (2) IAH Logo: Draft logo for the IAH website, and social media accounts annually shall be submitted 6 weeks after award and final logo has to be submitted 8 weeks after award.
- (3) Frequently Asked Questions (FAQ): Update the FAQs as needed including the webinar questions and provides response to inquiries to the COR within two business days of receiving the questions. The FAQ updates shall be provided to the COR in a word document, included with it shall be any updates needed to the IAH website. The Contractor shall update the FAQs on an average of 7 times per competition.
- (4) Additional Promotional Marketing Materials: The Contractor shall create and update supplementary promotional items, such as posters at least twice for each competition year.
- (5) Competition Schedule: Update the competition schedule annually including the deadlines for juror deliberation, team formation, team submission of designs, site visit, and final event. The draft schedule shall be submitted 6 weeks after award. The final schedule shall be submitted 8 weeks after award.
- (6) Draft Memo for the Secretary of HUD: The Contractor shall prepare a draft memo annually for the Secretary. The memo shall include the proposed event schedule and outline on how the event will run.
- (7) Final Memo for the Secretary of HUD: The final memo shall include the final event schedules and outlines of how the event will run,
- (8) Website Language: The Contractor shall provide updated website language to the COR at least annually within 6 weeks after contract award and ongoing as needed up to ten (10) times a year .

#### Performance Standards

- a) Standard: All questions posed on the website shall be answered and posted within two (2) business days. The deliverables listed below shall be updated annually and are due within six (6) weeks post-award, unless specified otherwise. HUD will provide comments within one (1) week of receiving these deliverables. The final deliverable shall be submitted to HUD within one (1) week of receipt of comments.

AQL: Zero Deviation

#### Deliverables

- A007 Brochures 8 weeks after award)
- A008 Draft Annual Logo
- A009 Final Annual Logo
- A010 Updated Frequently Asked Questions (FAQs) – within two (2) days of receipt of new inquiries.
- A011 Additional Promotional Materials annually
- A012 Draft Competition Schedule
- A013 Final Competition Schedule
- A014 Draft memo for Secretary of HUD, include a draft final event schedule and how the event will run 8 (eight) weeks of post-award.
- A015 Final Memo for the Secretary of HUD – to include finalized event schedule and detailed event logistics, within ten (10) weeks post-award.
- A016 Updates to the HUD IAH Website Language-

### **5.2.2 Marketing Competition Travel**

HUD will provide the Contractor with a master listing of all colleges and universities and other relevant educational organizations as part of their outreach. HUD expects the Contractor to send all correspondence, subject to COR approval, to all academic organizations. The Contractor shall market the competition to the institutes on the Master list. The Contractor shall work with the COR to determine the conferences, schools (such as HBCUs,) to travel to for marketing and recruiting students interested in competing. The Contractor is responsible for all travel, hotel, and per diem expenses for approximately six (6) trips and no more than two (2) Contractor staff members. Additional team members are responsible for their own travel expenses. All travel reimbursement shall be billed under task **C.5.8**.

### **5.3 Recruiting Partnering PHAs/THDEs and Graduate Students**

The Contractor shall promote the competition to appropriate venues, such as graduate schools and professional organizations, to publicize the competition and request entries from a diverse group of student teams and partnering PHAs.

#### **5.3.1 Student Team Recruitment**

The Contractor shall market the competition to a broad range of graduate students and is responsible for creating and implementing marketing tools and strategies to attract and engage prospective students to compete. The Contractor shall update the power point provided by HUD. The Contractor shall conduct a live one-hour webinar for students and faculty for HUD to present the power point. The webinar must be recorded and the contractor must take notes during the webinar. The webinar at a minimum will cover the requirements of the competition, the two Phases of the competition, the process for applying and the deadlines to qualify. The Contractor shall provide the COR with the recording of the webinar and notes. HUD will provide the Contractor with a master listing of all colleges and universities and other relevant educational organizations as part of their outreach. HUD expects the Contractor to send all correspondence, subject to COR approval, to all academic organizations. The

Contractor shall implement the market the strategy for the graduate schools on the master list, to recruit students from a diverse range of schools.

The Contractor shall provide a comprehensive list of registered student teams, including the name of their university and faculty advisor.

The Contractor shall also organize site visits to schools and educational events as required **C.5.4**; and advertise on popular websites frequented by students.

The Contractors shall record all questions asked during the webinar and will update the FAQs as needed as required in **C.5.2**. The primary objective is to recruit student teams that reflect a broad spectrum of socio-economic backgrounds. The Contractor shall focus recruitment at the following institutes:

- (1) Colleges and Universities for Women
- (2) Historically Black Colleges and Universities (HBCUs)
- (3) Hispanic Serving Institutes (HSIs)
- (4) Institutions Located in a HUBZone
- (5) Other institutions (for example, research institutes, such as the American Planning Association, National Building Museum)

#### Performance Standards

- a) Standard: The live webinar shall be held in the third week of September. Within one (1) week after the close of student registration. The recorded webinar and accompanying notes shall also be submitted within one week following the webinar.

AQL: Delay in meeting the above deadlines shall not exceed five (5) business days. This AQL applies to the submission of the registered student list, as well as the delivery of webinar recording and notes.

#### Deliverables

A017 Live Webinar for Students and Faculty and the recording and webinar notes.

A018 Final List of Registered Teams

#### **5.3.2 Public Housing Agency (PHA)/Indian Tribal Designed Entity (TDHE)**

The Contractor shall create marketing materials aimed at recruiting PHA and TDHE staff as required in **C.5.2**. For these materials, the Contractor shall collaborate with the COR to develop suitable language. The Contractor shall conduct a live one-hour webinar for interested PHA and TDHE staff for HUD to present the power point listed in **C.5.3.2**. The Contractor shall provide the recordings of this meeting and the notes and attendees to the COR. The Contractor shall also work with the COR to develop the final questions for the selection criteria. This webinar shall at minimum include detailed information about the competition, its two phases, entry requirements, logistics for the site visit, and relevant deadlines. The Contractor shall record all questions asked during the webinar and shall update the FAQs as necessary to reflect these inquiries as required in **C.5.2**. The responses to the FAQs will be vetted by the COR.

Performance Standards

- a) Standard: The Contractor shall conduct the Live PHA/TDHE webinar in the second week of October. The recorded meeting and corresponding notes must be provided within seven (7) days following the webinar. The list of PHA and TDHE attendees must be provided within one (1) week following the webinar. The final list of PHA and TDHE attendees, along with their responses to the selection criteria questionnaire shall be provided within two (2) days after the application deadline.

AQL: Delays in meeting the above timelines shall not exceed five (5) business days.

Deliverables

A019 Live Webinar for PHA/TDHE Staff

A020 Recorded Meeting and Notes

A021 List of PHA/TDHE Attendees

A022 Final list of PHAs and TDHEs – to include responses to the selection criteria questionnaire

**5.4 Phase 1 and Juror Selection****5.4.1 PHA/TDHE Selection and Competition Guidelines**

The Contractor shall facilitate the selection of the partnering PHA/TDHE in coordination with HUD staff. Following PHA/TDHE selection, the Contractor shall organize a meeting between the PHA, Contractor, and HUD staff. This meeting shall occur within two (2) weeks of the PHA's/TDHE's selection to establish project alignment and collaborative objectives.

In collaboration with the PHA/TDHE staff, the Contractor shall update the competition guidelines to ensure they accurately reflect the specific objectives of the selected PHA/TDHE and are consistent with the overarching goals of the competition. These guidelines are necessary to enable student teams to effectively develop their site plans and designs. The Contractor must annually update these guidelines to ensure they remain current and applicable.

The Contractor must maintain ongoing communication with the partnering PHA/TDHE, ensuring that the competition guidelines are not only consistently applied but also regularly updated as necessary throughout the duration of the competition.

The Contractor shall submit a draft of the updated competition guidelines to HUD within two (2) weeks after the PHA/TDHE is selected and HUD will review and provide feedback.

Performance Standards

- a) Standard: The Contractor shall submit a draft of the updated competition guidelines to HUD within two (2) weeks after the PHA/TDHE is selected. HUD will review and provide feedback within one (1) week of receiving this draft. Upon receiving HUD's feedback, the Contractor shall finalize and submit the updated competition guidelines within one (1) week.

AQL: No more than one (1) week delay for submission of deliverables

Deliverables

A023 Draft competition guidelines

A024 Final competition guidelines



### 5.4.2 Juror Selection

The Contractor shall provide a list of five (5) jurors with expertise in urban planning or design, architecture, real estate development, sustainability, financing, or building sciences and engineering on an annual basis. These jurors will serve as members of the panel to review designs and pro-forma submissions by student teams. The Contractor will coordinate with the COR to recruit the jurors, schedule meetings with each juror to discuss expectations, and distribute necessary materials, including student proposals and design files. The COR has established a scoring protocol. The Contractor is responsible for updating the existing scoring guide to aid jurors in effectively reviewing and providing objective feedback on each student's design. The Contractor shall develop a Conflict of Interest and Confidentiality form for jurors to sign and submit, subject to COR approval. Additionally, the Contractor must schedule and facilitate the juror deliberations within the second fiscal quarter (FY Quarter 2).

#### Performance Standards

- a) Standard: The Contractor shall provide the COR with a list of appropriate Jurors within seventeen (17) weeks of contract award. The Contractor is responsible for facilitating the juror deliberations, which must take place during the second fiscal quarter (FY Quarter 2).

AQL: Delay in providing the list of jurors, updating the scoring guide, or facilitating juror deliberations shall not exceed two (2) weeks beyond the specified deadlines.

#### Deliverables

- A025 List of Jurors and Qualifications and Conflict of Interest and Confidentiality Form
- A026 Scoring Guide for Jurors FY Quarter 2

### 5.4.3 Selection of the Four Final Teams

The Contractor shall rank all Phase I based on scores provided by the jurors. The list of the top ten (10) scoring teams shall be submitted to the COR within two (2) days following the receipt of scores from the jurors. The Contractor shall organize and facilitate a virtual deliberation session for the jurors within one (1) week of obtaining the top ten scoring teams and provide the notes to the COR. The objective of this session is for the jurors to select the top four (4) teams that will proceed to Phase II from the previously identified top ten (10) teams. The Contractor shall submit all scores and comments to HUD.

The contractor shall be responsible for the notification of the selected top four (4) teams that will advance to Phase II of the competition.

#### Performance Standards

- a) Standard: Delay in the juror deliberation, selection of top ten (10) teams, and subsequent notification of the final four (4) teams shall not exceed one (1) week beyond the specified timeline.

AQL: Zero Deviation

#### Deliverables

- A027 Completed Scorecards for all Student Teams.
- A028 List of Top-Scoring Ten (10) Teams

A029 List of Final Four (4) Teams – within two (2) days of Juror deliberations

A030 Jury Deliberation Notes – within two (2) days of juror deliberation

## **5.5 Phase II PHA/TDHE and Site Visit Management**

### **5.5.1 Site Visit**

The Contractor shall organize a site visit at a location specified by the PHA/TDHE for Phase II of the competition. The Contractor shall coordinate with the PHA/TDHE and the COR to finalize the site visit agenda. The Contractor is responsible for all travel, hotel, and per diem expenses for approximately one (1) trip with up to eight (8) student finalists (2 per team) and no more than two (2) Contractor staff members for a total of 10 travelers. Additional team members are responsible for their own travel expenses. All travel reimbursement shall be billed under task **C.5.8**

#### Performance Standards

- a) Standard: Timely: The Contractor shall provide the COR with a draft agenda due two (2) weeks prior to departure; the final agenda shall be provided one (1) day prior to departure.

AQL: Zero Deviation

#### Deliverables

A031 Draft Agenda for the site visit – two (2) weeks prior to departure

A032 Final Agenda for the site visit – one (1) day prior to departure

## 5.6 Final Event and Close-out

### 5.6.1 Final Event

As part of Phase II, the Contractor shall be responsible for the program preparation and logistics, including pre-registration activities, event promotion and outreach, registration, clearly written notetaking, and the design and printing of any necessary materials. Materials include event posters, the event agenda, name tags, table tents, and updates to the IAH website. The Contractor shall provide logistical support to the COR during the final event, which shall include setting up the PowerPoints, providing talking points, creating display boards, and registering teams. During the intermission, the Contractor shall air a pre-recorded video profiling the jurors and the PHA/TDHE as well as an interview with an expert on a topic selected by the COR. The pre-recorded video will be provided to the Contractor by HUD.

The Contractor shall ensure the final event is fully supported with adequate staff to independently execute the final event, without relying on support from HUD staff on the day of the final event. The Contractor shall also schedule time for the final four teams to meet with the jurors and the PHA/TDHE staff post-final event. The Contractor shall be responsible for distributing the prize money within two (2) weeks of the final event.

The Contractor shall provide final instructions for Phase II of competition to the final four (4) student teams. At a minimum, the students shall refine and expand on their initial proposal and prepare a more in-depth presentation for the final event at HUD Headquarters (HQ) in Washington, DC. The Contractor shall be responsible for updating instructions, gathering the necessary presentation materials from the team prior to the final event, and creating one poster for display for each team and one announcing the presentation. The Contractor shall draft an Article for the Edge range 2,500 – 5,000 words post-final event. The article shall highlight the competition purpose, site visit, upcoming final event, the students and jurors. See the attached link for an example.

<https://www.huduser.gov/portal/pdredge/pdr-edge-trending-041624.html>

### Performance Standards

- a) Standard: The Contractor shall provide the COR with the final presentations from each student team one (1) week before the scheduled final event in Washington, DC. All other required deliverables, including updated instructions and posters for the event, must be submitted according to the timeline specified in the deliverables section to ensure seamless preparation and execution of the final event.

### AQL: Zero Deviation

### Deliverables

- A033 Updated instructions for the student teams – FY Quarter 2 and during the site visit.
- A034 Provide COR with final PPT from the Student Teams --- one (1) week before the final event in DC
- A035 Poster for display during the final event (one (1) for each team and one (1) display) – one (1) week before the final in DC
- A036 Draft article for the Edge (2,500 – 5,000 words range)– two (2) weeks before the final event in DC

### 5.6.2 Prize and Honorarium

The funds shall be distributed as follows: 1st Place (winning team) - \$25,000, 2nd Place (runner-up team) - \$15,000, 3rd and 4th Place - \$6,000 each, and 5th – 10th Place - \$1,000 each. The Contractor shall also distribute a \$500 honorarium to each of the jurors. The contractor shall provide evidence of payment to the team and jurors.

The Contractor is responsible for all travel, hotel, and per diem expenses for approximately one (1) trip with up to eight (8) student finalists (2 per team) and no more than two (2) Contractor staff members and 6 jurors for total 16 travelers. Additional team members are responsible for their own travel expenses. All travel shall be billed under C.5.8.

#### Performance Standards

- a) Standard: The Contractor shall ensure that all deliverables related to the final event are provided on time, including the logistical arrangements and the distribution of prizes and honoraria.

AQL: Zero Deviation

#### Deliverables

- A037 Final competition Event Schedule – one (1) week prior to the final event
- A038 Coordinate travel for Jurors and Finalist to the Final Event in DC (Exclude Travel Costs) – two (2) weeks prior to final event
- A039 Attend, administrate, and travel to the Final Event – arrival one (1) day prior to the final event
- A040 Distribute the Prize Money and Honorarium– two (2) weeks post final event
- A041 Final Agenda with blurbs from the PHA/TDHE and Jurors – two (2) days prior to the final event
- A042 Run of the show – one (1) week prior to the final event

### 5.6.3 Close-out Activities

The Contractor shall be responsible for post-final event activities including administering a survey to both the student teams, and jurors.

The Contractor shall administer surveys to both student teams and jurors within one (1) week of the final event. The Contractor is responsible for creating the survey; however, the final version of the survey must be approved by the Contracting Officer's Representative (COR). The draft survey shall be submitted for approval one (1) week before the final event. The final survey, incorporating any changes requested by the COR, shall be submitted within one (1) week after the final event.

The Contractor shall provide the PHA/TDHE with materials from the final four (4) students within three weeks of the final event. Additionally, the Contractor shall draft language for the Edge, detailing the final event, the winner, and the runner-up teams. The Contractor shall schedule a debriefing meeting with the PHA/TDHE and the COR to discuss the competition and suggest future improvements. The meeting invitation shall be sent to the PHA/TDHE within one (1) week post-final event. The actual meeting shall be scheduled to accommodate the availability of PHA/TDHE staff.

The Contractor shall draft an Article for the Edge range 2,500 – 5,000 words post-final event. The article shall highlight the final event and final designs proposed by the students, juror comments as well as quotes for keynote HUD and PHA speakers.

The Contractor shall also provide thank-you letters to the jurors and certificates for the student participants within two (2) weeks of the final event.

#### Performance Standards

- a) Standard: The Contractor shall ensure timely delivery of all final event-related deliverables, including surveys, reports, meeting arrangements, thank-you letters, and certificates. Each deliverable must be submitted according to the timeline specified to ensure effective close-out of the event.

AQL: Delays for all deliverables shall not exceed one (1) week beyond their specified due dates.

#### Deliverables

- A043 Draft survey for jurors and students
- A044 Final survey and results from the jurors and students
- A045 Student Certificates and Juror Thank you letters.
- A046 Minute meetings and recording.
- A047 Draft Edge Article for the final event

## **5.7 Final Summary Report**

The Contractor shall write a Final Summary Report about the annual competition. The report shall capture:

- a. A summary of the awards planning process—both Phase I and Phase II
- b. The final event—student presentations and juror notes
- c. The winning projects—clearly detailed case studies and why the jury selected them.

The Contractor will also promote this report and distribute it to interested parties, such as universities and trade organizations. The final report shall be transmitted electronically and on CD to HUD. Accompanying the approved final report shall be the complete text of the report, submitted with the instructions provided in PD&R's "Guidelines for Preparing a Report for Publication" ([http://huduser.org/about/guidelines\\_prepare\\_report.html](http://huduser.org/about/guidelines_prepare_report.html)).

The Contractor shall provide two (2) case studies. One case study each for the winning and runner-up team. The case studies shall be approximately 4 pages each and must include the information listed below:

- 1. Summary of the team's design, highlighting the innovative ideas and products used.
- 2. High resolution pictures of the designs.
- 3. Key information from the jurors about what they thought was noteworthy.
- 4. Key financial information from the pro from a and presentation

The Contractor shall provide the Draft Report three (3) weeks following the final awards event.

The Contractor shall provide the Final Report seven (7) weeks following the final awards event

The Contractor shall provide the Case studies for the winning and runner-up team – three (3) weeks following the final awards event

#### Performance Standards

- a) Standard: Timely: Submission of both the draft and final versions of the Summary Report as scheduled.

AQL: Zero Deviation

#### Deliverables

A048 Draft Report – three (3) weeks following the final awards event

A049 Final Report – seven (7) weeks following the final awards event

A050 Case studies for the winning and runner-up team – three (3) weeks following the final awards event

### 5.8 Travel Reimbursement

Authorized cost reimbursable travel under **C.5.2**, **C.5.5**, **C.5.6** shall be billed under this task. The Contractor must obtain approval for all travel and must provide receipts and other information required in **B.4 Travel - Cost Reimbursement – No Fee**.

### 6.0 Deliverables and Milestones

The Contractor shall complete all work, deliver all deliverables, and adhere to all milestones as specified herein. The Government reserves the right to make changes to delivery dates.

- a. The Contractor shall copy the CS/CO on deliverables that are emailed to the COR.
- b. The COR will send an email back to the Contractor and copy the CS/CO on the acceptance or rejection or other comments on the deliverables. This acceptance email shall be documented before the Contractor can invoice.
- c. **The Government and Contractor shall include the Correct Number and Project Title in the subject of all emails.** Additionally, the Contractor should specify a concise topic descriptor to clarify the content of the email. For example, an appropriate email subject line might be formatted as follows:

Subject: [Contract Number] - [Project Title] - [Brief Topic Description]

**SECTION C - PERFORMANCE WORK STATEMENT****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005**

	CLIN	PWS Section	Number	QTY	Due After Effective Date (days/weeks/ /months)	Delivery Date	Government Review (in weeks)
A001		5.1.1	Draft Agenda and PowerPoint Presentation	1	1 week	10/07/24	1
A002		5.1.1	Final Agenda and PowerPoint Presentation	1	2 weeks	10/14/24	1
A003		5.1.1	Meeting Summary	1	3 weeks	10/21/24	
A004		5.1.2	Draft Management Plan	1	5 weeks	11/04/24	1
A005		5.1.2	Final Management Plan	1	7 weeks	11/18/24	
A006		5.1.3	Monthly Report and Meeting Summaries	12	15th of the month	15 <sup>th</sup> of each month	
A007		5.2	Brochures		8 weeks after award	11/25/24	
A008		5.2	Draft Annual Logo		6 weeks	11/11/24	
A009		5.2	Final Annual Logo		8 weeks	11/25/24	
A010		5.2	Updated Frequently Asked Questions	Ongoing 7 times per competition	Within 2 business days of receipt of questions	Ongoing	
A011		5.2	Additional Promotional Materials annually	Ongoing	6 weeks	11/11/24	
A012		5.2	Draft competition schedule	1	6 weeks	11/11/24	
A013		5.2	Final competition schedule	1	8 weeks	11/25/24	
A014		5.2	Draft memo for Secretary of HUD, include a draft final event schedule	1	8 weeks	11/25/24	
A015		5.2	Draft memo for Secretary of HUD, include a draft final event schedule	1	10 weeks	12/09/24	
A016		5.2	Updates for the IAH website language	Ongoing		Ongoing	
A017		5.3.1	Live Webinar for students and faculty and the recording and webinar notes	1	Third – week in October	10/17/24	1
A018		5.3.1	Final list of Registered Teams	1	First week in October	10/7/24	

**SECTION C - PERFORMANCE WORK STATEMENT****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005**

A019		5.3.2	Live Webinar for PHA/TDHE staff	1	Second week in October	10/10/24	1
A020		5.3.2	Recorded meeting and notes	1	Third week in October	10/17/24	1
A021		5.3.2	List of PHA/TDHE attendees	1	Third week in October	10/21/24	
A022		5.3.2	Final list of PHAs and TDHEs with responses of the selection criteria questionnaire	1	2 days after close of the application	10/31/24	
A023		5.4.1	Draft Competition Guidelines	1	2 weeks after PHA is selected	TBD	1
A024		5.4.1	Final Competition Guidelines	1	1 week after receipt of comments	TBD	
A025		5.4.2	List of Jurors and qualifications and Conflict of Interest and Confidentiality Form	1	17 weeks	01/27/25	
A026		5.4.2	Scoring Guide for Jurors FY Quarter 2	1	FY Quarter 2	Jan-Mar 2024	2
A027		5.4.3	Completed scorecards for all the student teams	1	FY Quarter 2	Jan-Mar 2024	
A028		5.4.3	List of the top scoring ten (10) teams	1	Within 2 days of receipt of the scores from the Jurors	TBD	
A029		5.4.3	List of the final four (4) teams	1	Within 2 days of Juror deliberations	TBD	
A030		5.4.3	Jury deliberations Notes	1	Within 2 days of Juror deliberations	TBD	
A031		5.5.1	Draft Agenda for the Site Visit	1	2 weeks prior to departure	TBD	
A032		5.5.1	Final Agenda for the Site Visit	1	1 day prior to departure	TBD	
A033		5.5.2	Updated instructions for the student teams	1	FY Quarter 2 and during the site visit	Jan – Feb 2025	
A034		5.5.2	Provide COR with final PPT from the Student Teams	4	1 week before the final event in DC	TBD	



**SECTION C - PERFORMANCE WORK STATEMENT****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005**

A035		5.5.2	Poster for display during the final event (1 for each team and 1 display)	4	Poster for display during the final event (1 for each team and 1 display) – 1 week before the final in DC	TBD	
A036		5.5.2	Draft article for the Edge (2,500 – 5,000 words range)	1	Draft article for the Edge – 2 weeks before the final event in DC	TBD	
A037		5.6.1	Final competition Event Schedule	1	1 week prior to the final event	TBD	
A038		5.6.1	Coordinate travel for Jurors and Finalist to the Final Event in DC (Exclude Travel Costs)	16	2 weeks prior to final event	TBD	
A039		5.6.1	Attend, administrate, and travel the Final Event		arrival 1 day prior to the final event	TBD	
A040		5.6.1	Distribute the Prize Money		2 weeks post final event	TBD	
A041		5.6.1	Final agenda with blurbs from the PHA/TDHE and Jurors	75	2 days prior to the final event	TBD	
A042		5.6.1	Run of the show	1	1 week prior to the final event	TBD	
A043		5.6.3	Draft Survey for jurors and students	1	1 week before-final event	TBD	
A044		5.6.3	Final survey results from the jurors and students	1	1 week after final event	TBD	
A045		5.6.3	Student Certificates and Juror Thank you letters.	1	1 week post final event	TBD	
A046		5.6.3	Minute meetings and recording	1	1 week post final event	TBD	
A047		5.6.3	Draft Edge Article for the final event	1	1 week post final event	TBD	
A048		5.7	Draft Final Report	1	3 weeks following the final awards event	TBD	
A049		5.7	Final Report	1	7 weeks following the final awards event	TBD	
A050		5.7	Case studies for the winning and runner-up team	2	3 weeks following the final awards event	TBD	

**SECTION C - PERFORMANCE WORK STATEMENT****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005**

A051	N/A	6.1	Preliminary Quality Control Plan	1	5 business days	10/04/24	
A052	N/A	6.1	Final Quality Control Plan	1	10 business days after COR review	10/11/24	
A053	N/A	6.1	Proposed Quality Control Plan Changes		As needed during Period of Performance		
A054	N/A	6.1	Quality Control Plan Revision		As needed during Period of Performance		

The Contractor shall complete Section **G.5** HUDAR 2452.237-70 KEY PERSONNEL upon award notification.

The Contractor shall submit resumes for Key Personnel listed in G.5 no later than five (5) business days after contract award. The Key Personnel must meet the qualifications listed in G.6 Key Personnel and other Personnel Minimum Experience and Education Requirements.

The Contractor shall submit the Non-Disclosure Agreements no later than five (5) business days after contract award.

## **6.1 Quality Control Plan**

The Contractor shall establish and maintain a comprehensive quality control program to ensure services are performed in accordance with this contract. The Contractor shall develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services in a Quality Control Plan (QCP). The Contractor's QCP is the mechanism by which it assures that its work complies with the requirements of the contract. The Contractor shall provide the associated QCP to the Government as directed.

The Contractor shall develop, maintain, enforce, and document a QCP. The QCP shall ensure the Government receives a level of quality consistent with the requirements specified in this contract. The QCP shall be sufficiently detailed to outline the Contractor's methodology for identifying and recruiting qualified personnel. The QCP shall also describe the Contractor's methodology for resolving problems identified by the Government during reviews conducted in accordance with its Quality Assurance Surveillance Plan (QASP).

The QCP shall also outline the Contractor's methodology for establishing an internal feedback system for support personnel and for resolving problems identified by that feedback system. The QCP shall demonstrate and validate that the services or deliverables provided under the contract meet the minimum performance threshold established in the Government's QASP. The QCP shall address the Quality Management Approach, Quality Assurance, Quality Control, and Quality Standards.

The Contractor shall submit a Preliminary QCP to the COR via email within five (5) business days after contract award. The Preliminary QCP shall include effective and independent quality control methods and procedures to ensure all tasks are completed in accordance with the performance standards listed in the PWS. The Preliminary QCP shall describe key risk areas, management controls, corrective actions, and how the Contractor will ensure the effective management of employees of both the prime and subcontractors and their activities. The Preliminary QCP shall describe an approach to subcontractor management that clarifies the contractual and reporting

relationships of all subcontractors. The Preliminary QCP shall include an organizational chart that reflects the independence of the Quality Control function.

No later than ten (10) business days after receiving feedback from the COR on the Preliminary QCP, the Contractor shall submit a Final QCP to the COR via email for review and approval.

Any modifications or changes to the QCP during the period of performance shall be provided to the COR for review no later than ten (10) business days prior to the effective date of the change. The QCP shall be subject to the Government's review and approval.

The Government may find the QCP "unacceptable" whenever the Contractor's procedures do not accomplish the quality control objective(s). The Contractor shall revise the QCP within ten (10) business days from receipt of notice that the QCP is found "unacceptable."

#### Performance Standards

a) Standard: The Contractor shall submit the QCP to the COR via email no later than five (5) business days after contract award, detailing how the Contractor will develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services.

AQL: Zero Deviation

b) Standard: The Contractor shall submit the Final QCP to the COR via email no later than ten (10) business days after receiving feedback from the COR.

AQL: Zero Deviation

c) Standard: The Contractor shall provide any modifications or changes to the QCP to the COR for review and approval no later than ten (10) business days prior to the effective date of the change. The QCP shall be subject to the Government's review and approval.

AQL: Zero Deviation

d) Standard: The Contractor shall ensure that all Quality Control Plans are reviewed, submitted, and followed in accordance with HUD timeframes, procedures, and policies referenced within the PWS.

AQL: Zero Deviation

#### Deliverables

- A051 Preliminary Quality Control Plan
- A052 Final Quality Control Plan
- A053 Proposed Quality Control Plan Changes
- A054 Quality Control Plan Revision

**\*\*\*\*Quality Control Plans are Not Separately Priced (NSP)**

## 6.2 Acceptance Criteria

Acceptance of all deliverables shall be as outlined in the PWS.

## 7.0 Performance Requirement Summary

The Performance Requirement Summary (PRS) chart below lists the contract's primary requirements, the associated performance standards, the expected target performance and the methods of surveillance. While some contract requirements may not be listed, requirements not appearing on the PRS chart do not negate the Contractor's obligation to fulfil all requirements as specified in the contract. Additionally, HUD reserves all rights and remedies under the provisions and clauses of the contract when performance of any contract requirement, whether listed below, is unacceptable.

HUD will develop a Quality Assurance Surveillance Plan (QASP) to be used to provide contract oversight. In conjunction with the Contractor's QCP and various other methods of assessing performance, the COR will perform on-site reviews and other types of verification to determine that the specified target performance requirements have been met.

Regular review of Contractor performance is critical to the overall success of the contract. On a monthly basis, the COR will evaluate the quality of the product or services.

### Performance Requirement Summary (PRS)

Statements	Standards/AQLs	Incentive/Remedy
5.1 Project Management		
5.1.1 Orientation and Post-Award Meetings	<p>a) Standard: Timely: The Draft Agenda and PowerPoint Presentation shall be submitted within one week after contract award. The Final Agenda and Presentation shall be submitted two (2) weeks after the contract award.</p> <p>b) Standard: Timely: The Meeting Summary shall be submitted within one (1) week after the Orientation meeting.</p> <p>c) Standard: Timely: The Meeting shall be conducted within three (3) weeks after contract award</p> <p>AQL: Zero Deviation</p>	
5.1.2 Management Plan	<p><u>Standards</u></p> <p>a) Standard: Draft is submitted four (4) weeks after contract award.</p> <p>b) Standard: Final is submitted one (1) week after receipt of HUD comments.</p> <p><u>AQL</u>: Zero Deviation</p>	

SECTION C - PERFORMANCE WORK STATEMENT		Innovation in Affordable Housing Student Design and Planning Competition	
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5.1.3	Monthly Progress Reports and Ongoing Communications	<p>a) Standard: The Contractor shall submit monthly reports by the 15th day of each month, aligned with the timely submission of payment invoices. Monthly meetings must be conducted as agreed upon and established by the Contractor and the COR.</p> <p><u>AQL</u>: Zero Deviation</p>	
5.2	Marketing and Competition Materials	<p>Standard: All questions posed on the website shall be answered and posted within two (2) business days. The deliverables listed below shall be updated annually and are due within six (6) weeks post-award, unless specified otherwise. HUD will provide comments within one (1) week of receiving these deliverables. The final deliverable shall be submitted to HUD within one (1) week of receipt of comments.</p> <p><u>AQL</u>: Deviations from the established timelines shall not exceed three (3) business days.</p>	
5.3	Recruiting Partnering PHAs and Graduate Students		
5.3.1	Student Team Recruitment	<p>a) Standard: The live webinar shall be held in the third week of September. The Contractor shall submit a comprehensive list of registered student teams, including the name of their university and faculty advisor within one (1) week after the close of student registration. The recorded webinar and accompanying notes shall also be submitted within one week following the webinar.</p> <p>AQL: Delay in meeting the above deadlines shall not exceed five (5) business days. This AQL applies to the submission of the registered student list, as well as the delivery of webinar recording and notes.</p>	
5.3.2	Public Housing Agency (PHA)/Indian Tribal Designed Entity (TDHE)	<p>Standard: The Contractor shall conduct the Live PHA/TDHE webinar the second week of October. The recorded meeting and corresponding notes must be provided within seven (7) days following the webinar. The list of PHA and TDHE attendees must be provided within one (1) week following the webinar. The final list of PHA and TDHE</p>	

SECTION C - PERFORMANCE WORK STATEMENT		Innovation in Affordable Housing Student Design and Planning Competition	
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	attendees, along with their responses to the selection criteria questionnaire shall be provided within two (2) days after application deadline.  <u>AQL</u> : Delays in meeting the above timelines shall not exceed five (5) business days.		
5.4	Phase 1 and Juror Selection		
5.4.1	PHA Selection and Competition Guidelines	Standard: The Contractor shall submit a draft of the updated competition guidelines to HUD within two (2) weeks after the PHA is selected. HUD will review and provide feedback within one (1) week of receiving this draft. Upon receiving HUD's feedback, the Contractor shall finalize and submit the updated competition guidelines within one (1) week.  <u>AQL</u> : No more than one (1) week delay for submission of deliverables	
5.4.2	Juror Selection	a) Standard: The Contractor shall provide the COR with a list of appropriate Jurors within seventeen (17) weeks of contract award. The Contractor is responsible for facilitating the juror deliberations, which must take place during the second fiscal quarter (FY Quarter 2).  <u>AQL</u> : Delay in providing the list of jurors, updating the scoring guide, or facilitating juror deliberations shall not exceed two (2) weeks beyond the specified deadlines.	
5.4.3	Selection of the Four Final Teams	a) Standard: Delay in the juror deliberation, selection of top ten (10) teams, and subsequent notification of the final four (4) teams shall not exceed one (1) week beyond the specified timeline.  <u>AQL</u> : Zero Deviation	
5.5	PHA/TDHE and Site Visit management		
5.5.1	Site Visit	a) Standard: Timely: The Contractor shall provide the COR the draft agenda due two (2) weeks prior to departure; the final agenda shall be provided one (1) day prior to departure.	

SECTION C - PERFORMANCE WORK STATEMENT		Innovation in Affordable Housing Student Design and Planning Competition	
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	AQL: Zero Deviations		
5.6	Final Event and Close-out		
5.6.1	Final Event	a) Standard: Final event deliverables provided on time.  AQL: Zero Deviations	
5.6.2	Close-out Activities	a) Standard: Final Deliverables  AQL: Delays for all deliverables shall not exceed one (1) week beyond their specified due dates.	
5.7	Final Summary Report	a) Standard: Draft and Final Summary Report deliverable provided on time.  AQL: Zero Deviations	

## 8.0 Related Documents

The Contractor shall abide by all applicable regulations, publications, manuals, policies, and procedures in the performance of this contract.

Applicable publications that apply to services provided under this contract:

1. GPO style guide: Government Publishing Office style guide. The GPO guide can be found at <https://www.govinfo.gov/content/pkg/GPO-STYLEMANUAL-2000/pdf/GPO-STYLEMANUAL-2000.pdf>
2. PD&R style guide: Office of Policy Development and Research guide style. The PD&R style guide can be found at <https://www.huduser.gov/portal/About/style-guide-for-reports.pdf>
3. The Chicago Manual of Style. The PDF format.

**SECTION D – PACKAGING AND MARKING****D.1 ENVIRONMENTALLY SAFE PACKAGING**

The Contractor shall package non-breakable deliverables (reports, proposals, studies, etc.) using environmentally safe packaging materials (e.g., recycled paper). All deliverables shall be packaged and marked in the most economical manner possible and in accordance with the best commercial practices and provide adequate protection during shipping and handling.

**D.2 PAYMENT OF POSTAGE AND SHIPPING COSTS**

All postage and shipping costs related to the submission of the information (including reports and forms) required by this contract shall be paid for by the Contractor. The price specified in Section B is inclusive of all postage, shipping, and delivery charges.

**D.3 MARKING**

All information submitted to the Contracting Officer or COR shall clearly indicate the contract number for which the information is being submitted.

**D.4 EMAILS**

The Government and Contractor shall include the Contract Number and Project Title as the subject of all emails. You should also add a brief topic name of what the email is about (example -November Progress Report).



**SECTION E – INSPECTION AND ACCEPTANCE****E.1 FAR 52.246-4 INSPECTION OF SERVICES-FIXED-PRICE (AUG 1996)****E.2 HUDAR 2452.246-70 INSPECTION AND ACCEPTANCE (APR 2019)**

Inspection and acceptance of all work required under this contract shall be performed by the COR or other individual as designated by the Contracting Officer or COR.

(End of clause)

**E.3 AVAILABILITY OF RECORDS**

Throughout the entire life of the contract, the Contracting Officer or duly authorized representative(s) shall have full and free access to the Contractor's books, documents, papers and records that are pertinent to activities under the contract, including all those books, documents, papers and records.

**E.4 QUALITY INSPECTION CRITERIA**

See Section C – Performance Work Statement for Performance Requirements Summary

Nothing in Section E is intended to supersede any other performance requirements in this document. In the event of a conflict, Section C shall take precedence over other apparent contradictory requirements.

**SECTION F – DELIVERIES OR PERFORMANCE****F.1 NOTICE LISTING CONTRACT CLAUSES INCORPORATED BY REFERENCE**

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

[FAR | Acquisition.GOV](https://www.acquisition.gov)

[https://www.hud.gov/program\\_offices/cpo/hudar](https://www.hud.gov/program_offices/cpo/hudar)

NUMBERTITLEDATE

FAR 52.242-15

STOP-WORK ORDER

AUG 1989

**F.2 DELIVERY SCHEDULE**

Deliveries shall be in accordance with PWS Section C.

**F.3 PERIOD OF PERFORMANCE**

This contract shall be effective **September 30, 2024**.

	Period of Performance
<b>Base Period</b>	<b>September 30, 2024, to September 29, 2025</b>
<b>Option Period 1</b>	<b>September 30, 2025, to September 29, 2026</b>
<b>Option Period 2</b>	<b>September 30, 2026, to September 29, 2027</b>
<b>Option Period 3</b>	<b>September 30, 2027, to September 29, 2028</b>
<b>Option Period 4</b>	<b>September 30, 2028, to September 29, 2029</b>

**SECTION G- CONTRACT ADMINISTRATION DATA**

Policy Development and Research (PD&amp;R)

Innovation in Affordable Housing Student  
Design and Planning Competition

86614624C00005

**SECTION G - CONTRACT ADMINISTRATION DATA****G.1 Invoice Submissions****G.1.1 HUDAR 2452.232-70 PAYMENT SCHEDULE AND INVOICE SUBMISSION (FIXED-PRICE)  
(Deviation MAY 2017)**

(a) *Payment schedule.* Payment of the contract price (see Section B of the contract) will be made upon completion and acceptance of all work unless a partial payment schedule is included below.

**Base Year**

CLIN	CLIN Type	PWS Section	Description – Base Year	Qty	Deliverable	Unit	Unit Price	Total Price
<b>0001</b>		<b>C.5.1</b>	<b>Project Management</b>					
0001AA	FP	C.5.1.1	Orientation Meeting	1	A001(1) A002(1) A003(1)	EA	\$699.30	\$699.30
0001AB	FP	C.5.1.2	Management and Work Plan	1	A004(1) A005(1)	EA	\$8,133.57	\$8,133.57
0001AC	FP-FUR	C.5.1.3	Monthly Progress Reports and Ongoing Communication	12	A006(12)	EA	\$1,123.00	\$13,476.00
<b>0002</b>		<b>C.5.2</b>	<b>Marketing and Competition Materials</b>	1	A007(1) A008(1) A009(1) A010(1) A011(1) A012(1) A013(1) A014(1) A015(1) A016(1)	EA	\$40,706.55	\$40,706.55
<b>0003</b>		<b>C.5.3</b>	<b>Recruiting Partnering PHAs and Graduate Students</b>					
0003AA	FP	C.5.3.1	Student Team Recruitment	1	A017(1) A018(1)	EA	\$8,094.17	\$8,094.17
0003AB	FP	C.5.3.2	Public Housing Agency (PHA/TDHE)	1	A019(1) A020(1) A021(1) A022(1)	EA	\$7,289.17	\$7,289.17
<b>0004</b>		<b>C.5.4</b>	<b>Phase I and Juror Selection</b>					
0004AA	FP	C.5.4.1	PHA Selection and Competition Guidelines	1	A023(1) A024(1)	EA	\$8,094.17	\$8,094.17
0004AB	FP	C.5.4.2	Juror Selection	1	A026(1) A025(1)	EA	\$8,094.17	\$8,094.17
0004AC	FP	C.5.4.3	Selection of the Four Final Teams	1	A027(1) A028(1) A029(1) A030(1)	EA	\$8,094.17	\$8,094.17
<b>0005</b>		<b>C.5.5</b>	<b>PHA/TDHE and Site Visit Management</b>					

**SECTION G– CONTRACT ADMINISTRATION DATA**
**Innovation in Affordable Housing Student  
Design and Planning Competition**
**Policy Development and Research (PD&R)**
**86614624C00005**

CLIN	CLIN Type	PWS Section	Description – Base Year	Qty	Deliverable	Unit	Unit Price	Total Price
0005AA	FP	C.5.5.1	Site Visit (students)	8	A031(1) A032((1)	EA	\$1,325.34	\$10,602.72
<b>0006</b>		<b>C.5.6</b>	<b>Final Event and Close-out</b>					<b>\$</b>
0006AA	FP	C.5.6.1	Final Event (printed copies of programs)	75	A033(1) A034(1) A035(1) A036(1)	EA	\$162.52	\$12,189.20
0006AB	FP	C.5.6.2	Prize and Honorarium	1	A037(1) A038(1) A039(1) A040(1) A042(1)	EA	\$61,000.00	\$61,000.00
0006AC	FP	C.5.6.3	Close-out Activities	1	A043(1) A044(1) A045(1) A046(1) A047(1)	EA	\$12,652.05	\$12,652.05
<b>0007</b>		<b>C.5.7</b>	<b>Final Summary Report</b>					<b>\$</b>
0007AA	FP	C.5.7	Draft Final Report	1	A048(1)	EA	\$7,328.57	\$7,328.57
0007AB	FP	C.5.7	Final Report	1	A049(1)	EA	\$4,871.57	\$4,871.57
0007AC	FP	C.5.7	Case Studies for winning and runner-up team	1	A050(1)	EA	\$7,074.99	\$7,074.99
<b>0008</b>	CR	C.5.8	Travel Reimbursement for C.5.2, C.5.5 and C.5.6	1		LO	\$80,000.00	\$80,000.00
			<b>BASE YEAR TOTAL PRICE</b>					<b>\$298,400.27</b>

**Alternate II**
**APRIL 2019**
*(b) Submission of invoices.*

(1) The Contractor shall obtain access and submit invoices to the Department of Treasury Bureau of Fiscal Services' Invoice Platform Processing System via the Web at URL: <https://www.ipp.gov/> in accordance with the instructions on the website. To constitute a proper invoice, the invoice must include all items required by the FAR clause at 52.232–25, “Prompt Payment.”

(2) To assist the Government in making timely payments, the Contractor is also requested to include on each invoice the appropriation number shown on the contract award document (e.g., block 14 of the Standard Form (SF) 26, block 21 of the SF– 33, or block 25 of the SF–1449).

(3) Invoices shall be submitted on the **15<sup>th</sup> of the month** following the month after deliverables are submitted and accepted in accordance with the payment table.

(End of Alternate II)

(c) Contractor Remittance Information. The Contractor shall provide the payment office with all information required by other payment clauses contained in this contract.

(d) Final Payment. The final payment shall not be made until the Contracting Officer has certified that the contractor has complied with all terms of the contract.

**G.1.2 HUDAR 2452.232-71 VOUCHER SUBMISSION (COST-REIMBURSEMENT,  
TIME-AND-MATERIALS, AND LABOR-HOUR)****(April 2019)****Alternate II (APRIL 2019)****(a) Voucher Submission.**

(1) The Contractor shall obtain access and submit invoices to the Department of Treasury Bureau of Fiscal Services' Invoice Platform Processing System via the Web at URL: <https://www.ipp.gov> in accordance with the instructions on the website. To constitute a proper voucher, in addition to the items required by the clause at FAR 52.232-25, Prompt Payment, the voucher shall show the elements of cost for the billing period and the cumulative costs to date.

(2) To assist the government in making timely payments, the contractor is requested to include on each voucher the applicable appropriation number(s) shown on the award or subsequent modification document (e.g., block 14 of the Standard Form (SF) 26 or block 21 of the SF-33).

(End of Alternate II)

**(b) Contractor Remittance Information.**

(1) The Contractor shall provide the payment office with all information required by other payment clauses contained in this contract.

(2) The contractor shall submit all necessary supporting documentation with vouchers that adequately demonstrate that costs claimed 1) have been incurred (including time sheets from the prime's and subcontractor's automated or manual time tracking records and paid invoices for materials acquired), 2) reflect that they are allocable to the contract tasks, and 3) comply with cost principles in the Federal Acquisition Regulation and HUD Acquisition Regulation. The contracting officer may disallow all or part of a claimed cost that is inadequately supported.

(3) For time-and-materials and labor-hour contracts, the Contractor shall aggregate vouchered costs by the individual task for which the costs were incurred and clearly identify the task or job.

(c) Final Payment. The final payment shall not be made until the Contracting Officer has certified that the contractor has complied with all terms of the contract.

CLIN	Description				NTE Payment Amount
0008 CR	Travel Reimbursement for C.5.2, C.5.5 and C.5.	1	LO	\$80,000.00	\$80,000.00

**G.2 Contractor Invoice:** To constitute a proper invoice, the invoice must include all items required by FAR clause 52.232-25 "Prompt Payment" and the following information and/or attached documentation:

1. Contract Number, applicable Task Order Number, and CLIN;
2. Contractor's name, address and telephone number;
3. Invoice Number and date;
4. Applicable accounting and appropriation data;
5. Total amount due.

**G.3 Email Addresses -Payment Office, COR and Contracting Officer**

**PAYMENT OFFICE Submission** - Submit all invoices to:  
Treasury's Invoice Processing Platform (IPP)

<https://www.ipp.gov/>

Questions can be emailed to: [AccountsPayable@fiscal.treasury.gov](mailto:AccountsPayable@fiscal.treasury.gov)

Vendor Support Email: [IPPCustomerSupport@fiscal.treasury.gov](mailto:IPPCustomerSupport@fiscal.treasury.gov)

Customer Support: (866) 973-3131

COR Submission - Email the following to the COR:

Email Address: [Jagruti.D.Rekhi@hud.gov](mailto:Jagruti.D.Rekhi@hud.gov)

1. Invoice
2. Supporting Documentation

Contracting Officer and Contract Specialist Submission – Email the following to the Contracting Officer- [cathy.j.baker@hud.gov](mailto:cathy.j.baker@hud.gov) and Contract Specialist – [trevor.a.simon@hud.gov](mailto:trevor.a.simon@hud.gov)

1. Invoice
2. Supporting Documentation

#### G.4 HUDAR 2452.237-73, CONDUCT OF WORK AND TECHNICAL GUIDANCE

APR 2019

(a) The Contracting Officer will provide the Contractor with the name and contact information of the COR assigned to this contract. The COR will serve as the Contractor's liaison with the Contracting Officer with regard to the conduct of work. The Contracting Officer will notify the Contractor in writing of any change to the current COR's status or the designation of a successor COR.

(b) The COR for liaison with the Contractor as to the conduct of work is **Jagruti D Rekhi** or a successor designated by the Contracting Officer.

(c) The COR will provide guidance to the Contractor on the technical performance of the contract. Such guidance shall not be of a nature which:

- (1) Causes the Contractor to perform work outside the statement of work or specifications of the contract;
- (2) Constitutes a change as defined in FAR 52.243-1;
- (3) Causes an increase or decrease in the cost of the contract;
- (4) Alters the period of performance or delivery dates; or
- (5) Changes any of the other express terms or conditions of the contract.

(d) The COR will issue technical guidance in writing or, if issued orally, he/she will confirm such direction in writing within five calendar days after oral issuance. The COR may issue such guidance via telephone, facsimile (fax), or electronic mail.

(e) Other specific limitations **TBD**:

(f) The Contractor shall promptly notify the Contracting Officer whenever the Contractor believes that guidance provided by any Government personnel, whether or not specifically provided pursuant to this clause, is of a nature described in paragraph (b) above.

(End of clause)

**SECTION G– CONTRACT ADMINISTRATION DATA****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005****G.5 HUDAR 2452.237-70 KEY PERSONNEL****FEB 2006**

(a) Definition. "Personnel" mean employees of the Contractor, or any Subcontractor(s), affiliates, joint venture partners, or team members, and consultants engaged by any of those entities.

(b) The personnel specified below are considered to be essential to the work being performed under this contract. Prior to diverting any of the specified individuals to other projects, the Contractor shall notify the Contracting Officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the program. No diversion shall be made by the Contractor without the written consent of the Contracting Officer. Key personnel shall perform as follows:

<u>Name</u>	<u>Title</u>	<u>Tasks to be assigned to Key person</u>	<u>Employee or Subcontractor</u>
Lauren Schatz	Project Manager	Communications/Deliverables	Employee
Camille William	Program Management	Resource Allocation	Employee
Sheree Lewis	Executive Leadership	Administrative Oversight/Compliance	Employee
Jill McAninch	Senior Technical Staff**	Communications and Processes	Employee
Jill McAninch	<b>**Alternate Project Manager</b>		

\* Technical Staff and Support Staff are not Key Personnel

\*\* Alternate Project Manager – Please identify one of the Key Personnel to serve as the Alternate Project Manager. The Project Manager and alternate shall have full authority to act on all contact matters relating to daily operations of this contract

**G.6 Key Personnel and Other Personnel Minimum Experience and Education Requirements**

The Contractor shall complete Section **G.5** upon award notification.

The Contractor shall submit resumes for Key Personnel listed in **G.5** no later than five business days after contract award. The Key Personnel must meet the qualifications listed in **G.6**.

<b>Key Personnel Title and Description</b>	<b>Minimum Qualifications</b>
<b>Project Manager (Key Personnel)</b>	Requires a minimum of a Masters Degree with 7 years of related work experience in the tasks required in the PWS and experience in client relationship management and supervision/staff development.

**G.7 Project Manager and Alternate Project Manager**

The Contractor shall provide a Project Manager who shall be responsible for the performance of work. An alternate shall also be designated to act in the absence of the Project Manager. One of the other Key Personnel shall be designated to serve as the Alternate Project Manager. The Project Manager and alternate shall have full authority to act on all contact matters relating to daily operations of this contract. These Contractor personnel (main point of contact and alternate point of contact) are considered Key Personnel by the Government and shall be listed as such in accordance with HUDAR 2452.237-70, "Key Personnel". **The Project Manager and Alternate Project Manager shall each be an employee of the Contractor. An employee of a Subcontractor is not acceptable for either of these positions.**

**SECTION G– CONTRACT ADMINISTRATION DATA****Innovation in Affordable Housing Student  
Design and Planning Competition****Policy Development and Research (PD&R)****86614624C00005**

Accordingly, at a minimum, the points of contact shall have the technical knowledge of the requirement and be in the position to receive assignment, guidance, and direction from the COR and CO per HUDAR 2452.237-73, "Conduct of Work and Technical Guidance" and shall be allocated enough hours to the requirement to ensure successful performance. The Contract/Project Manager or alternate shall be available between the hours of 8:00am to 4:30pm Monday through Friday EST, except Federal Holidays or when the Government facility is closed for administrative reasons.



**SECTION H - SPECIAL CONTRACT REQUIREMENTS****H.1 2452.204-70, PRESERVATION OF, AND ACCESS TO, CONTRACT RECORDS (TANGIBLE AND ELECTRONICALLY STORED INFORMATION (ESI) FORMATS DEC 2012**

(a) For the purposes of this clause—

Contract records means information created or maintained by the Contractor in the performance of the contract. Contract records include documents required to be retained in accordance with FAR 4.703 and other information generated or maintained by the Contractor that is pertinent to the contract and its performance including, but not limited to: email and attachments, formal and informal correspondence, calendars, notes, reports, memoranda, spreadsheets, tables, telephone logs, forms, survey, books, papers, photographs, drawings, machine-readable materials, and data. Contract records may be maintained as electronically stored information or as tangible materials. Contract records may exist in either final or any interim version (e.g., drafts that have been circulated for official purposes and contain unique information, such as notes, edits, comments, or highlighting). Contract records may be located or stored on the Contractor's premises or at off-site locations.

Electronically stored information (ESI) means any contract records that are stored on, or generated by, an electronic device, or contained in electronically accessible media, either owned by the Contractor, subcontractor(s), or employees of the Contractor or subcontractor(s) regardless of the physical location of the device or media (e.g., offsite servers or data storage).

ESI devices and media include, but are not limited to:

- (1) Computers (mainframe, desktop, and laptop);
- (2) Network servers, including shared and personal drives;
- (3) Individual email accounts of the Contractor's principals, officers, and employees, including all folders contained in each email account such as "inbox," "outbox," "drafts," "sent," "trash," "archive," and any other folders;
- (4) Personal data assistants (PDAs);
- (5) External data storage devices including portable devices (e.g., flash drive); and
- (6) Data storage media (magnetic, e.g., tape; optical, e.g., compact disc, microfilm, etc.).

Tangible materials means contract records that exist in a physical (i.e., non-electronic) state.

(b) If during the period of performance of this contract, HUD becomes, or anticipates becoming, a party to any litigation concerning matters related to records maintained or generated by the Contractor in the performance of this contract, the Contracting Officer may provide the Contractor with a written (either hardcopy or email) preservation hold notice and certification of compliance with the preservation hold notice. Upon receipt of the hold notice, the Contractor shall immediately take the following actions—

- (1) Discontinue any alteration, overwriting, deletion, or destruction of all tangible materials and ESI.
- (2) Preserve tangible materials and ESI. The Contractor shall preserve ESI in its "native" form to preserve metadata (i.e., creation and modification history of a document).
- (3) Identify all individuals who possess or may possess tangible materials and ESI related to this matter, including Contractor employees, subcontractors, and subcontractor employees. The Contractor shall provide the names of all such individuals via email to the HUD official indicated in the notice.
- (4) Document in writing the Contractor's efforts to preserve tangible materials and ESI. It may be useful to maintain a log documenting preservation efforts.
- (5) Complete the certification of compliance with the preservation hold notice upon receipt and return it to the identified contact person; and
- (6) Upon the request of the Contracting Officer, provide the Contracting Officer or other HUD official designated by the Contracting Officer with any of the information described in this clause. The Contractor shall immediately confirm receipt of such request. The Contractor shall describe in detail any records that the Contractor knows or believes to be unavailable and provide a detailed explanation of why they are unavailable, and if known, their location.

(c)

(1) If any request for records pursuant to paragraph (b)(6) of this clause causes an increase in the estimated cost or price or the time required for performance of any part of the work under this contract, or otherwise affects any other terms and conditions of this contract, the Contracting Officer shall make an equitable adjustment in the contract price, the delivery schedule, or both, and shall modify the contract.

(2) The Contractor must assert its right to an adjustment under this clause within 30 days if no other period inserted ] from the date of receipt of the Contracting Officer's request made pursuant to paragraph (b)(6) of this clause. However, if the Contracting Officer decides that the facts justify it, the Contracting Officer may receive and act upon a request submitted before final payment of the contract.

(3) Failure to agree to any adjustment shall be a dispute under the "Disputes" clause of this contract. However, nothing in this clause shall excuse the Contractor from providing the records requested by the Contracting Officer.

(e) The Contractor shall include this clause in all subcontracts.

(End of clause)

## H.2 HUDAR 2452.227-70 GOVERNMENT INFORMATION

DEC 2012

(a) Definitions. As used in this clause,

"Government information" includes--

Contractor-acquired information, which means information acquired or otherwise collected by the Contractor on behalf of the Government in the context of the Contractor's duties under the contract.

Government-furnished information (GFI), which means information in the possession of, or directly acquired by, the Government and subsequently furnished to the Contractor for performance of a contract. GFI also includes Contractor-acquired information if the Contractor-acquired information is a deliverable under the contract and is for continued use under the contract. Otherwise, GFI does not include information that is created by the Contractor and delivered to the Government in accordance with the requirements of the work statement or specifications of the contract. The type, quantity, quality, and delivery requirements of such deliverable information are set forth elsewhere in the contract schedule.

(b) Information Management and Information Security.

(1) The Contractor shall manage, account for, and secure all Government information provided or acquired by the Contractor. The Contractor shall be responsible for all Government information provided to its Subcontractors. The Contractor agrees to include a requirement in each subcontract under this contract that flows down the protection from disclosure requirements.

(2) The Contractor's responsibility for Government information extends from the initial provision or acquisition and receipt of information, through stewardship, custody, and use until returned to, or otherwise disposed of, as directed by the Contracting Officer. This requirement applies to all Government information under the Contractor's accountability, stewardship, possession or control, including its Subcontractors.

(c) Use of Government information.

(1) The Contractor shall not use any information provided or acquired under this contract for any purpose other than in the performance of this contract.

(2) The Contractor shall not modify or alter the Government information, unless authorized in writing, in advance, by the Contracting Officer.

(d) Government-furnished information.

(1) The Government shall deliver to the Contractor the information described below-

Master listing of all colleges and universities and other relevant educational organizations as part of their outreach

(2) The delivery and/or performance dates specified in this contract are based upon the expectation that the Government-furnished information will be suitable for contract performance and will be delivered to the Contractor by the dates stated in paragraph (d)(1) of this clause.

(i) The Government does not warrant the validity or accuracy of the Government-furnished information unless otherwise noted.

(ii) In the event that information received by the Contractor is not in a condition suitable for its intended use, the Contractor shall immediately notify the Contracting Officer in writing. Upon receipt of the Contractor's notification, the Contracting Officer shall advise the Contractor on a course of action to remedy the problem.

(iii) If either the failure of the Government to provide information to the Contractor by the dates shown in this clause or the remedial action taken under this clause to correct defective information causes an increase or decrease in the Contractor's cost of, or the time required for, the performance of any part of the work under this contract, the Contracting Officer shall consider an equitable adjustment to the contract. The Contractor shall provide to the Contracting Officer its written statement describing the general nature and amount of the equitable adjustment proposal within 30 days after the remedial action described in paragraph (ii) herein is completed, or within 30 days after the date upon which the Government failed to provide information, unless the Contracting Officer extends this period.

(3)(i) The Contracting Officer may, by written notice, at any time-

(A) Increase or decrease the amount of Government-furnished information under this contract;

(B) Substitute other Government-furnished information for the information previously furnished, to be furnished, or to be acquired by the Contractor for the Government under this contract; or

(C) Withdraw authority to use the information.

(ii) Upon completion of any action(s) under paragraph (d)(3)(i) of this clause, and the Contractor's timely written request, the Contracting Officer shall consider an equitable adjustment to the contract.

(e) Rights in information. Government information is the property of the U.S. Government unless otherwise specifically identified. The specific rights in any other information acquired or created by the Contractor under this contract shall be as expressed in the "Rights in Data" clause contained in this contract.

(f) Government access to information. The Government shall have the right to access any Government information maintained by the Contractor and any Subcontractors. The Contractor shall provide the Contracting Officer, and other duly authorized Government representatives, with access to all Government information, including access to the Contractor's facilities, as necessary, promptly upon written notification by the Contracting Officer. Such notification may be by electronic mail.

(g) Contractor liability for Government information.

(1) Unless otherwise provided for in the contract, the Contractor shall not be liable for loss, theft, damage, or destruction to the Government information furnished or acquired under this contract, except when the loss, theft, damage, or destruction is the result of the Contractor's failure to properly manage, account for, and safeguard the information in accordance with this clause.

(2) In the event of any loss, theft, damage, or destruction of Government information, the Contractor shall immediately take all reasonable actions necessary to protect the Government information from further loss, theft, damage, or destruction.

(3) The Contractor shall do nothing to prejudice the Government's rights to recover against third parties for any loss, theft, damage, or destruction of Government information.

(h) Information alteration and disposal. Except as otherwise provided for in this contract, the Contractor shall not alter, destroy, or otherwise dispose of any Government information unless expressly directed by the Contracting Officer to do so.

(i) Return of Government information to the Government.

(1) The Government may require the Contractor to return Government Information to the Government at any time. Upon demand by the Contracting Officer or his/her representative, the Contractor shall return all Government information to the Government as directed by the Contracting Officer or other individual designated by the Contracting Officer.

(2) The Contractor's failure to return all information as directed, including directions regarding the time frames for delivery back to the Government and directions prescribing the form in which the data must be returned, shall be considered a breach of contract, and the Government shall have the right to physically remove the Government information from the Contractor, including removal of such information from the Contractor's physical premises and from any electronic media (e.g., Contractor's computer systems).

(3) When required to return Government information to the Government, the Contractor shall do so at no cost to the Government. The Government shall not be responsible for the cost of data format conversion and the cost of delivery, if any.

(4) The Contractor shall ensure that all Government information provided to Subcontractors is returned to the Government.

(j) Equitable adjustment. Equitable adjustments under this clause shall be made in accordance with the procedures of the Changes clause. However, the Government shall not be liable for breach of contract for the following:

(1) Any delay in delivery of Government-furnished information.

(2) Delivery of Government-furnished information in a condition not suitable for its intended use.

(3) An increase, decrease, or substitution of Government-furnished information.

(4) Failure to correct or replace Government information for which the Government is responsible.

(k) Subcontracts. The Contractor shall ensure that all subcontracts under which Government information is provided to a Subcontractor include the basic terms and conditions set forth in paragraphs (a), (b), (c), (f), and (h) of this clause in each subcontract. Subcontracts shall clearly describe the Government information provided to the Subcontractor. The Contractor shall be responsible for all Government information provided to Subcontractors.

(End of clause)

### **H.3 2452.237-83 Access to Controlled Unclassified Information (CUI) (April 2019)**

(a) For the sole purpose of performing work required under this contract, the contracting officer may grant the contractor – including contractor employees, subcontractors, and subcontractor employees – access to controlled unclassified information (“CUI”).

(b) CUI:

(1) Is any information which the loss, misuse, or modification of, or unauthorized access to, could adversely affect the national interest or the conduct of federal programs or the privacy to which individuals are entitled under section 552a of title 5, United States Code (the Privacy Act), but which has not been specifically authorized under criteria established by an Executive Order or an Act of Congress to be kept secret in the interest of national defense or foreign policy;

(2) Is not available to the general public;

(3) May include:

(A) Government acquisition-sensitive information, including source selection information as defined at section 2.101 of the Federal Acquisition Regulation (48 CFR Chapter 1); contractor bid or proposal information;

(B) Information contained in individual contracts that is not public information and such contract information that is contained in Government databases; proprietary economic, financial, or business information (*e.g.*, salary information) provided to the Government by other parties (*e.g.*, other contractors) or belonging to HUD;

(C) Personally identifiable information (PII) that includes, but is not limited to social security numbers, names, dates of birth, places of birth, parents' names, credit card numbers, applications for entitlements, and information relating to a person's private financial, income, employment, and tax records; and

(D) Other information that the HUD contracting officer or other authorized HUD employee explicitly identifies as CUI; and

(4) May exist in various physical media (*e.g.*, paper, electronic file, audio or video disc) or be transmitted orally, may be developed under or pre-exist any related contract, and may be in its original form or a derivative form (*i.e.*, where the information has been included in contractor-generated work, or where it is discernible from materials incorporating or based upon such information).

(c) As a prior condition to being provided access to any CUI, each contractor or subcontractor employee shall execute the nondisclosure agreement in Attachment **J.1** – Non-Disclosure Agreement between HUD and Contractor Employee to this contract and deliver the executed agreement to the contracting officer.

(d) The contractor shall include this clause in all subcontracts.

(e) The contractor's failure to comply with any part of this clause or with the terms of the required nondisclosure agreements may result in the termination of this contract for default.

(End of Clause)

**The Contractor shall submit the Non-Disclosure Agreements no later than five business days after contract award.**

#### H.4 AS-2313 Examination of Records by HUD

JUL 2017

(a) The Contractor agrees that the Secretary of the Department of Housing and Urban Development (HUD) or any duly authorized representatives shall, until the expiration of 3 years after final payment under this contract, or of the time periods for the particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever expires earlier, have access to and the right to examine any books, documents, papers, and records of the Contractor involving transactions related to this contract or compliance with any clauses thereunder.

(b) The Contractor further agrees to include in all its subcontracts hereunder a provision to the effect that the subcontractor agrees that the Secretary of HUD or any authorized representatives shall, until the expiration of 3 years after final payment under the subcontract, or of the time periods for the particular records specified in Subpart 4.7 of the Federal Acquisition Regulation (48 CFR 4.7), whichever expires earlier, have access to and the right to examine any books, documents, papers, and records of such subcontractor involving transactions related to the subcontract or compliance with any clauses thereunder.

#### H.5 AS- 2314 Contractor Records Management Responsibilities

##### A. Definitions

"Federal record" as defined in 44 U.S.C. § 3301, includes all recorded information, regardless of form or characteristics, made or received by a Federal agency under Federal law or in connection with the transaction of public business and preserved or appropriate for preservation by that agency or its legitimate successor as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities of the United States Government or because of the informational value of data in them.

The term Federal record:

1. includes the Department of Housing and Urban Development (HUD) records.
2. does not include personal materials.
3. applies to records created, received, or maintained by Contractors pursuant to their HUD contract.
4. may include deliverables and documentation associated with deliverables.

#### B. *Requirements*

1. Contractor shall comply with all applicable records management laws and regulations, as well as National Archives and Records Administration (NARA) records policies, including but not limited to the Federal Records Act (44 U.S.C. chs. 21, 29, 31, 33), NARA regulations at 36 CFR Chapter XII Subchapter B, and those policies associated with the safeguarding of records covered by the Privacy Act of 1974 (5 U.S.C. 552a). These policies include the preservation of all records created or received, regardless of form (paper, electronic, etc.) or characteristics, mode of transmission (email, fax, etc.), or state of completion (draft, final, etc.).
2. In accordance with 36 CFR 1222.32, all data created for Government use and delivered to, or falling under the legal control of, the Government are Federal records subject to the provisions of 44 U.S.C. chapters 21, 29, 31, and 33, the Freedom of Information Act (FOIA) (5 U.S.C. 552), as amended, and the Privacy Act of 1974 (5 U.S.C. 552a), as amended and must be managed and scheduled for disposition only as permitted by statute or regulation.
3. In accordance with 36 CFR 1222.32, Contractor shall maintain all records created for Government use or created in the course of performing the contract and/or delivered to, or under the legal control of the Government and must be managed in accordance with Federal law. Electronic records and associated metadata must be accompanied by sufficient technical documentation to permit understanding and use of the records and data.
4. The Department of Housing and Urban Development (HUD) and its contractors are responsible for preventing the alienation or unauthorized destruction of records, including all forms of mutilation. Records may not be removed from the legal custody of HUD or destroyed except for in accordance with the provisions of the agency records schedules and with the written concurrence of the Contracting Officer Representative. Willful and unlawful destruction, damage or alienation of Federal records is subject to the fines and penalties imposed by 18 U.S.C. 2701. In the event of any unlawful or accidental removal, defacing, alteration, or destruction of records, the Contractor must report to the HUD Contracting Officer. The Contracting Officer must report promptly to the records officer. The agency record officer must report promptly to NARA in accordance with 36 CFR 1230.
5. The Contractor shall immediately notify the Contracting Officer upon discovery of any inadvertent or unauthorized disclosures of information, data, documentary materials, records or equipment. Disclosure of non-public information is limited to authorized personnel with a need-to-know as described in the contract. The Contractor shall ensure that the appropriate personnel, administrative, technical, and physical safeguards are established to ensure the security and confidentiality of this information, data, documentary material, records and/or equipment is properly protected. The Contractor shall not remove material from Government facilities or systems, or facilities or systems operated or maintained on the Government's behalf, without the express written permission of the Contracting Officer Representative. When information, data, documentary material, records and/or equipment is no longer required, it shall be returned to HUD control or the contractor must obtain written instruction/direction from the program manager for disposition of any records not returned to the government. Items returned to the Government shall be hand carried, mailed, emailed, or securely electronically transmitted to the Contracting Officer Representative or address prescribed in the contract. Destruction of records is EXPRESSLY PROHIBITED unless in accordance with Paragraph (4).

6. The Contractor shall not create or maintain any records containing any non-public HUD information that are not specifically tied to or authorized by the contract.
7. The Contractor shall not retain, use, sell, or disseminate copies of any deliverable that contains information covered by the Privacy Act of 1974 or that which is generally protected from public disclosure by an exemption to the Freedom of Information Act unless the retention is due to deliverable(s) containing proprietary or intellectual property of the contractor or is subject to a legal basis for retention.
8. HUD owns the rights to all data and records produced as part of this contract. All deliverables under the contract are the property of the U.S. Government for which HUD shall have unlimited rights to use, dispose of, or disclose such data contained therein as it determines to be in the public interest unless otherwise stated in the contract. Any Contractor rights in the data or deliverables must be identified as required by FAR 52.227-11 through FAR 52.227-20.

*C. Flowdown of requirements to subcontractors*

1. The Contractor shall incorporate the substance of this clause, its terms and requirements including this paragraph, in all subcontracts or other relationships that will result in the disclosure of information, documentary material and/or records generated under, or relating to this contract contract, and require written subcontractor acknowledgment of same. The Contractor (and any sub-contractor) is required to abide by Government and HUD guidance for protecting sensitive, proprietary information, classified, and controlled unclassified information.
2. Violation by a subcontractor of any provision set forth in this clause will be attributed to the Prime Contractor.

(End of clause)

**H.6 AS-2315 Cybersecurity and Privacy Requirements (APRIL 2022)**

1. The Contractor shall comply with all current and future Federal Information Technology (IT) security requirements.
2. The Contractor shall maintain compliance with all terms and conditions of the contract throughout the term of the contract with respect to all IT security and privacy requirements.
3. The Contractor shall maintain compliance, as per the National Institute of Standards and Technology (NIST) Special Publication (SP) 800-161, *Supply Chain Risk Management Practices for Federal Information Systems and Organizations*.
4. The Contractor shall complete and maintain security and privacy related documents, in accordance with all Federal Laws, Regulations, NIST guidance (<https://csrc.nist.gov/publications/sp>) and [HUD policies](#).
5. The Contractor shall maintain compliance with OMB Memorandum 17-12, *Preparing for and Responding to a Breach of Personally Identifiable Information*.

Failure to adhere to the above requirements could result in penalties, to include a contract performance stop-work order until compliance can be demonstrated. Disregard of these requirements could also lead to other criminal, civil, administrative, and/or contract penalties.

End Clause

**H.7 Compliance with FAR 52.222-37 - VETS-4212 Reporting**

The Contractor shall be required to submit annual confirmation that the report required in 52.222-37, Employment Reports on Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veteran has been completed. The VETS-4212 Report is due no later than September 30 of each year. ‘

X Multiple Year Contracts or BPAs - The confirmation shall be submitted **60 days** before option exercise for Multiple year contracts or BPAs with options.

\_\_\_ Multi-Year Contracts or BPAs - The confirmation shall be submitted annually within **60 days** before anniversary award date.

**H.8 Compliance with 52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment**

In accordance with FAR 4.2102 Prohibition - Agencies are prohibited from procuring or obtaining or extending or renewing a contract to procure or obtain, any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system, unless an exception applies, or equipment or services are covered by a waiver. Agencies are prohibited from entering into a contract or extending or renewing a contract with an entity that uses any equipment, system, or service that uses covered telecommunications equipment or services as a substantial or essential component of any system, or as critical technology as part of any system, unless an exception applies, or the covered telecommunications equipment or services are covered by a waiver. ***This prohibition applies to the use of covered telecommunications equipment or services, regardless of whether that use is in performance of work under a Federal contract.***

In the event the Contractor identifies covered telecommunications equipment or services used as a substantial or essential component of any system, or as critical technology as part of any system, during contract performance, or the Contractor is notified of such by a subcontractor at any tier or by any other source, the Contractor shall report the information in paragraph (d)(2) of this clause 52.204-25 to the Contracting Officer, unless elsewhere in this contract are established procedures for reporting the information.

**H.9 Compliance with 52.219-14 Limitations on Subcontracting**

The Contractor shall be required to submit annual confirmation of compliance with the limitations on subcontracting. The contractor will not pay more than 50 percent of the amount paid by the Government for contract performance to subcontractors that are not similarly situated entities. Any work that a similarly situated entity further subcontracts will count towards the prime contractor's 50 percent subcontract amount that cannot be exceeded. When a contract includes both services and supplies, the 50 percent limitation shall apply only to the service portion of the contract.

X Multiple Year Contracts or BPAs - The confirmation shall be submitted **60 days** before option exercise for multiple year contracts or BPAs with options.

\_\_\_ Multi-Year Contracts or BPAs - The confirmation shall be submitted annually within **60 days** before anniversary award date.

\_\_\_ N/A - This is not a small business set-aside.



**H.10 CONFLICTS OF INTERESTS**

  X   There are no conflicts of interests identified.

     The conflict of interests are listed below are but not limited to the following:

## PART II - CONTRACT CLAUSES

## SECTION I - CONTRACT CLAUSES

## I.1 FAR 52.252-2 CLAUSES INCORPORATED BY REFERENCE

FEB 1998

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

<https://www.acquisition.gov>

[https://www.hud.gov/program\\_offices/cpo/hudar](https://www.hud.gov/program_offices/cpo/hudar)

<u>NUMBER</u>	<u>TITLE</u>	<u>DATE</u>
52.203-3	Gratuities	APR 1984
52.203-12	Limitation on Payments to Influence Certain Federal Transactions	JUN 2020
52.203-17	Contractor Employee Whistleblower Rights and Requirement To Inform Employees of Whistleblower Rights	JUN 2020
52.204-4	Printed or Copied Double-Sided on Recycled Paper	MAY 2011
52.204-13	System for Award Management Maintenance	OCT 2018
52.204-18	Commercial and Government Entity Code Maintenance	AUG 2020
52.204-19	Incorporation by Reference of Representations and Certifications	DEC 2014
52.212-4	Contract Terms and Conditions -- Commercial Items	DEC 2022
52.224-2	Privacy Act	APR 1984
52.227-14	Rights In Data – General	MAY 2014
52.229-3	Federal, State, and Local Taxes	FEB 2013
52.232-8	Discounts for Prompt Payment	FEB 2002
52.232-11	Extras	APR 1984
52.232-18	Availability of Funds	APR 1984
52.232-39	Unenforceability of Unauthorized Obligations	JUN 2013
52.232-40	Providing Accelerated Payments to Small Business Subcontractors	MAR 2023
52.242-13	Bankruptcy	JUL 1995

**FAR CLAUSES INCORPORATED BY FULL TEXT****I.2 52.204-21 Basic Safeguarding of Covered Contractor Information Systems****NOV 2021**

(a) Definitions. As used in this clause--

“Covered Contractor information system” means an information system that is owned or operated by a Contractor that processes, stores, or transmits Federal contract information.

“Federal contract information” means information, not intended for public release, that is provided by or generated for the Government under a contract to develop or deliver a product or service to the Government, but not including information provided by the Government to the public (such as on public Web sites) or simple transactional information, such as necessary to process payments.

“Information” means any communication or representation of knowledge such as facts, data, or opinions, in any medium or form, including textual, numerical, graphic, cartographic, narrative, or audiovisual (Committee on National Security Systems Instruction (CNSSI) 4009).

“Information system” means a discrete set of information resources organized for the collection, processing, maintenance, use, sharing, dissemination, or disposition of information (44 U.S.C. 3502).

“Safeguarding” means measures or controls that are prescribed to protect information systems.

(b) Safeguarding requirements and procedures.

(1) The Contractor shall apply the following basic safeguarding requirements and procedures to protect covered Contractor information systems. Requirements and procedures for basic safeguarding of covered Contractor information systems shall include, at a minimum, the following security controls:

- (i) Limit information system access to authorized users, processes acting on behalf of authorized users, or devices (including other information systems).
- (ii) Limit information system access to the types of transactions and functions that authorized users are permitted to execute.
- (iii) Verify and control/limit connections to and use of external information systems.
- (iv) Control information posted or processed on publicly accessible information systems.
- (v) Identify information system users, processes acting on behalf of users, or devices.
- (vi) Authenticate (or verify) the identities of those users, processes, or devices, as a prerequisite to allowing access to organizational information systems.
- (vii) Sanitize or destroy information system media containing Federal Contract Information before disposal or release for reuse.
- (viii) Limit physical access to organizational information systems, equipment, and the respective operating environments to authorized individuals.
- (ix) Escort visitors and monitor visitor activity; maintain audit logs of physical access; and control and manage physical access devices.
- (x) Monitor, control, and protect organizational communications (i.e., information transmitted or received by organizational information systems) at the external boundaries and key internal boundaries of the information systems.
- (xi) Implement subnetworks for publicly accessible system components that are physically or logically separated from internal networks.
- (xii) Identify, report, and correct information and information system flaws in a timely manner.
- (xiii) Provide protection from malicious code at appropriate locations within organizational information systems.
- (xiv) Update malicious code protection mechanisms when new releases are available.
- (xv) Perform periodic scans of the information system and real-time scans of files from external sources as files are downloaded, opened, or executed.

(2) Other requirements. This clause does not relieve the Contractor of any other specific safeguarding requirements specified by Federal agencies and departments relating to covered Contractor information systems generally or other Federal safeguarding requirements for controlled unclassified information (CUI) as established by Executive Order 13556.

(c) Subcontracts. The Contractor shall include the substance of this clause, including this paragraph (c), in subcontracts under this contract (including subcontracts for the acquisition of commercial items, other than commercially available off-the-shelf items), in which the Subcontractor may have Federal contract information residing in or transiting through its information system.

(End of clause)

### I. 3 52.212-5 Contract Terms and Conditions Required To Implement Statutes or Executive Orders — Commercial Products and Commercial Services (May 2024)

(a) The Contractor shall comply with the following Federal Acquisition Regulation (FAR) clauses, which are incorporated in this contract by reference, to implement provisions of law or Executive orders applicable to acquisitions of commercial products and commercial services:

- (1) [52.203-19](#), Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements (Jan 2017) (section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions)).
- (2) [52.204-23](#), Prohibition on Contracting for Hardware, Software, and Services Developed or Provided by Kaspersky Lab Covered Entities (Dec 2023) (Section 1634 of Pub. L. 115-91).
- (3) [52.204-25](#), Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. (Nov 2021) (Section 889(a)(1)(A) of Pub. L. 115-232).
- (4) [52.209-10](#), Prohibition on Contracting with Inverted Domestic Corporations (Nov 2015).
- (5) [52.232-40](#), Providing Accelerated Payments to Small Business Subcontractors (Mar 2023) ( [31 U.S.C. 3903](#) and [10 U.S.C. 3801](#)).
- (6) [52.233-3](#), Protest After Award (Aug 1996) ( [31 U.S.C. 3553](#)).
- (7) [52.233-4](#), Applicable Law for Breach of Contract Claim (Oct 2004) (Public Laws 108-77 and 108-78 ( [19 U.S.C. 3805 note](#))).

(b) The Contractor shall comply with the FAR clauses in this paragraph (b) that the Contracting Officer has indicated as being incorporated in this contract by reference to implement provisions of law or Executive orders applicable to acquisitions of commercial products and commercial services:

[Contracting Officer check as appropriate.]

- ☒ (1) [52.203-6](#), Restrictions on Subcontractor Sales to the Government (Jun 2020), with *Alternate I* (Nov 2021) ( [41 U.S.C. 4704](#) and [10 U.S.C. 4655](#)).
- ☐ (2) [52.203-13](#), Contractor Code of Business Ethics and Conduct (Nov 2021) ( [41 U.S.C. 3509](#))).
- ☐ (3) [52.203-15](#), Whistleblower Protections under the American Recovery and Reinvestment Act of 2009 (Jun 2010) (Section 1553 of Pub. L. 111-5). (Applies to contracts funded by the American Recovery and Reinvestment Act of 2009.)
- ☒ (4) [52.203-17](#), Contractor Employee Whistleblower Rights (Nov 2023) ( [41 U.S.C. 4712](#)); this clause does not apply to contracts of DoD, NASA, the Coast Guard, or applicable elements of the intelligence community—see FAR [3.900](#)(a).
- ☒ (5) [52.204-10](#), Reporting Executive Compensation and First-Tier Subcontract Awards (Jun 2020) (Pub. L. 109-282) ( [31 U.S.C. 6101 note](#)).
- ☐ (6) [Reserved].
- ☒ (7) [52.204-14](#), Service Contract Reporting Requirements (Oct 2016) (Pub. L. 111-117, section 743 of Div. C).
- ☐ (8) [52.204-15](#), Service Contract Reporting Requirements for Indefinite-Delivery Contracts (Oct 2016) (Pub. L. 111-117, section 743 of Div. C).
- ☒ (9) [52.204-27](#), Prohibition on a ByteDance Covered Application (Jun 2023) (Section 102 of Division R of Pub. L. 117-328).

- \_\_\_ (10) [52.204-28](#), Federal Acquisition Supply Chain Security Act Orders—Federal Supply Schedules, Governmentwide Acquisition Contracts, and Multi-Agency Contracts. (Dec 2023) ( [Pub. L. 115–390](#), title II).
- \_\_\_ (11) (i) [52.204-30](#), Federal Acquisition Supply Chain Security Act Orders—Prohibition. (Dec 2023) ( [Pub. L. 115–390](#), title II).
- \_\_\_ (ii) Alternate I (Dec 2023) of [52.204-30](#).
- X (12) [52.209-6](#), Protecting the Government’s Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment. (Nov 2021) ( [31 U.S.C. 6101 note](#)).
- X (13) [52.209-9](#), Updates of Publicly Available Information Regarding Responsibility Matters (Oct 2018) ( [41 U.S.C. 2313](#)).
- \_\_\_ (14) [Reserved].
- \_\_\_ (15) [52.219-3](#), Notice of HUBZone Set-Aside or Sole-Source Award (Oct 2022) ( [15 U.S.C. 657a](#)).
- \_\_\_ (16) [52.219-4](#), Notice of Price Evaluation Preference for HUBZone Small Business Concerns (Oct 2022) (if the offeror elects to waive the preference, it shall so indicate in its offer) ( [15 U.S.C. 657a](#)).
- \_\_\_ (17) [Reserved]
- \_\_\_ (18) (i) [52.219-6](#), Notice of Total Small Business Set-Aside (Nov 2020) ( [15 U.S.C. 644](#)).
- \_\_\_ (ii) Alternate I (Mar 2020) of [52.219-6](#).
- \_\_\_ (19) (i) [52.219-7](#), Notice of Partial Small Business Set-Aside (Nov 2020) ( [15 U.S.C. 644](#)).
- \_\_\_ (ii) Alternate I (Mar 2020) of [52.219-7](#).
- X (20) [52.219-8](#), Utilization of Small Business Concerns (Feb 2024) ( [15 U.S.C. 637\(d\)\(2\)](#) and (3)).
- \_\_\_ (21) (i) [52.219-9](#), Small Business Subcontracting Plan (Sep 2023) ( [15 U.S.C. 637\(d\)\(4\)](#)).
- \_\_\_ (ii) Alternate I (Nov 2016) of [52.219-9](#).
- \_\_\_ (iii) Alternate II (Nov 2016) of [52.219-9](#).
- \_\_\_ (iv) Alternate III (Jun 2020) of [52.219-9](#).
- \_\_\_ (v) Alternate IV (Sep 2023) of [52.219-9](#).
- \_\_\_ (22) (i) [52.219-13](#), Notice of Set-Aside of Orders (Mar 2020) ( [15 U.S.C. 644\(r\)](#)).
- \_\_\_ (ii) Alternate I (Mar 2020) of [52.219-13](#).
- X (23) [52.219-14](#), Limitations on Subcontracting (Oct 2022) ( [15 U.S.C. 637s](#)).
- \_\_\_ (24) [52.219-16](#), Liquidated Damages—Subcontracting Plan (Sep 2021) ( [15 U.S.C. 637\(d\)\(4\)\(F\)\(i\)](#)).
- \_\_\_ (25) [52.219-27](#), Notice of Set-Aside for, or Sole-Source Award to, Service-Disabled Veteran-Owned Small Business (SDVOSB) Concerns Eligible Under the SDVOSB Program (Feb 2024) ( [15 U.S.C. 657f](#)).
- \_\_\_ (26) (i) [52.219-28](#), Post Award Small Business Program Rerepresentation (Feb 2024) ( [15 U.S.C. 632\(a\)\(2\)](#)).
- \_\_\_ (ii) Alternate I (Mar 2020) of [52.219-28](#).
- \_\_\_ (27) [52.219-29](#), Notice of Set-Aside for, or Sole-Source Award to, Economically Disadvantaged Women-Owned Small Business Concerns (Oct 2022) ( [15 U.S.C. 637\(m\)](#)).
- \_\_\_ (28) [52.219-30](#), Notice of Set-Aside for, or Sole-Source Award to, Women-Owned Small Business Concerns Eligible Under the Women-Owned Small Business Program (Oct 2022) ( [15 U.S.C. 637\(m\)](#)).
- \_\_\_ (29) [52.219-32](#), Orders Issued Directly Under Small Business Reserves (Mar 2020) ( [15 U.S.C. 644\(r\)](#)).
- \_\_\_ (30) [52.219-33](#), Nonmanufacturer Rule (Sep 2021) ( [15 U.S.C. 637\(a\)\(17\)](#)).
- X (31) [52.222-3](#), Convict Labor (Jun 2003) (E.O.11755).
- \_\_\_ (32) [52.222-19](#), Child Labor-Cooperation with Authorities and Remedies (Feb 2024).
- X (33) [52.222-21](#), Prohibition of Segregated Facilities (Apr 2015).
- X (34) (i) [52.222-26](#), Equal Opportunity (Sep 2016) (E.O.11246).
- \_\_\_ (ii) Alternate I (Feb 1999) of [52.222-26](#).
- X (35) (i) [52.222-35](#), Equal Opportunity for Veterans (Jun 2020) ( [38 U.S.C. 4212](#)).
- \_\_\_ (ii) Alternate I (Jul 2014) of [52.222-35](#).
- X (36) (i) [52.222-36](#), Equal Opportunity for Workers with Disabilities (Jun 2020) ( [29 U.S.C. 793](#)).
- \_\_\_ (ii) Alternate I (Jul 2014) of [52.222-36](#).
- X (37) [52.222-37](#), Employment Reports on Veterans (Jun 2020) ( [38 U.S.C. 4212](#)).
- X (38) [52.222-40](#), Notification of Employee Rights Under the National Labor Relations Act (Dec 2010) (E.O. 13496).
- X (39) (i) [52.222-50](#), Combating Trafficking in Persons (Nov 2021) ( [22 U.S.C. chapter 78](#) and E.O. 13627).
- \_\_\_ (ii) Alternate I (Mar 2015) of [52.222-50](#) ( [22 U.S.C. chapter 78](#) and E.O. 13627).

X (40) [52.222-54](#), Employment Eligibility Verification (May 2022) (Executive Order 12989). (Not applicable to the acquisition of commercially available off-the-shelf items or certain other types of commercial products or commercial services as prescribed in FAR [22.1803](#).)

\_\_\_ (41) (i) [52.223-9](#), Estimate of Percentage of Recovered Material Content for EPA–Designated Items (May 2008) ( [42 U.S.C. 6962\(c\)\(3\)\(A\)\(ii\)](#)). (Not applicable to the acquisition of commercially available off-the-shelf items.)

\_\_\_ (ii) Alternate I (May 2008) of [52.223-9](#) ( [42 U.S.C. 6962\(i\)\(2\)\(C\)](#)). (Not applicable to the acquisition of commercially available off-the-shelf items.)

\_\_\_ (42) [52.223-11](#), Ozone-Depleting Substances and High Global Warming Potential Hydrofluorocarbons (May 2024) ( [42 U.S.C. 7671](#), *et seq.*).

\_\_\_ (43) [52.223-12](#), Maintenance, Service, Repair, or Disposal of Refrigeration Equipment and Air Conditioners (May 2024) ( [42 U.S.C. 7671](#), *et seq.*).

\_\_\_ (44) [52.223-20](#), Aerosols (May 2024) ( [42 U.S.C. 7671](#), *et seq.*).

\_\_\_ (45) [52.223-21](#), Foams (May 2024) ( [42 U.S.C. 7671](#), *et seq.*).

\_\_\_ (46) [52.223-23](#), Sustainable Products and Services (May 2024) ( [E.O. 14057](#), [7 U.S.C. 8102](#), [42 U.S.C. 6962](#), [42 U.S.C. 8259b](#), and [42 U.S.C. 7671l](#)).

X (47) (i) [52.224-3](#) Privacy Training (Jan 2017) (5 U.S.C. 552 a).

\_\_\_ (ii) Alternate I (Jan 2017) of [52.224-3](#).

\_\_\_ (48) (i) [52.225-1](#), Buy American-Supplies (Oct 2022) ( [41 U.S.C. chapter 83](#)).

\_\_\_ (ii) Alternate I (Oct 2022) of [52.225-1](#).

\_\_\_ (49) (i) [52.225-3](#), Buy American-Free Trade Agreements-Israeli Trade Act (NOV 2023) ( [19 U.S.C. 3301 n note](#), [19 U.S.C. 2112 note](#), [19 U.S.C. 3805 note](#), [19 U.S.C. 4001 note](#), 19 U.S.C. chapter 29 (sections 4501-4732), Public Law 103-182, 108-77, 108-78, 108-286, 108-302, 109-53, 109-169, 109-283, 110-138, 112-41, 112-42, and 112-43).

\_\_\_ (ii) Alternate I [Reserved].

\_\_\_ (iii) Alternate II (Dec 2022) of [52.225-3](#).

\_\_\_ (iv) Alternate III (Feb 2024) of [52.225-3](#).

\_\_\_ (v) Alternate IV (Oct 2022) of [52.225-3](#).

\_\_\_ (50) [52.225-5](#), Trade Agreements (NOV 2023) ( [19 U.S.C. 2501](#), *et seq.*, [19 U.S.C. 3301](#) note).

X (51) [52.225-13](#), Restrictions on Certain Foreign Purchases (Feb 2021) (E.O.'s, proclamations, and statutes administered by the Office of Foreign Assets Control of the Department of the Treasury).

\_\_\_ (52) [52.225-26](#), Contractors Performing Private Security Functions Outside the United States (Oct 2016) (Section 862, as amended, of the National Defense Authorization Act for Fiscal Year 2008; 10 U.S.C. Subtitle A, Part V, Subpart G Note).

\_\_\_ (53) [52.226-4](#), Notice of Disaster or Emergency Area Set-Aside (Nov 2007) ( [42 U.S.C. 5150](#)).

\_\_\_ (54) [52.226-5](#), Restrictions on Subcontracting Outside Disaster or Emergency Area (Nov 2007) ( [42 U.S.C. 5150](#)).

\_\_\_ (55) [52.226-8](#), Encouraging Contractor Policies to Ban Text Messaging While Driving (May 2024) ( [E.O. 13513](#)).

X (56) [52.229-12](#), Tax on Certain Foreign Procurements (Feb 2021).

\_\_\_ (57) [52.232-29](#), Terms for Financing of Purchases of Commercial Products and Commercial Services (Nov 2021) ( [41 U.S.C. 4505](#), [10 U.S.C. 3805](#)).

\_\_\_ (58) [52.232-30](#), Installment Payments for Commercial Products and Commercial Services (Nov 2021) ( [41 U.S.C. 4505](#), [10 U.S.C. 3805](#)).

X (59) [52.232-33](#), Payment by Electronic Funds Transfer-System for Award Management (Oct 2018) ( [31 U.S.C. 3332](#)).

\_\_\_ (60) [52.232-34](#), Payment by Electronic Funds Transfer-Other than System for Award Management (Jul 2013) ( [31 U.S.C. 3332](#)).

\_\_\_ (61) [52.232-36](#), Payment by Third Party (May 2014) ( [31 U.S.C. 3332](#)).

X (62) [52.239-1](#), Privacy or Security Safeguards (Aug 1996) ( [5 U.S.C. 552a](#)).

\_\_\_ (63) [52.242-5](#), Payments to Small Business Subcontractors (Jan 2017) ( [15 U.S.C. 637\(d\)\(13\)](#)).

\_\_\_ (64) (i) [52.247-64](#), Preference for Privately Owned U.S.-Flag Commercial Vessels (Nov 2021) ( [46 U.S.C. 55305](#) and [10 U.S.C. 2631](#)).



- \_\_\_ (ii) Alternate I (Apr 2003) of [52.247-64](#).
- \_\_\_ (iii) Alternate II (Nov 2021) of [52.247-64](#).

(c) The Contractor shall comply with the FAR clauses in this paragraph (c), applicable to commercial services, that the Contracting Officer has indicated as being incorporated in this contract by reference to implement provisions of law or Executive orders applicable to acquisitions of commercial products and commercial services:

[Contracting Officer check as appropriate.]

- \_\_\_ (1) [52.222-41](#), Service Contract Labor Standards (Aug 2018) ( [41 U.S.C. chapter 67](#)).
- \_\_\_ (2) [52.222-42](#), Statement of Equivalent Rates for Federal Hires (May 2014) ( [29 U.S.C. 206](#) and [41 U.S.C. chapter 67](#)).
- \_\_\_ (3) [52.222-43](#), Fair Labor Standards Act and Service Contract Labor Standards-Price Adjustment (Multiple Year and Option Contracts) (Aug 2018) ( [29 U.S.C. 206](#) and [41 U.S.C. chapter 67](#)).
- \_\_\_ (4) [52.222-44](#), Fair Labor Standards Act and Service Contract Labor Standards-Price Adjustment (May 2014) ( [29 U.S.C. 206](#) and [41 U.S.C. chapter 67](#)).
- \_\_\_ (5) [52.222-51](#), Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements (May 2014) ( [41 U.S.C. chapter 67](#)).
- \_\_\_ (6) [52.222-53](#), Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements (May 2014) ( [41 U.S.C. chapter 67](#)).
- \_\_\_ (7) [52.222-55](#), Minimum Wages for Contractor Workers Under Executive Order 14026 (Jan 2022).
- \_\_\_ (8) [52.222-62](#), Paid Sick Leave Under Executive Order 13706 (Jan 2022) (E.O. 13706).
- \_\_\_ (9) [52.226-6](#), Promoting Excess Food Donation to Nonprofit Organizations (Jun 2020) ( [42 U.S.C. 1792](#)).

(d) *Comptroller General Examination of Record*. The Contractor shall comply with the provisions of this paragraph (d) if this contract was awarded using other than sealed bid, is in excess of the simplified acquisition threshold, as defined in FAR [2.101](#), on the date of award of this contract, and does not contain the clause at [52.215-2](#), Audit and Records-Negotiation.

(1) The Comptroller General of the United States, or an authorized representative of the Comptroller General, shall have access to and right to examine any of the Contractor's directly pertinent records involving transactions related to this contract.

(2) The Contractor shall make available at its offices at all reasonable times the records, materials, and other evidence for examination, audit, or reproduction, until 3 years after final payment under this contract or for any shorter period specified in FAR subpart [4.7](#), Contractor Records Retention, of the other clauses of this contract. If this contract is completely or partially terminated, the records relating to the work terminated shall be made available for 3 years after any resulting final termination settlement. Records relating to appeals under the disputes clause or to litigation or the settlement of claims arising under or relating to this contract shall be made available until such appeals, litigation, or claims are finally resolved.

(3) As used in this clause, records include books, documents, accounting procedures and practices, and other data, regardless of type and regardless of form. This does not require the Contractor to create or maintain any record that the Contractor does not maintain in the ordinary course of business or pursuant to a provision of law.

(e)

(1) Notwithstanding the requirements of the clauses in paragraphs (a), (b), (c), and (d) of this clause, the Contractor is not required to flow down any FAR clause, other than those in this paragraph (e)(1), in a subcontract for commercial products or commercial services. Unless otherwise indicated below, the extent of the flow down shall be as required by the clause-

- (i) [52.203-13](#), Contractor Code of Business Ethics and Conduct (Nov 2021) ( [41 U.S.C. 3509](#)).
- (ii) [52.203-17](#), Contractor Employee Whistleblower Rights (Nov 2023) ( [41 U.S.C. 4712](#)).
- (iii) [52.203-19](#), Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements (Jan 2017) (section 743 of Division E, Title VII, of the Consolidated and Further Continuing Appropriations Act, 2015 (Pub. L. 113-235) and its successor provisions in subsequent appropriations acts (and as extended in continuing resolutions)).

(iv) [52.204-23](#), Prohibition on Contracting for Hardware, Software, and Services Developed or Provided by Kaspersky Lab Covered Entities (Dec 2023) (Section 1634 of Pub. L. 115-91).

(v) [52.204-25](#), Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment. (Nov 2021) (Section 889(a)(1)(A) of Pub. L. 115-232).

(vi) [52.204-27](#), Prohibition on a ByteDance Covered Application (Jun 2023) (Section 102 of Division R of Pub. L. 117-328).

(vii)

(A) [52.204-30](#), Federal Acquisition Supply Chain Security Act Orders—Prohibition. (Dec 2023) ( [Pub. L. 115-390](#), title II).

(B) Alternate I (Dec 2023) of [52.204-30](#).

(viii) [52.219-8](#), Utilization of Small Business Concerns (Feb 2024) ( [15 U.S.C. 637\(d\)\(2\)](#) and (3)), in all subcontracts that offer further subcontracting opportunities. If the subcontract (except subcontracts to small business concerns) exceeds the applicable threshold specified in FAR [19.702](#)(a) on the date of subcontract award, the subcontractor must include [52.219-8](#) in lower tier subcontracts that offer subcontracting opportunities.

(ix) [52.222-21](#), Prohibition of Segregated Facilities (Apr 2015).

(x) [52.222-26](#), Equal Opportunity (Sep 2015) (E.O.11246).

(xi) [52.222-35](#), Equal Opportunity for Veterans (Jun 2020) ( [38 U.S.C. 4212](#)).

(xii) [52.222-36](#), Equal Opportunity for Workers with Disabilities (Jun 2020) ( [29 U.S.C. 793](#)).

(xiii) [52.222-37](#), Employment Reports on Veterans (Jun 2020) ( [38 U.S.C. 4212](#)).

(xiv) [52.222-40](#), Notification of Employee Rights Under the National Labor Relations Act (Dec 2010) (E.O. 13496). Flow down required in accordance with paragraph (f) of FAR clause [52.222-40](#).

(xv) [52.222-41](#), Service Contract Labor Standards (Aug 2018) ( [41 U.S.C. chapter 67](#)).

(xvi)

(A) [52.222-50](#), Combating Trafficking in Persons (Nov 2021) ( [22 U.S.C. chapter 78](#) and E.O 13627).

(B) Alternate I (Mar 2015) of [52.222-50](#) ( [22 U.S.C. chapter 78](#) and E.O. 13627).

(xvii) [52.222-51](#), Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements (May 2014) ( [41 U.S.C. chapter 67](#)).

(xviii) [52.222-53](#), Exemption from Application of the Service Contract Labor Standards to Contracts for Certain Services-Requirements (May 2014) ( [41 U.S.C. chapter 67](#)).

(xix) [52.222-54](#), Employment Eligibility Verification (May 2022) (E.O. 12989).

(xx) [52.222-55](#), Minimum Wages for Contractor Workers Under Executive Order 14026 (Jan 2022).

(xxi) [52.222-62](#), Paid Sick Leave Under Executive Order 13706 (Jan 2022) (E.O. 13706).

(xxii)

(A) [52.224-3](#), Privacy Training (Jan 2017) ( [5 U.S.C. 552a](#)).

(B) Alternate I (Jan 2017) of [52.224-3](#).

(xxiii) [52.225-26](#), Contractors Performing Private Security Functions Outside the United States (Oct 2016) (Section 862, as amended, of the National Defense Authorization Act for Fiscal Year 2008; 10 U.S.C. Subtitle A, Part V, Subpart G Note).

(xxiv) [52.226-6](#), Promoting Excess Food Donation to Nonprofit Organizations (Jun 2020) ( [42 U.S.C. 1792](#)). Flow down required in accordance with paragraph (e) of FAR clause [52.226-6](#).

(xxv) [52.232-40](#), Providing Accelerated Payments to Small Business Subcontractors (Mar 2023) ( [31 U.S.C. 3903](#) and [10 U.S.C. 3801](#)). Flow down required in accordance with paragraph (c) of [52.232-40](#).

(xxvi) [52.247-64](#), Preference for Privately Owned U.S.-Flag Commercial Vessels (Nov 2021) ( [46 U.S.C. 55305](#) and [10 U.S.C. 2631](#)). Flow down required in accordance with paragraph (d) of FAR clause [52.247-64](#).

(2) While not required, the Contractor may include in its subcontracts for commercial products and commercial services a minimal number of additional clauses necessary to satisfy its contractual obligations.

(End of clause)



**I.4 Reserved****I.5 52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT****MAR 2000**

(a) The Government may extend the term of this contract by written notice to the Contractor no later than **30 days** prior to the expiration of the contract; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least **60 days** before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed the period of time set in the Schedule except that extensions pursuant to FAR 52.217-8 permit the duration to extend up to **6 months** beyond the stated limit.

(End of Clause)

**I.6 52.252-6 AUTHORIZED DEVIATIONS IN CLAUSES****NOV 2020**

(a) The use in this solicitation or contract of any Federal Acquisition Regulation (48 CFR Chapter 1) clause with an authorized deviation is indicated by the addition of "(DEVIATION)" after the date of the clause

(b) The use in this solicitation or contract of any HUDAR (48 CFR Chapter 24) clause with an authorized deviation is indicated by the addition of "(DEVIATION)" after the name of the regulation.

(End of clause)

**THE FOLLOWING HUDAR CLAUSES ARE LISTED IN FULL TEXT:****1.7 HUDAR 2452.203-70 - PROHIBITION AGAINST THE USE OF GOVERNMENT EMPLOYEE****APR 2019**

In accordance with Federal Acquisition Regulation 3.601, contracts are not to be awarded to Federal employees or a business concern or other organization owned or substantially owned or controlled by one or more Federal employees. For the purposes of this contract, this prohibition against the use of Federal employees includes any work performed by the Contractor or any of its employees, Subcontractors, or Consultants.

(End of clause)

**I.8 HUDAR 2452.208-71 REPRODUCTION OF REPORTS****APR 2019**

In accordance with Title I of the Government Printing and Binding Regulations, printing of reports, data or other written material, if required herein, is authorized provided that the material produced does not exceed 5,000 production units of any page and that items consisting of multiple pages do not exceed 25,000 production units in aggregate. The aggregate number of production units is determined by multiplying pages times copies. A production unit is one sheet, size 8.5 by 11 inches or less, printed on one side only and in one color. All copy preparation to produce camera-ready copy for reproduction must be set by methods other than hot metal typesetting. The reports should be produced by methods employing stencils, masters and plates which are to be used on single unit duplicating equipment no larger than 11 by 17 inches with a maximum image of 10 3/4 by 14

1/4 inches and are prepared by methods or devices that do not utilize reusable contact negatives and/or positives prepared with a camera requiring a darkroom. All reproducibles (camera-ready copies for reproduction by photo offset methods) shall become the property of the Government and shall be delivered to the Government with the report, data or other written materials.

(End of clause)

### **I.9 HUDAR 2452.209-71 LIMITATION ON FUTURE CONTRACTS (FEB 2000)**

(a) The Contracting Officer has determined that this contract may give rise to potential organizational conflicts of interest as defined at FAR Subpart 9.5.

(b) The nature of the potential conflict of interest is: {**See Section H.10**}

(c) If the contractor, under the terms of this contract or through the performance of tasks pursuant to this contract, is required to develop specifications or statements of work that are to be incorporated into a solicitation, the contractor shall be ineligible to perform the work described in that solicitation as a prime or first-tier subcontractor under any ensuing HUD contract.

(d) Other restrictions-- [None currently identified]

(e) The restrictions imposed by this clause shall remain in effect **until contract expiration in Section F.**

### **I.10 HUDAR 2452.209-72 ORGANIZATIONAL CONFLICTS OF INTEREST**

**APR 1984**

(a) The Contractor warrants that to the best of its knowledge and belief and except as otherwise disclosed, he or she does not have any organizational conflict of interest which is defined as a situation in which the nature of work under a Government contract and a Contractor's organizational, financial, contractual or other interests are such that:

(1) Award of the contract may result in an unfair competitive advantage; or

(2) The Contractor's objectivity in performing the contract work may be impaired.

(b) The Contractor agrees that if after award he or she discovers an organizational conflict of interest with respect to this contract, he or she shall make an immediate and full disclosure in writing to the Contracting Officer which shall include a description of the action which the Contractor has taken or intends to take to eliminate or neutralize the conflict.

The Government may, however, terminate the contract for the convenience of the Government if it would be in the best interest of the Government.

(c) In the event the Contractor was aware of an organizational conflict of interest before the award of this contract and intentionally did not disclose the conflict to the Contracting Officer, the Government may terminate the contract for default.

(d) The provisions of this clause shall be included in all subcontracts and consulting agreements wherein the work to be performed is similar to the service provided by the prime contractor. The Contractor shall include in such subcontracts and consulting agreements any necessary provisions to eliminate or neutralize conflicts of interest.

(End of clause)

### **I.11 HUDAR 2452.222-70 ACCESSIBILITY OF MEETINGS, CONFERENCES, AND SEMINARS TO PERSONS WITH DISABILITIES**

**FEB 2006**

The contractor shall assure that any meeting, conference, or seminar held pursuant to the contract meets all applicable standards for accessibility to persons with disabilities pursuant to Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794), and any implementing regulations of the Department. The contractor shall be

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responsible for ascertaining the specific accessibility needs (e.g., sign language interpreters) for each meeting, conference, or seminar in light of the known or anticipated attendees.

(End of clause)

**I.12 HUDAR 2452.237-79, POST AWARD CONFERENCE Alternate I****MAR 2016**

The conference will be conducted **via teleconference**. The Contracting Officer or designee will provide the Contractor with the date, time and contact information for the conference.

(End of Alternate I)

**I.13 HUDAR CLAUSE 2452.239-71 INFORMATION TECHNOLOGY VIRUS SECURITY****FEB 2006**

a) The Contractor hereby agrees to make every reasonable effort to deliver information technology products to HUD free of known computer viruses. The Contractor shall be responsible for examining all such products prior to their delivery to HUD using software tools and processes capable of detecting all known viruses.

(b) The Contractor shall include the following statement on deliveries of hardware, software, and data products, including diskettes, made under this contract: **"This product has been scanned for known viruses using [name of virus-screening product, including version number, if any] and is certified to be free of known viruses at the time of delivery."**

(c) The Contracting Officer may assess monetary damages against the Contractor sufficient to compensate HUD for actual or estimated costs resulting from computer virus damage or malicious destruction of computer information arising from the Contractor's failure to take adequate precautions to preclude delivery of virus-containing products in the delivery of hardware, software, or data on diskettes under this contract.

(d) This clause shall not subrogate the rights of the Government under any other clause of this contract.

(End of clause)

**I.14 HUDAR 2452.251-70 CONTRACTOR EMPLOYEE TRAVEL****OCT 1999**

(a) To the maximum extent practical, the Contractor shall make use of travel discounts which are available to Federal employees while traveling in the conduct of official Government business. Such discounts may include, but are not limited to, lodging and rental car rates.

(b) The Contractor shall be responsible for obtaining and/or providing to his/her employees written evidence of their status with regard to their performance of Government contract work needed to obtain such discounts.

(a) To the maximum extent practical, the Contractor shall make use of travel discounts which are available to Federal employees while traveling in the conduct of official Government business. Such discounts may include, but are not limited to, lodging and rental car rates.

(b) The Contractor shall be responsible for obtaining and/or providing to his/her employees written evidence of their status with regard to their performance of Government contract work needed to obtain such discounts.

(End of clause)

**SECTION J – LIST OF ATTACHMENTS**

**Innovation in Affordable Housing Student  
Design and Planning Competition**

**Policy Development and Research (PD&R)**

**86614624C00005**

**PART III – LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS**

**SECTION J - LIST OF ATTACHMENTS**

**Contract Attachment**

Attachment **J.1** – Non-Disclosure Agreement between HUD and Contractor Employee