


SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30				1. REQUISITION NUMBER RCS-R-2024-00039		PAGE OF 1 78	
2. CONTRACT NO. 86614624C00004		3. AWARD/ EFFECTIVE DATE 09/30/2024	4. ORDER NUMBER		5. SOLICITATION NUMBER 86614624Q00001		6. SOLICITATION ISSUE DATE 08/05/2024
7. FOR SOLICITATION INFORMATION CALL: 		a. NAME TIMOTHY SMITH		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: 541720 SIZE STANDARD: \$28			
11. DELIVERY FOR FOB DESTINA- TION UNLESS BLOCK IS MARKED <input checked="" type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS		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		14. METHOD OF SOLICITATION <input checked="" type="checkbox"/> RFQ <input type="checkbox"/> IFB <input type="checkbox"/> RFP			
17a. CONTRACTOR/ OFFEROR CODE WR4LJXNPX627 OPTIMAL SOLUTIONS GROUP LLC 5825 UNIVERSITY RESEARCH COURT SUITE 1100 COLLEGE PARK MD 20740-3822 TELEPHONE NO.		FACILITY CODE		18a. PAYMENT WILL BE MADE BY CODE ARC/ASD/IPP ARCASDIPP SUBMIT INVOICES VIA THE INVOICE PROCESSING PLATFORM AT WWWIPPGOV INQUIRIES CALL 304-480-8000 7			
<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: 52-2216205 DUNS Number: Not Available 86614624C00004 - Housing Insecurity Research Support for the AHS The contractor shall provide services for the Housing Insecurity Research Support for the AHS for the U.S. Department of Housing and Urban Development (HUD), Office of Policy Development and Research (PD&R). The Contractor shall generate an updated literature review on housing (Use Reverse and/or Attach Additional Sheets as Necessary)						
25. ACCOUNTING AND APPROPRIATION DATA See schedule						26. TOTAL AWARD AMOUNT (For Govt. Use Only) \$798,975.00	
<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 type="checkbox"/> ARE <input checked="" 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 Mark Turner				31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)			
30b. NAME AND TITLE OF SIGNER (Type or print) Mark Turner, President & CEO		30c. DATE SIGNED 9/29/2024		31b. NAME OF CONTRACTING OFFICER (Type or print) CATHY J. BAKER		31c. DATE SIGNED 09/29/2024	
AUTHORIZED FOR LOCAL REPRODUCTION PREVIOUS EDITION IS NOT USABLE						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
	insecurity (including an analytic review of the report 'Measuring Housing Insecurity: Index Development Using American Housing Survey Data'), convene an expert roundtable on housing insecurity, develop a plan for analyses to be carried out at the end of the first year and through the second year of the contract - with a particular focus and emphasis upon developing an index to measure housing insecurity, develop programs to analyze AHS public use data, perform an initial analysis of this data, and produce interim and final reports for researchers and policymakers internal to HUD emphasizing the methodological developments that have been made through this work to creating an index to measure housing insecurity. Delivery: 09/29/2025 Accounting Info: HUD0108DB2425XX-2024-61000001-251002-HUDPD00000000-XXXXXXXXXX-HUDRCGC00000-HUDRECA-XXXXXXXXXX-XXXX-XXXXXXXXXX-XXXXXXXXXXXX-XXXXXXXXXX-XXXXXXXXXX-Period of Performance: 09/30/2024 to 09/29/2025				
0001	Base - Project Management - PWS Section C.5.1 Award Type: Firm-fixed-price Ceiling Amount: \$81,933.00				49,195.00
0001AA	Base - Orientation Meeting - PWS Section C.5.1.1 Continued ...	1	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	37. CHECK NUMBER
<input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL			<input type="checkbox"/> COMPLETE <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			42a. RECEIVED BY (<i>Print</i>)	
41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER		41c. DATE	42b. RECEIVED AT (<i>Location</i>)	
			42c. DATE REC'D (YY/MM/DD)	42d. TOTAL CONTAINERS

CONTINUATION SHEET	REFERENCE NO. OF DOCUMENT BEING CONTINUED 86614624C00004	PAGE	OF
		3	78

NAME OF OFFEROR OR CONTRACTOR
OPTIMAL SOLUTIONS GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Qty 1 x \$7,392.00 = \$7,392.00 Award Type: Firm-fixed-price (Not Separately Priced)				
0001AB	Base - Management Plan - PWS Section C.5.1.2 Qty 1 x \$2,355.00 = \$2,355.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0001AC	Base - Monthly Progress Reports and Ongoing Communication- PWS Section C.5.1.3 Qty 12 x \$3,287.33 = \$39,448.00 Award Type: Firm-fixed-price (Not Separately Priced)	12	EA	NSP	NSP
0001AD	Option 1 - Monthly Progress Reports and Ongoing Communication- PWS Section C.5.1.3 Qty 12 x \$2,728.17 = \$32,738.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026	12	EA	NSP	0.00
0002	Base - Generate an Updated Literature Review on Housing Insecurity - PWS Section C.5.2 Obligated Amount: \$81,433.00 Award Type: Firm-fixed-price				81,433.00
0002AA	Base - Analytic Brief on the 2023 Measuring Housing Insecurity: Index Development Using American Housing Survey (AHS) Data Report - PWS Section C.5.2.1 Qty 1 x \$50,553.00 = \$50,553.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0002AB	Base - Generate Literature Review on Housing Insecurity - PWS Section C.5.2.2 Qty 1 x \$30,880.00 = \$30,880.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0003	Base - Convene an Expert Roundtable on Housing Insecurity - PWS Section C.5.3 Obligated Amount: \$74,881.00 Award Type: Firm-fixed-price Continued ...				74,881.00

CONTINUATION SHEET

 REFERENCE NO. OF DOCUMENT BEING CONTINUED
 86614624C00004

 PAGE OF
 4 78

 NAME OF OFFEROR OR CONTRACTOR
 OPTIMAL SOLUTIONS GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
0003AA	Base - Identification of Experts List - PWS Section C.5.3.1 Qty 1 x \$11,779.00 = \$11,779.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0003AB	Base - Develop Program for Expert Roundtable - PWS Section C.5.3.2 Qty 1 x \$36,718.00 = \$36,718.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0003AC	Base - Hold Expert Roundtable - PWS Section C.5.3.3 Qty 1 x \$14,569.00 = \$14,569.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0003AD	Base - Generate Expert Roundtable Feedback Report - PWS Section C.5.3.4 Qty 1 x \$11,815.00 = \$11,815.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0003AE	Base - Honorarium - PWS Section C.5.3.5 Qty 10 x \$1,200.00 = \$12,000.00 Award Type: Cost (Not Separately Priced)	10	EA	NSP	NSP
0004	Base - Develop Analysis Plans for Years 1 & 2 of the Contract - PWS Section C.5.4 Obligated Amount: \$93,859.00 Award Type: Firm-fixed-price				93,859.00
0004AA	Base - Generate Analysis Plan for Contract Year 1 - PWS Section C.5.4.1 Qty 1 x \$65,124.00 = \$65,124.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0004AB	Base - Generate Analysis Plan for Contract Year 2 - PWS Section C.5.4.2 Qty 1 x \$28,735.00 = \$28,735.00 Award Type: Firm-fixed-price Continued ...	1	EA	NSP	NSP

CONTINUATION SHEET	REFERENCE NO. OF DOCUMENT BEING CONTINUED	PAGE	OF
	86614624C00004	5	78

NAME OF OFFEROR OR CONTRACTOR
OPTIMAL SOLUTIONS GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	(Not Separately Priced)				
0005	Base - Perform Initial Analysis of American Housing Survey Public-Use File Data - PWS Section C.5.5 Award Type: Firm-fixed-price Ceiling Amount: \$198,742.00				167,191.00
0005AA	Base - Develop Code for the Analysis of AHS Public Use Data - PWS Section C.5.5.1 Qty 1 x \$100,517.00 = \$100,517.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0005AB	Base - Using the Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File Data - PWS Section C.5.5.2 Qty 1 x \$66,674.00 = \$66,674.00 Award Type: Firm-fixed-price (Not Separately Priced)	1	EA	NSP	NSP
0005AC	Option 1 - Final Analysis Plan for Contract Years 2, Informed by Results of Initial Analysis - PWS Section C.5.5.3 Qty 1 x \$31,551.00 = \$31,551.00 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
0006	Option 1 - Produce Interim Report- 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
0006AA	Option 1 - Generate one Interim Report Containing Writeup of Preliminary Analysis (Option Year 1) - PWS Section C.5.6.1 Qty 1 x \$92,715.00 = \$92,715.00 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
0006AB	Option 1 - Prepare one Interim Report Briefing Continued ...	1	EA	NSP	0.00

CONTINUATION SHEET	REFERENCE NO. OF DOCUMENT BEING CONTINUED	PAGE	OF
	86614624C00004	6	78

NAME OF OFFEROR OR CONTRACTOR
OPTIMAL SOLUTIONS GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Document (Option Year 1) - PWS Section C.5.6.2 Qty 1 x \$31,613.00 = \$31,613.00 Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026				
0006AC	Option 1 - Deliver one Interim Report Briefing Meeting (Option Year 1) - PWS Section C.5.6.3 Qty 1 x \$5,382.00 = \$5,382.00 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
0007	Option 1 - Produce Final 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
0007AA	Option 1 - Drafts 1 and 2 of Final Report (Option Year 1) - PWS Section C.5.7.1 Qty 1 x \$83,746.00 = \$83,746.00 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
0007AB	Option 1 - Prepare Final Report Briefing Document (Option Year 1) - PWS Section C.5.7.2 Qty 1 x \$29,752.00 = \$29,752.00 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
0007AC	Option 1 - Deliver Final Report Briefing Meeting (Option Year 1)- PWS Section C.5.7.3 Qty 1 x \$4,941.00 = \$4,941.00 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
0007AD	Option 1 - Generate Publication-Ready Final Report (Option Year 1)- PWS Section C.5.7.4 Qty 1 x \$19,978.00 = \$19,978.00 Continued ...	1	EA	NSP	0.00

NAME OF OFFEROR OR CONTRACTOR
OPTIMAL SOLUTIONS GROUP LLC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	<div>Award Type: Firm-fixed-price (Option Line Item) (Not Separately Priced) Period of Performance: 09/30/2025 to 09/29/2026 The obligated amount of award: \$466,559.00. The total for this award is shown in box 26.</div>				

Table of Contents

Page

PART I – THE SCHEDULE

SECTION B - SUPPLIES OR SERVICES AND PRICE/COSTS.....	9
SECTION C - DESCRIPTION/PERFORMANCE WORK STATEMENT (PWS).....	14
SECTION D - PACKAGING AND MARKING.....	47
SECTION E - INSPECTION AND ACCEPTANCE.....	48
SECTION F - DELIVERIES OR PERFORMANCE.....	49
SECTION G - CONTRACT ADMINISTRATION DATA.....	50
SECTION H - SPECIAL CONTRACT REQUIREMENTS.....	59

PART II – CONTRACT CLAUSES

SECTION I - CONTRACT CLAUSES.....	68
------------------------------------------	-----------

PART III – LIST OF ATTACHMENTS

SECTION J - LIST OF ATTACHMENTS.....	78
---------------------------------------------	-----------

PART I – THE SCHEDULE
SECTION B - SUPPLIES OR SERVICES AND PRICES/COSTS

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 **541720 – Research and Development in the Social Sciences and Humanities** for performance of the services stated in Section C, Performance Work Statement. This is a 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 **Housing Insecurity Research Support for the AHS** for the U.S. Department of Housing and Urban Development (HUD), Office of Policy Development and Research (PD&R). The Contractor shall generate an updated literature review on housing insecurity (including an analytic review of the report “Measuring Housing Insecurity: Index Development Using American Housing Survey Data”), convene an expert roundtable on housing insecurity, develop a plan for analyses to be carried out at the end of the first year and through the second year of the contract – **with a particular focus and emphasis upon developing an index to measure housing insecurity**, develop programs to analyze AHS public use data, perform an initial analysis of this data, and produce interim and final reports for researchers and policymakers internal to HUD emphasizing the methodological developments that have been made through this work to creating an index to measure housing insecurity.

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

Base (Year 1) and Option 1 (Year 2)

CLIN	CLIN Type	Description	PWS Section	Qty	Unit	Unit Price	Total Price
0001	FP-FUR	Project Management	C.5.1				\$81,933.00
0001AA	FP	Orientation Meeting	C.5.1.1	1	EA	\$7,392.00	\$7,392.00
0001AB	FP	Management Plan	C.5.1.2	1	EA	\$2,355.00	\$2,355.00
0001AC	FP-FUR	Monthly Progress Reports and Ongoing Communication (Base)	C.5.1.3	12	EA	\$3,287.33	\$39,448.00
0001AD	FP-FUR	Monthly Progress Reports and Ongoing Communication (Option 1 -Year 2)	C.5.1.3	12	EA	\$2,728.17	\$32,738.00
0002	FP	Generate an Updated Literature Review on Housing Insecurity	C.5.2				\$81,433.00
0002AA	FP	Analytic Brief on the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report	C.5.2.1	1	EA	\$50,553.00	\$50,553.00
0002AB	FP	Generate Literature Review on Housing Insecurity	C.5.2.2	1	EA	\$30,880.00	\$30,880.00
0003	FP CR	Convene an Expert Roundtable on Housing Insecurity	C.5.3				\$74,881.00
0003AA	FP	Identify the leading experts on Housing Insecurity Research and Measurement, with guidance from HUD	C.5.3.1	1	EA	\$11,779.00	\$11,779.00
0003AB	FP	Develop Program for Expert Roundtable	C.5.3.2	1	EA	\$24,718.00	\$24,718.00
0003AC	FP	Expert Roundtable on Housing Insecurity	C.5.3.3	1	EA	\$14,569.00	\$14,569.00
0003AD	FP	Generate Expert Roundtable Feedback Report	C.5.3.4	1	EA	\$11,815.00	\$11,815.00
0003AE	CR	Honorarium	C.5.3.5	10	EA	\$1,200.00	\$12,000.00
0004	FP	Develop Analysis Plans for Year 1 and Year 2 of the Contract	C.5.4				\$93,859.00
0004AA	FP	Generate Analysis Plan for Contract Year 1	C.5.4.1	1	EA	\$65,124.00	\$65,124.00
0004AB	FP	Generate Analysis Plan for Contract Year 2	C.5.4.2	1	EA	\$28,735.00	\$28,735.00
0005	FP	Perform Initial Analysis of American Housing Survey Public-Use File (PUF) Data	C.5.5				\$198,742.00
0005AA	FP	Develop Code for the Analysis of AHS Public Use Data	C.5.5.1	1	EA	\$100,517.00	\$100,517.00
0005AB	FP	Using the Revised Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File	C.5.5.2	1	EA	\$66,674.00	\$66,674.00

CLIN	CLIN Type	Description	PWS Section	Qty	Unit	Unit Price	Total Price
0005AC	FP	Final Analysis Plan for Contract Years 2 (Option Year), Informed by Results of Initial Analysis	C.5.5.3	1	EA	\$31,551.00	\$ 31,551.00
0006	FP	Produce Interim Report (Option 1 – Year 2)	C.5.6				\$129,710.00
0006AA	FP	Generate one Interim Report Containing Writeup of Preliminary Analysis (Option 1 - Year 2)	C.5.6.1	1	EA	\$92,715.00	\$92,715.00
0006AB	FP	Prepare one Interim Report Briefing Document (Option 1 - Year 2)	C.5.6.2	1	EA	\$31,613.00	\$31,613.00
0006AC	FP	Deliver one Interim Report Briefing Meeting (Option 1 - Year 2)	C.5.6.3	1	EA	\$5,382.00	\$5,382.00
0007	FP	Generate Final Report (Option 1 – Year 2)	C.5.7				\$138,417.00
0007AA	FP	Drafts 1 and 2 of Final Report (Option 1 - Year 2)	C.5.7.1	1	EA	\$83,746.00	\$83,746.00
0007AB	FP	Prepare Final Report Briefing Document (Option 1 - Year 2)	C.5.7.2	1	EA	\$29,752.00	\$29,752.00
0007AC	FP	Deliver Final Report Briefing Meeting (Option 1 - Year 2)	C.5.7.3	1	EA	\$4,941.00	\$4,941.00
0007AD	FP	Generate Publication-Ready Final Report (Option 1 - Year 2)	C.5.7.4	1	EA	\$19,978.00	\$19,978.00
		Base and Option 1 Total Value					\$798,975.00

Base (Year 1)

CLIN	CLIN Type	Description	PWS Section	Qty	Unit	Unit Price	Total Price
0001	FP-FUR	Project Management	C.5.1				\$49,195.00
0001AA	FP	Orientation Meeting	C.5.1.1	1	EA	\$7,392.00	\$7,392.00
0001AB	FP	Management Plan	C.5.1.2	1	EA	\$2,355.00	\$2,355.00
0001AC	FP-FUR	Monthly Progress Reports and Ongoing Communication (Base)	C.5.1.3	12	EA	\$3,287.33	\$39,448.00
0002	FP	Generate an Updated Literature Review on Housing Insecurity	C.5.2				\$81,433.00
0002AA	FP	Analytic Brief on the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report	C.5.2.1	1	EA	\$50,553.00	\$50,553.00
0002AB	FP	Generate Literature Review on Housing Insecurity	C.5.2.2	1	EA	\$30,880.00	\$30,880.00
0003	FP CR	Convene an Expert Roundtable on Housing Insecurity	C.5.3				\$74,881.00
0003AA	FP	Identify the leading experts on Housing Insecurity Research and Measurement, with guidance from HUD	C.5.3.1	1	EA	\$11,779.00	\$11,779.00
0003AB	FP	Develop Program for Expert Roundtable	C.5.3.2	1	EA	\$24,718.00	\$24,718.00
0003AC	FP	Expert Roundtable on Housing Insecurity	C.5.3.3	1	EA	\$14,569.00	\$14,569.00
0003AD	FP	Generate Expert Roundtable Feedback Report	C.5.3.4	1	EA	\$11,815.00	\$11,815.00
0003AE	CR	Honorarium	C.5.3.5	10	EA	\$1,200.00	\$12,000.00
0004	FP	Develop Analysis Plans for Year 1 and Year 2 of the Contract	C.5.4				\$93,859.00
0004AA	FP	Generate Analysis Plan for Contract Year 1	C.5.4.1	1	EA	\$65,124.00	\$65,124.00
0004AB	FP	Generate Analysis Plan for Contract Year 2	C.5.4.2	1	EA	\$28,735.00	\$28,735.00
0005	FP	Perform Initial Analysis of American Housing Survey Public-Use File (PUF) Data	C.5.5				\$167,191.00
0005AA	FP	Develop Code for the Analysis of AHS Public Use Data	C.5.5.1	1	EA	\$100,517.00	\$100,517.00
0005AB	FP	Using the Revised Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File	C.5.5.2	1	EA	\$66,674.00	\$66,674.00
		BASE YEAR TOTAL PRICE					\$466,559.00

Option 1 (Year 2)

CLIN	CLIN Type	Description	PWS Section	Qty	Unit	Unit Price	Total Price
0001	FP-FUR	Project Management	C.5.1				\$32,738.00
0001AD	FP-FUR	Monthly Progress Reports and Ongoing Communication (Option 1 -Year 2)	C.5.1.3	12	EA	\$2,728.17	\$32,738.00
0005	FP	Perform Initial Analysis of American Housing Survey Public-Use File (PUF) Data	C.5.5				\$31,551.00
0005AC	FP	Final Analysis Plan for Contract Years 2 (Option Year), Informed by Results of Initial Analysis	C.5.5.3	1	EA	\$31,551.00	\$ 31,551.00
0006	FP	Produce Interim Report (Option 1 – Year 2)	C.5.6				\$129,710.00
0006AA	FP	Generate one Interim Report Containing Writeup of Preliminary Analysis (Option 1 - Year 2)	C.5.6.1	1	EA	\$92,715.00	\$92,715.00
0006AB	FP	Prepare one Interim Report Briefing Document (Option 1 - Year 2)	C.5.6.2	1	EA	\$31,613.00	\$31,613.00
0006AC	FP	Deliver one Interim Report Briefing Meeting (Option 1 - Year 2)	C.5.6.3	1	EA	\$5,382.00	\$5,382.00
0007	FP	Generate Final Report (Option 1 – Year 2)	C.5.7				\$138,417.00
0007AA	FP	Drafts 1 and 2 of Final Report (Option 1 - Year 2)	C.5.7.1	1	EA	\$83,746.00	\$83,746.00
0007AB	FP	Prepare Final Report Briefing Document (Option 1 - Year 2)	C.5.7.2	1	EA	\$29,752.00	\$29,752.00
0007AC	FP	Deliver Final Report Briefing Meeting (Option 1 - Year 2)	C.5.7.3	1	EA	\$4,941.00	\$4,941.00
0007AD	FP	Generate Publication-Ready Final Report (Option 1 - Year 2)	C.5.7.4	1	EA	\$19,978.00	\$19,978.00
		OPTION YEAR 1 TOTAL PRICE					\$332,416.00

B.4 Travel - Included in Fixed Unit Prices

This is a fixed-priced contract. All travel costs shall be in the fixed unit prices for the tasks stated in Section C.5, if applicable.

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

Not Applicable

SECTION C - DESCRIPTION/PERFORMANCE WORK STATEMENT (PWS)

Vision Statement

Advance research on the measurement and indexing of housing insecurity through updating prior related work, developing housing insecurity indexes with 2023 AHS data, and recommending questions for future iterations of the housing insecurity module.

1.0 General Information

1.1 Scope of Work

The Department of Housing and Urban Development (HUD), Office of Policy Research and Development (PD&R) requires contractor support to generate an updated literature review on housing insecurity (including an analytic review of the report “Measuring Housing Insecurity: Index Development Using American Housing Survey Data”), convene an expert roundtable on housing insecurity, develop a plan for analyses to be carried out at the end of the first year (Base Year) and through the second year (Option Year) of the contract – **with a particular focus and emphasis upon developing an index to measure housing insecurity**, develop programs to analyze AHS public use data, perform an initial analysis of this data, and produce interim and final reports for researchers and policymakers internal to HUD emphasizing the methodological developments that have been made through this work to creating an index to measure housing insecurity.

The main tasks as stated in Section 5 are the following:

5.1 Project Management

- 5.1.1 Orientation Meeting
- 5.1.2 Management Plan
- 5.1.3 Monthly Progress Reports and Ongoing Communication (Base an Option Year)

5.2 Generate an Updated Literature Review on Housing Insecurity

- 5.2.1 Analytic Brief on the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report
- 5.2.2 Generate Literature Review on Housing Insecurity

5.3 Convene an Expert Roundtable on Housing Insecurity

- 5.3.1 Identify the leading experts on Housing Insecurity Research and Measurement, with guidance from HUD
- 5.3.2 Develop Program for Expert Roundtable
- 5.3.3 Expert Roundtable on Housing Insecurity
- 5.3.4 Generate Expert Roundtable Feedback Report
- 5.3.5 Honorarium

5.4 Develop Analysis Plans for Year 1 and Year 2 of the Contract

- 5.4.1 Generate Analysis Plan for Contract Year 1
- 5.4.2 Generate Analysis Plan for Contract Year 2

5.5 Perform Initial Analysis of American Housing Survey Public-Use File Data

- 5.5.1 Develop Code for the Analysis of AHS Public Use Data
- 5.5.2 Using the Revised Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File Data
- 5.5.3 Final Analysis Plans, Informed by Results of Initial Analysis (Option Year)

5.6 Produce Interim Report (Option Year)

- 5.6.1 Generate one Interim Report Containing Writeup of Preliminary Analysis
- 5.6.2 Prepare one Interim Report Briefing Document
- 5.6.3 Deliver one Interim Report Briefing Meeting

5.7 Produce Final Report (Option Year)

- 5.7.1 Drafts 1 and 2 of Final Report
- 5.7.2 Prepare Final Report Briefing Document

- 5.7.3 Deliver Final Report Briefing Meeting
- 5.7.4 Generate Publication-Ready Final Report

1.2 Background

The AHS is designed to provide current information on the size and composition of the housing inventory, the characteristics of its occupants, changes in the inventory resulting from new construction, indicators of housing and neighborhood quality, and the characteristics of recent movers.

Housing insecurity is defined as a significant lapse for a given household of one or more elements of secure housing. The key elements include affordability, stable occupancy, and whether the housing is decent and safe. “Affordability” implies that shelter costs are manageable over the long term without severely burdening or compromising other consumption that normally is essential for health and well-being. “Stable occupancy” implies that the household does not face substantial risk of involuntary displacement for economic or non-economic reasons. “Decent and safe” implies that a unit has physical attributes that satisfy functional needs for well-being related to health, security, and support for the activities of daily living. Such attributes include appropriate facilities for excluding external threats, providing climate control, storing and preparing food, maintaining physical and mental hygiene, and developing human potential. Not included are aspects of the neighborhood or environment that one encounters beyond the confines of the structure or property.

Researchers, policymakers, program leaders, and practitioners widely use the concept of housing insecurity, yet it has not been defined or measured consistently in research literature. The lack of a comprehensive consensus measure makes it impossible to track prevalence of housing insecurity from year to year and to examine the correlation of housing insecurity with health, education, employment, and criminal justice outcomes. No comprehensive transferable instrument currently exists for measuring housing insecurity in national surveys.

In 2017, PD&R at HUD identified the development of a housing insecurity module in the AHS as a research priority.¹ The Housing Insecurity Research Module (HIRM), which was collected as a opt-in follow-on survey to the 2019 AHS, was developed to provide data on multiple dimensions of housing insecurity that could be used in the development of housing insecurity indices.² HUD funded research on the prior Housing Insecurity Research Support Contract to develop housing insecurity indexes with the 2019 AHS data and to inform decisions on a reduced set of housing insecurity questions to be asked in the 2023 AHS.

1.3 Constraints

The services identified in this PWS will adhere to the rules, regulations, laws, standards, and conventions identified by HUD as well as within the Federal Government.

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

¹ 2017. “HUD Research Roadmap: 2017 Update.” January 2017. U.S. Department of Housing and Urban Development, Office of Policy Development and Research. (<https://www.huduser.gov/portal/pdf/ResearchRoadmap-2017Update.pdf>).

² Watson, Nicole Elsasser, and George R. Carter III. 2020. “Toward Implementation of a National Housing Insecurity Research Module.” *Cityscape: A Journal of Policy Development and Research*. 22(1): 227-247. (<https://www.huduser.gov/portal/periodicals/cityscpe/vol22num1/article8.html>).

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 Contactor shall be the sole responsibility of the Government.

1.5 Period of Performance

The period of performance shall be for one base period of 12 months from the date of award and one 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 through 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 HUD Acquisition Regulation (HUDAR) clause 2452.237-79 - Post Award Conference.

1.10 Status Meetings

The Contracting Officer (CO), Contracting Officers 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 CO 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. The Post Award Conference and subsequent meetings may be held via teleconference.

1.11 Contractor Travel

This is a fixed-price contract. All travel costs shall be in the fixed unit price.

1.12 Transition In

N/A.

1.13 Transition Out

N/A.

2.0 Definitions and Acronyms

2.1 Definitions

Business Day/Workday - Every official day of the week which are days between and including Monday to Friday. This does not include federal 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 about 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 the 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) - 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 deliverable under a cost contract when accepted by the Government for continued use under the contract.

Housing Insecurity (HI)- A significant lapse for a given household of one or more elements of secure housing; key elements include affordability, stable occupancy, and safety and decency.

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 standards for these requirement 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 describes the required results in clear, specific, and objective terms with measurable outcomes.

Physical Security- Actions that prevent the loss or damage of Government property.

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.

Service Contract - A contract that directly engages the time and effort of a Contractor whose primary purpose is to perform an identifiable task rather than to furnish an end item of supply.

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.

Work Week - Monday through Friday, unless specified otherwise.

2.2 Acronyms

AHS - American Housing Survey
AQL - Acceptable Quality Level
BAA – Business Area Analysis Study
CBT - Computer-Based Training
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
CPO - Office of the Chief Procurement Officer of HUD
EA - Each
EOP - Executive Office of the President
EST - Eastern Standard Time (U.S.)
ETC - Estimate to Completion
GAO - Government Accountability Office
GPO - Government Printing Office
HDAD - Housing and Demographic Analysis Division
HI - Housing Insecurity
HIRM - Housing Insecurity Research Module
HUD - U.S. Department of Housing and Urban Development
HUDAR - HUD Acquisition Regulation
IG or OIG - Inspector General (Office of)
IPP - Invoice Processing Platform
IT - Information Technology
IUF – Internal Use File (of the AHS)
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
PL - Public Law
PM - Project Manager
POC - Point of Contact
PPM - Project Planning and Management
PRA - Paperwork Reduction Act
PUF - Public Use File (of the AHS)
QA - Quality Assurance
QASP - Quality Assurance Surveillance Plan
QC - Quality Control
QCP - Quality Control Plan
RFP - Request for Proposal
SAS - Statistical Analysis System ®
SCOR - Subordinate Contracting Officers Representative
SF - Standard Form
TBD - To be determined
U.S.C. - United States Code

3.0 Government-Furnished Property and Services

3.1 Government Services

Government services will not be provided.

3.2 Facilities

Government services will not be provided.

3.3 Equipment

Government services will not be provided.

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 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 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 of performance.

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 to distinguish themselves from Government employees. When conversing with Government personnel during business meetings, 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 at a minimum, "Contractor" after name.

5.0 Specific Tasks

a. Editorial Standards

The deliverables associated with the below Tasks must be in compliance with the following Editorial Standards.

5.2 Generate an Updated Literature Review on Housing Insecurity

5.6 Produce Interim Report

5.7 Generate Final Report

Additionally, the Analysis Plans described in Tasks 5.4.1 and 5.4.2, which are to be included in the technical appendix to the Interim and Final Reports, must also be in full compliance when they are submitted as part of these reports.

b. Editorial Standards for Written Reports/Briefs:

Editorial Standards for Written Reports/Briefs to be provided under this contract:

Editorial Standards: The Contractor shall be responsible for creating publications for HUD and the public in a clear and accessible manner to both technical and non-technical audiences. Reports shall be stand-alone documents that provide an overview of the subject, a summary of the research questions, and the data collection and analysis activities that were undertaken to address the research question or questions covered in each report. The reports are expected to be of publishable quality, and HUD intends to publish several of these reports on www.huduser.gov.

The Contractor shall not be required to modify or eliminate independent opinions, judgments, conclusions, or views. Where the Contractor's views do not coincide with HUD's views, the Contractor shall be required to clearly label such independent views. HUD may require language inserts to label such independent views. If there is disagreement regarding the adequacy of the data, methodology, calculations, analyses, or other technical elements of the work used to support the independent views of the Contractor, HUD may require the insertion of a clearly labeled HUD dissent (or dissents) in the text of the final approved version of a report. Disapproved reports shall be resubmitted for review following correction of the cited deficiency. The complete text of an approved report shall be submitted in accordance with the instructions provided in PD&Rs "Guidelines of Preparing a Report for Publication" that can be found at the following link: <https://www.huduser.gov/portal/About/style-guide-for-reports.pdf>.

The Contractor shall use the following disclaimer for each report required in this contract:

"The contents of this report are the views of the Contractor and do not necessarily reflect the views or policies of the U.S. Department of Housing and Urban Development or the U.S. Government."

Contractors are responsible for ensuring that all final written publications submitted to HUD are accessible to persons with disabilities by ensuring all written materials comply with federal accessibility standards (Section 508 - www.section508.gov). Federal law requires all web-based publications be accessible to people with disabilities, including those with vision impairments. Before delivering electronic reports, contractors shall ensure that all elements of the report are Section 508 compliant. 508 compliance requires alternative text (alt text) for all images, graphs, photos, headers of charts/tables (but not for the data), maps as well as native files for these items. Alt text can be composed as a separate Word file, but it is preferable and best to include the alt text throughout the report's final draft.

In addition to including alt text, contractors shall do the following to ensure 508 compliance:

1. Do not include any merged cells in tables. All tables should have content in each cell.
2. No empty paragraph marks should remain in the document. Use the standard spacing that is applied when using the correct font styles in Word.
3. Only use colors that pass the color contrast analyzer.
4. Use the font styles correctly in the template. This ensures only one H1 tag is used in the publication title on the front page.
5. All endnotes converted to footnotes.
6. Enter in the document title in the title field under File > Info > Properties.

Contractors may not publish reports based on these tasks or otherwise disclose the contents of reports prepared under this contract to the public for 3 months following the formal submission of a report, unless the COR has provided the Contractor with written permission. After the 3-month period, the Contractor who wishes to publish shall include a clear notice that the research was performed under a contract with the Office of Policy Development & Research, U.S. Department of Housing and Urban Development. Although these reports will have been prepared with HUD funds, the Contractor may copyright the layout and design (but not the substantive language, which remains in the public domain).

5.1. Project Management

5.1.1 Orientation Meeting

The Contracting Office Representative (COR) and the Contracting Officer/Specialist (CO/CS) will collaborate on the date for 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.

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.

Performance Standards

- a) Standard: Timely: Deliver the Draft Agenda and Power Point Presentation (A001) within one (1) week after contract award. Deliver the Final Agenda and Presentation (A002) two (2) weeks after contract award.
- b) Standard: Timely: Conduct the Meeting shall be conducted within three (3) weeks after contract award.
- c) Standard: Timely: Deliver the Meeting Summary (A003) within one (1) week after the Orientation meeting.

AQL: Zero Deviation

Deliverables

A001: Draft Agenda and Power Point Presentation

A002: Final Agenda and Power Point Presentation

A003: Meeting Summary

5.1.2 Management Plan

The Contractor's draft Management Plan shall be delivered to the COR and CO within four (4) weeks after contract award. HUD will respond with comments within one (1) week. The Contractor shall submit a final Management Plan incorporating HUD's comments within one (1) week of receipt of HUD comments.

Subsequent revisions to the Management Plan shall be submitted to the COR and CO within 15 business days thereafter. 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 shall demonstrate it will meet the objectives and requirements contained within the Performance Work Statement.
- 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: Timely: Draft (A004) is submitted four (4) weeks after contract award.
- b) Standard: Timely: Final (A005) is submitted one (1) week of receipt of HUD comments.

AQL: Zero Deviation

Deliverables

A004 Draft Management Plan

A005 Final Management Plan

5.1.3 Monthly Progress Reports and Ongoing Communication

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 15th 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.

NA 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 15th 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.

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).

Performance Standards

a) Standard: Timely: The Contractor shall submit monthly reports (A006AA in the Base year and A006AB in the Option Year) by the 15th day of each month. Reports shall be submitted contemporaneously with payment invoices in a timely fashion. Monthly meetings should take place as agreed to and established by the Contractor and the COR.

AQL: Zero Deviation

Deliverables

A006AA Monthly Reports (Base Year)

A006AB Monthly Reports (Option Year)

5.2 Generate an Updated Literature Review on Housing Insecurity

5.2.1 Analytic Brief on the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report

The Contractor shall draft an analytic brief on the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report (<https://www.huduser.gov/portal/publications/Measuring-Housing-Insecurity-Index-Development-Using-AHS-Data.html>), focusing specifically upon (a) the housing insecurity research cited in the 2023 report, as well as (b) the methodological work involved in developing a scale to measure the multidimensional housing insecurity concept. The analytic brief will lay the groundwork for subsequent Tasks, including identifying housing insecurity experts, generating an updated literature review, and developing an analysis plan for the current contract. The Analytic Brief shall be no longer than 15 pages and shall be submitted within twelve (12) weeks following the award of the contract.

Performance Standards

a) Standard: Brief conveys accurate and reliable analysis of report findings informed by state-of-the-art methodology and techniques in well-written format.

AQL: Zero Deviation from Editorial Standards as outlined above in task 5.0.

b) Standard: Timely: The Contractor shall submit the brief twelve (12) weeks after contract award.

AQL: Zero Deviation

Deliverables

A007: Analytic Brief on 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report

5.2.2 Generate Literature Review on Housing Insecurity

The Contractor shall generate a literature review on the concept of housing insecurity, informed by the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report (<https://www.huduser.gov/portal/publications/Measuring-Housing-Insecurity-Index-Development-Using-AHS-Data.html>), with particular emphasis on conveying key research on the topic published from 2019 – present. A model for the Literature Review can be found in Appendix F of the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report. The literature review shall also be included in a Technical Appendix to the Interim and Final Reports. The Literature Review shall be submitted no later than seventeen (17) weeks following the award of the contract. The Literature Review shall be no longer than 50 pages in length.

Performance Standards

a) Standard: Literature Review conveys accurate and reliable analysis in a well-written format.

AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.

b) Standard: Timely: The Contractor shall submit the literature review within seventeen (17) weeks of the contract award.

AQL: Zero Deviation

Deliverables

A008: Literature Review on Housing Insecurity, focusing on research from 2019-present.

5.3 Convene an Expert Roundtable on Housing Insecurity

5.3.1 Identify the leading experts on Housing Insecurity Research and Measurement, with guidance from HUD

The Contractor shall identify the leading experts on Housing Insecurity Research and Measurement, with guidance from the HUD. The expert roundtable shall include no more than 10 academic experts and 4 experts from the Federal Government to discuss thoughts on defining, measuring, and indexing housing insecurity, in particular the dimensions of housing affordability, housing quality and safety, and residential stability. HUD will provide input on the selection of experts sixteen (16) weeks following the award of the contract, and in cases where individuals on the list are federal employees, HUD will manage outreach to these federal agency employees. Contractor shall submit a draft list eighteen (18) weeks after contract award. HUD will provide feedback on the draft list nineteen (19) weeks after the contract award. Contractor shall submit the final list of experts no later than twenty (20) weeks following the award of the contract.

Federal employees invited to speak are required to obtain any necessary Ethics Clearance by their respective Federal Agency or Department. Honorarium shall not be paid to federal employees who participate in the panel.

Performance Standards

a) Standard: Timely: HUD shall provide contractors with an expert list sixteen (16) weeks after contract award. Contractor shall submit the draft expert list to HUD no later than eighteen (18) weeks after contract award. HUD shall provide feedback on the draft nineteen (19) weeks after contract award. The Contractor shall submit the final expert list (A009) twenty (20) weeks after contract award.

AQL: Zero Deviation

Deliverables

A009: Identification of Experts List

5.3.2 Develop Program for Expert Roundtable

The contractor shall develop a program for the Expert Roundtable on Housing Insecurity, which will provide detailed information on the goals of the event: to provide a forum in which participants can identify the state of the art in housing insecurity research, scale design methodology and measurement of a multidimensional concept, as well as to discuss the 2023 “Housing Insecurity Research for the American Housing Survey” Report. The expert roundtable shall be a day-long virtual event. This program can in turn be used to provide a basis of information for invited panelists. The Program shall be submitted no later than twenty-two (22) weeks following the award of the contract. HUD will provide feedback within four business days of receipt, and should any revisions be necessary, these should be completed within one week of receiving HUD’s comments.

Performance Standards

a) Standard: Timely: The Contractor shall submit the Program (A010) twenty-two (22) weeks after contract award.

AQL: Zero Deviation

Deliverables

A010: Program for Expert Roundtable

5.3.3 Expert Roundtable on Housing Insecurity

The contractor shall manage all aspects of convening the Expert Roundtable on Housing Insecurity, a day-long virtual event, after the identification of experts and development of the event program are complete. This task shall include but is not limited to contacting panelists to inform them about the date/time/agenda/and login information for the expert roundtable, coordinating invites to participate, any related logistics information for the event, and circulating any related event materials in advance. For the event itself, the contractor shall manage the setup of the virtual event using the webhost of choice (Microsoft Teams, WebEx, Zoom, etc., to be decided with HUD colleagues), send the invitation for the event from their own account (as host), and facilitate the discussion using questions drafted for the purpose of structuring and sustaining the discussion among participants.

The contractor shall also need to coordinate with available HUD staff for the recording of notes from the roundtable, which the contractor shall use in Task 5.3.4 to generate the feedback report, as well as in Task 5.4.1 should the feedback indicate revisions may be needed to the Analysis Plans for the remainder of Year 1 (Base Year) and for Year 2 (Option Year). The Expert Roundtable is estimated to be conducted thirty-one (31) weeks after award.

The Contractor shall include progress updates in the monthly progress report in 5.1.3.

Performance Standards

a) Standard: Timely: The Contractor shall convene the Expert Roundtable thirty-one (31) weeks after award.

AQL: Zero Deviation

5.3.4 Generate Expert Roundtable Feedback Report

The contractor shall document feedback from the expert roundtable and use detailed notes from the event as the basis for the Report on Expert Roundtable Feedback. The Report shall be no longer than 50 pages and shall be submitted no later than two (2) weeks following the Expert Roundtable.

Performance Standards

a) Standard: Timely: The Contractor shall submit the Expert Roundtable Feedback Report (A011) two (2) weeks after the Expert Roundtable no more than thirty-three (33) weeks after award.

AQL: Zero Deviation.

Deliverables

A011: Expert Roundtable Feedback Report

5.3.4 Honorarium

The Contractor shall be reimbursed for the honorarium amount paid to each non-federal employee expert panel member in the amount of no greater than \$1200 for each non-federal employee. The Contractor shall provide the evidence of payment to the panel member.

5.4 Develop Analysis Plans for Years 1 & Year 2 of the Contract

5.4.1 Generate Analysis Plan for Contract Year 1

The contractor shall generate an analysis plan for Contract Year 1 (Base Year), which will be informed by the basis of knowledge established on housing insecurity to date (inclusive of Tasks 5.1 – 5.3) and sets reasonable research and analysis goals for the remainder of Contract Year 1 (Base Year). One of the primary goals of the analysis, which will be reflected in the analysis plan, is to build on scale development work in the previous contract, oriented toward establishing viable methods for measuring the multidimensionality of housing insecurity. Therefore, the analysis plan for year 1 (Base Year) should emphasize the work that will be done to continue and improve upon the development of an index to measure housing insecurity.

The Analysis Plan for Contract Year 1 (Base Year) shall be no longer than 30 pages in length, not including appendices. The Analysis Plan shall also be included in a Technical Appendix in the Interim and Final Reports. The Year 1 (Base Year) plan shall be submitted no later than twenty-five (25) weeks from the contract award. HUD will have one (1) week to review and provide comments, with the final Analysis Plan for Contract Year 1 (Base Year) due no later than twenty-seven (27) weeks from contract award.

Performance Standards

a) Standard: Timely: The Contractor shall submit the draft Analysis Plan (A012) for Contract Year 1 (Base Year) no later than twenty-five (25) weeks from contract award, and the final Analysis Plan (A013) for Contract Year 1 (Base Year) one week after receipt of HUD comments no later than twenty-seven (27) weeks from contract award.

AQL: Zero Deviation

Deliverables

A012: Draft Analysis Plan for Contract Year 1

A013: Final Analysis Plan for Contract Year 1

5.4.2 Generate Analysis Plan for Contract Year 2

The contractor shall generate an analysis plan for Contract Year 2 (Option Year) which considers deliverables due at the end of Contract Year 2 (Option Year) and develops timelines for Contract Year 2 (Option Year) accordingly. Consistently with the Analysis Plan for Year 1 (Base Year), the Analysis Plan for Year 2 (Option Year) will require continued methodological research, index development, and testing to establish viable methods for measuring the multidimensionality of housing insecurity. Therefore, the analysis plan for year 2 (Option Year) should emphasize the work that will be done in contract year 2 (Option Year) to continue and improve upon the development of an index to measure housing insecurity.

The Analysis Plan for Contract Year 2 (Option Year) shall be no longer than 30 pages in length, not including appendices. The Analysis Plan shall also be included in a Technical Appendix in the Interim and Final Reports. The Analysis Plan for Contract Year 2 (Option Year) shall be submitted no later than twenty-nine (29) weeks after contract award and HUD will have one (1) week to review and provide comments, with the final Analysis Plan for Contract Year 2 (Option Year) due no later than thirty-four (34) weeks after contract award.

Performance Standards

a) Standard: Timely: The Contractor shall submit the draft Analysis Plan for Contract Year 2 (Option Year) (A014) no later than twenty-nine (29) weeks after contract award, and the final Analysis Plan for Contract Year 2 (Option Year) (A015) two (2) weeks after receipt of HUD comments, submitted by thirty-four (34) weeks after contract award.

AQL: Zero Deviation

Deliverables

A014: Draft Analysis Plan for Contract Year 2

A015: Final Analysis Plan for Contract Year 2

5.5 Perform Initial Analysis of American Housing Survey Public-Use File (PUF) Data

Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.

5.5.1 Develop Code for the Analysis of AHS Public Use Data

The Contractor shall write code in SAS, STATA, R or a combination of these programming languages for the analysis of the PUF of the 2023 AHS data. Currently, SAS is the primary programming language used by both HUD and the United States Census Bureau. The Contractor shall ensure that the HUD can functionally replicate the results of the analysis as outlined in Tasks 5.5, 5.6, and 5.7. The 2023 American Housing Survey (AHS) has a sample size of approximately 100,000 housing units. The housing insecurity module was administered to half of the 2023 National AHS sample or approximately 50,000 housing units. The code shall include the use of the names and response categories for the new housing insecurity items provided by HUD. The code shall also be delivered to HUD for reference and replicability checks. The contractor shall write code for the analysis of AHS internal use file data when requested by HUD. The code shall be submitted no later than thirty-nine (39) weeks after contract award and HUD will have two (2) weeks to review and provide comments, with the revised code due no later than forty-three (43) weeks after contract award.

Performance Standards

a) Standard: Timely: The code (A016) shall be submitted no later than thirty-nine (39) weeks after contract award

and HUD will have two (2) weeks to review and provide comments, with the revised code (A017) due no later than forty-three (43) weeks after contract award.

AQL: Zero deviation.

Deliverables

A016: Initial Code for Housing Insecurity Analysis of 2023 AHS PUF Data

A017: Revised Code for Housing Insecurity Analysis of 2023 AHS PUF Data

5.5.2 Using the Revised Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File Data

The Contractor shall use the revised code developed in Task 5.5.1 (A017) to conduct an analysis of housing insecurity using the AHS 2023 PUF data. This initial analysis is meant to develop multidimensional and unidimensional housing insecurity scales, categorical housing insecurity variables derived from these scales, and determine housing insecurity module questions to be excluded from these scales, as well as Core AHS questions to be included in these scales. Scale validity shall be evaluated by methods including, but not limited to, comparison of scales to Worst Case Housing Needs measures and measures of generalized stress and health. The contractor shall produce tables and figures from the analysis (A018), create presentation slides including the tables and figures (A018 and A19), and brief HUD on the initial analysis (A20). The initial analysis tables, figures, and presentation slides shall be submitted to HUD no later forty-five (45) weeks after contract award. The contractor shall brief (A020) HUD on these materials (A018 and A019) in a briefing meeting that shall be held no later than forty-six (46) weeks after contract award.

Performance Standards

a) Standard: Timely: The initial analysis tables and figures (A018) and presentation slides (A019) shall be submitted to HUD no later forty-five (45) weeks after contract award. The contractor shall brief (A020) HUD on these materials (A018 and A019) in a briefing meeting that shall be held no later than forty-six (46) weeks after contract award.

b) Standard: Quality - Reports shall be drafted in accordance with the replicable standards in 5.5.

AQL: Zero Deviation.

Deliverables

A018: Tables and Figures from analysis, using A017 revised code

A019: Analysis slide deck, including A018 tables and figures, using A017 revised code

A020: Analysis briefing

5.5.3 Final Analysis Plan for Contract Year 2 (Option Year), Informed by Results of Initial Analysis

The Contractor shall draw from the results of the analysis performed in Task 5.5.2 to finalize the analysis plan for Contract Year 2 (Option Year) (submitted as Task 5.4.2). The final Analysis Plan for Contract Year 2 (Option Year) (A021) shall be submitted no later than fifty-five (55) weeks after contract award.

Performance Standards

a) Standard: Timely: Final Analysis Plan for Contract Year 2 (Option Year) (A021) informed by results of initial analysis of AHS PUF data shall be submitted no later than fifty-five (55) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A021: Final Analysis Plan for Contract Year 2 (Option Year) informed by results of initial analysis of AHS PUF data.

5.6 Produce Interim Report

Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.

5.6.1 Generate one Interim Report Containing Writeup of Preliminary Analysis

The Contractor shall produce one Interim Report (A023) which conveys the findings to date from the analysis of housing insecurity conducted on the 2023 American Housing Survey Public-Use File Data. If the code used for the Interim Report was updated after the revised code (A017) used for the initial analysis, this shall be delivered as a separate file (A022). Consistently with the Analytic Plans for Contract Years 1 (Base Year) and 2 (Option Year), the Interim Report shall communicate the methodological research and testing that have been done on the development of a viable index to measure housing insecurity. The report shall identify what has been done to date, including strengths and shortcomings of the current approach, as well as what remains to be done on the index prior to the end of the contract year 2 (Option Year). The code for the Interim Report (A022) and the Interim Report (A023) shall be submitted to HUD no later than sixty-seven (67) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

Performance Standards

a) Standard: Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.6

AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.

b) Standard: Timely - After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

c) Standard: Timely: The code for the Interim Report (A022) and the Interim Report (A023) shall be submitted to HUD no later than sixty-seven (67) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A022: Code for Interim Report on Housing Insecurity Analysis of 2023 American Housing Survey (AHS) Public Use File (PUF) Data, if revised from A017.

A023: Interim Report

5.6.2 Prepare one Interim Report Briefing Document

The contractor shall generate one Interim Report Briefing document (A024) to convey the highlights of findings to date from the analysis of housing insecurity conducted on the 2023 American Housing Survey Public-Use File Data, as well as the details set forth in the Interim Report. The Interim Report Briefing Document shall be submitted to HUD no later than sixty-seven (67) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days

after receipt of comments.

Performance Standards

a) Standard: Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.6

AQL: Zero Deviation

b) Standard: Timely - After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

AQL: Zero Deviation

c) Standard: Timely: The Interim Report Briefing Document (A024) shall be submitted to HUD no later than sixty-seven (67) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A024: Interim Report Briefing Document

5.6.3 Deliver one Interim Report Briefing Meeting

The contractor shall meet with HUD virtually using (Microsoft Teams, WebEx, Zoom, etc.) to deliver the Interim Report Briefing (A025), discuss findings to date from the analysis of housing insecurity conducted on the 2023 American Housing Survey Public-Use File Data, as well as the details set forth in the Interim Report, as well as to gather feedback from HUD. As mentioned in 5.6.1 above, if the code used for the Interim Report was updated after the revised code (A017) used for the initial analysis, this shall be delivered as a separate file (A022). The Interim Report Briefing meeting shall be held no later than sixty-seven (68) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

Performance Standards

a) Standard: Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.6.

AQL: Zero Deviation

b) Standard: Timely: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

AQL: Zero Deviation.

c) Standard: Timely: Hold Interim Briefing (A025) no later than sixty-eight (68) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A025: Interim Report Briefing

5.7 Generate Final Report

Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.

5.7.1 Drafts 1 and 2 of Final Report

The contractor shall incorporate HUD feedback from the Interim Report Briefing to inform the Final Report. The Final Report shall convey findings from the analysis of housing insecurity conducted on the 2023 American Housing Survey Public-Use File Data. Consistently with the Analytic Plans for Contract Years 1 (Base Year) and 2 (Option Year), and consistently also with the Interim Report, the Final Report shall communicate the methodological research and testing that have been done on the development of a viable index to measure housing insecurity. The report shall identify what has been done to date, including strengths and shortcomings of the current approach. Draft 1 (A026) shall be submitted no later than eighty-two (82) weeks after contract award; Draft 2 (A027) shall be submitted no later than 95 weeks after the contract award. The report shall be accompanied by a file containing the final code used in the analysis in the Final Report (A028). The file containing the final code using in the analysis of the Final Report (A028) shall be submitted no later than one hundred (100) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

Performance Standards

a) Standard: Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.7.

AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.

b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

AQL: Zero Deviation. Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days.

c) Standard: Timely: Draft 1 (A026) shall be submitted no later than eighty-two (82) weeks after contract award; Draft 2 (A027) shall be submitted no later than 95 weeks after the contract award. The report shall be accompanied by a file containing the final code used in the analysis in the Final Report (A028). The file containing the final code used in the analysis of the Final Report (A028) shall be submitted no later than one hundred (100) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A026: Final Report – Draft 1

A027: Final Report – Draft 2

A028: Code for Final Report on Housing Insecurity Analysis of 2023 American Housing Survey (AHS) Public Use File (PUF) Data

5.7.2 Prepare Final Report Briefing Document

The contractor shall generate one Final Report Briefing document (A029) to convey the highlights of findings from the analysis of housing insecurity conducted on the 2023 American Housing Survey Public-Use File Data, as well as the details set forth in the Interim Report. This document shall be submitted no later than ninety-nine (99) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the

Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

Performance Standards

a) Standard: Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.7.

AQL: Zero Deviation

b) Standard: Timely: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

AQL: Zero Deviation

c) Standard: Timely: Deliver Final Report Briefing document (A029) no later than ninety-nine (99) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A029: Final Report Briefing Document

5.7.3 Deliver Final Report Briefing Meeting

The contractor shall meet with HUD virtually using (Microsoft Teams, WebEx, Zoom, etc.) to deliver the Final Report Briefing (A030), discuss findings from the analysis of housing insecurity conducted on the 2023 American Housing Survey Public-Use File Data, as well as the details set forth in the Final Report, as well as to gather feedback from HUD. This meeting shall be held no later than one hundred (100) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

Performance Standards

a) Standard: Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.7.

AQL: Zero Deviation.

b) Standard: Timely: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

AQL: Zero Deviation.

c) Standard: Timely: Hold final report briefing meeting (A030) no later than one hundred (100) weeks after contract award.

AQL: Zero Deviation.

Deliverables

A030: Final Report Briefing Meeting

5.7.4 Generate Publication-Ready Final Report

The contractor shall incorporate HUD feedback from the Final Report Briefing to finalize and generate a publication-ready Final Report (A031). This document shall be submitted no later than one-hundred two (102) weeks after contract award. After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

Performance Standards

a) Standard Quality - Reports shall be drafted according to the editorial standards set forth above in task 5.0 and in accordance with the replicable standards in 5.7.

AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.

b) Standard: Timely: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.

AQL: Zero Deviation.

c) Standard: Timely: Deliver Publication-Ready Final Report (A031) no later than one-hundred two (102) weeks after contract award.

AQL: Zero deviation.

Deliverables

A031: Final Report – Publication-ready

6.0 Deliverables

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

	CLIN	PWS Section	Deliverable Name	QTY	Due After Effective Date (days/weeks/ /months)	Delivery Date	Gov Review (in weeks)
A001	0001AA	5.1.1	Draft Agenda and Power Point Presentation	1	1 week	10/07/2024	1
A002	0001AA	5.1.1	Final Agenda and Power Point Presentation	1	2 weeks	10/14/2024	1
A003	0001AA	5.1.1	Meeting Summary Document	1	4 weeks	10/28/2024	1
A004	0001AB	5.1.2	Draft Management Plan	1	4 weeks	10/28/2024	1
A005	0001AB	5.1.2	Final Management Plan	1	6 weeks	11/11/2024	1
A006AA	0001AC	5.1.3	Monthly Reports (Base Year)	12	Once Monthly	15 th of each month	1
A006AB	0001AD	5.1.3	Monthly Reports (Option Year)	12	Once Monthly	15 th of each month	1
A007	0002AA	5.2.1	Analytic Brief on 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report	1	12 weeks	12/23/2024	1
A008	0002AB	5.2.2	Literature Review on Housing Insecurity, focusing on research from 2019-present.	1	17 weeks	01/27/2025	
A009	0003AA	5.3.1	Identification of Experts List	1	20 weeks	02/17/2025	
A010	0003AB	5.3.2	Program for Expert Roundtable	1	22 weeks	03/03/2025	
A011	0003AD	5.3.4	Expert Roundtable Feedback Report	1	33 weeks	05/19/2025	
A012	0004AA	5.4.1	Draft Analysis Plan for Contract Year 1	1	25 weeks	03/24/2025	1

	CLIN	PWS Section	Deliverable Name	QTY	Due After Effective Date (days/weeks/ /months)	Delivery Date	Gov Review (in weeks)
A013	0004AA	5.4.1	Final Analysis Plan for Contract Year 1	1	27 weeks	04/07/2025	
A014	0004AB	5.4.2	Draft Analysis Plan for Contract Year 2	1	29 weeks	04/21/2025	1
A015	0004AB	5.4.2	Final Analysis Plan for Contract Year 2	1	34 weeks	05/26/2025	
A016	0005AA	5.5.1	Initial Code for Housing Insecurity Analysis of 2023 AHS PUF Data	1	39 weeks	06/29/2025	2
A017	0005AA	5.5.1	Revised Code for Housing Insecurity Analysis of 2023 AHS PUF Data	1	43 weeks	07/27/2025	2
A018	0005AB	5.5.2	Tables and Figures from analysis, using A018 revised code	1	45 weeks	08/10/2025	1
A019	0005AB	5.5.2	Analysis slide deck, including A019 tables and figures, using A018 revised code	1	45 weeks	08/10/2025	1
A020	0005AB	5.5.2	Analysis briefing	1	46 weeks	08/17/2025	1
A021	0005AC	5.5.3	Final Analysis Plan for Contract Year 2 (Option Year) informed by results of initial analysis of AHS PUF data.	1	55 weeks	10/20/2025	2
A022	0006AA	5.6.1	Code for Interim Report on Housing Insecurity Analysis of 2023 American Housing Survey (AHS) Public Use File (PUF) Data, if revised from A018.	1	67 weeks	01/12/2026	2
A023	0006AA	5.6.1	Interim Report	1	67 weeks	01/12/2026	2

	CLIN	PWS Section	Deliverable Name	QTY	Due After Effective Date (days/weeks/ /months)	Delivery Date	Gov Review (in weeks)
A024	0006AB	5.6.2	Interim Report Briefing Document	1	67 weeks	01/12/2026	2
A025	0006AC	5.6.3	Interim Report Briefing Meeting	1	68 weeks	01/19/2026	2
A026	0007AA	5.7.1	Final Report – Draft 1	1	82 weeks	04/27/2026	2
A027	0007AA	5.7.1	Final Report – Draft 2	1	95 weeks	07/26/2026	2
A028	0007AA	5.7.1	Code for Final Report on Housing Insecurity Analysis of 2023 American Housing Survey (AHS) Public Use File (PUF) Data	1	100 weeks	08/30/2026	2
A029	0007AB	5.7.2	Final Report Briefing Document	1	99 weeks	08/23/2026	1
A030	0007AC	5.7.3	Final Report Briefing Meeting	1	100 weeks	08/30/2026	1
A031	0007AD	5.7.4	Final Report – Publication-ready	1	102 weeks	09/13/2026	1
A032	NA	6.1	Preliminary Quality Control Plan	1	5 business days	10/04/2024	
A033	NA	6.1	Final Quality Control Plan	1	10 business days after COR review		
A034	NA	6.1	Proposed Quality Control Plan Changes		As needed during Period of Performance		
A035	NA	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 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 business days after contract award

6.1 Quality Control Plan

The Contractor shall establish and maintain a complete quality control program that shall 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 how 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 the level of quality that is consistent with the requirements specified in this contract. The QCP shall be sufficiently detailed to provide the Contractor's methodology for identifying and recruiting qualified personnel. The QCP shall also provide 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 provide 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 to be provided under the contract are completed with a level of quality that meets the minimum performance threshold established in the Government's QASP. The QCP shall address Quality Management Approach, Quality Assurance, Quality Control and Quality Standards.

The Contractor shall submit to the COR via email a Preliminary QCP within 5 business days after contract award. The Preliminary QCP shall have effective and independent quality control methods and procedures to ensure that 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 describe how the Contractor shall ensure the effective management of employees of the prime and subcontractors and their activities. The Preliminary QCP shall describe an approach to subcontractor management that makes clear the contractual and reporting relationships of all subcontractors. The Preliminary QCP shall include an organizational chart which reflects the independence of the Quality Control function.

No later than 10 business days of 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 / changes to the QCP during the period of performance shall be provided to the COR for review no later than 10 business days prior to 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 quality control objective(s). The Contractor shall revise the QCP within 10 business days from receipt of notice that QCP is found "unacceptable."

Performance Standards

a) Standard: 100% the Contractor Preliminary (QCP) shall be submitted to the COR via email no later than 5 business days of contract award that details how the Contractor shall develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services. AQL: Zero Deviation from Standard

b) Standard: 100% the Contractor shall submit to the COR a Final QCP via email no later than 10 business days from receiving feedback from the COR.

AQL: Zero Deviation from Standard

c) Standard: 100% the Contractor shall provide the COR any modifications/changes to the QCP for review and approval no later than 10 business days prior to effective date of the change. The QCP shall be subject to the Government's review and approval.

AQL: Zero Deviation from Standard

d) Standard: 100% of Quality Control Plans are reviewed, submitted and followed in 100% accordance with HUD timeframes, procedures and policies referenced within the PWS.

AQL: Zero Deviation from Standard

Deliverables

A032 Preliminary Quality Control Plan

A033 Final Quality Control Plan

A034 Proposed Quality Control Plan Changes

A035 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 and final Management Plan.

7.0 Performance Requirement Summary (PRS)

The Performance Requirement Summary (PRS) chart below lists the order'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 perform all requirements as specified in the order. Additionally, HUD reserves all rights and remedies under the provisions and clauses of the order when performance of any contract requirement, whether or not listed below, is unacceptable.

HUD will develop a Quality Assurance Surveillance Plan (QASP) to be used to provide order oversight. In conjunction with the Contractor's QCP and various other methods of assessing performance, the COR will perform on-site reviews and/or 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 order. On a monthly basis, the COR will evaluate the quality of the product or services.

Statements		Standards/AQLs	Incentive/Remedy
5.1 Project Management			
5.1.1	Orientation Meeting Summary Memorandum	<p>a) Standard: Timely: Deliver the Draft Agenda and Power Point Presentation (A001) within one (1) week after contract award. Deliver the Final Agenda and Presentation (A002) two (2) weeks after contract award.</p> <p>b) Standard: Timely: Conduct the Meeting shall be conducted within three (3) weeks after contract award.</p>	

Statements		Standards/AQLs	Incentive/Remedy
		c) Standard: Timely: Deliver the Meeting Summary (A003) within one (1) week after the Orientation meeting. AQL: Zero Deviation	
5.1.2	Final Management Plan	<u>Performance Standards</u> a) Standard: Timely: Draft (A004) is submitted four (4) weeks after contract award. b) Standard: Timely: Final (A005) is submitted one (1) week of receipt of HUD comments. AQL: Zero Deviation	
5.1.3	Monthly Report	<u>Performance Standards</u> a) Standard: Timely: The Contractor shall submit monthly reports (A006) by the 15 th day of each month. Reports shall be submitted contemporaneously with payment invoices in a timely fashion. Monthly meetings should take place as agreed to and established by the Contractor and the COR. AQL: Zero Deviation	
5.2.1	Analytic Brief on 2023 Report, "Measuring Housing Insecurity: Index Development Using the American Housing Survey"	<u>Performance Standards</u> a) Standard: Brief conveys accurate and reliable analysis of report findings informed by state-of-the-art methodology and techniques in well-written format. AQL: Zero Deviation from Editorial Standards as outlined above in task 5.0. b) Standard: Timely: The Contractor shall submit the brief twelve (12) weeks after contract award. AQL: Zero Deviation	
5.2.2	Literature Review on Housing Insecurity, focusing on research from 2019-present	<u>Performance Standards</u> a) Standard: Literature Review conveys accurate and reliable analysis in a well-written format. AQL: Zero Deviation from Editorial Standards set forth above in task 5.0. b) Standard: Timely: The Contractor shall submit the literature review within seventeen (17) weeks of the contract award. AQL: Zero Deviation	
5.3.1	Expert Roundtable Identification List	a) Standard: Timely: HUD shall provide contractors with an expert list sixteen (16) weeks after contract award. Contractor shall submit the draft expert list to HUD no later than eighteen (18)	

Statements		Standards/AQLs	Incentive/Remedy
		<p>weeks after contract award. HUD shall provide feedback on the draft nineteen (19) weeks after contract award. The Contractor shall submit the final expert list (A009) twenty (20) weeks after contract award.</p> <p>AQL: Zero Deviation</p>	
5.3.2	Program for Expert Roundtable	<p>a) Standard: Timely: The Contractor shall submit the Program (A010) twenty-two (22) weeks after contract award.</p> <p>AQL: Zero Deviation</p>	
5.3.3	Expert Roundtable on Housing Insecurity	<p>a) Standard: Timely: The Contractor shall convene the Expert Roundtable thirty-one (31) weeks after award.</p> <p>AQL: Zero Deviation</p>	
5.3.4	Expert Roundtable Feedback Report	<p>a) Standard: Timely: The Contractor shall submit the Expert Roundtable Feedback Report (A011) two (2) weeks after the Expert Roundtable no more than thirty-three (33) weeks after award.</p> <p>AQL: Zero Deviation.</p>	
5.4.1	Final Analysis Plan for Contract Year 1	<p>a) Standard: Timely: The Contractor shall submit the draft Analysis Plan (A012) for Contract Year 1 (Base Year) no later than twenty-five (25) weeks from contract award, and the final Analysis Plan (A013) for Contract Year 1 (Base Year) one week after receipt of HUD comments no later than twenty-seven (27) weeks from contract award.</p> <p>AQL: Zero Deviation</p>	
5.4.2	Final Analysis Plan for Contract Year 2	<p>a) Standard: Timely: The Contractor shall submit the draft Analysis Plan for Contract Year 2 (Option Year) (A014) no later than twenty-nine (29) weeks after contract award, and the final Analysis Plan for Contract Year 2 (Option Year) (A015) two (2) weeks after receipt of HUD comments, submitted by thirty-four (34) weeks after contract award.</p> <p>AQL: Zero Deviation</p>	
5.5.1	Revised Code for Initial Analysis of Housing Insecurity Analysis using 2023 AHS PUF Data	<p>a) Standard: Timely: The code (A016) shall be submitted no later than thirty-nine (39) weeks after contract award and HUD will have two (2) weeks to review and provide comments, with the</p>	

Statements		Standards/AQLs	Incentive/Remedy
		<p>revised code (A017) due no later than forty-three (43) weeks after contract award.</p> <p>AQL: Zero deviation.</p>	
5.5.2	Using the Revised Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File Data	<p>a) Standard: Timely: The initial analysis tables and figures (A018) and presentation slides (A019) shall be submitted to HUD no later forty-five (45) weeks after contract award. The contractor shall brief (A020) HUD on these materials (A018 and A019) in a briefing meeting that shall be held no later than forty-six (46) weeks after contract award.</p> <p>AQL: Zero Deviation. Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.</p>	
5.5.3	Final Analysis Plan for Contract Year 2 (Option Year) informed by results of initial analysis of AHS PUF data	<p>a) Standard: Timely: Final Analysis Plan for Contract Year 2 (Option Year) (A021) informed by results of initial analysis of AHS PUF data shall be submitted no later than fifty-five (55) weeks after contract award.</p> <p>AQL: Zero Deviation.</p>	
5.6.1	Interim Report	<p>a) Standard: Deliver reports according to the contract schedule and drafted according to the editorial standards set forth above in task 5.0.</p> <p>AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.</p> <p>AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p> <p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.</p> <p>AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days.</p> <p>c) Standard: Timely: The Code for the Interim Report (A022) and the Interim Report (A023)</p>	

Statements		Standards/AQLs	Incentive/Remedy
		shall be submitted to HUD no later than sixty-seven (67) weeks after contract award. AQL: Zero Deviation.	
5.6.2	Prepare one Interim Report Briefing Document	<p><u>Performance Standards</u></p> <p>a) Standard: Deliver reports according to the contract schedule and drafted according to the editorial standards set forth above in task 5.0. AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.</p> <p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments. AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days. AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p> <p>c) Standard: Timely: The Interim Report Briefing Document (A024) shall be submitted to HUD no later than sixty-seven (67) weeks after contract award. AQL: Zero Deviation.</p>	
5.6.3	Deliver one Interim Report Briefing Meeting	<p>a) Standard: Deliver reports according to the contract schedule and drafted according to the editorial standards set forth above in task 5.0. AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata. AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p> <p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments. AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days.</p>	

Statements		Standards/AQLs	Incentive/Remedy
		<p>c) Standard: Timely: Hold Interim Briefing meeting (A025) no later than sixty-seven (68) weeks after contract award.</p> <p>AQL: Zero Deviation.</p>	
5.7.1	Final Report – Draft 1 and Draft 2	<p>a) Standard: Deliver reports according contract schedule and drafted according to the editorial standards set forth above in task 5.0.</p> <p>AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.</p> <p>AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p> <p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments.</p> <p>AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days.</p> <p>c) Standard: Timely: Draft 1 (A026) shall be submitted no later than eighty-two (82) weeks after contract award; Draft 2 (A027) shall be submitted no later than 95 weeks after the contract award. The report shall be accompanied by a file containing the final code used in the analysis in the Final Report (A028). The file containing the final code using in the analysis of the Final Report (A028) shall be submitted no later than one hundred (100) weeks after contract award.</p> <p>AQL: Zero Deviation.</p>	
5.7.2	Prepare Final Report Briefing Document	<p>Performance Standards</p> <p>a) Standard: Deliver reports according to contract schedule and drafted according to the editorial standards set forth above in task 5.0.</p> <p>AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.</p> <p>AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p>	

Statements		Standards/AQLs	Incentive/Remedy
		<p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments. AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days.</p> <p>c) Standard: Timely: Deliver Final Report Briefing document (A030) no later than one hundred (100) weeks after contract award.</p> <p>AQL: Zero Deviation.</p>	
5.7.3	Deliver Final Report Briefing Meeting	<p>a) Standard: Deliver reports according to -upon agreed schedule and drafted according to the editorial standards set forth above in task 5.0. AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata.</p> <p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD within 7 business days after receipt of comments. AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days. AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p> <p>c) Standard: Timely: Hold final report briefing meeting (A031) no later than one hundred (100) weeks after contract award.</p> <p>AQL: Zero Deviation.</p>	
5.7.4	Final Report – publication-ready	<p>a) Standard: Deliver reports according to contract schedule and drafted according to the editorial standards set forth above in task 5.0. AQL: Reporting results shall be replicable using specific AHS data cited. Table cells shall match values using the appropriate weighted statistics for their respective crosstabulations of the underlying AHS microdata. AQL: Zero Deviation from Editorial Standards set forth above in task 5.0.</p> <p>b) Standard: After HUD/PD&R/HDAD review, any requested revisions submitted to the Contractor shall be made and returned to HUD</p>	

Statements		Standards/AQLs	Incentive/Remedy
		within 7 business days after receipt of comments. AQL: Any requested revisions submitted to the Contractor shall be made and returned to HUD within 10 business days. c) Standard: Timely: Deliver Publication-Ready Final Report (A029) no later than one-hundred two (102) weeks after contract award. AQL: Zero deviation.	

8.0 Related Documents

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

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.

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.hud.gov/acquisition)
https://www.hud.gov/program_offices/cpo/hudar

<u>NUMBER</u>	<u>TITLE</u>	<u>DATE</u>
FAR 52.242-15	STOP-WORK ORDER	AUG 1989

F.2 DELIVERY SCHEDULE

Deliveries shall be in accordance with the PWS Section C.

F.3 PERIOD OF PERFORMANCE

This contract shall be effective September 30, 2024.

	Period of Performance
Base Period	September 30, 2024 - September 29, 2025
Option Period 1	September 30, 2025 - September 29, 2026

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.

CLIN	CLIN TYPE	Description Base Year	PWS Section	Qty	Deliverable	Unit	Unit Price	Total Price
0001	FP-FUR	Project Management	C.5.1					\$49,195.00
0001AA	FP	Orientation Meeting	C.5.1.1	1	<u>A001</u> <u>A002</u> <u>A003</u>	EA	\$7,392.00	\$7,392.00
0001AB	FP	Management Plan	C.5.1.2	1	<u>A004</u> <u>A005</u>	EA	\$2,355.00	\$2,355.00
0001AC	FP-FUR	Monthly Progress Reports and Ongoing Communication	C.5.1.3	12	<u>A006-AA</u>	EA	\$3,287.33	\$39,448.00
0002	FP	Generate an Updated Literature Review on Housing Insecurity	C.5.2					\$81,433.00
0002AA	FP	Analytic Brief on the 2023 “Measuring Housing Insecurity: Index Development Using American Housing Survey Data” Report	C.5.2.1	1	<u>A007</u>	EA	\$50,553.00	\$50,553.00
0002AB	FP	Generate Literature Review on Housing Insecurity	C.5.2.2	1	<u>A008</u>	EA	\$30,880.00	\$30,880.00
0003	FP CR	Convene an Expert Roundtable on Housing Insecurity	C.5.3					\$74,881.00
0003AA	FP	Identify the leading experts on Housing Insecurity Research and Measurement, with guidance from HUD	C.5.3.1	1	<u>A009</u>	EA	\$11,779.00	\$11,779.00
0003AB	FP	Develop Program for Expert Roundtable	C.5.3.2	1	<u>A010</u>	EA	\$36,718.00	\$36,718.00
0003AC	FP	Expert Roundtable on Housing Insecurity	C.5.3.3	1		EA	\$14,569.00	\$14,569.00
0003AD	FP	Generate Expert Roundtable Feedback Report	C.5.3.4	1	<u>A011</u>	EA	\$11,815.00	\$11,815.00
0003AE	CR	Honorarium	C.5.3.5	10		EA	\$1,000.00	\$12,000.00
0004	FP	Develop Analysis Plans for Year 1 and Year 2 of the Contract	C.5.4					\$93,859.00
0004AA	FP	Generate Analysis Plan for Contract Year 1	C.5.4.1	1	<u>A012</u> <u>A013</u>	EA	\$65,124.00	\$65,124.00

CLIN	CLIN TYPE	Description Base Year	PWS Section	Qty	Deliverable	Unit	Unit Price	Total Price
0004AB	FP	Generate Analysis Plan for Contract Year 2	C.5.4.2	1	<u>A014</u> <u>A015</u>	EA	\$28,735.00	\$28,735.00
0005	FP	Perform Initial Analysis of American Housing Survey Public-Use File (PUF) Data	C.5.5					\$167,191.00
0005AA	FP	Develop Code for the Analysis of AHS Public Use Data	C.5.5.1	1	<u>A016</u> <u>A017</u>	EA	\$100,517.00	\$100,517.00
0005AB	FP	Using the Revised Code (A017), Conduct Initial Analysis of Housing Insecurity using AHS Public-Use File Data	C.5.5.2	1	<u>A018</u> <u>A019</u> <u>A020</u>	EA	\$66,674.00	\$66,674.00
			BASE YEAR TOTAL PRICE					\$466,559.00

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 **15th of the month (once a 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 or other supplemental information (e.g., contracts for commercial services) contained in this contract.

(d) *Final invoice payment.* The final invoice will not be paid prior to certification by the Contracting Officer that all work has been completed and accepted.

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	Qty	Unit	Unit Price	NTE Payment
0003 FP/CR (NTE)	Convene an Expert Roundtable on Housing Insecurity				
0003AE CR (NTE)	Honorarium C.5.3.5	10	EA	\$1,200.00	\$12,000.00

G.1.3 Accelerated Payments to Small Business Contractors and Prime Contractors that Subcontract with a Small Business Concern

Prime contractors that subcontract with a small business concern, if the prime contractor agrees to make payments to the small business subcontractor within 15 days of receiving the accelerated payment from the Government, after receipt of a proper invoice and all other required documentation from the small business subcontractor, to the maximum extent practicable, without any further consideration from or fees charged to the subcontractor. This acceleration does not provide any new rights under the Prompt Payment Act and does not affect the application of the Prompt Payment Act late payment interest provisions [32.009-1(a)(2)(ii)].

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

<p><u>PAYMENT OFFICE Submission</u> - Submit all invoices to: Treasury's Invoice Processing Platform (IPP) https://www.ipp.gov/</p> <p>Vendor Support Email: IPPCustomerSupport@fiscal.treasury.gov Customer Support: (866) 973-3131</p>
<p><u>COR Submission</u> - Email the following to the COR: Email Address: katherine.e.tait@hud.gov</p> <ol style="list-style-type: none">1. Invoice2. Supporting Documentation
<p><u>Contracting Officer and Contract Specialist Submission</u> – Email the following to the Contracting Officer- cathy.j.baker@hud.gov and Contract Specialist – timothy.d.smith@hud.gov</p> <ol style="list-style-type: none">1. Invoice2. 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 **George Carter** 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)

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:

Key Personnel

<u>Name</u>	<u>Key Personnel Role</u>	<u>Title</u>	<u>Employee or Subcontractor</u>	<u>Name of Prime or Subcontractor</u>
O. Urdapilleta	Project Manager	Research Director	Employee	Optimal Solutions Group
S. Brown	Senior Technical Staff	Senior Analyst	Subcontractor	Abt Global
R. Whorton	Senior Technical Staff	Senior Analyst	Employee	Optimal Solutions Group
M. Turner	Senior Technical Staff	Senior Analyst & Quality Assurance Manager	Employee	Optimal Solutions Group

Other Contractor Personnel

<u>Name</u>	<u>Personnel Role</u>	<u>Title</u>	<u>Employee or Subcontractor</u>	<u>Name of Prime or Subcontractor</u>
D. Walton	Senior Technical Staff	Senior Analyst	Subcontractor	Abt Global
J. Walker	Senior Technical Staff	Senior Analyst	Subcontractor	Abt Global
E. McManus	Technical Staff	Analyst	Employee	Optimal Solutions Group
N. Bahel	Technical Staff	Research Assistant	Employee	Optimal Solutions Group
S. Dastrup	Senior Analyst	Social Science Economics Senior Associate	Subcontractor	Abt Global
A. Vinokurov	Senior Analyst	Senior Associate	Employee	Optimal Solutions Group
M. Finkel	Senior Analyst	Science and Research Director	Subcontractor	Abt Global
S. Anvekar	Analyst	Data Scientist & Programmer	Employee	Optimal Solutions Group
T. Turner	Senior Facilitator & Meeting Planner	Research Senior Project Manager **	Employee	Optimal Solutions Group
M. Wood	Senior Analyst	Client Account Lead	Subcontractor	Abt Global
E. Ternes	Editor/Technical Writer	Senior Editor	Employee	Optimal Solutions Group

J. Grant	Communications Specialist	Communications Specialist	Employee	Optimal Solutions Group
TBD	Analyst	Analyst	Subcontractor	Abt Global
TBD	Analyst	Project Financial Analyst	Subcontractor	Abt Global

* 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**.

Title and Description	Qualifications
<p>Executive Leadership/Senior Principal Associate – Research Director (Project Manager) (Key Personnel)</p> <p>Individual serving in this role may have one of a variety of titles including President, Vice President, Managing Director, Principal Investigator, or Research Director. For this contract, the individual in this role will have the title of Research Director. Strategic leader directing contract efforts and managing client relationships. Education and experience result in status as an industry expert. Serve as the senior client contact. Broadly oversee the planning, design and implementation of project protocols and procedures through strategy development, problem solving and oversight. Contributes through direct involvement or collaboration with project staff the efforts to translate client project requirements needs and/or objectives into specific deliverables in a timely and cost-efficient manner. Responsible for providing input and review on the technical approach on challenging or unique projects. Demonstrated capability to present and speak at client and professional meetings.</p>	<p>A combination of education and experience would allow the individual to provide strategic vision and make tangible, valuable technical contributions to the overall project effort. The Research Director shall have and combination of education and experience that includes a PhD in a related discipline (Statistics, Survey Methodology, Data Science, Economics, Public Policy/Public Administration, Urban Planning, Sociology, Psychology, or other social science discipline) and a minimum of 4-6 years of related experience managing projects or, at a minimum, managing substantive components of a project or the equivalent. If the highest degree held by the Research Director is a Master's Degree in a related discipline (Statistics, Survey Methodology, Data Science, Economics, Public Policy/Public Administration, Urban Planning, Sociology, Psychology, or other social science discipline), the incumbent shall have a minimum of 7-10 years of related experience managing projects or, at a minimum, managing substantive components of a project or the equivalent. Education and experience result in status as an industry expert.</p> <p>Must have demonstrated expertise and experience in scale development, survey methodology, housing research, non-probability sampling and weighting, programming in the SAS, STATA, or R statistical analysis program coding, and literature review development. Additional relevant experience may include overseeing the design and implementation of research and evaluation projects, including survey development and administration; managing the assemblage and analysis of datasets; analysis of and expertise in survey methodology; and writing final reports summarizing study findings suitable for publication. Demonstrated supervisory and management</p>

Title and Description	Qualifications
	experience overseeing a team is required. Demonstrated capability to present and speak at client and professional meetings.
<p>Senior Technical Staff - Deputy Research Director (Key Personnel) <i>The Contractor is not required to have a Deputy Project Director</i></p> <p>Individual serving in this role may have one of a variety of titles including Associate Research Director, Co-Principal Investigator, or Senior Research Scientist. This role will support the Research Director by sharing responsibilities for strategic leadership, planning, design, and implementation of project protocols and procedures. The Deputy Research Director will work closely with the Research Director to translate client project requirements into specific deliverables in a timely and cost-efficient manner. They will be responsible for providing input and review on the technical approach for challenging or unique projects, and will collaborate with project staff to ensure the successful execution of the project. The Deputy Research Director will also present and speak at client and professional meetings as needed.</p>	<p>A combination of education and experience would allow the individual to provide valuable technical contributions and support the strategic vision of the project. The Deputy Research Director shall have a combination of education and experience that includes a PhD in a related discipline (Statistics, Survey Methodology, Data Science, Economics, Public Policy/Public Administration, Urban Planning, Sociology, Psychology, or other social science discipline) and a minimum of 4-6 years of related experience managing projects or substantive components of a project. If the highest degree held is a Master's Degree in a related discipline, the incumbent shall have a minimum of 7-10 years of related experience.</p> <p>The Deputy Research Director must have demonstrated expertise and experience in areas such as scale development, survey methodology, housing research, non-probability sampling and weighting, programming in the SAS, STATA, or R statistical analysis program coding, and literature review development. Additional relevant experience may include overseeing the design and implementation of research and evaluation projects, managing the assemblage and analysis of datasets, expertise in survey methodology, and writing final reports summarizing study findings suitable for publication. Demonstrated supervisory and management experience overseeing a team is required, as is the capability to present and speak at client and professional meetings.</p>
<p>Senior Technical Staff - Senior Analyst (Key Personnel)</p> <p>Individual serving in this role may have one of many titles which might include Statistician, Economist, Planner, Senior Analyst, Analyst, Programmer, or Researcher. For this contract, the individual in this role will have the title of Senior Analyst. Leads project teams and performs a variety of research tasks including research design, data collection, data analysis, data visualizations, and report writing. May independently visit field or remote sites for information collection. Organizes, documents, and analyzes data and information using standard practices and techniques in the field(s) of specialization. Devises methods and leads the design computer modeling, stimulation or simple to moderately complex forecasting using standard software packages, as required. Applied quantitative</p>	<p>A combination of education and experience would allow the individual to effectively carry out technical tasks in support of the project effort. Educational experience shall include an advanced degree (Master's or PhD) in a related discipline (Statistics, Survey Methodology, Data Science, Economics, Public Policy/Public Administration, Urban Planning, Sociology, Psychology or other social science discipline). If candidate has a PhD, a minimum of 4-6 years related experience managing projects or, at a minimum, managing substantive components of a project or the equivalent are required; if the candidate has an MA, a minimum of 7-10 years related experience required.</p> <p>Must have proven relevant technical expertise in scale development; experience with housing research; expertise in SAS, STATA, or R statistical programming; expertise in data collection and analysis mixed-methods research, including overseeing the design, fielding, and analysis of</p>

Title and Description	Qualifications
<p>and/or qualitative analysis techniques and methods, as appropriate for the research effort. Independently work on assignments that are complex under indirect supervision with latitude for independent action and decision-making. May provide training and technical supervision to less experienced staff.</p>	<p>surveys; managing statistical analyses of datasets; supervising interview data collection and analysis. Demonstrated skills in writing technical materials are also required. Demonstrated capabilities in managing technical research staff, project tasks, and budgets.</p>
<p>Technical Staff – Analyst Individual filling this role may have one of many position titles which might include Statistician, Economist, Sociologist, Data Analyst, Data Scientist, Social Science Analyst, Research Associate/Analyst, Analyst, or a similar title. For this contract, the individual in this role will have the title of Analyst.</p> <p>This individual will provide programming and technical support to research and survey projects. Develop moderately complex programs that enable the control, manipulation, and analysis of data. Assists senior project staff in a variety of research and analysis tasks, including project management, qualitative and /or quantitative data collection and analysis, and writing as appropriate to the individual’s skill set and project needs.</p> <p>The Analyst will assist experienced professionals in a variety of research and analysis tasks by independently collecting, compiling, checking, and analyzing data using standard practices and techniques in the field(s) of specialization. Serve on project teams and perform a variety of research tasks including design, collection, analysis, and report writing. May visit field or remote sites for information collection. Review collected data and analyses using standard practices and techniques in the field(s) of specialization. Writes portions of project reports in an accurate, clear, and understandable manner.</p>	<p>A combination of education and experience would allow the individual to effectively carry out technical tasks in support of the project effort. Educational experience shall include an advanced degree (Master’s or PhD) in a related discipline (Statistics, Survey Methodology, Data Science, Economics, Public Policy/Public Administration, Urban Planning, Sociology, Psychology, or other social science discipline). If candidate has a PhD, a minimum of 2-3 years related experience managing projects or, at a minimum, managing substantive components of a project or the equivalent are required; if the candidate has an MA, a minimum of 4-6 years related experience required.</p> <p>Must have proven relevant technical expertise in scale development; experience with housing research; expertise in SAS, STATA, or R statistical programming; expertise in data collection and analysis mixed-methods research, including overseeing the design, fielding, and analysis of surveys; managing statistical analyses of datasets; supervising interview data collection and analysis. Demonstrated skills in writing technical materials are also required. Demonstrated capabilities in managing technical research staff, project tasks, and budgets.</p>

Title and Description	Qualifications
<p>Technical Staff – Research Assistant</p> <p>The individual filling this role will assist other project staff in a variety of project management or research and analysis tasks. For this contract, the individual in this role will have the title of Research Assistant. Research Assistant tasks might include assistance contributing to scale development, general housing research, and literature review development, as well as managing project schedules or budgets, supporting the development of written documents, or performing administrative tasks in support of project completion.</p>	<p>Research assistance for this contract requires experience in scale development, housing research, SAS, STATA, or R, and literature review development, and a combination of education and experience to meet these requirements, including an undergraduate degree in a related discipline (Economics, Sociology, Psychology, Survey Methodology, or other social science discipline). A combination of education and work experience would allow the individual to provide support to the overall project effort. More specialized support positions may appropriately have additional training that is relevant to the position.</p>

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.**

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 HUDAR 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** 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-

The Government shall provide the following materials and information:

a. Electronic data files from the AHS.

- b. Copies of required materials may be provided to the Contractor in hard copy or soft copy.
- c. All materials will remain the property of the Government and will be returned to the COR upon request or at the end of the contract period.
- d. Code and/or files from the previous contract may be provided to the contractor upon request, subject to approval for release by the Census Disclosure Review Board.

(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 HUDAR 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.

☒ 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 INTEREST

☒ 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

(End of provision)

<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
52.204-4	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
52.233-1	Disputes	May 2014
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](#).
- ☒ (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](#)).
- ☒ (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]
- X (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](#)).
- X (26) (i) [52.219-28](#), Post Award Small Business Program Representation (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. 76711](#)).
- ☒ (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 ote](#), [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).
- ☒ (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 2_007) ([42 U.S.C. 5150](#)).
- ☒ (55) [52.226-8](#), Encouraging Contractor Policies to Ban Text Messaging While Driving (May 2024) ([E.O. 13513](#)).
- ☒ (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](#)).
- ☒ (59) [52.232-33](#), Payment by Electronic Funds Transfer-System for Award Management (Oct2018) ([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](#)).
- ☒ (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. chapter67](#)).
- ___ (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) ([29U.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 52.217-8 OPTION TO EXTEND SERVICES

NOV 1999

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed **6 months**. The Contracting Officer may exercise the option by written notice to the Contractor no later than **10 days** prior to the expiration of the contract.

(End of Clause)

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 (FAR) (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)

HUDAR CLAUSES INCORPORATED BY FULL TEXT

I.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 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 Reserved

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