



ACQUISITION SERVICES DIRECTORATE Herndon

To: GSA Schedule Contractors

From: Acquisition Services Directorate/Interior Business Center/Department of the Interior

Subject: Request for Quotation (RFQ) – AQD RFQ/Solicitation No. 140D0422Q0702

The U.S. Department of the Interior, through its Franchise Fund activity, Acquisition Services Directorate (AQD or “Government”) is issuing this competitive Request for Quotations (RFQ) for the purpose of entering into a Task Order under the General Services Administration (GSA) Federal Supply Schedule (FSS). AQD will conduct this acquisition using Subpart 8.4 of the Federal Acquisition Regulation (FAR).

The requirement identified herein is to secure a Contractor to conduct a study to better understand the impact of eliminating the required client interview for SNAP benefit certification and recertification. FNS anticipates that five (5) States will participate in demonstration projects designed to examine the effects of not conducting interviews at certification and recertification on program operations.

This RFQ is a firm fixed price type task order..

The due date for your response to this solicitation, both technical and price quotations, is on or before **1:00 PM Eastern Time (ET), June 29, 2023** All responses must be posted in GSA eBuy.

If you have questions regarding this solicitation, please submit your inquiries to the Contracting Officer, Harinder Pabbi at Harinder_Pabbi@ibc.doi.gov no later than **1:00 PM ET, May 22, 2023**. Questions submitted via telephone or facsimile will not be addressed.

PERFORMANCE WORK STATEMENT

Evaluating the Interview Requirement for SNAP Certification

1. INTRODUCTION

The United States Department of Agriculture (USDA) Food and Nutrition Service (FNS) is seeking a Contractor for a study to better understand the impact of eliminating the required client interview for SNAP benefit certification and recertification. During the COVID-19 pandemic Public Health Emergency (PHE) States could obtain waivers from FNS to waive client interviews at certification and recertification. States also had the option of seeking interview waivers for up to 12 months in the year after the end of the Federal PHE, as part of an unwinding waiver package.¹ Little research has been conducted to quantify the impacts of removing the interview. One previous FNS study sheds light on this topic,² but further research is needed to inform policy considerations.

FNS anticipates that five (5) States will participate in demonstration projects designed to examine the effects of not conducting interviews at certification and recertification on program operations. Each participating State will randomly assign up to 20% of their SNAP applicants (new and recertifying clients) to a no-interview group with the remaining cases being assigned to business as usual/regular interview process while denoting what type of interview they receive (face-to-face, phone, or video). The Contractor will evaluate the demonstration projects to examine whether, and to what extent, the absence of client interviews affects participation, program efficiency, payment accuracy, administrative costs, client access, and staff satisfaction. The results of this study will inform FNS's efforts to help States further improve program operations and client access.

2. BACKGROUND

During the PHE, SNAP State agencies had the option to seek a waiver of the interview with SNAP applicants at certification and/or SNAP participants at recertification. States with approved waivers may continue to waive the interview requirement for one month after the PHE ends.³ FNS released a study in 2015, "Assessment of the Contributions of an Interview to SNAP Eligibility and Benefit Determination," that evaluated the elimination of both the certification and recertification interview in two States, Oregon and Utah. The study found mixed results: interviews may improve application timeliness and the likelihood that applicants will report earnings but eliminating the interview may reduce error rates and churning.⁴ Since the prior

¹<https://www.fns.usda.gov/snap/temporary-administrative-waivers-available-state-agencies-support-unwinding-covid-19>

²<https://www.fns.usda.gov/snap/assessment-contributions-interview-supplemental-nutrition-assistance-program-eligibility-and-benefit>

³<https://www.fns.usda.gov/snap/expiration-program-flexibilities-covid-19>

⁴ The 2015 study found that case and payment error rates for demonstration groups were lower than the State QC error rates in both States, however, the method and timing for collecting this information compared to the standard State

study many changes have taken place in SNAP operations including increased options for video interviews and data matching with employment databases. FNS seeks to revisit the role of the interview by conducting a larger set of demonstration projects and rigorously evaluating the impacts on client access, benefit accuracy, and administrative costs through this study.

Currently, FNS allows 19 States to waive interviews for clients at initial certification and recertification using a COVID-19 waiver; another 2 States waive the interview using an unwinding waiver tied to Medicaid certification and recertification processes. The PHE will end on May 11, 2023, and many flexibilities related to COVID-19 will be phased out.⁵

As more States express the desire to eliminate the interview, it raises important questions for FNS. A recent study reported that during the PHE, many States used the flexibility to waive the interviews.^{6,7} Some clients prefer to eliminate the interview because it means they may apply for benefits without visiting the office⁸ or spending time in an interview. Yet, the interview has traditionally served several purposes. It is designed to ensure the most accurate household information is collected from clients in the application and recertification processes. Moreover, clients can receive enhanced assistance during the interview and caseworkers can help clients navigate the application. This ensures that clients receive the maximum deductions to which they are entitled and are referred to other programs that can serve their needs. Some types of households (e.g., households composed of older adults with no earned income) could have interviews waived with minimal effect on program operations including benefit accuracy. Alternative approaches to conducting certification and recertification interviews may yield sufficient and accurate results; some States report conducting targeted interviews even under COVID-19 interview waivers.⁹

More research is needed to determine if eliminating the interview is associated with increased administrative efficiency, decreased accuracy in the benefit calculation, or lower access for clients (for example: under-issued benefits due to lack of interview and engagement with client). FNS has an interest in better understanding how eliminating or adjusting the interview requirements might affect these outcomes. Therefore, this study will examine how eliminating the interview affects administration of SNAP.

QC reviews may bias the demonstration error rate results. <https://www.fns.usda.gov/snap/assessment-contributions-interview-supplemental-nutrition-assistance-program-eligibility-and-benefit>

⁵ This information is relative to March 2023.

⁶ Bresnahan C, Ellison C, Green C, Headrick G, Ji Yeun Lee C, Lyons M, Moran A, Tse J. SNAP Waivers and Adaptations During the COVID-19 Pandemic: A Survey of State Agency Perspectives in 2020. Baltimore, MD: Johns Hopkins Bloomberg School of Public Health, 2021.

⁷ See <https://www.fns.usda.gov/disaster-assistance/snap-covid-19-waivers>

⁸ Rowe, Gretchen, Sam Hall, Carolyn O'Brien, Nancy Pindus, Lauren Eyster, Robin Koralek, and Alexandra Stanczyk. "Enhanced Supplemental Nutrition Assistance Program (SNAP) Certification: SNAP Modernization Efforts, Final Report: Volume I." Washington, DC: The Urban Institute, July 2010.

⁹ Bresnahan C, Ellison C, Green C, Headrick G, Ji Yeun Lee C, Lyons M, Moran A, Tse J. SNAP Waivers and Adaptations During the COVID-19 Pandemic: A Survey of State Agency Perspectives in 2020. Baltimore, MD: Johns Hopkins Bloomberg School of Public Health, 2021.

3. SCOPE

This study will focus exclusively on whether and to what extent waiving the client interview at SNAP certification and recertification affects program outcomes. The study will include up to five (5) States that will be part of the demonstration and will apply for an interview waiver through the FNS SNAP program office. The Contractor shall work with the selected States to determine the best approaches for the randomization of participants into test (no-interview) and control (regular interview process) groups. The Contractor shall work with State agencies to determine how to share extant administrative data to answer key research questions. The extant administrative data will be supplemented with both a collection of new administrative information, and interviews to develop a deeper understanding of how waiving interviews affected program operations (see section 3.2 on Data Sources for the Evaluation).

3.1 STUDY OBJECTIVES

The Contractor shall address the following study objectives and research questions. Contractors may propose additional research questions under each objective:

Objective 1: Describe the regular interview and the no interview process in each State.

1. How are SNAP applicants assigned to the no-interview group or the control group, which is the regular interview process?
2. What types of interview modes (e.g., in-person, phone, video) are offered and for which households in each State? Are households given a choice?
3. How is the interview process conducted at certification/recertification in each of the different modes (if State offers different modes)? How is client information verified?
4. What share of interviews are in each mode in each State?
5. How is the information provided by caseworkers during certification/recertification interviews made available to clients assigned to the no-interview group?
6. What other programs (e.g., Temporary Assistance for Needy Families (TANF), Medicaid, Child Support) may have been affected by the waiver of interviews?

Objective 2: Describe the experience of SNAP State agencies when using the no interview waiver at certification and recertification.

1. What time and cost savings occur, if any, without an interview compared to the regular interview process? How do the time and cost savings vary compared to the different interview modes?
2. What are the negative effects of removing interviews for SNAP staff members involved in the certification/recertification/verification process?
3. What are the positive effects of removing interviews for SNAP staff members involved in the certification/recertification/verification process?
4. How often do caseworkers need to reach out to the client for information that would have been clarified at the interview? In other words, are caseworkers still having contact with clients for whom the interview is not conducted?

Objective 3: Analyze differences in the key participant and program outcomes between the no-interview group and the regular interview process in each State. For the regular interview process, depending on the sample size, the analysis should also examine mode of interview (in person, phone, and video) if State offers different types of interviews.

1. Are there significant differences in average benefit levels for the no-interview group compared to the regular interview process? Do the differences vary by household type, circumstances, or interview mode?
2. Are there significant differences in the share of households reporting earnings for the no-interview group compared to the regular interview process? Does the difference vary by household type, circumstances, or interview mode?
3. Are there significant differences in payment errors for the no-interview group compared to the regular interview process?
4. Are there significant differences in deduction accuracy by group when implementing a no-interview waiver? (medical, shelter, dependent care, and child support deductions)
 - a. If using a standard utility allowance (SUA), is the correct SUA used?
 - b. If the State offers a standard medical deduction (SMD), does the share of households receiving the SMD vary between the no-interview group and the regular interview process group? Does the difference vary by interview mode? Is the household given the most beneficial option (actual expenses vs. SMD)
5. Are there significant differences in household composition accuracy for the no-interview group compared to the regular interview process?
6. Are there significant differences in the frequency or accuracy of application denials and approvals when comparing the no-interview group to the regular interview process? If so, how?
7. Are there significant differences in application timeliness when comparing the no-interview group to the regular interview process?
8. Describe and provide the number and percentage of clients who were assigned to the no-interview group but chose an interview instead? Does the number vary by subgroup?

Objective 4: Identify how waiving the interview could affect outcomes for various subpopulations of clients.

1. What populations experience a negative impact with waiving interview requirements during certification and recertification?
2. What populations can be excluded from interviews with the lowest impact during certification and recertification?

Objective 5: Document the main take away points from the study to inform FNS for program changes, for use by other States, and for other consideration for future studies.

1. Which of the interview modes are associated with the best program outcomes?
2. To what extent are findings specific to the features of the demonstration State or other factors?
3. Under what circumstances does each interview mode work best?

3.2 DATA SOURCES FOR THE EVALUATION

The study will examine the impact of waiving the interview on various outcomes including, application processing timeliness, application denials, participation, benefit amounts and payment accuracy.¹⁰ The Contractor's technical proposal shall describe the data sources and the data collection methods they plan to use to thoroughly address the study objectives and research questions. FNS envisions that data will be collected from different sources using a variety of methods including but not limited to:

Extant administrative data: Monthly caseload files for all applicants and participants for the demonstration period. Quality Control (QC) review data.

New administrative data: Demonstration-specific data needed to address the study objectives and research questions. Also, staff time use logs that will be used for assessing staff time and cost to process applications.¹¹

Interviews: Interviews with State and local agency SNAP administrators, caseworkers and staff who conduct quality control interviews.

FNS envisions that each demonstration State will conduct 200 QC reviews of their no-interview group. This would be in addition to the State's annual QC review sample, which will be used for the regular interview group. The contractor, in their technical proposal, shall provide an approach for ensuring that they have the sample size needed to compare the no interview group with regular interview group for each State.¹² If a larger sample is needed, the Contractor shall propose an approach for obtaining the additional QC reviews. The approach should also discuss the timing for conducting the QC reviews for the no-interview group sample.

3.3 STUDY CONSIDERATIONS AND CONSTRAINTS: As part of the study plan, the Contractor shall provide a complete description of constraints to meeting the study objectives and research questions and their plans for addressing the constraints. Constraints include, but are not limited to:

- a) The Contractor shall allow, at a minimum, 52 weeks for OMB's final approval from the date of publication of the Federal Register 60-day Notice. The Contractor shall discuss how the project timeline will be flexible enough to accommodate the possibility of an earlier approval date and how the approval timeline will align with other data collection and analysis activities.

¹⁰ See the report at <https://www.fns.usda.gov/snap/assessment-contributions-interview-supplemental-nutrition-assistance-program-eligibility-and-benefit> for information on data collection instruments, data sources and analyses conducted.

¹¹ Ibid Appendix A has the instrument used in the previous study.

¹² Ibid

- b) The Contractor can propose a different schedule as long as it falls within the 44 months period of performance.
- c) FNS will consult the Contractor when developing and finalizing the list of States to invite to participate in the demonstration. The Contractor shall address how they plan to engage States to participate in the study after States have been selected.
- d) Over the course of the 12 month demonstration, FNS envisions each study State will randomly assign 20 percent of applications received from new and recertifying clients to the no-interview group. The Contractor shall provide a proposed approach to working with States on an efficient and effective solution for randomly assigning client applications to the no-interview group or to the regular interview process with the understanding that the approach may need to be adjusted after States are selected.
- e) Although FNS envisions that all demonstration projects will occur concurrently, the Contractor shall discuss how they would accommodate a staggered implementation within the contract's period of performance. Each demonstration project is expected to be conducted for 12 months.
- f) The Contractor shall provide the sample sizes needed to detect significant differences in the participant and program outcomes (Objective 3) for comparing the no-interview group to the control group (regular interview process) for the certification and recertification samples. The Contractor shall provide the minimum detectable difference (MDD) for the outcomes with a 95 percent confidence and 80 percent power for the proposed sample sizes.
- g) The Contractor shall address how they plan to ensure the integrity of any administrative data and/or data collected from State staff and secure storage of those data.
- h) The Contractor shall address their plan for obtaining, cleaning and analyzing administrative data.
- i) The Contractor shall address their plan for accepting administrative data in formats submitted by State Agencies and creating and merging analytic files as needed.
- j) Study States will need to apply for the No Interview Waiver, and as part of the waiver, they will be required to randomly select and complete QC reviews on 200 cases certified to receive SNAP benefits without participating in a certification or recertification interview. The Contractor shall work with States to obtain their QC review data.
- k) The Contractor shall coordinate the review of State-specific chapters by each of the five (5) demonstration States presented in the final report.

4. PERFORMANCE REQUIREMENTS

The Contractor shall provide all management, supervision, labor and equipment, planning, scheduling, and coordinating to ensure effective performance of all services and/or supplies as described in the Performance Work Statement (PWS). The Contractor shall ensure that all personnel working on data collection, analysis and reporting tasks complete scientific integrity training in accordance with USDA and FNS requirements. In addition, the Contractor shall provide FNS with bi-weekly updates of their progress towards

meeting the objectives. These updates can be by email, telephone, or other means that are mutually acceptable to the Contractor and FNS Contracting Officer Representative (COR).

All drafts of deliverables shall be in final form and thoroughly proofread. When multiple drafts are necessary, each subsequent draft shall be reflective of FNS's feedback on the prior draft and include a summary of all changes made with justifications for any feedback not incorporated. In addition, the Contractor shall submit a clean and a tracked changes version of all revised documents.

4.1 Task 1: Project Orientation Meeting and Reporting

Orientation Meeting: The Contractor, in cooperation with FNS' Contracting Officer Representative (COR), shall prepare an agenda prior to the meeting. The meeting shall cover items including but not limited to the following:

- An overview of the Contractor's technical approach for addressing the study objectives;
- A description of the tasks to be performed in sufficient detail for FNS staff who have not read the PWS, proposal, or contract to understand them;
- A clarification of all project activities and tasks and a discussion of the proposed schedule of deliverables;
- Establishing official protocols for all project communication, substantive and financial reporting requirements and procedures for the approval of contract deliverables; and

At least two (2) days prior to the Project Orientation Meeting, the Contractor shall submit to the COR a Project Orientation Meeting agenda and draft PowerPoint Slides. Within two (2) weeks of the orientation meeting, the Contractor shall submit to FNS a draft memorandum summarizing the orientation meeting. This summary memorandum shall include all issues discussed at the meeting, the conclusions reached, and any issues remaining to be resolved. FNS will provide comments on the draft version of the memo. The final project orientation summary memorandum is due within four (4) weeks of the orientation meeting.

Monthly Progress Reports: Each month, the Contractor shall prepare and submit monthly progress reports to FNS in an FNS-approved format by the 10th of each month (or next business day), beginning one (1) month after award. Each report shall include a:

- Cover page with task order title, number, award date, period of performance covered by the report and number in the sequence of monthly reports;
- Description of activities, by subtask(s), that were carried out during the reporting period and staff involved in completing the task(s);
- Clear description of any technical problems or issues, along with proposed steps to resolve them;

- Clear description of any contractual problems or issues, including delays encountered, along with proposed steps to resolve them;
- Description of activities by subtask, planned for the next reporting period including dates and details of any planned site visits including all planned interviews and observations;
- Project schedule that shows, by subtask and deliverable, the dates on which work started, was expected to end, and actually ended;
- Table listing all project deliverables in the first column, due dates listed in the contract in the second column, the date submitted to the COR in the third column, the date accepted by the COR in the fourth column, and the date when the invoice for the deliverable was submitted in the fifth column.

All monthly progress reports shall be submitted in electronic format directly to the FNS COR. In addition, the Contractor shall notify the COR, by phone and e-mail, of any schedule delays.

Deliverable 1.1 – Project Orientation Meeting Agenda and Draft PowerPoint Slides

Deliverable 1.2 – Draft Project Orientation Meeting Summary Memorandum

Deliverable 1.3 – Final Project Orientation Meeting Summary Memorandum

Deliverable 1.4 – Monthly Progress Reports

4.2 Task 2: Prepare the Updated Study Plan

The Contractor shall update the study plan offered in their technical proposal and submit a complete study plan that further details their approach for addressing the scope of work. The study plan in the technical proposal shall clearly state how the study objectives will be accomplished and the technical expertise needed to address the study objectives and research questions. At a minimum the study plan shall include:

- A discussion of the relevant background, study objectives, and research questions;
- The Contractor's approach to recruiting States' participation in the demonstration project. (FNS will select the five (5) study States in collaboration with the Contractor.)
- A cross walk between data collection instruments (extant administrative data collection, new administrative data collection, and interview guides; See Section 3.2 of the PWS) and the study objectives and research questions.
- A detailed plan for pre-testing data collection instruments;
- Proposed schedule for data collection including the timing of administrative data collection and qualitative data collection.
- A description and rationale for all analytic techniques, including the link between the proposed data analysis and the corresponding research question and objective;
- A description of methods for ensuring data accuracy, completeness, and quality control, and any related concerns or issues that could impact fulfillment of study

- objectives and research questions;
- Process for establishing and implementing data use agreements (DUAs) with the 5 demonstration States for all administrative data requests;
- A description of how the randomization system will work into the existing State workflows;
- A detailed overview of the quantitative data collection approach including contact protocols and procedures for monitoring the quality of the data collection process for both extant and new administrative information;
- A detailed description of the procedures for conducting interviews with key informants, including plan to ensure that the mix of respondents reflects the variation in roles related to certifying/recertifying clients without conducting interviews and business as usual certification/recertification processes, length of interviews, and plans for capturing interviewer notes;
- A description of the method for collecting time use data including the proposed length of the data collection period (for example, number of days), how staff would be selected and the number that would be completing time use logs.
- A description of all software that will be used for analyzing all administrative data (extant and new) and interview data;
- Approach for preparing restricted use and public use data files;
- A detailed description of major tasks, events, and deliverables to organize and structure the work. This section must include the proposed scheduling and sequencing of tasks and the identification of any key non-deliverable dates;
- Management and staffing plan including a table that identifies key personnel, their role in the study and allocation of hours per study task and subtask; and
- A description of the final report format and content. All versions (draft, revised, and final) shall undergo a quality control review prior to FNS submission. The final version of the report shall be 508 compliant.

The updated study plan must address any issues with or refinements to the proposed approach, data acquisition and preparation, and/or analysis plans offered in the technical proposal. The update to the study plan shall reflect the discussion with FNS at the project orientation meeting and describe any proposed elaborations or changes made, along with a justification for those changes.

A draft updated study plan shall be submitted to FNS within six (6) weeks of contract award. A revised updated study plan shall be submitted within twelve (12) weeks of contract award and the final version of the updated study plan incorporating FNS comments shall be submitted within sixteen (16) weeks of contract award. Updates or edits to the study plan shall not be construed to change the scope of work specified in the contract. Should revisions to the contract be required, they must be made with the approval

of the FNS Contracting Officer.

Deliverable 2.1 – Draft Updated Study Plan

Deliverable 2.2 – Revised Updated Study Plan

Deliverable 2.3 – Final Updated Study Plan

4.3 Task 3: Develop Data Collection Procedures and Instruments

The Contractor shall prepare all data collection procedures and instruments to be used in the process of collecting administrative data and qualitative data to meet the study objectives. The instruments shall be designed in accordance with the Final Updated Study Plan, and the procedures shall include protocols for collecting administrative data and interviews with key informants. The Contractor shall also design instruments and instructions for collecting new administrative information that fulfills research questions and objectives that extant data does not cover. As part of the description of procedures, the Contractor shall describe the experience and training background of all staff responsible for collecting data. FNS shall review and provide comments on these data collection instruments. After incorporating FNS comments, the Contractor shall provide revised data collection instruments.

Draft instruments and procedures shall be submitted to the FNS eighteen (18) weeks after award. Revised instruments and procedures shall be submitted to FNS twenty-four weeks (24) after award to allow time for pre-testing of draft instruments. The Contractor shall incorporate FNS comments on the revised instruments and procedures for the use of pre-testing.

The Contractor must obtain IRB approval prior to the pre-testing of instruments. The Contractor should address how they plan to obtain IRB approval prior to pre-test and amendments prior to draft OMB ICR submission. The Contractor shall pre-test the revised data collection instruments and procedures on a total of not more than nine (9) respondents to assess respondent comprehension, response burden, and effectiveness of delivery method. Results of the pretests shall be submitted in a memorandum to the FNS COR thirty-two (32) weeks after award, and changes to the instruments based on the pretests shall be made. Final, OMB-ready revised instruments shall be submitted to the COR thirty-four (34) weeks after award.

Deliverable 3.1 – Draft Instruments and Procedures

Deliverable 3.2 – Revised Instruments and Procedures

Deliverable 3.3 – Pre-test memorandum

Deliverable 3.4 – OMB-Ready Instruments

Deliverable 3.5 – IRB approval (pre-test and amendments)

4.4 Task 4: Develop OMB Information Collection Request (ICR) Package

When developing the project schedule, the contractor shall allow, at a minimum, 52 weeks for OMB's final approval from the date of publication of the Federal Register 60-day Notice. The approval process may take less than this amount of time. The contractor shall be advised that the amount of time for clearance is directly related to the quality of the initial submission of the OMB package.

The Contractor shall prepare and submit a draft and final version of the Federal Register 60-Day Notice for publication that meets all the requirements of the [Office of the Federal Register Document Drafting Handbook](#). The 60-Day Notice shall be considered final and accepted by the Government at the point of publication in the Federal Register.

The Draft Federal Register Notice shall be submitted to the COR twenty (20) weeks after award. The Revised Federal Register Notice shall be submitted to the COR twenty-four (24) weeks after award.

The Contractor shall summarize all public comments received in response to the published Federal Register Notice and draft responses to each comment to be sent by FNS, as needed. The summary of comments will include a summary of the actions taken to address the comments. The summary of public comments will be included in the Supporting Statement and the individual responses to the public comments will be provided as an appendix to the OMB package.

The Contractor shall submit to FNS a package requesting OMB approval for all information collection activities, including copies of all recruiting materials and data collection instruments and a supporting statement as set forth in 5 CFR 1320, Controlling Paperwork Burdens on the Public, the USDA Information Collection Package Submission Guidelines: <http://www.ocio.usda.gov/policy-directives-records-forms/information-collection/information-collection-package> and OMB guidance including, but not limited to, [OMB Guidance on Agency Survey and Statistical Information Collections](#) and [Revisions to the Standards for the Classification of Federal Data on Race and Ethnicity](#). Note that scripts are required to be prepared and included in the OMB package for all communications (either by telephone, mail, email, or internet) with all persons and organizations contacted for data collection purposes. If web-based data collection is included, screen shots of web-based versions of instruments shall be included in the information collection package. If required, versions of the data collection instruments translated into other languages, such as Spanish, must be included in the OMB package.

The Contractor shall provide a clearance package that provides a narrative addressing each

of the supporting statements (Parts A and B) with appropriate appendices. The contractor shall anticipate the need to make revisions after each level of review. The contractor shall also provide all the information necessary for completing the 83-I form. Form 83-I can be found on page 88 of the OMB Guidance on Agency Survey and Statistical Information Collections (see link above). The OMB package shall provide an explicit, concise description of the direct links between the study objectives, research questions, variables, instrument items, data analysis plans and desired products.

For purposes of calculating response burden, the time required in communications with respondents and separately for non-respondents contacted in the project must be included in the burden table. The OMB package shall be submitted in MS Word format. The burden table shall also be submitted in MS Excel as an appendix.

The ICR package will be reviewed by the FNS Office of Policy Support (OPS), the FNS Planning and Regulatory Affairs Office (PRAO), USDA's Office of the Chief Information Officer (OCIO), and USDA's National Agricultural Statistics Service (NASS) prior to being submitted to OMB for review and approval. Revisions to the package may be required after each level of review. The Contractor shall update the OMB package after each set of required revisions and edits, as necessary. Preparation of a high-quality initial draft, followed by timely responses to required revisions, will greatly facilitate the OMB approval process. The Contractor shall participate in a conference call presentation of the study to OMB and/or draft responses to questions from OMB, as requested.

The OMB ICR Package shall be considered final and accepted by the Government at the point that OMB provides final clearance.

For reference, recently published FNS Federal Register Notices are available online at <https://www.federalregister.gov>. Recently cleared FNS OMB packages are available online at <https://www.reginfo.gov>.

The Draft OMB Package shall be submitted to the COR twenty-eight (28) weeks after award. The Revised OMB Package incorporating FNS feedback shall be submitted to the COR thirty-four (34) weeks after award.

- Deliverable 4.1 – Draft Federal Register Notice
- Deliverable 4.2 – Final Federal Register Notice
- Deliverable 4.3 – Draft OMB Package
- Deliverable 4.4 – Revised OMB Package
- Deliverable 4.5 – Final OMB Package

4.5 Task 5 Train Data Collectors

The Contractor shall submit a draft plan for training data collectors, including agendas, methods, all materials to be used, and methods for evaluating data collectors' suitability and readiness for work on the study. The Draft Data Collector Training Plan shall be submitted to the COR three (3) weeks after the information collection request (ICR) is submitted to OMB for approval. Two weeks after receiving FNS comments on Deliverable 5.1, the Contractor shall submit the final data collector training plan.

The Contractor shall select and train experienced data collectors according to the final data collector training plan approved by FNS. The training that is provided shall be specific to this project and is required to ensure that data collectors selected for this project are capable of collecting data that will meet the study objectives. This training shall include, at a minimum, an overview of the study, data collection instruments, procedures for data collection, and simulated data collection exercises.

Data collectors shall demonstrate the ability and experience to administer the instruments reliably and consistently through certification tests, role plays, or other methods to provide an assurance of readiness to FNS. At the conclusion of data collector training, the contractor shall submit a memorandum within two (2) weeks of the data collector training describing the training, issues encountered and how they have been addressed, and results of the quality control processes used to ensure data collectors are ready to begin work collecting data on the study.

The training shall be scheduled no more than **three** (3) weeks before data collection is to begin. FNS may, at its option, observe and/or invite others to observe data collector training. The training shall be scheduled with a minimum of three (3) weeks advance notice to FNS so that FNS, at its discretion, may attend and participate either in person or remotely.

Deliverable 5.1 – Draft Data Collector Training Plan

Deliverable 5.2 – Final Data Collector Training Plan

Deliverable 5.3 – Data Collector Training Memorandum

4.6 Task 6: Quantitative Data Collection and Analysis

FNS in consultation with the Contractor will select five (5) States for the demonstrations (as well as three (3) backup States) and notify the Regional Offices about the States selected for the demonstration and that the Contractor will be conducting the study. FNS will also email each selected State Agency about the study. The Contractor shall draft emails for FNS to send to selected State Agencies inviting them to participate in the demonstration. The Contractor shall

also prepare a study description to include in their email to the State Agencies specifying the type of information and data needed from the States. These shall be delivered eighteen (18) weeks after award. Following the introductory email sent by FNS to State Agencies about the study, the Contractor shall be responsible for any follow-up required to recruit States for the demonstration and related data collection including establishing DUAs or Memoranda of Understanding (MOUs) required for data collection. The Contractor shall send the COR status updates on DUAs biweekly until the final DUA is executed starting after each demonstration study state is recruited. The COR will review the Contractor's communication strategy with States including introductory and follow-up recruitment emails. The COR will attend the initial video call between State agencies and Contractor staff to introduce the study and answer any questions State agencies may have for FNS.

The Contractor shall schedule a technical assistance meeting with each of the study States regarding the study. The purposes of these meetings are to work with States to best randomize the sample for their States, discuss establishing Data Use Agreements (DUAs) and data transferring processes, clarify the roles and responsibilities of the States, the evaluation Contractor and FNS; and address any outstanding questions from the States. FNS envisions the meetings to occur virtually, however, the Contractor can make a case for in person meetings. Topics to be addressed at this meeting shall include, but not be limited to:

- confirmation and introduction of key project staff;
- detailed information about evaluation objectives and priorities;
- overview of the research design, data collection activities and data sources (to include an oversample of quality control (QC) interviews of those selected for the no-interview group);
- data collection schedule and protocol;
- protocols for all communications between the States and the contractor and the FNS COR; and
- potential challenges and possible strategies to successfully address them.

Within 1 week of each State technical assistance meeting, the contractor shall provide a final copy of the meetings summary memorandum. The contractor shall submit this deliverable in electronic format to FNS.

Quantitative data collection shall include extant administrative data collection and new administrative data collection including time-use data. The Contractor shall collect the data using the procedures approved by OMB. Meetings with States shall be scheduled as soon as possible but no later than six (6) weeks of receiving OMB approval. The Contractor shall submit monthly memos via e-mail throughout the data collection period. These memos shall include a description of the data collection (e.g., analysis of data progress, analysis of data completeness i.e., percent of missing data by variable). Should problems arise during the data collection process, the Contractor shall immediately contact FNS to resolve the problems. At the end of the data collection period, the Contractor shall prepare a summary report on quality of the final

administrative data, including a variable-by-variable analysis of complete/missing data to be delivered within four (4) weeks of the end of data collection.

Following the completion of data collection, the Contractor shall conduct an analysis of how the no interview demonstration project relates to various outcome measures of SNAP operations. The data shall be analyzed in a manner that fully addresses the objectives of the PWS and that is consistent with the approved Final Updated Study Plan developed in Task 2.

Deliverable 6.1 – Draft Recruitment Emails and Materials

Deliverable 6.2 – Technical Assistance meeting summary memorandum

Deliverable 6.3 – Data Use Agreement (DUA) Status Updates

Deliverable 6.4 – Monthly Quantitative Data Collection Memoranda

Deliverable 6.5 – Summary Report on Quality of the Final Quantitative Data

4.7 Task 7: Qualitative Data Collection and Analysis

The qualitative data collection will conform to the approved Final Updated Study Plan prepared under Task 2 and to any supporting or clarifying correspondence between the Contractor and the COR that does not change the project's scope of work, time, or cost. The qualitative data collection includes interviews with SNAP staff, at the State and local levels, as appropriate. The data collection shall be conducted using the OMB-approved data collection instruments.

The Contractor shall interview SNAP staff near the completion of the demonstration project to gather information regarding research questions that cannot be captured in administrative data. The Contractor can propose conducting interviews at other time period(s) during the demonstration project and provide a rationale for those interviews. The Contractor shall provide weekly data collection update memos to the COR via email throughout the qualitative data collection period. The memos will include the number of interviews planned/scheduled, any problems encountered during the data collection including informant concerns and questions, and any other metric or issue FNS requests. The Contractor shall prepare and submit a summary memorandum for each State on the interview data collection within two (2) weeks of the end of data collection. At a minimum, these memos shall include the number of key informant interviews conducted, number and types of participants in each interview, average length of interviews, and the quality of the data collected. FNS envisions interviews to be virtual, however, the Contractor may make a case for in-person data collection.

Following the completion of data collection, the Contractor shall conduct a thorough analysis for each State. The data shall be analyzed in a manner that fully addresses the objectives of the PWS and that is consistent with the approved Final Updated Study Plan developed in Task 2.

Deliverable 7.1 – Qualitative Data Collection Updates

4.8 Task 8: Reporting

The Contractor shall prepare and submit for FNS review and comment a detailed draft annotated report outline for all chapters and appendices including all draft tables, figures, and State profiles. A revised version of the annotated report outline should incorporate all feedback provided by FNS on the draft version.

The Contractor shall prepare and submit a Final Report, which covers the background, methods, and findings of the study. Findings of the administrative data and qualitative research shall be presented by State. The Contractor shall also include details of the study methodology, assessment of data representativeness, data collection procedures, and other technical details in the Appendices. FNS strongly encourages the Contractor to consider creatively presenting information included in the final report using innovative dissemination tools and graphics, such as maps and infographics.

At a minimum, the final report (and all drafts) shall contain the following:

- A report cover that includes color photographs or graphics that are relevant to the subject of the report and that meets Government Publishing Office (GPO) professional standards of report publication;
- The format and contents of the report cover pages shall follow current FNS guidance, which the contractor shall obtain from the COR prior to submitting the draft report;
- An executive summary describing the overall study, its research objectives, and the main findings presented clearly and concisely for an audience of program and policy officials, and State officials;
- An introduction and background to the study that provides a review of relevant literature, study objectives, and research questions;
- An overview of the study's research methods;
- A chapter summarizing the overall study findings, general lessons learned, and best practices;
- Chapters on quantitative and qualitative State-specific findings, with one chapter devoted to each demonstration State that includes a State profile to provide context and a detailed presentation of findings including study limitations, and lessons learned;
- A conclusions chapter that synthesizes the findings across all States;
- Optional appendices with additional information on State profiles;
- Technical appendices necessary to fully document technical specifications and analytic procedures used. The technical appendices shall also include data collection instruments.

The Contractor shall submit a Revised Draft after incorporating FNS's feedback. The Final Report shall incorporate FNS's feedback on the Revised Draft, feedback from the briefing and feedback from planned State reviews. The Contractor shall ensure that each version of the report goes through the Contractor's internal quality assurance or control process before it is submitted to FNS. The internal quality assurance review shall ensure that the report does not contain grammatical or formatting errors. A track changes version with notes on how and where FNS comments were addressed shall accompany the Revised and Final versions of the report.

The report format shall be consistent with the requirements of the most recent version of the Government Printing Office Style Manual as well as the USDA Visual Standards Guide. The electronic version shall be 508-compliant and shall be submitted in MS Word and PDF formats for easy web posting. The final report shall not be considered an accepted deliverable until FNS has confirmed 508-compliance.

- Deliverable 8.1 – Draft Annotated Report Outline
- Deliverable 8.2 – Revised Annotated Report Outline
- Deliverable 8.3 – Draft Final Report
- Deliverable 8.4 – Revised Final Report
- Deliverable 8.5 – Final Report

4.9 Task 9: Briefing

Following the submission of the revised final report, the Contractor shall conduct a virtual briefing for FNS staff presenting an overview of the study, the study design, and results. The briefing should be conducted using a platform agreed upon with FNS (e.g., Microsoft Teams or WebEx). This presentation shall include visual display materials prepared in PowerPoint. Copies of the PowerPoint presentation shall be submitted to FNS for review two (2) weeks prior to the presentation. An electronic copy of the final presentation shall be emailed to the COR at least two (2) days before the briefing.

- Deliverable 9.1 – Draft PowerPoint Slides for Briefing
- Deliverable 9.2 – Final PowerPoint Slides for Briefing
- Deliverable 9.3 – Virtual Briefing

4.10 Task 10: Prepare and Submit Data Files and Documentation

The Contractor should note that FNS intends the data resulting from this study to be widely used by the research community. FNS advises the Contractor to consider this as they build the documentation for the study, ideally from the very start. FNS expects the

documentation and data files to stand alone; that is, an outside researcher should have all the information needed to analyze the data completely and accurately without input from the Contractor or FNS.

The Contractor shall submit cleaned and coded data files in Stata and/or other suitable analytic software approved by FNS to accompany the Final Report. A qualitative software package acceptable to FNS shall be used (e.g., NVivo or Atlas.ti) for analyzing the qualitative data.

Restricted use quantitative data and qualitative data sets should each be delivered in one complete data file. The data files shall be submitted with codebooks and syntax (code) sufficient for FNS to replicate all analyses without any further communication with the Contractor. The code (e.g., R scripts or Stata DO files) should be well commented and each block of code should clearly label its purpose and/or how it relates to findings in the final report (if applicable). Data files shall be accompanied by a folder containing all data collection instruments, extant data/documents analyzed, notes, digital recordings, interviewer notes, and interview transcripts data used to produce tables and analysis for all the data deliverables. Paradata and imputation flags (if applicable) or other relevant flags shall also be included. The file documentation, data dictionary and codebook shall document file names, acquired and derived variables and codes. The dictionary shall describe the file structure (data set name, record format, record length, block size and number of records). The codebook shall include variable name, type, label, format, missing values, and the frequency of missing values.

The file documentation shall also include data sources and methods for data input, editing procedures and descriptions of any composite variables. The formulation and syntax code of any calculated variables shall also be described and provided. For discrete variables, at a minimum include the count/frequency and for continuous variables include the mean, median, maximum value, and minimum value. The data files shall be complete, such that in addition to replicating the tables and analytic models submitted, FNS can easily compute descriptive statistics and additional analyses of the data to further consider the research topic. Updated data files with codebooks and syntax shall be submitted. The Contractor shall submit: (1) restricted-use files for FNS' Office of Policy Support's internal use and (2) public-use files, which remove or de-identify all Personally Identifiable Information (PII) and Confidential Information as defined and approved by OMB. Public use files shall not be prepared for the qualitative data.

For public use quantitative data files, the Contractor shall expect to make edits to the data file in addition to removing the PII as a combination of variables may result in a cell size small enough to identify a particular study participant or site. De-identification techniques include but are not limited to reducing the number of variables on which a match might be made, recoding variables into fewer categories to provide less precise detail, substituting random numbers in place of

unique identifiers, and setting top-codes and bottom-codes to limit details for extreme values. Contractors shall propose to FNS for approval the de-identification methods they will use for the variables they consider to be of concern in revealing PII. FNS seeks the application of de-identification techniques that minimize limits on secondary analyses of public use files. The audience for public use data files is the broader research community. Thus, all documentation necessary to understand and use the data shall be included such that a researcher with requisite technical faculties could use the files without further guidance from FNS or the Contractor.

FNS and the Contractor will determine what is appropriate to include in the restricted use files. The documentation shall also explicitly note the differences between the public-use and restricted-use data files.

Delivery dates for data files and documentation correspond with final report delivery dates. The draft version of data files and documentation shall be submitted to the COR with the Draft Final Report (Deliverable 8.3). Upon incorporating FNS comments, the Contractor shall submit the revised version of data files and documentation with the Revised Final report (Deliverable 8.4). The final version of data files and documentation incorporating FNS feedback is due with the Final Report (Deliverable 8.5).

Deliverable 10.1 – Draft Public Use Quantitative Data Files and Documentation

Deliverable 10.2 – Revised Public Use Quantitative Data Files and Documentation

Deliverable 10.3 – Final Public Use Quantitative Data Files and Documentation

Deliverable 10.4 – Draft Restricted Use Quantitative Data Files and Documentation

Deliverable 10.5 – Revised Restricted Use Quantitative Data Files and Documentation

Deliverable 10.6 – Final Restricted Use Quantitative Data Files and Documentation

Deliverable 10.7 – Draft Restricted Use Qualitative Data Files and Documentation

Deliverable 10.8 – Revised Restricted Use Qualitative Data Files and Documentation

Deliverable 10.9 – Final Restricted Use Qualitative Data Files and Documentation

5.0 Schedule of Deliverables

The period of performance is 44 months from date of award. All deliverables shall be submitted electronically.

	Task		Deliverable Description	Due Date	Delivery Format/ Quantities
1	Project Orientation Meeting and Reporting	1.1	Project Orientation Meeting Agenda and draft PowerPoint Slides	2 work days prior to meeting	Electronic (.docx and .pdf)
		1.2	Draft Project Orientation Meeting Summary Memorandum	Within 2 weeks after meeting	Electronic (.docx)
		1.3	Final Project Orientation Meeting Summary Memorandum	Within 4 weeks after meeting	Electronic (.docx and .pdf)
		1.4	Monthly Progress Reports	10 th of each month	Electronic (.docx)
2	Prepare the Updated Study Plan	2.1	Draft Updated Study Plan	6 weeks after award	Electronic (.docx)
		2.2	Revised Updated Study Plan	12 weeks after award	Electronic (.docx)
		2.3	Final Updated Study Plan	16 weeks after award	Electronic (.docx and .pdf)
3	Develop Data Collection Procedures and Instruments	3.1	Draft Instrument and Procedures	18 weeks after award	Electronic (.docx)
		3.2	Revised Instrument and Procedures	24 weeks after award	Electronic (.docx and .pdf)
		3.3	Pre-Test Memorandum	32 weeks after award	Electronic (.docx and .pdf)

		3.4	OMB-Ready Instruments	34 weeks after award	Electronic (.docx and .pdf)
		3.5	IRB approval and amendments	34 weeks after award	Electronic (.docx and .pdf)
4	Develop OMB Information Collection Request (ICR) Package	4.1	Draft Federal Register Notice	20 weeks after award	Electronic (.docx)
		4.2	Final Federal Register Notice	24 weeks after award	Electronic (.docx and .pdf)
		4.3	Draft OMB Package	28 weeks after award	Electronic (.docx)
		4.4	Revised OMB Package	34 weeks after award	Electronic (.docx or .xlsx)
		4.5	Final OMB Package	Considered delivered upon OMB approval	
5	Train Data Collectors	5.1	Draft Data Collector Training Plan	3 weeks after the ICR is submitted to OMB for approval	Electronic (.docx)
		5.2	Final Data Collector Training Plan	2 weeks after receiving COR comments on 5.1	Electronic (.docx and .pdf)
		5.3	Data Collector Training Memorandum	Within 2 weeks of end of data collector training	Electronic (.docx and .pdf)
6	Quantitative Data Collection and Analysis	6.1	Draft Recruitment Emails and Materials	18 weeks after award	Electronic (.docx)

		6.2	Technical Assistance meeting summary memorandum	Within 1 week of each State technical assistance meeting	Electronic (.docx)
		6.3	Data Use Agreement (DUA) Status Updates	Biweekly starting after each case study State is recruited until final DUA is executed.	Electronic (.docx)
		6.4	Monthly Quantitative Data Collection Memoranda	Every month during data collection period	Electronic (.docx)
		6.5	Summary Report on Quality of the Administrative Data	Within 4 weeks of end of data collection	Electronic (.docx and .pdf)
7	Qualitative Data Collection and Analysis	7.1	Qualitative Data Collection Updates	Weekly updates throughout data collection period	Electronic (.docx)
		7.2	Summary Memos	Within two weeks of completion of each demonstration project data collection	Electronic (.docx)
8	Prepare and Submit Final Report	8.1	Draft Annotated Report Outline	No later than 8 weeks after data collection	Electronic (.docx and .pdf)
		8.2	Revised Annotated Report Outline	No later than 12 weeks after completion of data collection	Electronic (.docx and .pdf)

		8.3	Draft Final Report	No later than 18 weeks after completion of data collection	Electronic (.docx)
		8.4	Revised Final Report	No later than 24 weeks after completion of data collection	Electronic (.docx)
		8.5	Final Report	No later than 28 weeks after completion of data collection	Electronic (.docx and .pdf)
9	Briefing	9.1	Draft PowerPoint slides for briefing	At least 2 weeks prior to briefing	Electronic (.pptx and .pdf)
		9.2	Final PowerPoint slides for briefing	At least 2 business days prior to briefing	Electronic (.pptx and .pdf)
		9.3	Virtual Briefing	No later than 15 business days after submission of 8.4 (Revised Final Report)	
10	Prepare and Submit Data Files and Documentation	10.1	Draft Public Use Quantitative Data Files and Documentation	Due with submission of Deliverable 8.3 (Draft Final Report)	Electronic (approved software format)
		10.2	Revised Public Use Quantitative Data Files and Documentation	Due with submission of Deliverable 8.4 (Revised Final Report)	Electronic (approved software format)
		10.3	Final Public Use Quantitative Data Files and Documentation	Due with submission of Deliverable 8.5 (Final	Electronic (approved software format)

				Report)	
		10.4	Draft Restricted Use Quantitative Data Files and Documentation	Due with submission of Deliverable 8.3 (Draft Final Report)	Electronic (approved software format)
		10.5	Revised Restricted Use Quantitative Data Files and Documentation	Due with submission of Deliverable 8.4 (Revised Final Report)	Electronic (approved software format)
		10.6	Final Restricted Use Quantitative Data Files and Documentation	Due with submission of Deliverable 8.5 (Final Report)	Electronic (approved software format)
		10.7	Draft Restricted Use Qualitative Data Files and Documentation	Due with submission of Deliverable 8.3 (Draft Final Report)	Electronic (approved software format)
		10.8	Revised Restricted Use Qualitative Data Files and Documentation	Due with submission of Deliverable 8.4 (Revised Final Report)	Electronic (approved software format)
		10.9	Final Restricted Use Qualitative Data Files and Documentation	Due with submission of Deliverable 8.5 (Final Report)	Electronic (approved software format)

6.0 PERFORMANCE REQUIREMENTS

The Performance Requirements Summary (PRS) describes the requirements of this project, along with a performance standard and measure per outcome.

Task or Deliverable	Performance Standard	Performance Standard	Surveillance Method	Performance Rating	Surveillance Frequency	Monitoring Performed
Project Orientation Meeting and Reporting	Project Orientation slides provide relevant details and take away messages for a non-technical audience of program staff and managers. Slides are professionally designed, contain an appropriate amount of information, and can be viewed clearly from the audience. Presentation is effective and delivered within the allotted time and allows for discussion with the audience. Written memoranda are clear, comprehensive, well-organized, and error-free. Descriptions of the discussion at the orientation meeting are accurate and credible. Timely delivery of monthly progress reports that meet all requirements set forth in the PWS.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract’s approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable

Prepare the Updated Study Plan	Written document is clear, comprehensive, well-organized, and error-free. Plan evidences a high level of technical expertise and demonstrates the use of a creative approach to achieve FNS objectives with available resources. Plan presents specific research questions and outlines the steps that will be taken to fully address these questions using the available data.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable
Develop Data Collection Procedures and Instruments	The data collection instruments are methodologically sound, designed to collect the data needed to thoroughly address the study objectives and incorporate feedback from the pre-testing. Written documents are clear, comprehensible, well-organized, and error-free.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable
Develop OMB Information Clearance Request (ICR) Package	Written documents are clear, comprehensive, well-organized, and error-free. Federal Register and OMB supporting documents meet OMB requirements and are delivered in compliance with the date in the schedule of deliverables. Corrective issues on the OMB package are	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the

	adequately addressed and in a timely manner.					deliverable
Train Data Collectors	Manual for data collectors is clear, comprehensive, well-organized, and error-free. Training plan incorporates diverse learning and instructional methods and procedures to document each data collector's readiness for collecting high quality, complete and accurate data at the end of the training. Training is done no more than two weeks before the start of data collection and the memorandum clearly documents the readiness of data collectors for the study.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable
Quantitative Data Collection and Analysis	Data use agreements are executed, and data are collected from selected States in accordance with the approved final updated study plan and data collection procedures. Data	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the

	are collected monthly from each demonstration State. Data collected meet the scope and depth of data required to address all research questions. There is limited item non-response. The analysis of the administrative data thoroughly addresses the objectives and research questions.					deliverable
Qualitative Data Collection and Analysis	Data collected meet the scope and depth of data required to address all PWS objectives. Data are analyzed to address PWS research objectives. Summary memos are clear, comprehensive, well-organized, and error-free.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable
Prepare and submit final report	Report is clear, comprehensive, well-organized, and error-free. Each draft is complete and includes all the sections of the report. Analytic tables are clear, comprehensive, well-organized, and error-free. The report provides a thorough examination of and reporting on the objectives and research questions as outlined in the PWS and informed by administrative and qualitative data collection. All materials meet 508	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable

	compliance.					
Briefing	Briefing slides provide relevant details and take away messages for a non-technical audience of program staff and managers. Slides are professionally designed, contain an appropriate amount of information, and can be viewed clearly from the audience. Presentation is effective and delivered within the allotted time and allows for discussion with the audience.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable
Data Files and Documentation	Files are delivered in format specified in the PWS and are complete and without errors. COR's analysis with restricted use files replicate the analysis conducted by the Contractor and reported in the draft report and data tables.	All deliverables as described in the PWS and specified in the approved Schedule of Deliverables	100 percent inspection	Exceptional Very Good Satisfactory Marginal Unsatisfactory	Per the contract's approved schedule of deliverables	Acceptance or Rejection of each deliverable is noted via a Government Transmittal Sheet attached to the deliverable

Exceptional	Performance meets contractual requirements and exceeds many to the Government's benefit. The contractual performance of the element or sub-element being assessed was accomplished with few minor problems for which corrective actions taken by the contractor were highly effective.
Very Good	Performance meets contractual requirements and exceeds some to the Government's benefit. The contractual performance of the element or sub-element being assessed was accomplished with some minor problems for which corrective actions taken by the contractor were effective.
Satisfactory	Performance meets contractual requirements. The contractual performance of the element or sub-element contains some minor problems for which corrective actions taken by the contractor appear or were satisfactory.
Marginal	Performance does not meet some contractual requirements. The contractual performance of the element or sub-element being assessed reflects a serious problem for which the contractor has not yet identified corrective actions. The contractor's proposed actions appear only marginally effective or were not fully implemented.
Unsatisfactory	Performance does not meet most contractual requirements and recovery is not likely in a timely manner. The contractual performance of the element or sub-element contains a serious problem(s) for which the contractor's corrective actions appear or were ineffective.

SECTION II – CONTRACT CLAUSES

FAR 52.252-2, CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

In addition to the clauses contained in the GSA contract, the following clauses apply to this acquisition. In the event that the same clause is referenced in both the GSA contract and this solicitation, the clause contained in the GSA contract (along with its associated publication date) shall take precedence.

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 address: <http://farsite.hill.af.mil/vffara.htm>.

FAR

52.203-3– Gratuities (Apr 1984)

52.203-17 – Contractor Employee Whistleblower Rights and Requirement to Inform Employees of Whistleblower Rights. (June 2020)

52.204-9 Personal Identity Verification of Contractor Personnel (Jan 2011)

52.227-14 Rights in Data-General (May 2014)

52.212-4 Contract Terms and Conditions – Commercial Products and Commercial Services (Nov 2021)

52.242-13 Bankruptcy (July 1995)

52.232-40 – Providing Accelerated Payments to Small Business Subcontractors (Nov 2021)

AGAR Clauses Incorporated by Reference

AGAR 452.237-75 Restrictions Against Disclosure (Feb 1988)

452.224-70 Confidentiality of Information

452.237-75 Restrictions Against Disclosure.

Clauses Incorporated by Full Text

ADDENDUM TO 52.212-4 Contract Terms and Conditions - Commercial Products and Commercial Services (Nov 2021)

Payment shall be made for each Firm-Fixed Price item accepted by the government that have been delivered to the delivery destinations set forth in this task order and may be invoiced upon delivery and acceptance of each deliverable listed in the attached Excel Price Sheet.

Invoices may be submitted no more frequently than on a monthly basis for deliverables provided and accepted by the Government in accordance with the clause, **Electronic Invoicing and Payment Requirements – Internet Payment Platform (IPP)**, incorporated into this task order. Contractors are advised that partial payments of invoices are not possible at time of award under the Internet Payment Platform (IPP) and recommend submitting invoices for travel separate from firm fixed-price/labor billings.

FINAL INVOICE FOR CLOSEOUT OF THE CONTRACT:

Within sixty calendar days of completion of services:

- a. The contractor shall submit a final invoice, designated as such by a clear statement of "FINAL INVOICE" on the face of the invoice document.
- b. The contractor shall provide a certificate of completion which certifies all services have been provided as required by the contract.
- c. The contractor shall provide a release of claims against the government for any further payment under the contract.

The sixty calendar day submission timeframe shall not be extended without written authorization from the Contracting Officer. In the event items a, b, or c above are not submitted within the authorized timeframe, the Contracting Officer will make final cost determinations in order to make final payment and close out the contract unilaterally.

(End of Clause)

FAR 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 websites) 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 products or commercial services, 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)

FAR 52.212-5 -Contract Terms and Conditions Required to Implement Statutes or Executive Orders -- Commercial Products and Commercial Services (May 2022)

(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 and Other Covered Entities (Nov 2021) (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) [52.233-3](#), Protest After Award (AUG 1996) ([31 U.S.C. 3553](#)).

(6) [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.]

 X (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. 2402](#)).

 (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.)

 X (4) [52.204-10](#), Reporting Executive Compensation and First-Tier Subcontract Awards (JUN 2020) (Pub. L. 109-282) ([31 U.S.C. 6101 note](#)).

 (5) [Reserved].

 X (6) [52.204-14](#), Service Contract Reporting Requirements (OCT 2016) (Pub. L. 111-117, section 743 of Div. C).

 (7) [52.204-15](#), Service Contract Reporting Requirements for Indefinite-Delivery Contracts (OCT 2016) (Pub. L. 111-117, section 743 of Div. C).

 X (8) [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](#)).

 (9) [52.209-9](#), Updates of Publicly Available Information Regarding Responsibility Matters (OCT 2018) ([41 U.S.C. 2313](#)).

 (10) [Reserved].

 (11) [52.219-3](#), Notice of HUBZone Set-Aside or Sole-Source Award (SEP 2021) ([15 U.S.C. 657a](#)).

 (12) [52.219-4](#), Notice of Price Evaluation Preference for HUBZone Small Business Concerns (SEP 2021) (if the offeror elects to waive the preference, it shall so indicate in its offer) ([15 U.S.C. 657a](#)).

 (13) [Reserved]

 (14) (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](#).
- ___ (15) (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](#).
- ___ (16) [52.219-8](#), Utilization of Small Business Concerns (OCT 2018) ([15 U.S.C. 637\(d\)\(2\)](#) and (3)).
- ___ (17) (i) [52.219-9](#), Small Business Subcontracting Plan (NOV 2021) ([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 2021) of [52.219-9](#).
- ___ (18) (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_ (19) [52.219-14](#), Limitations on Subcontracting (SEP 2021) ([15 U.S.C. 637s](#)).
- ___ (20) [52.219-16](#), Liquidated Damages—Subcontracting Plan (SEP 2021) ([15 U.S.C. 637\(d\)\(4\)\(F\)\(i\)](#)).
- ___ (21) [52.219-27](#), Notice of Service-Disabled Veteran-Owned Small Business Set-Aside (SEP 2021) ([15 U.S.C. 657f](#)).
- ___ (22) (i) [52.219-28](#), Post Award Small Business Program Rerepresentation (SEP 2021) ([15 U.S.C. 632\(a\)\(2\)](#)).
- ___ (ii) Alternate I (MAR 2020) of [52.219-28](#).
- ___ (23) [52.219-29](#), Notice of Set-Aside for, or Sole-Source Award to, Economically Disadvantaged Women-Owned Small Business Concerns (SEP 2021) ([15 U.S.C. 637\(m\)](#)).
- ___ (24) [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 (SEP 2021) ([15 U.S.C. 637\(m\)](#)).
- ___ (25) [52.219-32](#), Orders Issued Directly Under Small Business Reserves (MAR 2020) ([15 U.S.C. 644\(r\)](#)).
- ___ (26) [52.219-33](#), Nonmanufacturer Rule (SEP 2021) ([15 U.S.C. 637\(a\)\(17\)](#)).

- ☒ (27) [52.222-3](#), Convict Labor (JUN 2003) (E.O.11755).
- ☐ (28) [52.222-19](#), Child Labor-Cooperation with Authorities and Remedies (JAN 2022) (E.O.13126).
- ☒ (29) [52.222-21](#), Prohibition of Segregated Facilities (APR 2015).
- ☒ (30) (i) [52.222-26](#), Equal Opportunity (SEP 2016) (E.O.11246).
- ☐ (ii) Alternate I (FEB 1999) of [52.222-26](#).
- ☒ (31) (i) [52.222-35](#), Equal Opportunity for Veterans (JUN 2020) ([38 U.S.C. 4212](#)).
- ☐ (ii) Alternate I (JUL 2014) of [52.222-35](#).
- ☒ (32) (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](#).
- ☒ (33) [52.222-37](#), Employment Reports on Veterans (JUN 2020) ([38 U.S.C. 4212](#)).
- ☒ (34) [52.222-40](#), Notification of Employee Rights Under the National Labor Relations Act (DEC 2010) (E.O. 13496).
- ☒ (35) (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).
- ☒ (36) [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](#).)
- ☐ (37) (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.)
- ☐ (38) [52.223-11](#), Ozone-Depleting Substances and High Global Warming Potential Hydrofluorocarbons (Jun 2016) (E.O. 13693).
- ☐ (39) [52.223-12](#), Maintenance, Service, Repair, or Disposal of Refrigeration Equipment and Air Conditioners (JUN 2016) (E.O. 13693).

___ (40) (i) [52.223-13](#), Acquisition of EPEAT®-Registered Imaging Equipment (JUN 2014) (E.O.s 13423 and 13514).

___ (ii) Alternate I (OCT 2015) of [52.223-13](#).

___ (41) (i) [52.223-14](#), Acquisition of EPEAT®-Registered Televisions (JUN 2014) (E.O.s 13423 and 13514).

___ (ii) Alternate I (Jun2014) of [52.223-14](#).

___ (42) [52.223-15](#), Energy Efficiency in Energy-Consuming Products (MAY 2020) ([42 U.S.C. 8259b](#)).

___ (43) (i) [52.223-16](#), Acquisition of EPEAT®-Registered Personal Computer Products (OCT 2015) (E.O.s 13423 and 13514).

___ (ii) Alternate I (JUN 2014) of [52.223-16](#).

X (44) [52.223-18](#), Encouraging Contractor Policies to Ban Text Messaging While Driving (JUN 2020) (E.O. 13513).

___ (45) [52.223-20](#), Aerosols (JUN 2016) (E.O. 13693).

___ (46) [52.223-21](#), Foams (Jun2016) (E.O. 13693).

___ (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) [52.225-1](#), Buy American-Supplies (Nov 2021) ([41 U.S.C. chapter 83](#)).

___ (49) (i) [52.225-3](#), Buy American-Free Trade Agreements-Israeli Trade Act (Nov 2021) ([41 U.S.C. chapter 83](#), [19 U.S.C. 3301](#) note, [19 U.S.C. 2112](#) note, [19 U.S.C. 3805](#) note, [19 U.S.C. 4001](#) note, Pub. L. 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 (JAN 2021) of [52.225-3](#).

___ (iii) Alternate II (JAN 2021) of [52.225-3](#).

___ (iv) Alternate III (JAN 2021) of [52.225-3](#).

___ (50) [52.225-5](#), Trade Agreements (OCT 2019) ([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. 2302Note](#)).

___ (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 (Nov2007) ([42 U.S.C. 5150](#)).

___ (55) [52.229-12](#), Tax on Certain Foreign Procurements (FEB 2021).

___ (56) [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. 2307\(f\)](#)).

___ (57) [52.232-30](#), Installment Payments for Commercial Products and Commercial Services (Nov 2021) ([41 U.S.C. 4505](#), [10 U.S.C. 2307\(f\)](#)).

X (58) [52.232-33](#), Payment by Electronic Funds Transfer-System for Award Management (OCT2018) ([31 U.S.C. 3332](#)).

___ (59) [52.232-34](#), Payment by Electronic Funds Transfer-Other than System for Award Management (Jul 2013) ([31 U.S.C. 3332](#)).

___ (60) [52.232-36](#), Payment by Third Party (MAY 2014) ([31 U.S.C. 3332](#)).

X (61) [52.239-1](#), Privacy or Security Safeguards (AUG 1996) ([5 U.S.C. 552a](#)).

___ (62) [52.242-5](#), Payments to Small Business Subcontractors (JAN 2017) ([15 U.S.C. 637\(d\)\(13\)](#)).

___ (63) (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.]

X (1) [52.222-41](#), Service Contract Labor Standards (AUG 2018) ([41 U.S.C. chapter67](#)).

X (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](#)).

 X (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](#)).

 X (7) [52.222-55](#), Minimum Wages for Contractor Workers Under Executive Order 14026 (JAN 2022).

 X (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) [52.203-19](#), 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)).

(iii) [52.204-23](#), Prohibition on Contracting for Hardware, Software, and Services Developed or Provided by Kaspersky Lab and Other Covered Entities (Nov 2021) (Section 1634 of Pub. L. 115-91).

(iv) [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).

(v) [52.219-8](#), Utilization of Small Business Concerns (OCT 2018) ([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.

(vi) [52.222-21](#), Prohibition of Segregated Facilities (APR 2015).

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

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

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

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

(xi) [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](#).

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

(xiii)

(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](#)).

(xiv) [52.222-51](#), Exemption from Application of the Service Contract Labor Standards to Contracts for Maintenance, Calibration, or Repair of Certain Equipment-Requirements (May2014) ([41 U.S.C. chapter 67](#)).

(xv) [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](#)).

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

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

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

(xix)

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

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

(xx) [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. 2302 Note](#)).

(xxi) [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.

(xxii) [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)

DIAR 1452.201-70 Authorities and Delegations (SEP 2011)

(a) The Contracting Officer is the only individual authorized to enter into or terminate this contract, modify any term or condition of this contract, waive any requirement of this contract, or accept nonconforming work.

(b) The Contracting Officer will designate a Contracting Officer's Representative (COR) at time of award. The COR will be responsible for technical monitoring of the contractor's performance and deliveries. The COR will be appointed in writing, and a copy of the appointment will be furnished to the Contractor. Changes to this delegation will be made by written changes to the existing appointment or by issuance of a new appointment.

(c) The COR is not authorized to perform, formally or informally, any of the following actions:

(1) Promise, award, agree to award, or execute any contract, contract modification, or notice of intent that changes or may change this contract;

(2) Waive or agree to modification of the delivery schedule;

(3) Make any final decision on any contract matter subject to the Disputes Clause;

(4) Terminate, for any reason, the Contractor's right to proceed;

(5) Obligate in any way, the payment of money by the Government.

(d) The Contractor shall comply with the written or oral direction of the Contracting Officer or authorized representative(s) acting within the scope and authority of the appointment memorandum. The Contractor need not proceed with direction that it considers to have been issued without proper authority. The Contractor shall notify the Contracting Officer in writing, with as much detail as possible, when the COR has taken an action or has issued direction (written or oral) that the Contractor considers to exceed the COR's appointment, within 3 days of the occurrence. Unless otherwise provided in this contract, the Contractor assumes all costs, risks, liabilities, and consequences of performing any work it is directed to perform that falls within any of the categories defined in paragraph (c) prior to receipt of the Contracting Officer's response issued under paragraph (e) of this clause.

(e) The Contracting Officer shall respond in writing within 30 days to any notice made under paragraph (d) of this clause. A failure of the parties to agree upon the nature of a direction, or upon the contract action to be taken with respect thereto, shall be subject to the provisions of the Disputes clause of this contract.

(f) The Contractor shall provide copies of all correspondence to the Contracting Officer and the COR.

(g) Any action(s) taken by the Contractor, in response to any direction given by any person acting on behalf of the Government or any Government official other than the Contracting Officer or the COR acting within his or her appointment, shall be at the Contractor's risk.

(End of clause)

AGAR Clauses

452.237-74 Key Personnel (FEB 1988)

(a) The Contractor shall assign to this contract the following key personnel:

Project Director

Subject Matter Expert

Senior Researcher

(b) During the first ninety (90) days of performance, the Contractor shall make no substitutions of key personnel unless the substitution is necessitated by illness, death, or termination of employment. The Contractor shall notify the Contracting Officer within 15 calendar days after the occurrence of any of these events and provide the information required by paragraph (c) below. After the initial 90-day period, the Contractor shall submit the information required by paragraph (c) to the Contracting Officer at least 15 days prior to making any permanent substitutions.

(c) The Contractor shall provide a detailed explanation of the circumstances necessitating the proposed substitutions, complete resumes for the proposed substitutes, and any additional information requested by the Contracting Officer. Proposed substitutes should have comparable qualifications to those of the persons being replaced. The Contracting Officer will notify the Contractor within 15 calendar days after receipt of all required information of the decision on substitutions. The contract will be modified to reflect any approved changes of key personnel.

(End of clause)

AQD Local Clauses

NOTICE TO CONTRACTORS - Contractor Performance Assessment Reporting System (December 2015)

1. [FAR 42.1502](#) directs all Federal agencies to collect past performance information on contracts. The Department of the Interior (DOI) has implemented the Contractor Performance Assessment Reporting System (CPARS) to comply with this regulation. One or more past performance evaluations will be conducted in order to record your contract performance as required by [FAR 42.15](#).
2. The past performance evaluation process is a totally paperless process using CPARS. CPARS is a web-based system that allows for electronic processing of the performance evaluation report. Once the report is processed, it is available in the Contractor Performance Assessment Reporting System (CPARS) for Government use in evaluating past performance as part of a source selection action.
3. We request that you furnish the Contracting Officer (CO) with the name, position title, phone number, and email address for each person designated to have access to your firm's past performance evaluation(s) for the contract no later than **30 days after award**. Each person granted access will have the ability to provide comments in the Contractor portion of the report and state whether or not the Contractor agrees with the evaluation,

before returning the report to the Assessing Official (AO). Information in the report must be protected as source selection sensitive information not releasable to the public.

4. When your Contractor Representative(s) are registered in CPARS, they will receive an automatically generated email with detailed login instructions. Further details, systems requirements, and training information for CPARS is available at <https://www.cpars.gov/>.
5. Within 60 days after the end of a performance period, the AO will complete an interim or final past performance evaluation, and the report will be accessible at <https://www.cpars.gov/>.
 - a. Contractor Representatives may then provide comments in response to the evaluation, or return the evaluation without comment.
 - b. Your comments should focus on objective facts in the AO's narrative and should a) provide your views on the causes and ramifications of the assessed performance.
 - c. All information provided should be reviewed for accuracy prior to submission.
 - d. If you elect not to provide comments, please acknowledge receipt of the evaluation by indicating "No comment" in the space provided, and then selecting "Accept the Ratings and Close the Evaluation".
 - e. Your response is due within 60 calendar days after receipt of the CPAR. On day 15, the evaluation will become available in CPARS-RC marked as "Pending" with or without comments and whether or not it has been closed.
 - f. If you do not sign and submit the CPAR within 60 days, it will automatically be returned to the Government and will be annotated: "The report was delivered/received by the contractor on (date). The contractor neither signed nor offered comment in response to this assessment."
6. The following guidelines apply concerning your use of the past performance evaluation:
 - a. Protect the evaluation as source selection information. After review, transmit the evaluation by completing and submitting the form through CPARS. If for some reason you are unable to view and/or submit the form through CPARS, contact the CO for instructions.
 - b. Strictly control access to the evaluation within your organization. Ensure the evaluation is never released to persons or entities outside of your control.
 - c. Prohibit the use of or reference to evaluation data for advertising, promotional material, pre-award surveys, responsibility determinations, production readiness reviews, or other similar purposes.
7. If you wish to discuss a past performance evaluation, you should request a meeting in writing to the CO no later than seven days following your receipt of the evaluation. The meeting will be held in person or via telephone or other means during your 60-day review period.
8. A copy of the completed past performance evaluation will be available in CPARS for your viewing and for Government use supporting source selection actions after it has been finalized.

(End of notice)

Electronic Invoicing and Payment Requirements – Invoice Processing Platform (IPP) (April 2013)

Payment requests must be submitted electronically through the U. S. Department of the Treasury's Invoice Processing Platform System (IPP).

"Payment request" means any request for contract financing payment or invoice payment by the Contractor. To constitute a proper invoice, the payment request must comply with the requirements identified in the applicable Prompt Payment clause included in the contract, or the clause 52.212-4 Contract Terms and Conditions - Commercial Items included in commercial item contracts. The IPP website address is: <https://www.ipp.gov>.

Under this contract the following documents are required to be submitted as an attachment to the IPP invoice

Invoices shall include at a minimum, the following information:

- Task Order Number
- Billing Period covered by services performed
- Description of Deliverable and Contract Line Item Number (CLIN)
- Price of Deliverable

The Contractor must use the IPP website to register access and use IPP for submitting requests for payment. The Contractor Government Business Point of Contact (as listed in SAM) will receive enrollment instructions via email from the Federal Reserve Bank of Boston (FRBB) prior to the contract award date, but no more than 3 - 5 business days of the contract award date. Contractor assistance with enrollment can be obtained by contacting the IPP Production Helpdesk via email ippgroup@bos.frb.org or phone (866) 973-3131.

If the Contractor is unable to comply with the requirement to use IPP for submitting invoices for payment, the Contractor must submit a waiver request in writing to the Contracting Officer with its quote or quotation.

(End of Local Clause)

Conflict of Interest Certification:

The contractor employee may be required to sign a conflict of interest certificate if the Contracting Officer determines the contract and associated work may potentially affect the employee's or the employer's financial interest. When the Contracting Officer determines the potential exist, the contractor employee, through the contract Project Manager, shall be required to sign a Conflict of Interest Certificate.

(End of Clause)

SECTION III – SOLICITATION PROVISIONS

In addition to the aforementioned clauses, the following provisions apply to this acquisition:

Provisions Incorporated by Reference

52.252-1 Solicitation Provisions Incorporated by Reference (Feb 1998)

This solicitation incorporates one or more solicitation provisions 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. The vendor is cautioned that the listed provisions may include blocks that must be completed by the vendor and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the vendor may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this address: <http://farsite.hill.af.mil/vffar1.htm>

- 52.204-7 System for Award Management (Oct 2018)
- FAR 52.203-18, Prohibition on Contracting with Entities that Require Certain Internal Confidentiality Agreements or Statements--Representation (Jan 2017)

Provisions Incorporated by Full Text

FAR 52.212-1, Instructions to Offerors – Commercial Products and Commercial Services (Nov 2021) Addendum

As an addendum to this provision, Vendors are instructed to submit quotes as follows:

Quotes shall consist of separate written technical and price quotes.

Quotes that merely restate the requirements of the Government's Performance Work Statement will not be highly rated.

INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS

Quotes shall be submitted in accordance with the following instructions. Quotes must be signed, dated and received by the office specified in this solicitation on or before the exact time specified in this solicitation. Deviations from these instructions may result in a rejection of your quote. Quotes must be clear, complete and logically organized. The Government will consider a Vendor's failure to fully comply with these instructions as indicative of the type of conduct that it may expect from the Vendor during contract performance.

Vendors must include the following information in their **Price Quote** cover letter:

RFQ Number and Project Title

- Vendor's Point of Contact for this project (name, title, address, phone number, and email address)

- Tax Identification Number (TIN)
- SAM Unique Entity Identifier (UEI) Number
- North American Industrial Classification System (NAICS) Code 541611 – Offices of Certified Public Accountants
- Product Service Code (PSC): B599 Special Studies/Analysis- Other
- The validity period of the quote [Vendor's quote(s) must be valid for at least 60 calendar days]
- Provide acknowledgement of all RFQ amendments, if any (must reference amendment numbers)
- GSA schedule contract number

Include a statement that services ordered are within the scope of your GSA schedule contract.

Vendors must also ensure that their firm is registered with the System for Award Management (SAM).

For information, refer to www.sam.gov.

ASSUMPTIONS, CONDITIONS, or EXCEPTIONS: If the vendor seeks exception to any specific technical requirement of the Performance Work Statement (PWS), specifications or any other terms and conditions of the solicitation, the vendor shall notify the Contracting Officer and Contract Specialist via email no later than **May 22, 2023**. Vendor exceptions shall identify each specific area of concern. If the Contracting Officer determines that a change is in fact required, an amendment to the solicitation will be issued. In no event is the vendor to submit a quote that is not in exact conformance with the solicitation. A quote that is found to deviate from the solicitation may be rejected as unacceptable.

Vendors are expected to provide all deliverables associated with the Performance Work Statement. Vendors specifying any assumptions, conditions, or exceptions in their quotes which are not agreeable to the Government may be considered non-compliant and rejected. Further, the Government will reject a vendor's quote containing any qualifiers placed on their quote's price for deliverables that is not within the scope of the awarded order.

TECHNICAL QUOTE

IMPORTANT: Price data shall not be included within the Technical Quote. Technical quotes are limited to 30 single-spaced pages, on standard letter-size paper. All pages shall have a minimum of a 1-inch margin on the top, bottom, left, and right. Page numbering, vendor identification, and disclaimers may be placed in the 1-inch margin. Quotes shall be submitted in font size, 11- or 12-point, in an easily readable font, such as Calibri or Arial. Nine (9) point font size and single spacing is acceptable for any tables, graphic, and illustrations; however, do not submit an abundance of information in chart format. Page limit includes: All executive summaries, charts, graphs, diagrams, tables, pictures, drawings, etc. Page Limit does not include: Appendices, Teaming Agreements, Letter of Intent, covers for volumes, tables of contents, glossary of abbreviations and acronyms, indices, title pages, and section dividers/tables if they are inserted solely to provide ease to the reader in locating parts/sections of the quote. They will be counted if they contain any other information, i.e., diagrams, extraneous data, etc. Pages marked "This page intentionally left blank" will not be counted.

Electronic versions of the quote shall be submitted in Microsoft Word™, Excel™, or Adobe PDF™ format as appropriate.

Schedule Contractors shall provide a technical quotation that includes the following:

Volume I Technical

1) Technical Approach

In the narrative section, the Quoter shall include the following:

1. A clear, detailed, innovative, and feasible approach to create a study to better understand the impact of eliminating the required client interview for SNAP benefit certification and recertification.
2. The technical approach must address each area within the “Technical Factor 1. Technical Approach” section in the Evaluation Criteria section of the solicitation.

2) Management Approach

In the narrative section, the Quoter shall include the following:

1. The Quoter shall fully describe and discuss in detail the management approach for the successful completion of the PWS.
2. Provide a management plan that addresses each area within the “Technical Factor 2. Management Approach” section in the Evaluation Criteria section of the solicitation.
3. Quoters shall include a Work Breakdown Structure (WBS) which identifies the labor categories and estimated hours (NO PRICING/LABOR RATES) for each labor category.

Volume II Past Performance

Offerors shall provide examples of three (3) past projects performed within the past three (3) years to include contracts or task orders for work of the same or similar to the requirements specified in the PWS, including timeliness and quality of services provided and brief descriptions of how the projects relate to this project and how the success of prior projects was determined. This list must include the contract number, value, description, and technical/contracting points of contact (POCs). The POC’s names, telephone numbers, agency and e-mail addresses must also be included. These past projects will be evaluated for relevancy to the scope and requirements of this PWS.

Past performance information may take into account predecessor companies, key personnel who have relevant experience or subcontractors that will perform major or critical aspects of the requirement. In the case of a Vendor without a record of relevant past performance or for whom information on past performance is not available, the Vendor may not be evaluated favorably or unfavorably.

The Government may also consider information obtained through other sources, including the Contractor Performance Assessment Reporting System (CPARS), previously the Past Performance Information Retrieval System (PPIRS).

The past performance evaluation will be considered in an assessment of the Vendor’s probability of meeting the solicitation requirements.

Volume III Price Volume

The price quote shall be a **separate volume** from the technical quote. There is no page limit on the price quote.

1. Quoters shall submit a Firm-Fixed-Price (FFP) quote in accordance with the deliverables chart in the pricing template (Attachment 1). In addition to the FFP price submitted, quoters shall submit a detailed breakdown of the labor categories, GSA labor rates, percentage discount, and quoted rate, along with the proposed hours and items that make up the basis for the FFP quote. The quoter shall identify any labor categories that are subject to the Service Contract Labor Standards (SCLS)/Service Contract Act (SCA) and ensure applicable labor categories are paid wages equal to or greater than the corresponding prevailing rates found in the MAS contract Wage Determinations.
2. To assist Quoters in providing conforming price quotes and to promote standardization across submissions, the Government has provided a Price Quote Spreadsheet (Attachment 1) that shall be used by the quoters. **Quoters shall leave the Price Quote Spreadsheet as an Excel spreadsheet when submitting their price quote.** Failure to use the Excel spreadsheet as provided will be viewed as unacceptable and the Quoter will be removed from consideration for award.
3. The Government requests discounts. If a discount is provided, Quoters shall indicate on the labor rate tab the non-discounted rates, the proposed percentage of discount, and the discounted rate on the pricing sheet.
4. Quoters shall indicate any price-related assumptions that have been made, conditions have been stipulated or exceptions have been taken with the PWS or RFQ as written. If not noted in this volume of the quote, it will be assumed that the Quoter's quote reflects no price assumptions for award and agrees to comply with all of the terms and conditions set forth herein. It is not the responsibility of the Government to seek out and identify assumptions, conditions, deviations, or exceptions buried within the Quoter's quote. Accordingly, any price-related assumptions listed in any other volume or section shall be null and void. Any assumptions that are considered unacceptable by the Government and cannot be resolved may result in the Quoter being removed from further consideration.

Period of Performance: 44 months from award

Technical Questions: Contractors must submit all technical questions concerning this solicitation via email to the Contracting Officer at Harinder.Pabbi@ibc.doi.gov **on or before 1:00 PM ET May 22, 2023.** The Acquisition Services Directorate will answer questions which may affect quotes in an amendment to the solicitation. Please be advised that the Government reserves the right to transmit those questions and answers of a common interest to all prospective Vendors. The Vendor or source of the question will not be referenced when issuing an amendment to the solicitation.

RFQ Due Date: The due date for responses to this RFQ, both technical and price quotations, is **on before 1:00 PM ET, June 29, 2023.**

Instructions for Submission: All quote responses must be posted in GSA eBuy by the RFQ due date/time. Should offerors have an issue with this, please email the contracting officer.

Note:

Other Direct Costs (ODC) are anticipated during performance under this contract for NTE \$10,000.

(End of Provision)

52.212-2 Evaluation – Commercial Products and Commercial Services (Nov 2021)

Basis for Award

Best Value – Trade Off: The Government will make award to the responsible offeror whose offer: 1) conforms to the solicitation, 2) will be most advantageous to the Government as it represents the Best Value considering price and other factors, and 3) represents a reasonable price in accordance with FAR 8.405-2(d).

The following non-price factors shall be used to evaluate offers:

Factor (1) Technical Approach

Factor (2) Management Approach

Factor (3) Past performance

Technical Approach is more important than Management Approach, the technical factors when combined are significantly more important than past performance. Overall, when combined, the Government considers non-price factors significantly more important than price. The Government will make award for the quote that represents the best value to the Government after conducting a tradeoff between price and non-price factors, where non-price factors are significantly more important than price. Between quotes that the government determines are essentially technical equivalent, price shall become the determining factor.

Price- The total evaluated price for the order will be derived by summing the quoted firm fixed price for each deliverable during each performance period as shown in the solicitation's attached pricing spreadsheet.

The Government will reserve the right to make award to other than the lowest priced offeror should a better technical solution be proposed. In order to be considered for award, an offeror must receive a minimum rating of satisfactory on Factors 1 and 2.

The total quoted price will be evaluated separately, but in conjunction with the non-price elements to ensure that the Government is awarding based on best value.

The Government reserves the right to award based on initial submissions, but reserves the right to request additional information, such as revisions to correct minor clerical errors, or to request additional discounts if it is in the Government's best interest to do so. The Offeror should

recognize that its initial written price and non-price quotes may be used as the sole and final basis of award and should quote accordingly.

Prior to award, the CO will review the information in the Contractor Performance Assessment Reporting System (CPARS), previously the Past Performance Information Retrieval System (PPIRS), and the Federal Awardee Performance and Integrity Information System (FAPIS) for the prospective awardee in order to perform a responsibility determination as required by FAR 9.104.

The Government reserves the right not to make an award, depending on the quality of the quotes, the availability of funding, and the continued existence of the requirement.

The evaluation criteria for this acquisition are as follows:

The Government will evaluate the quotes pursuant to the information contained within this section of the RFQ. Issuance of an order will be based on the following factors: technical approach, management approach, past performance, and price. The technical factors are more important than past performance. When combined, the technical and past performance evaluation factors are significantly more important than price. Sub-factors within the technical factors are of equal importance. The evaluation criteria for each factor are outlined below:

Criteria Factor 1: Technical Approach:

The Government will evaluate the Vendor's technical approach to determine whether and how well it reflects a substantive understanding of the scope, complexity and requirements associated with the project described in the PWS. The Government will evaluate the Vendor's quote to determine whether and how well the quote presents the Vendor's approach and methodology in a way that demonstrates a clear understanding of, and clear plan to achieve, all study objectives, tasks, subtasks, deliverables, and any other requirements outlined in the PWS. The Government will evaluate the Vendor's quote to determine whether and how well the Vendor discusses and addresses the study considerations and constraints.

The Government will evaluate whether and how well the Vendor's methodology addresses how to accomplish each required task. The Government will evaluate whether and how well the proposed deliverable due dates meet the requirements of the proposed methodology.

The Government will also evaluate the Vendor's quote to determine whether and how well the Vendor will address the objectives and research questions and how well the technical approach all the components of the PWS study plan including:

- A discussion of the research approach for addressing each objective and research question. The Contractor shall specify and justify all recommended modes of data collection and the data sources they propose to use for this study and provide a table or graphic that cross-references the study objectives, research questions, data collections, and information needed to answer the research questions;
- A detailed overview of the quantitative data collection approach including contact protocols and procedures for monitoring the quality of the data collection process for both extant and new administrative information;
- A detailed description of the procedures for conducting interviews with key

informants, including plan to ensure that the mix of respondents reflects the variation in roles related to certifying/recertifying clients without conducting interviews and business as usual certification/recertification processes, length of interviews, and plans for capturing interviewer notes;

- A description of the method for collecting time use data including the proposed length of the data collection period (for example, number of days), how staff would be selected and the number that would be completing time use logs;
- A description of the Contractor's proposed approach to working with States on an efficient and effective solution for randomly assigning client applicants to the no-interview group or the regular interview group;
- A description of how the Contractor shall provide sample sizes needed to detect significant differences in the participant and program outcomes for comparing the no-interview group to the control group for the certification and recertification samples. The Contractor shall provide the minimum detectable difference (MDD) for the outcomes with 95 percent confidence and 80 percent power for the proposed sample sizes;
- A description of how the Contractor will select and train experienced data collectors;
- Proposed schedule for data collection including the timing of the extant administrative, new administrative and interviews with key informants;
- A description of methods for ensuring data accuracy, completeness, and quality control across all data collections, and any related concerns or issues that could impact fulfillment of study objectives and research questions;
- A detailed description of major tasks, events, and deliverables to organize and structure the work. This section must include the proposed scheduling and sequencing of tasks and the identification of any key non-deliverable dates;
- The Contractor shall describe their approach to engaging the 5 demonstration States in review of State chapters and incorporating their feedback in the revised draft of the final report;
- Description of contingency plans in case there are delays or unforeseen obstacles in any aspect of the study; and
- Discussion of the study considerations and constraints noted in the PWS, and the proposed approach for addressing them.

Criteria Factor 2 – Management Approach:

The Government will evaluate whether and how well the submitted management plan demonstrates that they possess appropriate and sufficient oversight for the planning, initiation, implementation, conduct, monitoring and quality control to achieve the objectives of the requirements (tasks, subtasks, deliverables, etc.) outlined in the PWS. The Government will evaluate whether and how well the Vendor's management plan demonstrates the ability to manage all aspects of the proposed efforts including technical performance, time and delivery constraints, cost, status reporting, and subcontractor(s). The Government will evaluate whether and how well the Vendor demonstrates that they possess appropriate and sufficient procedures and facilities to protect proprietary and confidential data and analysis related to this requirement.

The following aspects of the management plan shall also be evaluated:

- Adequacy of the Vendor's proposed organization structure to successfully perform, including quality control to ensure quality and timely deliverables; and task order compliance.

- An effective communications plan that demonstrates the communication flow with subcontractors (if applicable), teaming partners and the USDA, and resolving problems.
- A clear chain of responsibility for all tasks, contract administration, and adequate, qualified staff resources.
- A labor-loading chart, showing the expected amount of labor anticipated for each individual, by task and overall, including key personnel, subcontractor personnel, and generic positions such as “editor” or “research assistant,” and the role of each individual in the study (see Sample Labor Loading Chart).
- A table showing, by year, the availability of all key personnel, including the percentage of work to be performed under this requirement, the percentage of time currently committed to other contracts, and the percentage of time bid on other projects (see Sample Key Personnel Chart).
- A table with the names of proposed staff with technical expertise in SNAP policy, SNAP operations, SNAP certification, project management, qualitative and quantitative data collection and analysis methods and techniques (highlighting expertise on sampling, time use data collection, and randomized control trials), and writing clear government reports. The table should also provide a brief description of the individual’s relevant expertise and experience as it relates to their proposed role on the project. The expertise and experience in the table should be limited to no more than 200 words for each person, including key personnel, and should be supported by their resumes (All resumes, including resumes for key personnel shall be provided in the Appendix).
- Whether the research team includes appropriate expertise to complete all work at a high quality without significant delays.
- Letters of Commitment for all proposed subcontractors, consultants, etc.
- The Vendor’s process for advising the Government of any problems in regard to the commitment of assigned key personnel and its proposed corrective action for the task order requirements outline in the PWS.
- The quality and appropriateness of the Quality Control Plan (QCP). The Vendor will be evaluated on whether and how well the submitted management plan (including subcontractors) demonstrates appropriate and sufficient procedures, facilities and staff to meet the performance requirement outlined in the PWS.

Sample Labor Loading Chart

Name	Labor Category	Task 1	Task 2	Task 3	Task 4	...	Project Total
<i>Ex. John Smith</i>	<i>Project Director</i>	X	X	X	X		X
<i>Subcontractor Staff</i>							
TOTAL (hours)		X	X	X	X		X

Sample Key Personnel Chart

Name	Time Commitment of Key Personnel (%)						
	Year 1			Year 2			...
	<i>This project</i>	<i>Other existing contracts</i>	<i>Bid on other projects</i>	<i>This project</i>	<i>Other existing contracts</i>	<i>Bid on other projects</i>	
<i>Ex. John Smith</i>	X	X	X	X	X	X	

Sample Expertise and Experience Chart

Name	Area of Expertise	Relevant Experience	Key Person
<i>Ex. John Smith</i>	<i>Ex. SNAP Policy</i>	<i>Ex. Previous work experience...</i>	Yes
<i>Ex. Bob Smith</i>	<i>Ex. Experimental Design and Sampling</i>	<i>Ex. Previous work experience, academic background...</i>	Yes
<i>Ex. Jane Smith</i>	<i>Ex. Time Use Methodology</i>	<i>Ex. Academic background, previous work experience</i>	No

(iii) Past performance

The Government will evaluate the Vendor's quality of service, timeliness of delivery, ability to control costs, and its business relationship and overall customer satisfaction on projects similar in size, scope, and complexity to those found within this RFQ. The Government may obtain and use past performance information from sources other than those identified in the quote response. Although the Government cannot guarantee that it will contact each of the Vendor's and their proposed subcontractor's references, it will make a reasonable effort to contact them. Vendors who have no relevant past performance will receive a neutral rating for this factor.

(iv) Price

The total evaluated price for this order will be derived by summing the quoted firm fixed price for each deliverable during the performance period as shown in the solicitation's attached pricing spreadsheet. An evaluation of the offeror's price quote will consider the level of effort and the mix of labor proposed to perform the SOW to determine that the price is reasonable.

A written notice of award or acceptance of an offer mailed or otherwise furnished to the successful contractor within the time for acceptance specified in the offer, shall result in a

binding contract without further action by either party. Before the offer's specified expiration time, the Government may accept an offer (or part of an offer), whether or not there are negotiations after its receipt, unless a written notice of withdrawal is received before award.

(End of Provision)

FAR 52.212-3, Offeror Representations and Certifications - Commercial Products and Commercial Services (May 2022)

The Offeror shall complete only paragraph (b) of this provision if the Offeror has completed the annual representations and certification electronically in the System for Award Management (SAM) accessed through <https://www.sam.gov>. If the Offeror has not completed the annual representations and certifications electronically, the Offeror shall complete only paragraphs (c) through (v) of this provision..

*See <https://www.acquisition.gov/far/52.212-3> for a full text version of this provision.

(b)

(1) *Annual Representations and Certifications.* Any changes provided by the Offeror in paragraph (b)(2) of this provision do not automatically change the representations and certifications in SAM.

(2) The offeror has completed the annual representations and certifications electronically in SAM accessed through <http://www.sam.gov>. After reviewing SAM information, the Offeror verifies by submission of this offer that the representations and certifications currently posted electronically at FAR [52.212-3](#), Offeror Representations and Certifications- Commercial Products and Commercial Services, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard(s) applicable to the NAICS code(s) referenced for this solicitation), at the time this offer is submitted and are incorporated in this offer by reference (see FAR [4.1201](#)), except for paragraphs _____.

[Offeror to identify the applicable paragraphs at (c) through (v) of this provision that the offeror has completed for the purposes of this solicitation only, if any.]

These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer.

Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted electronically on SAM.]

(End of provision)

**DIAR 1452.215-71 USE AND DISCLOSURE OF PROPOSAL INFORMATION --
DEPARTMENT OF THE INTERIOR (APR 1984)**

(a) Definitions. For the purposes of this provision and the Freedom of Information Act (5 U.S.C. 552), the following terms shall have the meaning set forth below:

(1) "Trade Secret" means an unpatented, secret, commercially valuable plan, appliance, formula, or process, which is used for making, preparing, compounding, treating or processing articles or materials which are trade commodities.

(2) "Confidential commercial or financial information" means any business information (other than trade secrets) which is exempt from the mandatory disclosure requirement of the Freedom of Information Act, 5 U.S.C. 552. Exemptions from mandatory disclosure which may be applicable to business information contained in quotes include exemption (4), which covers "commercial and financial information obtained from a person and privileged or confidential," and exemption (9), which covers "geological and geophysical information, including maps, concerning wells."

(b) If the vendor, or its subcontractor(s), believes that the quote contains trade secrets or confidential commercial or financial information exempt from disclosure under the Freedom of Information Act, (5 U.S.C. 552), the cover page of each copy of the quote shall be marked with the following legend:

"The information specifically identified on pages _____ of this quote constitutes trade secrets or confidential commercial and financial information which the vendor believes to be exempt from disclosure under the Freedom of Information Act. The vendor requests that this information not be disclosed to the public, except as may be required by law. The vendor also requests that this information not be used in whole or part by the government for any purpose other than to evaluate the quote, except that if a contract is awarded to the vendor as a result of or in connection with the submission of the quote, the Government shall have the right to use the information to the extent provided in the contract."

(c) The vendor shall also specifically identify trade secret information and confidential commercial and financial information on the pages of the quote on which it appears and shall mark each such page with the following legend:

"This page contains trade secrets or confidential commercial and financial information which the vendor believes to be exempt from disclosure under the Freedom of Information Act and which is subject to the legend contained on the cover page of this quote."

(d) Information in a quote identified by an vendor as trade secret information or confidential commercial and financial information shall be used by the Government only for the purpose of evaluating the quote, except that (i) if a contract is awarded to the vendor as a result of or in connection with submission of the quote, the Government shall have the right to use the information as provided in the contract, and (ii) if the same information is obtained from another source without restriction it may be used without restriction.

(e) If a request under the Freedom of Information Act seeks access to information in a quote identified as trade secret information or confidential commercial and financial information, full consideration will be given to the vendor's view that the information constitutes trade secrets or confidential commercial or financial information. The vendor will also be promptly notified of the request and given an opportunity to provide additional evidence and argument in support of its position, unless administratively unfeasible to do so. If it is determined that information claimed by the vendor to be trade secret information or confidential commercial or financial information is not exempt from disclosure under the Freedom of Information Act, the vendor will be notified of this determination prior to disclosure of the information.

(f) The Government assumes no liability for the disclosure or use of information contained in a quote if not marked in accordance with paragraphs (b) and (c) of this provision. If a request under the Freedom of Information Act is made for information in a quote not marked in accordance with paragraphs (b) and (c) of this provision, the vendor concerned shall be promptly notified of the request and given an opportunity to provide its position to the Government. However, failure of a vendor to mark information contained in a quote as trade secret information or confidential commercial or financial information will be treated by the Government as evidence that the information is not exempt from disclosure under the Freedom of Information Act, absent a showing that the failure to mark was due to unusual or extenuating circumstances, such as a showing that the vendor had intended to mark, but that markings were omitted from the vendor's quote due to clerical error.

(End of provision)

52.227-15 Representation of Limited Rights Data and Restricted Computer Software (Dec 2007)

(a) This solicitation sets forth the Government's known delivery requirements for data (as defined in the clause at 52.227-14, Rights in Data--General). Any resulting contract may also provide the Government the option to order additional data under the Additional Data Requirements clause at 52.227-16, if included in the contract. Any data delivered under the resulting contract will be subject to the Rights in Data--General clause at 52.227-14 included in this contract. Under the latter clause, a Contractor may withhold from delivery data that qualify as limited rights data or restricted computer software, and deliver form, fit, and function data instead. The latter clause also may be used with its Alternates II and/or III to obtain delivery of limited rights data or restricted computer software, marked with limited rights or restricted rights notices, as appropriate. In addition, use of Alternate V with this latter clause provides the Government the right to inspect such data at the Contractor's facility.

(b) By completing the remainder of this paragraph, the offeror represents that it has reviewed the requirements for the delivery of technical data or computer software and states [*offeror check appropriate block*]

[] (1) None of the data proposed for fulfilling the data delivery requirements qualifies as limited rights data or restricted computer software; or

[] (2) Data proposed for fulfilling the data delivery requirements qualify as limited rights data or restricted computer software and are identified as follows:

(c) Any identification of limited rights data or restricted computer software in the offeror's response is not determinative of the status of the data should a contract be awarded to the offeror.

(End of provision)

NBCM-ACQ-6920-0007 Required Provision for Services Contracts (Sep 2006)

This is a non-personal services contract, it is therefore, understood and agreed that the contractor and/or the contractor's employees shall:

- (1) perform the services specified herein as independent contractors, not as employees of the government;
- (2) be responsible for their own management and administration of the work required and bear sole responsibility for complying with any and all technical, schedule, or financial requirements or constraints attendant to the performance of this contract;
- (3) be free from supervision or control by any government employee with respect to the manner or method of performance of the services specified; and
- (4) pursuant to the government's right and obligation to inspect, accept or reject the work, comply with such general direction of the Contracting Officer; or the duly authorized representative as is necessary to ensure accomplishment of the contract objectives.

The contractor shall include this provision in all subcontracts for contractor support services under this contract.

(End of Provision)

Attachments

Attachment A – Price Sheet