



*Professional Logistics Human
Capital Technology Services*

Purpose

The purpose of this project was created out of necessity. The firm owner wanted to streamline the front and back office daily operations. In order to create these services. the programmer developer, editor and owner used several of 12 largest SIN categories. Then broke down the subs into subgroups categories.

- *Human Capital*
- *Logistics Services*
- *Innovative technology*
- *Integration Software and Hardware*
- *Telecommunication*
- *Deployment*
- *Tracking*
- *Visibility*
- *Secured web-based*
- *AI assistances*

White Lotus Freight Bonded Broker and Dispatch LLC.

Presents

Logistics Consultant Services

Commerical Stakeholders

Telecommunication/Visual Access

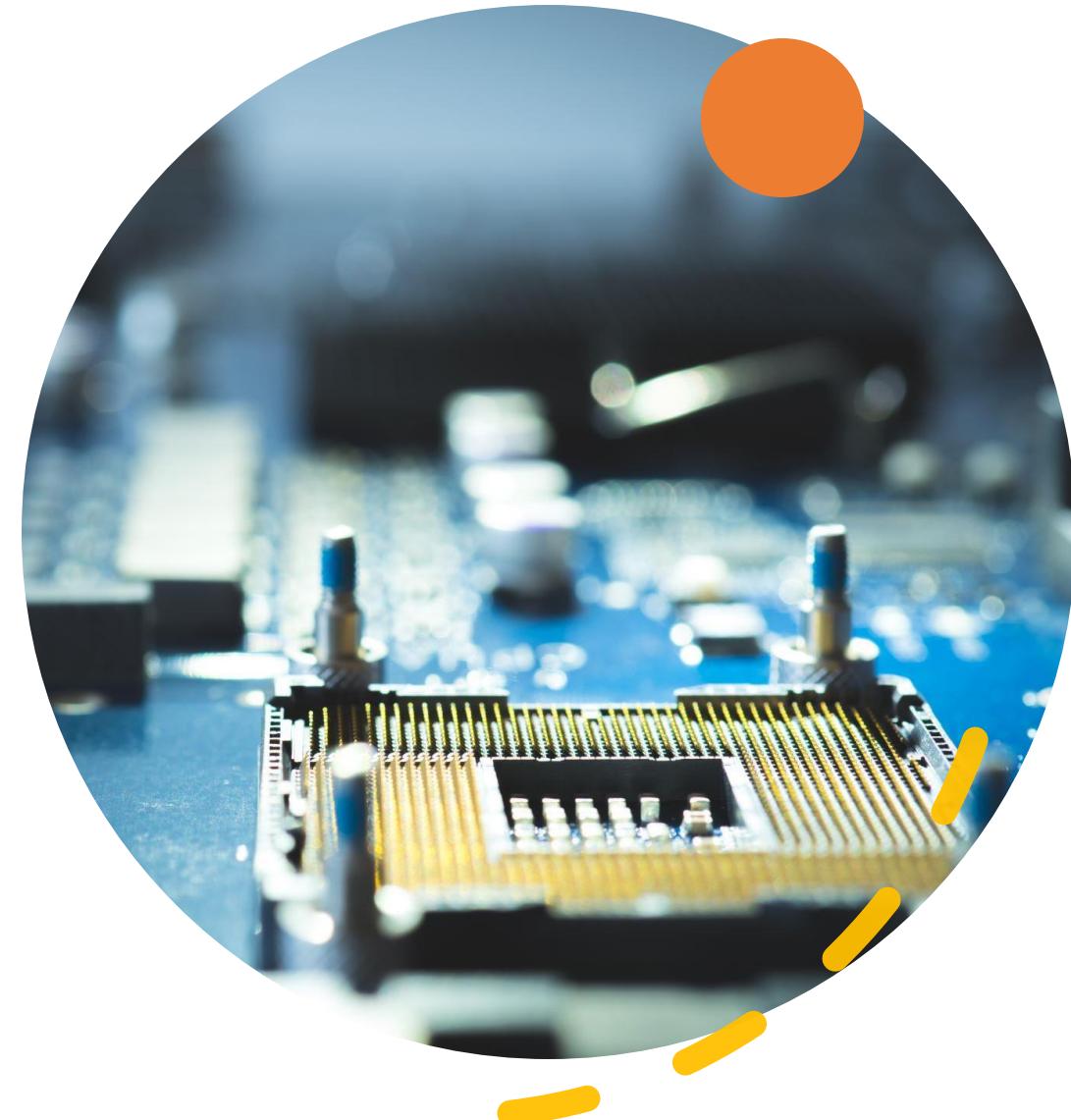
Salesforce Cloud Software

Salesforce AI Component/Integration System

TruckStop Integrated Software

Cyber-Security Assistance

EPA Mechanism Footprint



Commercial Stakeholder Products

 *Mobile Telecommunication Services*

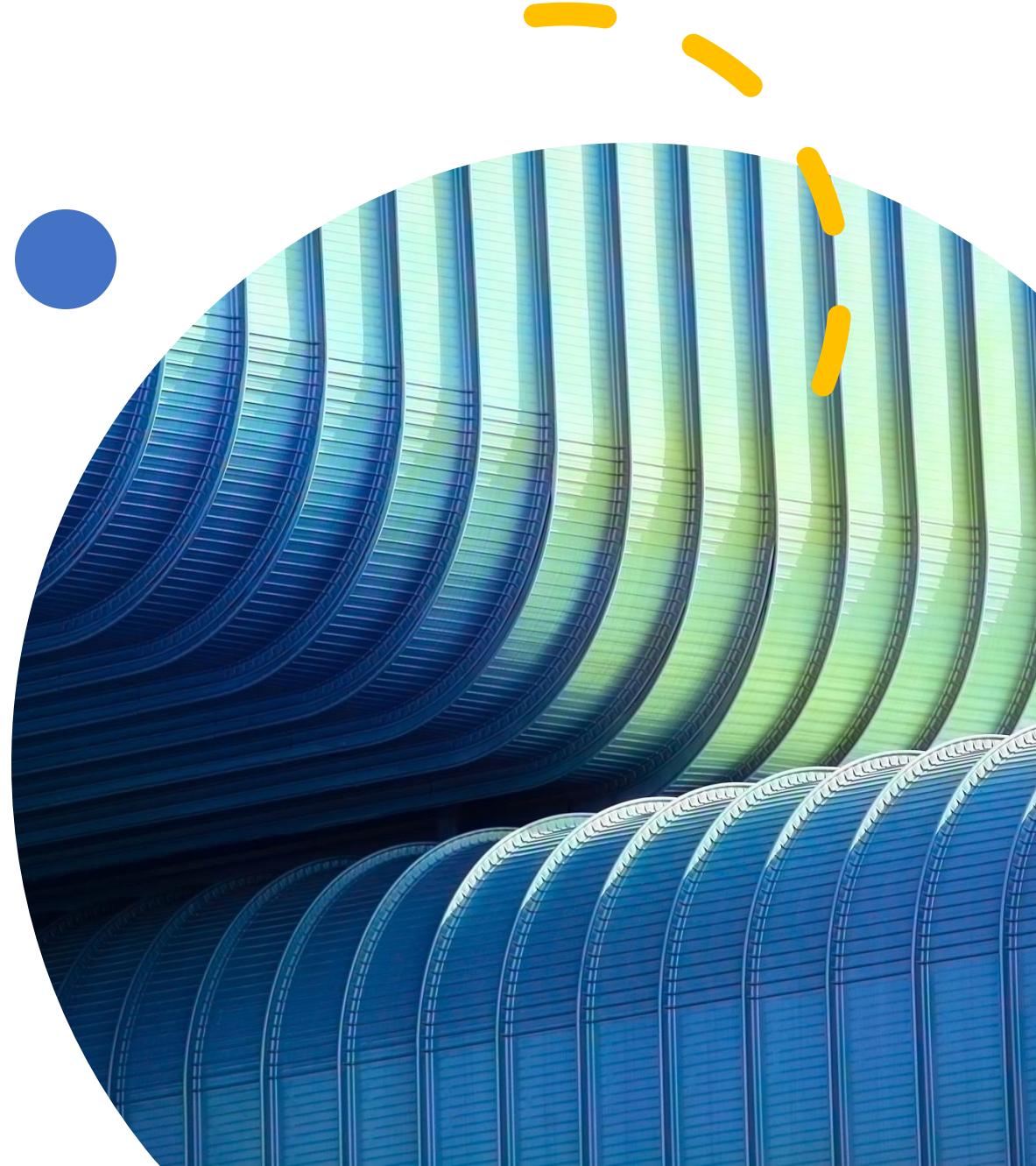
 *Mobile Tracking and Visual Services*

 *Human Capital Services*

 *Salesforce Cloud Services*

 *Salesforce AI Navigation Services*

 *TruckStop Integration System*



While going through my journey navigating through the federal and government programs in order submit and bid on contracts. An logician must obtain an United States Department of Transportation (USDOT#) and Motor Carrier (MC#) number to conduct business in all 50 States. The Fedeal Motor Carrier Safety Administration (FMSCA) also requires logisticians to have one hundred thousand dollars (\$100,000.00) of Limited Liability Insurance, An Seventy-five thousand (\$75,000.00) Surety Bond, and Fifty thousand dollars for Errors and Omission coverages.

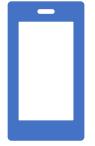
As logistician service provider there were no other resources provided through the United States Department of Transportation. Only through my local South Carolina Department of Transportation (SCDOT). I was a little confused at first, then I quickly realize there's no more freight brokers and the industry is changing but slowly changing. Logisticians plays pivotal role in the supply chain industry. According to the United States Bureau of Labor and Statistics, the COVID-19 pandemic led an surge in newly formulate businesses across the united states. More than 4.4 million new businesses were created during the fourth quarter of 2020. Which is the highest total on record and a 24.3% increase from 2019.

The increase in new business applications occurred in the last quarter of 2020. Small business continuously growing and beating the odds though 2023. Some of the reasons for this phenomenon increases in business applications. It Is due to the shift in the sector. More entrepreneurs are settling doing business on ecommerce platforms, remote work and homebased businesses. These days there's different types of entrepreneurs such as, Social, Serial, Lifestyle and Intrapreneurs. Basically there's various skills and qualities to become successful. However, entrepreneurs has been flocking to professional service, personal services and transportation.

Small Business Procurement - FY2023 Small Business Goals - as of 12/15/2022

FUNDING DEPARTMENT NAME	Prime Contract Small Business Goals	Prime Small Disadvantaged Business Goal	Prime Service-Disabled Veteran-Owned Small Business Goal	Prime Women Owned Small Business Goal	Prime HUBZone Small Business	Subcontract Small Business Goals	Subcontract Small Disadvantaged Business Goal	Subcontract Service-Disabled Veteran-Owned Small Business Goal	Subcontract Women Owned Small Business Goal	Subcontract HUBZone Small Business Goal
DEPT OF DEFENSE (9700)	22.43%	10.57%	3.00%	5.00%	3.00%	30.00%	5.00%	3.00%	5.00%	3.00%
ENERGY, DEPARTMENT OF (8900)	5%/17%	7.00%	3.00%	5.00%	3.00%	49.00%	5.00%	3.00%	5.00%	3.00%
HEALTH AND HUMAN SERVICES, DEPARTMENT OF (7500)	22.00%	13.08%	3.00%	5.00%	3.00%	32.00%	5.00%	3.00%	5.00%	3.00%
VETERANS AFFAIRS, DEPARTMENT OF (3600)	27.00%	11.10%	3.00%	5.00%	3.00%	17.20%	5.00%	3.00%	5.00%	3.00%
NATIONAL AERONAUTICS AND SPACE ADMINISTRATION (8000)	16.87%	8.90%	3.00%	5.00%	3.00%	34.20%	5.00%	3.00%	5.00%	3.00%
HOMELAND SECURITY, DEPARTMENT OF (7000)	35.50%	17.90%	3.00%	5.00%	3.00%	43.00%	5.00%	3.00%	5.00%	3.00%
GENERAL SERVICES ADMINISTRATION (4700)	33.00%	21.90%	3.00%	5.00%	3.00%	21.00%	5.00%	3.00%	5.00%	3.00%
AGRICULTURE, DEPARTMENT OF (1200)	55.00%	22.40%	3.00%	5.00%	3.00%	21.00%	5.00%	3.00%	5.00%	3.00%
JUSTICE, DEPARTMENT OF (1500)	33.00%	15.90%	3.00%	5.00%	3.00%	38.00%	5.00%	3.00%	5.00%	3.00%
INTERIOR, DEPARTMENT OF THE (1400)	49.37%	30.50%	3.00%	5.00%	3.00%	43.80%	5.00%	3.00%	5.00%	3.00%
STATE, DEPARTMENT OF (1900)	25.50%	21.00%	3.00%	5.00%	3.00%	38.00%	5.00%	3.00%	5.00%	3.00%
COMMERCE, DEPARTMENT OF (1300)	39.00%	20.90%	3.00%	5.00%	3.00%	30.00%	5.00%	3.00%	5.00%	3.00%
TREASURY, DEPARTMENT OF THE (2000)	40.00%	12.00%	3.00%	5.00%	3.00%	20.00%	5.00%	3.00%	5.00%	3.00%
TRANSPORTATION, DEPARTMENT OF (6900)	33.40%	21.00%	3.00%	5.00%	3.00%	43.00%	5.00%	3.00%	5.00%	3.00%
OFFICE OF PERSONNEL MANAGEMENT (2400)	50.00%	31.80%	3.00%	5.00%	3.00%	25.00%	5.00%	3.00%	5.00%	3.00%
LABOR, DEPARTMENT OF (1600)	37.85%	28.90%	3.00%	5.00%	3.00%	60.00%	5.00%	3.00%	5.00%	3.00%
ENVIRONMENTAL PROTECTION AGENCY (6800)	44.70%	17.80%	3.00%	5.00%	3.00%	56.50%	5.00%	3.00%	5.00%	3.00%
EDUCATION, DEPARTMENT OF (9100)	14.50%	9.15%	3.00%	5.00%	3.00%	37.00%	5.00%	3.00%	5.00%	3.00%
HOUSING AND URBAN DEVELOPMENT, DEPARTMENT OF (8600)	20.00%	18.90%	3.00%	5.00%	3.00%	28.00%	5.00%	3.00%	5.00%	3.00%
SOCIAL SECURITY ADMINISTRATION (2800)	26.00%	10.20%	3.00%	5.00%	3.00%	50.00%	5.00%	3.00%	5.00%	3.00%
AGENCY FOR INTERNATIONAL DEVELOPMENT (7200)	13.25%	8.30%	3.00%	5.00%	3.00%	14.50%	5.00%	3.00%	5.00%	3.00%
NATIONAL SCIENCE FOUNDATION (4900)	23.68%	12.60%	3.00%	5.00%	3.00%	25.00%	5.00%	3.00%	5.00%	3.00%
NUCLEAR REGULATORY COMMISSION (3100)	41.00%	27.90%	3.00%	5.00%	3.00%	40.00%	5.00%	3.00%	5.00%	3.00%
SMALL BUSINESS ADMINISTRATION (7300)	68.00%	60.00%	3.00%	5.00%	3.00%	39.00%	5.00%	3.00%	5.00%	3.00%

Estimate Projection Cost



*Mobile
Telecommunication
Services*



*Mobile Tracking and
Visual Services*



Human Capital Services



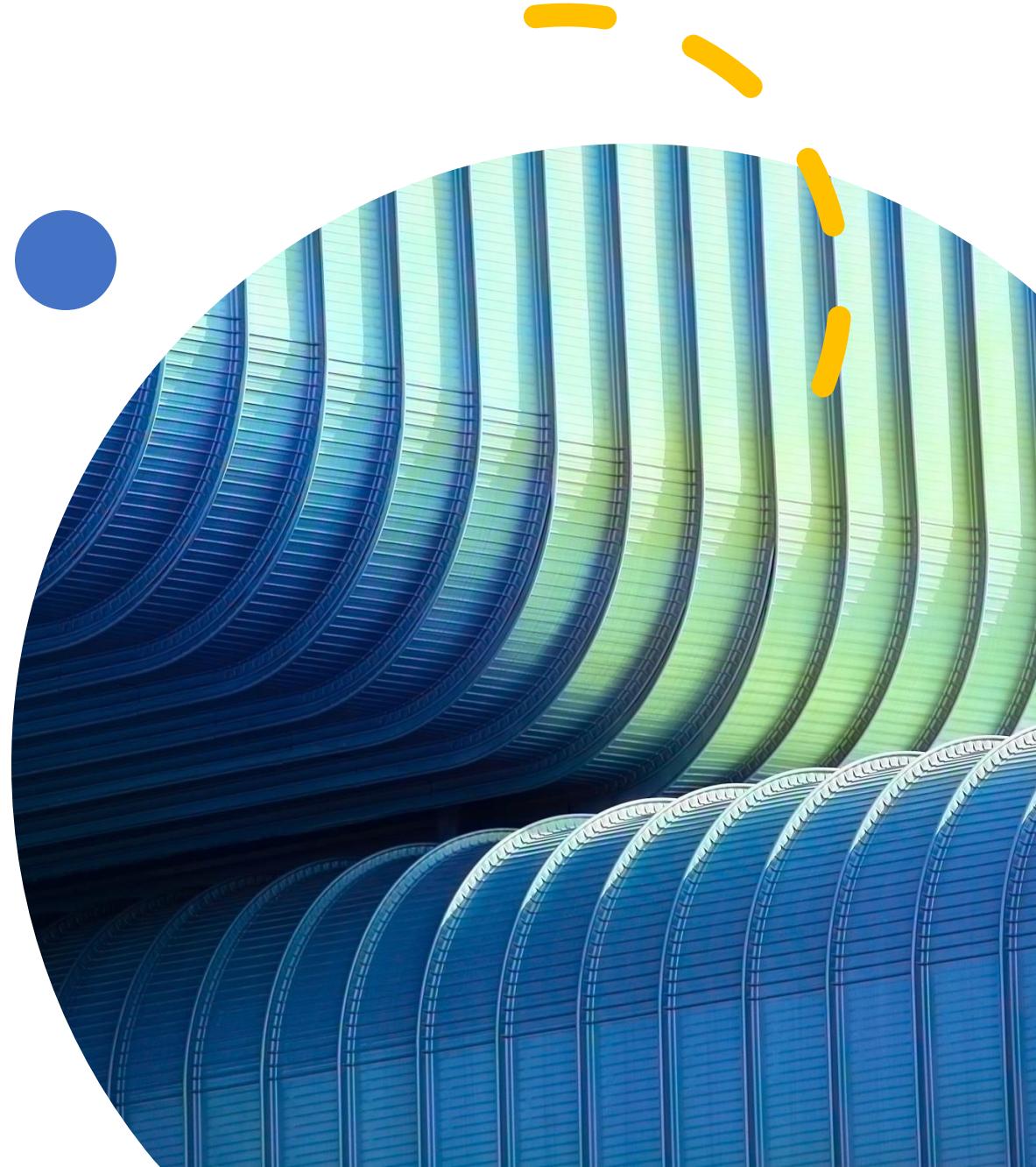
*Salesforce Cloud
Services*

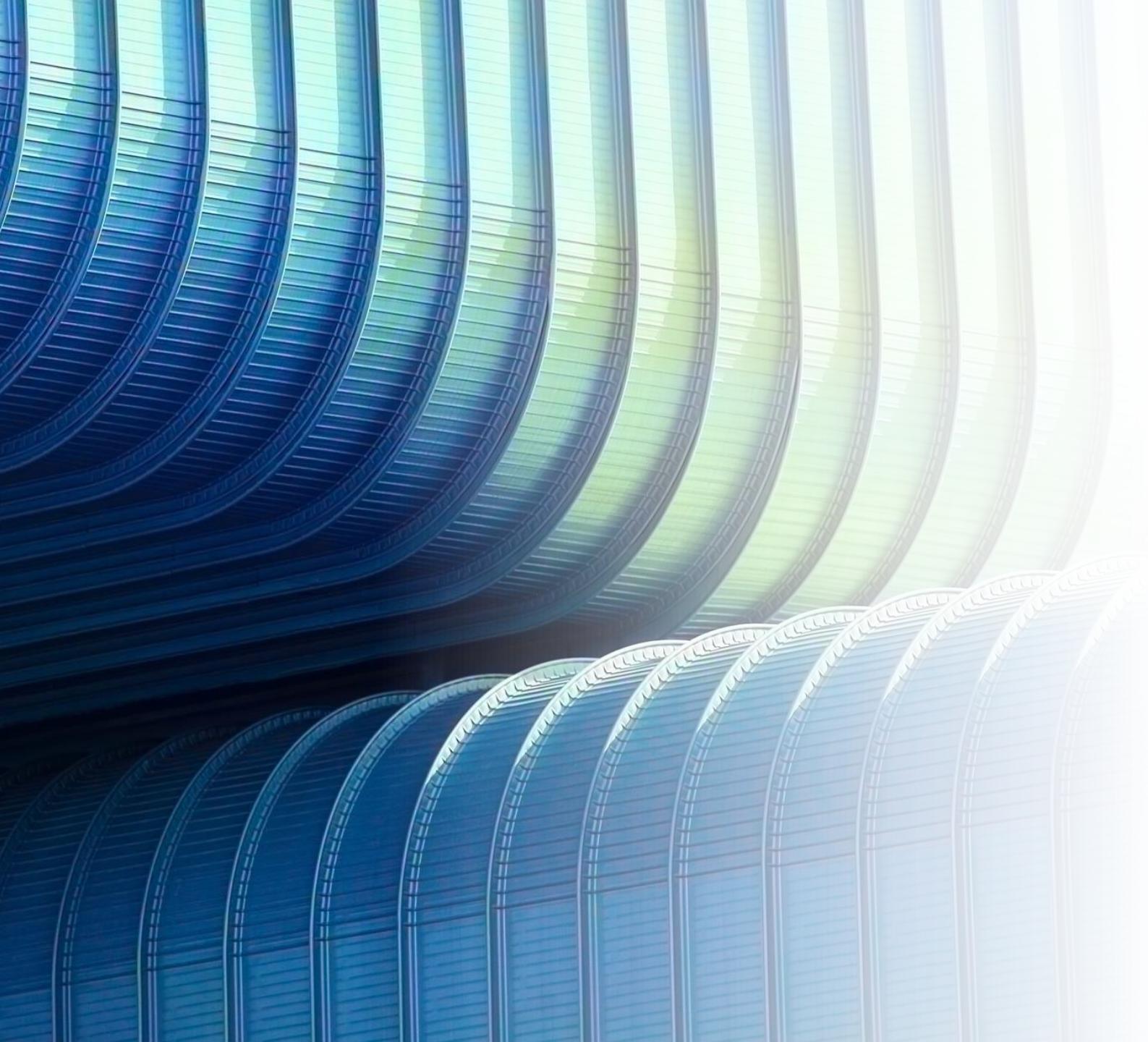


*Salesforce AI
Navigation Services*



*TruckStop Integration
System*





Research Cost

Mobile Telecommunication Services

Mobile Tracking and Visual Services

Human Capital Services

Salesforce Cloud Services

Salesforce AI Navigation Services

TruckStop Integration System

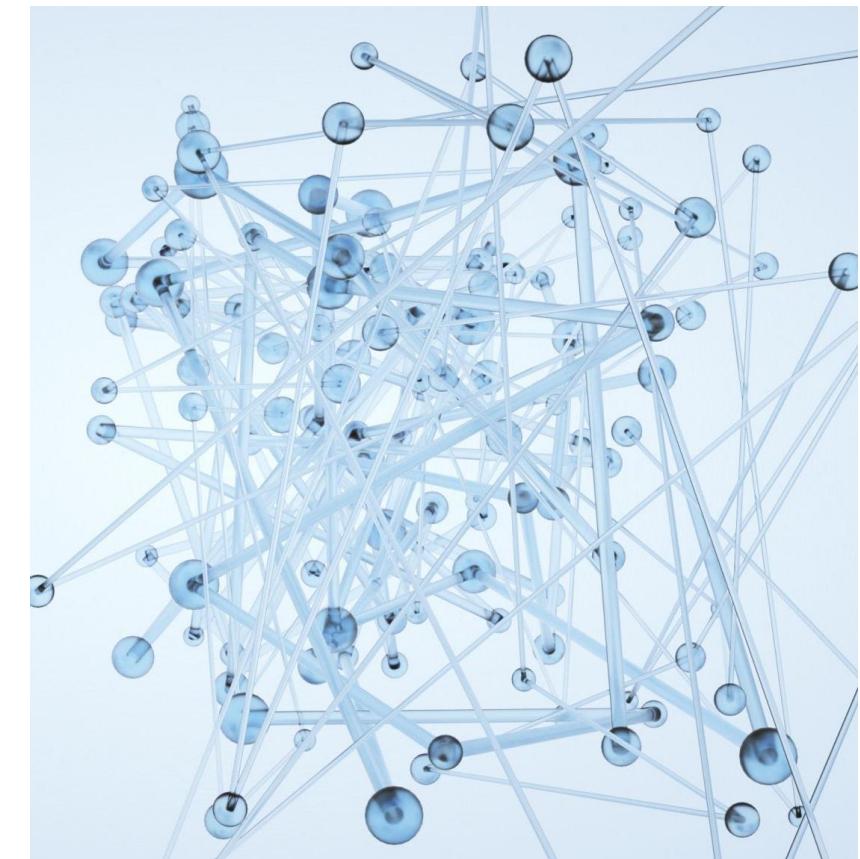
Transportation Management System (TMS)

Truckstop Commercial Transportation Management System (TMS). It is a integration software solution that helps logistics consultants and carriers optimize their operations and increase their profits. Truckstop TMS offers features such as rate analysis, load booking, driver dispatching, shipment tracking, reporting, compliance, and documentation. Truckstop TMS is also integrated with other Truckstop products, such as load boards, carrier monitoring, and payment solutions.



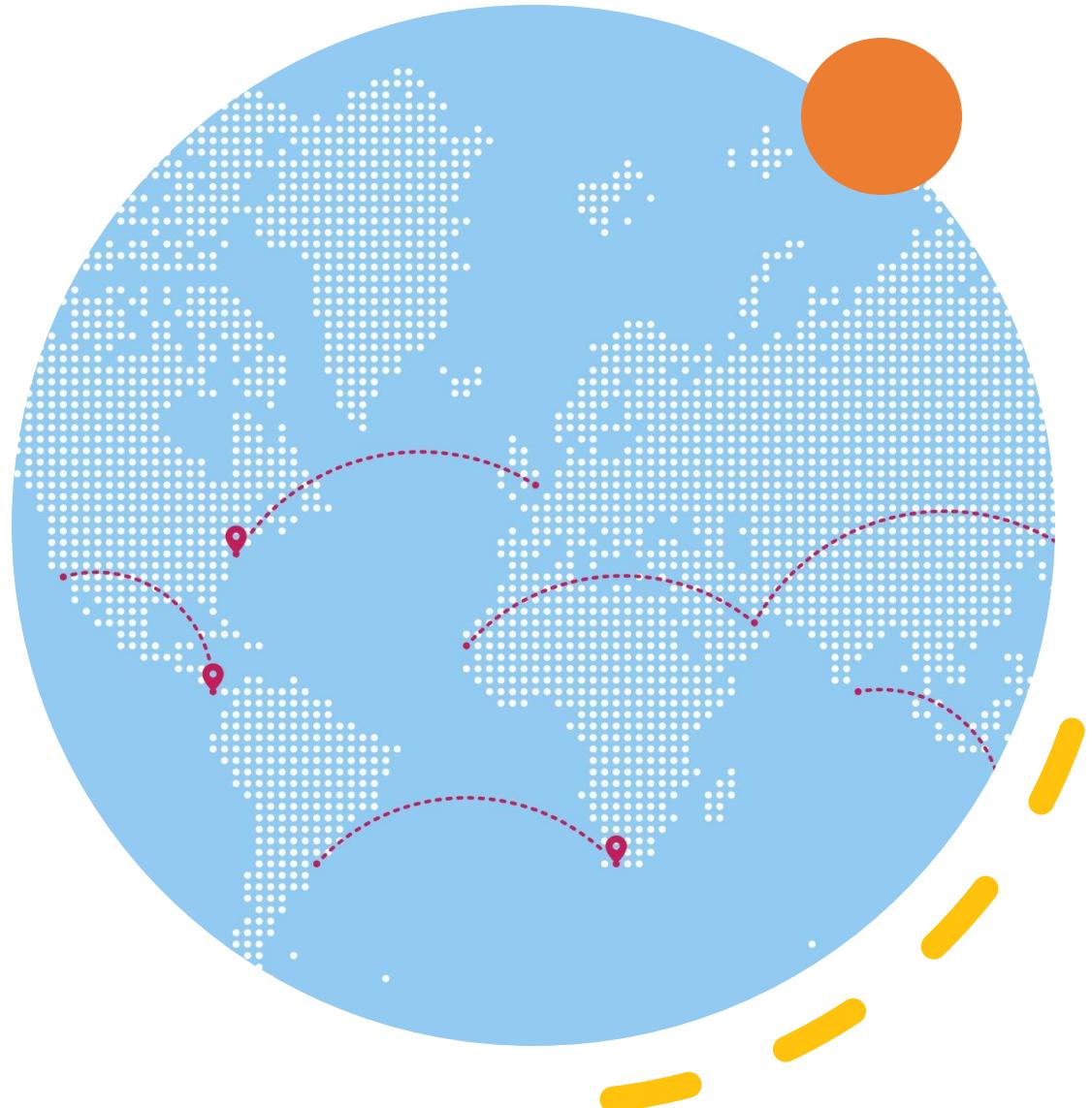
Quasi-Experimental Design Theory

To prevent White Lotus Freight Bonded Broker and Dispatch, LLC from inherently using government contractual awarded contracts. The firm shall implement progression period performance based upon the quasi-experimental design theory. This type of research method resembles an experiment but does not use random assignment of participants to groups or conditions. Instead, the experiment relies on other methods, such as pre-existing subcontractors, pretests, or regression discontinuity, to estimate the causal impact of an intervention or treatment on a target population. Quasi-Experimental designs are often used when true experiments are not possible or ethical complications for practical reasons.



Targeted Marketing Strategy Population

- *South Carolina 46 Counties*
- *South Carolina Department of Transportation (SCDOT)*
- *All other Branches of South Carolina State Government*
- *ALL other 49 States and Federal Government*
- *All Branches of the United States Military Arm Force*
- *United States Allies and Countries*
- *Manufactures*
- *Retailers*
- *Carriers*
- *Shippers*
- *Private Subscription Transportation Management Systems (TMS)*
- *Commerical Transportation Management Systems (TMS)*
- *Commerical Companies TMS and/or Load-Board Access*
- *Fleet Owners*



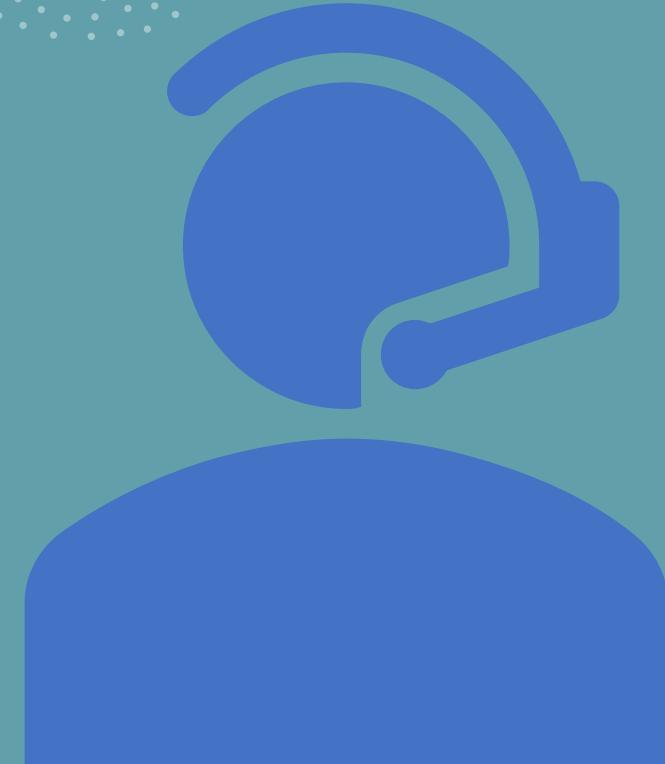
Targeted General Partnership Agreements

- Sales forces
- Federal Motor Carriers Safety Administration
- Truckstop
- Fleet Truck Drivers
- Owner Operator Carriers
- Manufactures Companies
- Shippers
- Supply Chain Industry etc.
- Teaming Arrangements
- Insurance Companies



Interactive Logistics Consultant Services

Interactive logistics consultant services are services that help businesses design, implement, manage and optimize their daily transportation and logistics operations.



Analytical Reports

There's several types of analytical reports that are commonly used to document logistics consultant services: The logistics consultant will analyze the data and report findings to the appropriate government department of concerns

- *Market Analysis*
- *Performance Analysis*
- *Customer Analysis*
- *Competitor Analysis*
- *Innovation Analysis*





Market Analysis

Market analysis report provides an overview of the current and future trends, opportunities, threats and drivers in the logistics market. Which can help the logistics consultant identify the best practices, strategies and solutions to meet the customer needs and expectations.



Performance Analysis

Performance analysis report evaluates the efficiency, effectiveness, quality and profitability of the logistics operations. The purpose is to help the logistics consultant identify the strengths, weaknesses, gaps in services and areas for improvement in the processes, systems, assets and resources.

Customer Analysis

Customer analysis report analyzes the behavior, preferences, satisfaction and loyalty of the customers. In order to help logistics consultants segment the customers tailored services, optimize the pricing and enhance the customer experience all while ensuring the analytical data reported accurately.

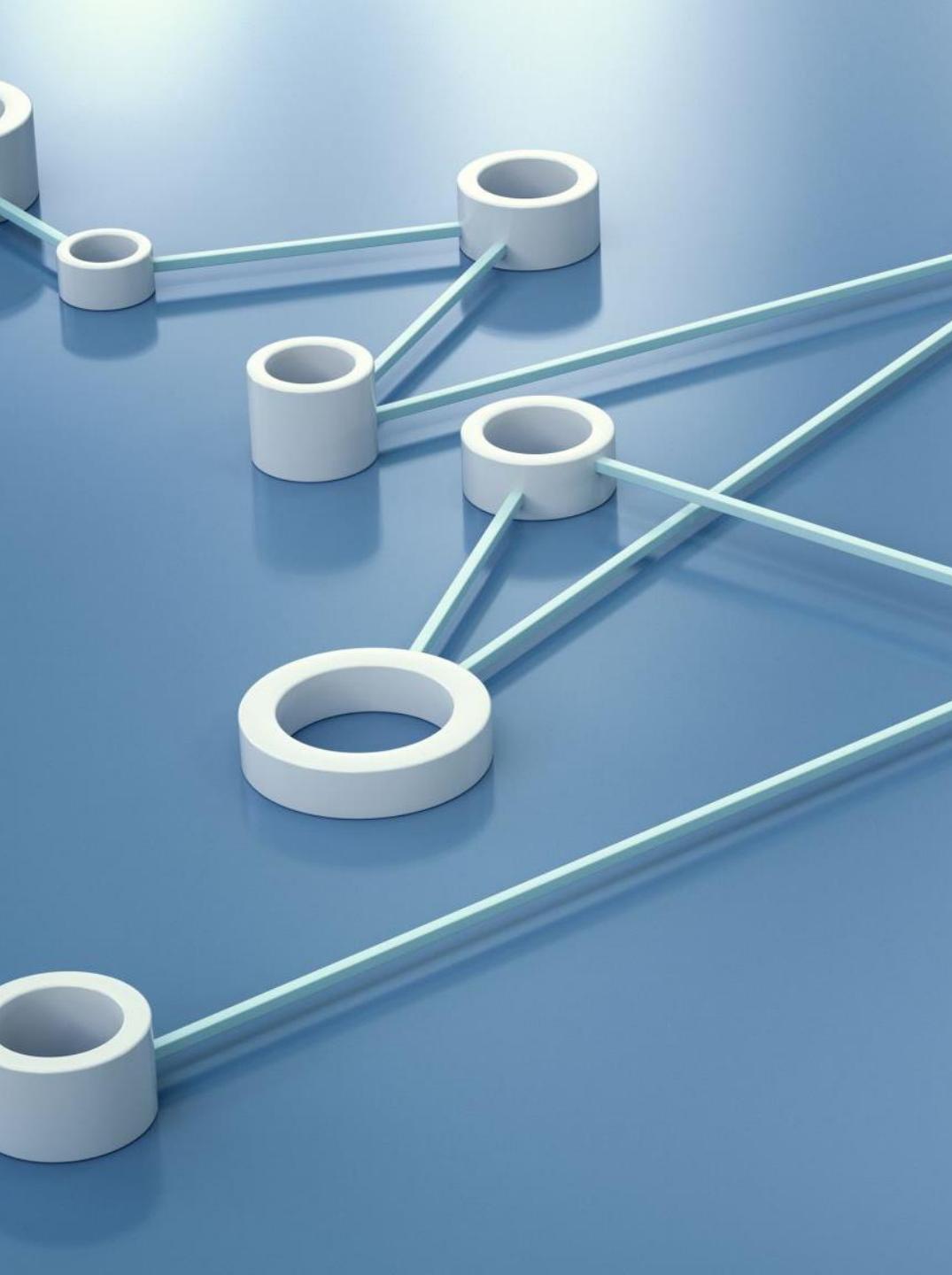


Competitor Analysis

Competitor analysis report compares and contrasts the offerings, capabilities, strengths and weaknesses of the competitors.

The purpose is to help logistics consultants benchmark their performance, identify their competitive advantages and disadvantages and develop differentiation strategies.





Innovation Analysis

Innovation analysis report explores the potential impact of new innovative technologies, solutions and business models within the logistics industry. The logistician assess the feasibility, viability and desirability of adopting or developing innovations alternatives.

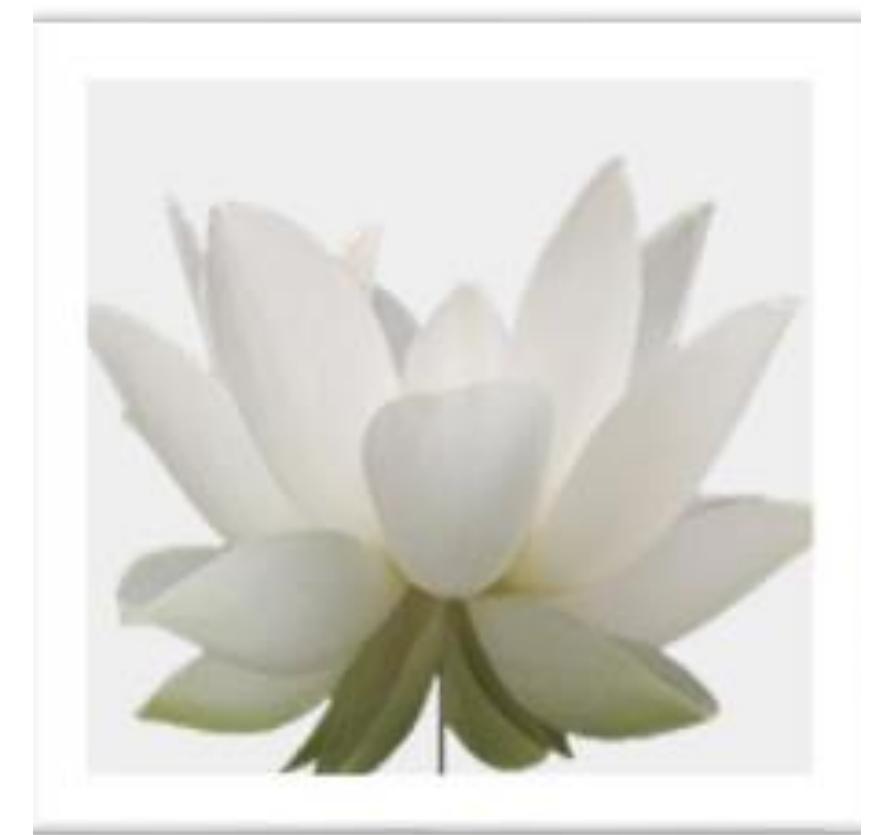
Mobile Telecommunication and Visible Tracking System

Mobile communication devices and video chat tracking system. Clients can receive and retrieve updates as often by login into their account. The purpose is to ensure there's a mobile telecommunication network connection that can track carrier, provide visible status timely delivery services.



Whitelotusfreight.com

White Lotus Freight Bonded Broker and Dispatch, LLC is small logistics consultant firm. Tiawana White currently owns 100% of this establishment. On September 19, 2023 South Carolina Department of Transportation (SCDOT) deemed firm's eligible for the economics status of an Disadvantaged Business Enterprise, and Small Business Enterprise.



Small Business Administration (SBA)

The Small Business Administration (SBA) (applied not granted) White Lotus Bonded Broker and Dispatch the status of an Economically Disadvantaged Woman Own Small Business (EDWOSB).





We are taking the next generational steps to streamline Logistical Professional Consultant Services. Bringing forth integrating commercial services and products to the next generation. These software and products produced by Salesforce developers, Safe guarding Salesforce Clouds and AI (BOT) services. Salesforce Cloud Services is an unique product that allows the users to complete their online applications with the assistance (AI BOT). LOTUS BOT will be capable of navigating potential customers to our services and hyperlinks to resources. Dispatching Services, General Partnership Agreement and Owner Operator Carriers Agreement. The client will apply on company website by login and create an account. Client data information is stored in salesforce cloud services.

Salesforce Commercial AI & Cloud Services

The customers will apply on White Lotus Freight Bonded Broker and Dispatch, LLC firm's website <https://whitelotusfreight.com>

In order for customers to participate they must create an account, login and submit an completed application for the services. The pertinent data collected is stored and secured by Salesforce Cloud System.

- *Dispatching Services*
- *General Partnership Agreement*
- *Owner Operator Carriers Agreement.*



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***Professional Logistics Human Capital Technology Services
(PLHCTS)***

• **Scope**

a. Minority Owned Small Disadvantaged Businesswoman of Color. General Partnerships/Subcontractors' Contract Agreement, Shipper's, Carrier's, and Dispatch Agreement involvement. Emergency Disaster Preparedness. Increasing productivity and collaboration all while improving transparency. Build sustainable relationships and increase revenues. Using commercial products and human capital to streamline day-to-day operations of logistics consultant firm.

The commercial products and solutions include Salesforce and Cloud Services. Programmers will start by creating AI BOT +Data + CRM. Enable through the implementation of Salesforces Commerical product. This includes Salesforce Sales Cloud CRM package, AI BOT, Customize Analytical Data, Salesforce Service Cloud helps businesses manage their client/customer relationship and partnerships based. Main purpose to provide services and customer/client support. Maintaining relationships through routines marketing strategies. Capable of collecting and responding to raw data tailored marketing surveys and insight to improve upon brand/firm development.

- a. Increase Sales*
- b. Increase productivity*
- c. Customer Services Feedback*
- d. Customized Analytical database*
- e. Relationship and partnerships based.*
- f. Main purpose to provide services and customer/client support*
- g. Maintaining relationships through routines marketing strategies.*
- h. Capable of collecting and responding to raw data tailored marketing.*
- i. Surveys and insight to improve upon brand/firm development.*
- j. Create and contain interchangeable interactive content AI BOT Virtual Assistance*
- k. AI BOT (Virtual Assistance) Navigate clients through on-line applications.*
- l. AI BOT can carry out interviews and suggest other available services.*
- m. Manage and resolve on-line client/customer complaints*
- n. Capable of summarizing complaints and prioritizing the actions taken.*
- o. Hyperlinks to Federal Motor Carrier Safety Administration (FMCSA)*
- p. Check Commercial Driver's License (CDL) Status.*
- q. Updates on Regulations and Guidelines etc.*
- r. Safety Rating*
- s. Resources*
- t. Hyperlinks to Drug and Alcohol testing and nearest location*

- 4. TruckStop Commercial Products and Services Transportation Management System (TMS) .*
- a. GPS Navigation integrated System Software*
- b. Safer*
- c. Tracking System*
- d. Load board*
- e. Partnerships Agreements*
- f. Liability Insurance 100,000.*
- g. Surety Bond covers 75,000.*
- h. Errors and Omission coverage 50,000*
- i. Online Applications for Professional Services*
- j. Online Credit Application*
- k. Shipper's Agreement*
- l. General Partnership's Agreement*
- m. Carrier's Agreement*
- n. Dispatch Agreement*

White Lotus Freight Bonded Broker and Dispatch, LLC, presents itself as the firm. Contractor also is represented as the firm. businesses without employees/nor staff. Favorable for private entities and stakeholders. Great for public sectors including Local State and Federal Government Contracts, Military Branches, Allies, Manufactures, Commercial Factories, Shippers, Carriers, and General Partnerships.

Continuously, enhancing and establishing the firm AI Bot on their website to be interactive and solution solver on facts, most asked questions. A single place to ensure Cybersecurity, Cloud-based Services, Resources Services, Logistics Consultant Brokerage Services Contracts and Agreement, Unique Partnership's Agreement, Dispatch Services Agreement, Carrier's Agreement.

Our firm has the capability to compete for government contracts alongside larger firms. Focusing primarily on all 50 States, Local, State and Federal Government Contracts, Military Branches, United States Allies, Outlying Countries Canada, and Mexico. Manufactures, Commercial Factories. Shippers' Carriers, and Partnerships, including Emergency Preparedness and Disaster Services. Streamlining Professional Services, Human Capital, Logistical General Management, Logistics Services, Administrative, and Management Contracts and Procurement Specialist, General Services Administration Federal Supply Service Authorized Federal Supply Schedule Price List Online access to contract ordering information, terms and conditions, up to date pricing, and the option to create an electronic delivery order.

Professional Services Logistics Human Capital Technology Services
Category Instructions and Regulations

Instructions:

All offerors must follow evaluation criteria and instructions outlined in the MAS solicitation, including in SCP-FSS-001. The Professional Services Category Attachment outlines additional evaluation criteria, requirements and information specific to this category only. For a list of required Schedule templates and attachments, please visit www.gsa.gov/masscopeandtemplates.

For additional guidance and information for Schedule buyers and Sellers, please visit general guidance page at www.gsa.gov/schedules.

The following requirements apply to all services covered under the Professional Services Category:

- 1. Personal services contracts as defined in FAR 37.102 and FAR 37.104 are prohibited.*
- 2. Architect-Engineering (A/E) services as the term is defined in FAR 36.601-4 are prohibited.*
- 3. Inherently Governmental services as defined in FAR 7.503 are prohibited.*
- 4. Share-in-Savings contracting is prohibited.*
- 5. The contractor shall be responsible for obtaining all necessary permits and licenses and for complying with all applicable Federal, State, and Municipal laws. The contractor shall ensure that its staff maintains any generally required professional certification, accreditation, and proficiency relative to their area of expertise. The contractor shall retain documentation of such records. The proposed/awarded prices must reflect all costs associated with this requirement.*
- 6. Organizational conflicts of interest may arise at the task order level, particularly services involving systems engineering and technical direction, financial services, consulting services, acquisition support services, and any other services involving access to proprietary data or information. Ordering agency contracting officers may impose organizational conflict of interest disclosure requirements, provisions and/or clauses at the task order level as they determine appropriate.*
- 7. Contract staffing services, such as temporary help services, are prohibited under this Category. Refer to the Human Capital Large Category, Temporary Help Services Subcategory, for these services.*

Note: GSA will not award any Drones/Unmanned Aircraft Systems (UAS), as defined in 49 USC Ch. 448, in response to this Large Category except those drones approved by the Department of Defense (DoD) Defense Innovation Unit (DIU) through its Blue sUAS Program.

Regulation Number	Regulation Title/Comments
52.222-46 EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES (FEB 1993)	
52.222-48 EXEMPTION FROM APPLICATION OF THE SERVICE CONTRACT LABOR STANDARDS TO CONTRACTS FOR MAINTENANCE, CALIBRATION, OR REPAIR OF CERTAIN EQUIPMENT CERTIFICATION (MAY 2014)	
52.222-52 EXEMPTION FROM APPLICATION OF THE SERVICE CONTRACT LABOR STANDARDS TO CONTRACTS FOR CERTAIN SERVICES - CERTIFICATION (MAY 2014)	
52.222-62 PAID SICK LEAVE UNDER EXECUTIVE ORDER 13706 (JAN 2022)	
52.223-13 ACQUISITION OF EPEAT - REGISTERED IMAGING EQUIPMENT (JUN 2014)	
52.223-14 ACQUISITION OF EPEAT® - REGISTERED TELEVISIONS (JUN 2014)	
52.223-16 ACQUISITION OF EPEAT® - REGISTERED PERSONAL COMPUTER PRODUCTS (OCT 2015)	
52.223-19 COMPLIANCE WITH ENVIRONMENTAL MANAGEMENT SYSTEMS (MAY 2011)	
52.228-5 INSURANCE - WORK ON A GOVERNMENT INSTALLATION (JAN 1997)	
52.229-1 STATE AND LOCAL TAXES (APR 1984)	
552.238-73 IDENTIFICATION OF ELECTRONIC OFFICE EQUIPMENT PROVIDING ACCESSIBILITY FOR INDIVIDUALS WITH DISABILITIES (MAR 2022)	
552.238-86 DELIVERY SCHEDULE (MAY 2019)	
552.238-89 DELIVERIES TO THE U.S. POSTAL SERVICE (MAY 2019)	
552.238-90 CHARACTERISTICS OF ELECTRIC CURRENT (MAY 2019)	
552.238-91 MARKING AND DOCUMENTATION REQUIREMENTS FOR SHIPPING (MAY 2019)	
552.238-92 VENDOR MANAGED INVENTORY (VMI) PROGRAM (MAY 2019)	
552.238-93 ORDER ACKNOWLEDGMENT (MAY 2019)	
552.238-94 ACCELERATED DELIVERY REQUIREMENTS (MAY 2019)	
552.238-105 DELIVERIES BEYOND THE CONTRACTUAL PERIOD - PLACING OF ORDERS (MAY 2019)	
552.238-107 TRAFFIC RELEASE (SUPPLIES) (MAY 2019)	
552.238-115 SPECIAL ORDERING PROCEDURES FOR THE ACQUISITION OF ORDER-LEVEL MATERIALS (APR 2022)	

Subcategory Instructions and Regulations

Electronic Commerce Subcategory

Instructions:

Continuous Diagnostics and Mitigation (CDM) Approved Products

GSA has partnered with the Cybersecurity and Infrastructure Security Agency (CISA) to showcase CISA approved CDM tools. The CISA CDM Program's Approved Products List (APL) is the authoritative catalog for all approved CDM Tools and associated services. CDM APL Tools will carry the CDM tools symbol. The full complement of CDM subcategories includes tools, associated maintenance, and other related activities such as training. The CDM products and associated services undergo a DHS CISA product qualification process in order to be added to the CDM Approved Products List (APL). The APL features high-quality cybersecurity vendors offering products and related services to Federal, State, and Local Governments. CISA only accepts submissions to modify the CDM APL monthly. Offerors can submit updates to the APL on the first Monday of the first full or partial week of the month, with submissions being accepted through Friday of that week. A full submission calendar can be found on the CISA website. For technical and CDM APL related questions, please contact the CISA CDM Program Office at (csd_cb.acqbudg@cisa.dhs.gov).

SIN 54151ECOM Electronic Commerce and Subscription Services

54151ECOM Includes value added network services, e-mail services, Internet access services, electronic subscription services, data transmission services, and emerging electronic commerce technologies.

NOTE: Subject to Cooperative Purchasing

Cooperative Purchasing: Yes

Set Aside: No

FSC/PSC Code: DG10

Maximum Order: \$500,000

IT Services Subcategory

Instructions:

Offerors submitting an offer for a SIN(s) under the "IT Services Sub-category" must also comply with the following:

- a. Only IT Professional Services or Labor Categories shall be offered.*
- b. Resumes shall be provided to the GSA contracting officer or the ordering activity upon request.*
- c. Offerors shall provide a description of each type of IT Professional Service or Labor Category offered, and it should be presented in the same manner as the Contractor sells to its commercial and other ordering activity customers. If the Contractor is proposing hourly rates, a description*

of all corresponding commercial job titles (labor categories) for those individuals who will perform the service should be provided.

The following is an example of the manner in which the description of a commercial job title should be presented:

EXAMPLE: Commercial Job Title: System Engineer

Minimum/General Experience: Three (3) years of technical experience which applies to systems analysis and design techniques for complex computer systems. Requires competence in all phases of systems analysis techniques, concepts and methods; also requires knowledge of available hardware, system software, input/output devices, structure and management practices.

Functional Responsibility: Guides users in formulating requirements, advises alternative approaches, conducts feasibility studies.

Minimum Education: Bachelor's Degree in Computer Science

d. Pricing for each type of IT Professional Service or Labor Category shall be in accordance with customary commercial practices; e.g., hourly rates, monthly rates, term rates, and/or fixed prices, minimum general experience and minimum education.

e. Pricing of services shall be offered at the Contractor's facility and/or at the ordering activity location in accordance with customary commercial practices.

f. All awarded professional services/labor categories shall be included as an attachment to the GSA Price List (I-FSS-600 CONTRACT PRICE LISTS (OCT 2016)) in the format provided above.

SIN 54151HACS Highly Adaptive Cybersecurity Services (HACS)

54151HACS Includes a wide range of fields such as, the seven-step Risk Management Framework services, information assurance, virus detection, zero trust architecture, network management, situational awareness and incident response, secure web hosting, backups, security services and Security Operations Center (SOC) services. HACS vendors are cataloged under the 5 subcategories of High Value Asset Assessments; Risk and Vulnerability Assessments, Cyber Hunt, Incident Response, and Penetration Testing.

NOTE: Subject to Cooperative Purchasing

Cooperative Purchasing: Yes

Set Aside: No

FSC/PSC Code: DJ01

Maximum Order: \$500,000

NAICS Number	Description	Business Size
541519	Other Computer Related Services	\$34 million

Additional SIN Description: Includes proactive and reactive cybersecurity services that improve customer enterprise-level security posture. Services to identify and protect a customer's information resources, detect and respond to cybersecurity events or incidents, and recover capabilities or services impaired by any incidents that emerge.

It encompasses a wide range of fields that include, but are not limited to, Risk Management Framework (RMF) services, information assurance (IA), virus detection, network management, situational awareness and incident response, secure web hosting, and backup and security services.

The seven-step RMF includes preparation, information security categorization; control selection, implementation, and assessment; system and common control authorizations; and continuous monitoring. RMF activities may also include Information Security Continuous Monitoring Assessment (ISCMA), which evaluate organization wide ISCM implementations, and Federal Incident Response Evaluations (FIREs), which assesses an organization's incident management functions.

It also includes Security Operations Center (SOC) services. The SOC scope includes services such as: 24x7x365 monitoring and analysis, traffic analysis, incident response and coordination, penetration testing, anti-virus management, intrusion detection and prevention, and information sharing.

1. *Specific Instructions for SIN 54151HACS - Highly Adaptive Cybersecurity Services (HACS)*
 - a. *Offerors may request to be placed in the following subcategories.*

i. High Value Asset (HVA) Assessments include Risk and Vulnerability Assessment (RVA which assesses threats and vulnerabilities, determines deviations from acceptable configurations, enterprise or local policy, assesses the level of risk, and develops and/or recommends appropriate mitigation countermeasures in operational and non-operational situations. The services offered in the RVA sub-category include Network Mapping, Vulnerability Scanning, Phishing Assessment, Wireless Assessment, Web Application Assessment, Operating System Security Assessment (OSSA), Database Assessment, and Penetration Testing. Security Architecture Review (SAR) evaluates a subset of the agency's HVA security posture to determine whether the agency has properly architected its cybersecurity solutions and ensures that agency leadership fully understands the risks inherent in the implemented cybersecurity solution. The SAR process utilizes in-person interviews, documentation reviews, and leading practice evaluations of the HVA environment and supporting systems. SAR provides a holistic analysis of how an HVA's individual security components integrate and operate, including how data is protected during operations. The SAR uses the RMF when designing and implementing the seven tenets of zero trust architecture by describing how the steps in the RMF map to similar steps described in NIST Special Publication (SP) 800-207, Zero Trust Architecture. Systems Security Engineering (SSE) identifies security vulnerabilities and minimizes or contains risks associated

with these vulnerabilities spanning the Systems Development Life Cycle. SSE focuses on, but is not limited to the following security areas: perimeter security, network security, endpoint security, application security, physical security, and data security.

ii. Risk and Vulnerability Assessment (RVA) assesses threats and vulnerabilities, determines deviations from acceptable configurations, enterprise or local policy, assesses the level of risk, and develops and/or recommends appropriate mitigation countermeasures in operational and non-operational situations. The services offered in the RVA sub-category include Network Mapping, Vulnerability Scanning, Phishing Assessment, Wireless Assessment, Web Application Assessment, Operating System Security Assessment (OSSA), Database Assessment, and Penetration Testing.

iii. Penetration Testing is security testing in which assessors mimic real-world attacks to identify methods for circumventing the security features of an application, system, or network.

iv. Incident Response services help organizations impacted by a cybersecurity compromise determine the extent of the incident, remove the adversary from their systems, and restore their networks to a more secure state.

v. Cyber Hunt activities respond to crises or urgent situations within the pertinent domain to mitigate immediate and potential threats. Cyber Hunts start with the premise that threat actors known to target some organizations in a specific industry or with specific systems are likely to also target other organizations in the same industry or with the same systems.

b. Services offered SIN 54151HACS shall be in accordance with the following laws and standards when applicable to the specific task orders, including but not limited to:

i. Federal Acquisition Regulation (FAR) Part 52.204-21

ii. OMB Memorandum M-17-12 - Preparing for and Responding to a Breach of Personally Identifiable Information (PII)

iii. OMB Memorandum M- 19-03 - Strengthening the Cybersecurity of Federal Agencies by enhancing the High Value Asset Program

iv. 2017 Report to the President on Federal IT Modernization

v. The Cybersecurity National Action Plan (CNAP)

vi. NIST SP 800-14 - Generally Accepted Principles and Practices for Securing Information Technology Systems

vii. NIST SP 800-27A - Engineering Principles for Information Technology Security (A Baseline for Achieving Security)

viii. NIST SP 800-30 - Guide for Conducting Risk Assessments

ix. NIST SP 800-35 - Guide to Information Technology Security Services

x. NIST SP 800-37 - Risk Management Framework for Information Systems and Organizations: A Systems Life Cycle Approach for Security and Privacy

- xi. NIST SP 800-39 - Managing Information Security Risk: Organization, Mission, and Information System View*
 - xii. NIST SP 800-44 - Guidelines on Securing Public Web Servers*
 - xiii. NIST SP 800-48 - Guide to Securing Legacy IEEE 802.11 Wireless Networks*
 - xiv. NIST SP 800-53 – Security and Privacy Controls for Federal Information Systems and Organizations*
 - xv. NIST SP 800-61 - Computer Security Incident Handling Guide*
 - xvi. NIST SP 800-64 - Security Considerations in the System Development Life Cycle*
 - xvii. NIST SP 800-82 - Guide to Industrial Control Systems (ICS) Security*
 - xviii. NIST SP 800-86 - Guide to Integrating Forensic Techniques into Incident Response*
 - xix. NIST SP 800-115 - Technical Guide to Information Security Testing and Assessment*
 - xx. NIST SP 800-128 - Guide for Security-Focused Configuration Management of Information Systems*
 - xxi. NIST SP 800-137 - Information Security Continuous Monitoring (ISCM) for Federal Information Systems and Organizations*
 - xxii. NIST SP 800-153 - Guidelines for Securing Wireless Local Area Networks (WLANS)*
 - xxiii. NIST SP 800-160 - Systems Security Engineering: Considerations for a Multidisciplinary Approach in the Engineering of Trustworthy Secure Systems*
 - xxiv. NIST SP 800-171 - Protecting Controlled Unclassified Information in non-federal Information Systems and Organizations*
 - xxv. NIST SP 800-207 - Zero Trust Architecture*
- c. All professional labor categories under SIN 54151S Information Technology Professional Services may remain there, unless the labor categories are specific to SIN 54151HACS.*
- 2. Oral Technical Evaluation for SIN 54151HACS - Highly Adaptive Cybersecurity Services (HACS)*
- a. Unless otherwise specified, the offeror shall participate in an oral technical evaluation that will be conducted by a Technical Evaluation Board (TEB). The oral technical evaluation will be held at the unclassified level and will be scheduled by the TEB. The oral technical evaluation will be used to assess the offeror's capability to successfully perform the services within the scope of each subcategory as set forth in this solicitation, excepting those service components awarded through the submission of the Service Self-Attestation. The Self-Attestation form is available at gsa.gov/hacs.*
- An offeror may only be awarded SIN 54151HACS upon successful completion of the Highly Adaptive Cybersecurity Services oral technical evaluation. If the offeror elects to be catalogued*

under the "Cyber Hunt" and/or "Incident Response" subcategories, additional questions related to those areas will be asked during the HACS Oral Technical Evaluation.

i. ORAL TECHNICAL EVALUATION CONSTRAINTS: The offeror shall identify up to five key personnel, by name and association with the offeror, who will field questions during the oral technical evaluation. The HACS SIN consists of 5 subcategories. The base HACS Oral Technical Evaluation consists of questions related to the 3 subcategories of, High Value Asset Assessments, Risk and Vulnerability Assessments and Penetration Testing. One (1) hour and 40 minutes is allotted for the base HACS Oral Technical Evaluation. The evaluation will be stopped precisely after 1 hour and 40 minutes. Should the offeror elect to be considered for the additional subcategories of Incident Response and Cyber Hunt, an additional 10 minutes will be allotted for each of those subcategories. The total base evaluation session is expected to last up to 1 hour and 40 minutes, depending on the number of subcategories the offeror is proposing. The TEB Chairperson will be responsible for ensuring the schedule is met and that all offerors are given the same opportunity to present and answer questions.

ii. ORAL TECHNICAL EVALUATION SCHEDULING: The TEB will contact the offeror's authorized negotiator or the signatory of the SF 1449 via email to schedule the oral technical evaluation. Evaluation time slots will be assigned on a first-come-first-served basis. The Government reserves the right to reschedule any offeror's oral technical evaluation at its sole discretion. The oral technical evaluation will be held at facilities designated by the TEB. The exact location, seating capacity, and any other relevant information will be provided when the evaluations are scheduled. The Government may also make accommodations for vendors to participate in oral evaluations virtually.

iii. PROHIBITION OF ELECTRONIC RECORDING OF THE ORAL TECHNICAL EVALUATION: The offeror may not record or transmit any of the oral evaluation process. All offeror's electronic devices shall be removed from the room during the evaluation. The offeror is permitted to have a timer in the room during the evaluation, provided by the TEB.

iv. RESUBMISSION RESTRICTIONS FOR UNSUCCESSFUL VENDORS UNDER THIS EVALUATION FACTOR: The TEB will afford the offeror multiple opportunities to achieve the "pass" criteria under this evaluation factor through "clarification" questioning, during the Oral Technical Evaluation. Any offeror whom the TEB has found to have not passed under this evaluation factor shall be failed and shall be ineligible to re-submit under the SIN to participate in this evaluation factor for a period of six (6) months following the date of failure.

v. FOR REJECT AND WITHDRAWN OFFERS OR MODIFICATIONS: An offeror or contractor can re-apply for SIN 54151HACS if they are rejected or withdrawn.

1. If an offeror or contractor passes the oral technical evaluation but their offer or modification is rejected or withdrawn; they can re-apply within six (6) months after the oral technical evaluation completion date without having to participate in the oral technical evaluation again. When documentation is resubmitted for review for a new offer/modification, include a statement in the cover letter that the capabilities remain current, accurate, and complete as stated during the oral technical evaluation.

2. If an offeror or contractor passes the oral technical evaluation but their offer or modification is rejected or withdrawn, and they do not re-apply within six (6) months after the oral technical evaluation completion date, they must participate in a new oral technical evaluation in order to add SIN 54151HACS.

vi. **HIGH VALUE ASSET (HVA) ASSESSMENTS SUBCATEGORY PLACEMENT:** Any offeror previously awarded all of the following four SINs: 132-45A Penetration Testing, 132-45B Incident Response, 132-45C Cyber Hunt, and 132-45D Risk and Vulnerability Assessment, shall not be subject to a Highly Adaptive Cybersecurity Services oral technical evaluation, so long as they provide in the modification package to the GSA contracting officer a Service Self-Attestation acknowledging their ability to perform Security Architecture Review (SAR) and Systems Security Engineering (SSE) services in their entirety. The Self-Attestation form is available at gsa.gov/hacs.

b. **Oral Technical Evaluation Procedures:** The offeror will be evaluated on their knowledge of the proposed services. The oral technical evaluation will require the offeror to respond to a specific scenario and general questions to assess the offeror's expertise. The competencies, criteria and evaluation minimums for the questions are below: All new offerors and modifications must participate in and PASS the HACS Oral Technical Evaluation. The Oral Technical Evaluation will include, at a minimum, questions on Risk and Vulnerability Assessment (RVA), Security Architecture Review (SAR), Systems Security Engineering (SSE), and Penetration Testing. At the time of submission, all new offerors and modifications can also elect to be cataloged in one or both subcategories of Cyber Hunt and Incident Response (IR). Should this election be taken, additional questions related to these subcategories will be included in their HACS evaluation and these additional subcategory topics must be passed as well.

Below will be used for the evaluation of the offeror's responses to questions during the oral evaluation.

d. **SIN Subgroups:** Upon completion of the oral technical evaluation for both offers and modifications, the government will determine which of the following 5 SIN subgroups apply:

1. High value Asset (HVA) Assessments
2. Risk and Vulnerability Assessment (RVA)
3. Cyber Hunt
4. Incident Response
5. Penetration Testing

Following notification that they are eligible for one or more of the 5 SIN subgroups, awarded contractors may select the corresponding subgroups by following the instructions below:

1. Login to eBuy
2. From the top menu, select "Profile"
3. Click "Modify Subgroups"
4. Select the applicable subgroups according to the instructions

All contractor selections will be monitored by GSA for compliance and action will be taken against your contract if you select Subgroups that have not been awarded under your contract.

Note: All services shall be billed in arrears in accordance with 31 U.S.C. 3324.

IT Solutions Subcategory

Instructions:

Offerors submitting an offer for a SIN(s) under the "IT Solutions Subcategory" must also comply with the following:

- 1) The following applies to any IT Solutions SIN that includes IT Professional Services.*
 - a) Only IT Professional Services or Labor Categories shall be offered.*
 - b) Resumes shall be provided to the GSA contracting officer or the user ordering activity upon request.*
 - c) Shall provide a description of each type of IT Professional Service or Labor Category offered, and it should be presented in the same manner as the Contractor sells to its commercial and other ordering activity customers. If the Contractor is proposing hourly rates, a description of all corresponding commercial job titles (labor categories) for those individuals who will perform the service should be provided.*

The following is an example of the manner in which the description of a commercial job title should be presented:

EXAMPLE: Commercial Job Title: System Engineer

Minimum/General Experience: Three (3) years of technical experience which applies to systems analysis and design techniques for complex computer systems. Requires competence in all phases of systems analysis techniques, concepts and methods; also requires knowledge of available hardware, system software, input/output devices, structure and management practices.

Functional Responsibility: Guides users in formulating requirements, advises alternative approaches, conducts feasibility studies.

Minimum Education: Bachelor's degree in computer science

d) Pricing for each type of IT Professional Service or Labor Category shall be in accordance with customary commercial practices; e.g., hourly rates, monthly rates, term rates, and/or fixed prices, minimum general experience and minimum education.

e) Pricing of services shall be offered at the Contractor's facility and/or at the ordering activity location in accordance with customary commercial practices.

f) All awarded professional services/labor categories shall be included as an attachment to the GSA Price List (I-FSS-600 CONTRACT PRICE LISTS (OCT 2016)) in the format provided above.

2) Continuous Diagnostics and Mitigation (CDM) Approved Products

GSA has partnered with the Cybersecurity and Infrastructure Security Agency (CISA) to showcase CISA approved CDM tools. The CISA CDM Program's Approved Products List (APL) is the authoritative catalog for all approved CDM Tools and associated services. CDM APL Tools will carry the CDM tools symbol. The full complement of CDM subcategories includes

tools, associated maintenance, and other related activities such as training. The CDM products and associated services undergo a DHS CISA product qualification process in order to be added to the CDM Approved Products List (APL). The APL features high-quality cybersecurity vendors offering products and related services to Federal, State, and Local Governments. CISA only accepts submissions to modify the CDM APL monthly. Offerors can submit updates to the APL on the first Monday of the first full or partial week of the month, with submissions being accepted through Friday of that week. A full submission calendar can be found on the CISA website. For technical and CDM APL related questions, please contact the CISA CDM Program Office at csd_cb.acqbudg@cisa.dhs.gov.

SIN 518210C Cloud Computing and Cloud Related IT Professional Services

518210C Includes commercially available cloud computing services such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS) and emerging cloud computing services. IT professional services that are focused on providing the types of services that support the Government's adoption of, migration to, or governance/management of cloud computing. Specific cloud related IT professional labor categories and/or fixed price professional services solutions (e.g., migration services) that support activities associated with assessing cloud solutions, refactoring workloads for cloud solutions, migrating legacy or other systems to cloud solutions, providing management/governance of cloud solutions, DevOps, developing cloud native applications, or other cloud-oriented activities are within scope of this SIN.

NOTE: Subject to Cooperative Purchasing

Cooperative Purchasing: Yes

Set Aside: No

FSC/PSC Code: DB10

Maximum Order: \$500,000

NAICS

Number	Description	Business Size
518210	Data Processing, Hosting, and Related Services	\$40 million

Instructions:

Additional SIN Description: This SIN provides access to cloud (e.g., IaaS, PaaS, SaaS) computing services across public, community, and hybrid deployment models. Cloud computing services shall comply with National Institute of Standards and Technology (NIST) Definition of Cloud Computing Essential Characteristics (NIST SP 800-145). Cloud computing that does not meet all NIST essential characteristics are outside the scope of this SIN and shall be assigned to other SINs, where applicable.

Cloud related IT professional labor categories are within scope of this SIN. Cloud related IT professional labor categories are not subject to adherence to the NIST definition of cloud computing; therefore, no technical response is required for a labor proposal. Non-professional labor categories subject to Service Contract Labor Standards (SCLS) (e.g., IT help desk support) that are incidental to and used solely to support specific Cloud related IT professional labor

categories and/or fixed-price professional services solutions must be offered under a different SIN that specifically covers the proposed services.

Ancillary products and services are not within scope of this SIN. Any items that are not within the scope of this SIN must be offered under a SIN that specifically covers the proposed services.

The following are out of scope for this SIN: cloud “token,” “gift card,” “credit,” or other similar types of prepaid offerings:

1.) Cloud computing services (e.g., IaaS, PaaS, SaaS) are sometimes offered commercially as a cloud “token,” “gift card,” “credit,” or require purchase of a prepaid offering; these are out of scope for this SIN. The pricing model for these items does not accurately represent the stock-keeping units (SKU) that are awarded at the task-order level. Therefore, non-submission of pricing of underlying IaaS, PaaS, SaaS SKUs are not allowed.

2.) Credits for cloud computing services (e.g., IaaS, PaaS, SaaS) that are paid for in advance and spent or used at a later time are commonly termed commercially as a cloud “token,” “gift card,” or “Credit” and are out of scope for SIN 518210C. Cloud computing services (e.g., IaaS, PaaS, SaaS) must be paid for in arrears in accordance with 31 U.S.C. 3324.

3.) Also out of scope is any payment for cloud computing services which carry a risk to the Government of a “use or lose” situation where a government cloud account may forfeit unexpended credits/deposits towards future cloud computing services charges at the end of a vendor-defined period (e.g., 1, 2 or 3 years). Therefore, pre-payment of products or services prior to delivery of SKUs is not allowed. Payment for these SKUs must be in arrears.

Physical hardware, non-cloud software per the NIST definition, and other artifacts acquired to support the physical construction of a private or other cloud are not within the scope of this SIN.

1) Specific Instructions for SIN 518210C – Cloud Computing and Cloud Related IT Professional Services

a) All offerings must be billed as follows:

i) Cloud computing services (e.g., IaaS, PaaS, SaaS) must adhere to the “pay as you go” pricing model and must be billed in arrears in accordance with 31 U.S.C. 3324.

ii) Cloud related IT professional services, specific cloud labor categories and/or fixed-price professional services solutions must also be billed in arrears in accordance with 31 U.S.C.3324.

b) Offerors shall follow instructions and guidance for cloud computing services available at <http://www.gsa.gov/mascategoryrequirements>

c) Offerors may propose:

i) Cloud computing services only (e.g., IaaS, PaaS, SaaS);

ii) Cloud related IT professional services and/or fixed-price professional services solutions that are not subject to NIST standards only; or

iii) Cloud computing services (e.g., IaaS, PaaS, SaaS) (subject to NIST standards) and cloud related IT professional services and/or fixed-price professional services solutions (not subject to NIST standards).

iv) The offeror must state which cloud computing service model(s), if any, is/are being proposed (e.g., IaaS, PaaS, SaaS).

v) The offeror must state which cloud computing deployment model(s), if any, is/are being proposed (e.g., public, community, and hybrid).

d) Pricing increment of offerings:

i) For all offers of IaaS/PaaS/SaaS the appropriate maximum measured increment of pricing shall be no more than one month per user, or some other equivalent discrete measurement that provides the Government with the advantage of frequent (every month or less) “pay as you go” metering cycles.

ii) Cloud For all offers of IaaS/PaaS/SaaS a pricing increment that is greater than one month may be offered under SIN 518210C only if an offer with a pricing increment of one month or less is also made for that particular item.

e) Acceptance Testing: Acceptance testing shall be performed of the systems for ordering activity approval in accordance with the approved test procedures.

f) Training

i) If training is provided in accordance with standard commercial practices, the offeror shall provide normal commercial installation, operation, maintenance, and engineering interface training on the system.

ii) If there are separate training charges, they should be included in the GSA Price List (I-FSS-600 CONTRACT PRICE LISTS (OCT 2016).

g) Information Assurance/Security Requirements: Offerors shall meet information assurance/security requirements in accordance with the ordering activity requirements.

h) Reporting: Offerors shall provide to the ordering activity any general reporting capabilities available to verify performance, cost and availability. In accordance with commercial standard practice, the offeror may furnish the ordering activity with a monthly summary report.

i) Cloud related IT professional services may be listed on SIN 54151S - Information Technology Professional Services. The cloud related IT professional services on this SIN (518210C) shall be cloud specific titles and descriptions. At a minimum, the word “cloud” shall appear both in the title and the description of each labor category or fixed-price professional services solutions proposed for this SIN. The relevant past performance projects must demonstrate that the cloud related IT professional services were utilized in the IaaS, PaaS, and/or SaaS environment.

NOTE: Identical labor categories cannot be on both SINs 54151S and 518210C. It is recommended that cloud related IT professional services and/or fixed-price professional services solutions that are not subject to NIST standards should be offered under SIN 518210C.

j) Offerors may optionally select a single service model that best fits a proposed cloud computing offering. Only one service model may be selected per each proposed cloud computing offering. Offerors may elect to submit multiple cloud computing offerings, each with its own single service model.

k) Deployment model selection within this SIN is optional for any individual cloud computing offering. Offerings may be included without a deployment model selection so long as they comply with all the essential characteristics of cloud computing as outlined by NIST SP 800-145. The three NIST deployment models within the scope of this SIN are: Public, Community, and Hybrid.

l) All current pricing requirements in provision SCP-FSS-001 apply. At the current time, there is no provision for reducing or eliminating standard price list posting requirements to accommodate rapid cloud price fluctuations.

m) All pricing models for cloud computing services must have the core capability to meet the NIST Essential Cloud Characteristics, particularly with respect to on-demand self-service, while allowing alternate variations at the task order level at agency discretion, pursuant to the guidance on NIST Essential Characteristics.

n) Evaluation factors for cloud related IT professional services, specific cloud labor categories and/or fixed-price professional services solutions are found within this same document under Section II Instructions for all IT Offerors under 6) Relevant Project Experience Evaluation.

2) Specific Evaluation Factor for Cloud Computing Services Adherence to the NIST Essential Cloud Characteristics per NIST SP 800-145.

Within a two-page limitation for each cloud computing service (e.g., IaaS, PaaS, SaaS) submitted, provide a description of how the cloud computing service meets each of the five essential cloud computing characteristics as defined in National Institute of Standards and Technology (NIST) Special Publication 800-145 and subsequent versions of this publication. This standard specifies the definition of cloud computing for use by Federal agencies. Each cloud computing service must be capable of satisfying each of the five NIST essential characteristics as follows:

- On-demand self-service
- Broad network access
- Resource pooling
- Rapid elasticity
- Measured service cloud (Pay per use, or pay as you go)

Refer to 518210C. Specific Information for Offerors available at <http://www.gsa.gov/mascategoryrequirements> for guidance on meeting the NIST essential characteristics. For the purposes of the cloud computing and cloud related IT professional services SIN, meeting the NIST essential characteristics is concerned primarily with whether the

underlying capability of the commercial service is available, and whether an ordering activity requests or implements the capability.

3) Cloud Consumption

Offerors must identify in their GSA price List (I-FSS-600 CONTRACT PRICE LISTS) all cloud computing services that are available to be ordered on a consumption basis.

SIN Level Regulations:	Regulation Title/Comments
Regulation Number	PRICE REDUCTIONS (DEC 2021) (DEVIATION)
552.238-81	<i>Instructions:</i> <i>This GSAR clause is prescribed and contained within Acquisition Letter MV-21-06, Supplement 1.</i> SPECIAL ORDERING PROCEDURES APPLICABLE
552.238-199	WHEN PROCURING CLOUD COMPUTING ON A CONSUMPTION BASIS (MAR 2022) <i>Instructions:</i> <i>This GSAR clause is prescribed and contained within Acquisition Letter MV-21-06, Supplement 1.</i>

SIN 518210FM Financial Management Quality Service Management Office (FM QSMO) Core Financial Management (FM) Solutions and IT Professional Services

518210FM Includes Core Financial Management Solutions (Core FS) and Financial Management (FM) services and solutions that are complementary to or augment Core FS and/or support agency modernizations. Offerings include financial management software suites in a cloud environment; services, applications, and modules that help agencies adopt FM QSMO solutions; and IT professional services and/or labor categories, software, cloud computing and IT training that support FM QSMO adoption.

Cooperative Purchasing: Yes

Set Aside: No

FSC/PSC Code: DB10

Maximum Order: \$500,000

NAICS

Number	Description	Business Size
518210	Data Processing, Hosting, and Related Services	\$40 million

Instructions:

For additional SIN subgroup requirements, please visit Financial Management Capabilities Framework (FMCF) website at the following link:

<https://www.fiscal.treasury.gov/fnqsmo/financial-management-capability-framework.html>

SIN 518210FM Subgroups:

- 1. Core Financial Management Solutions (Core FS) – partially pre-configured commercial financial management software suites offered in a cloud environment. Core FS offerings that are determined acceptable to meet or exceed Core FS functionality scope and Financial Management Capability Framework (FMCF) standards and that can accommodate agency-specific business needs. Items within scope of this subgroup: cloud computing services.*
- 2. Additional Financial Management (FM) Solutions - business capabilities that augment those provided by the Core FS Baseline Solution and have a correlation to Federal Financial Management (FFM) functions or activities. Includes cost management solutions, reporting tools, business information exchange (BIE) solutions, FM business analytics and intelligence. Items within scope of this subgroup: products and professional services/labor categories.*
- 3. Financial Management (FM) Service/Solution Adoption and Transition Services – services to help agencies in identifying, selecting, acquiring, migrating to, and using FM QSMO Marketplace offerings effectively and efficiently. These services may also be needed when extensive or complex FM solution/service changes are released, or significant functionality is removed. Includes strategy and planning, FM data conversion and migration, IV&V, readiness assessments, integration support, project management, and FM solution/service testing. Items within scope of this subgroup: products and professional services/labor categories.*
- 4. Financial Management (FM) Technology Operations Support Services – support and assist with technology implementation and operations. Includes FM technology development, testing, implementation, operations, and maintenance support, information exchanges between FM solutions and services and agency mission systems, service desk, related ancillary training, and support for legacy core financial systems. Items within scope of this subgroup: products, training and professional services/labor categories.*

The following are out of scope for this SIN: cloud “token,” “gift card,” “credit,” or other similar types of prepaid offerings:

- 1. Cloud computing services (e.g., IaaS, PaaS, SaaS) are sometimes offered commercially as a cloud “Token” “gift card” credit or require purchase of a prepaid offering; these are out of scope for this SIN. The pricing model for these items does not accurately represent the stock-keeping units (SKU) that are awarded at the task-order level. Therefore, non-submission of pricing of underlying IaaS, PaaS, SaaS SKUs is not allowed.*
- 2. Credits for cloud computing services (e.g., IaaS, PaaS, SaaS) that are paid for in advance and spent or used later are commonly termed commercially as a cloud “token, gift card, or “credit”, and are out of scope for SIN 518210C. Cloud computing services (e.g., IaaS, PaaS, SaaS) must be paid for in arrears in accordance with 31 U.S.C. 3324.*
- 3. Also out of scope is any payment for cloud computing services which carry a risk to the Government of a “use or lose” situation where a government cloud account may forfeit*

unexpended credits/deposits towards future cloud computing services charges at the end of a vendor-defined period (e.g., 1, 2 or 3 years). Therefore, pre-payment of products or services prior to delivery of SKUs is not allowed. Payment for these SKUs must be in arrears.

1) Specific Instructions for SIN 518210FM:

a) All offerings must be billed as follows:

i) Cloud computing services (e.g., IaaS, PaaS, SaaS) must adhere to the “pay as you go” pricing model and must be billed in arrears in accordance with 31 U.S.C. 3324.

ii) Cloud related IT professional services, specific cloud labor categories and/or fixed-price professional services solutions must also be billed in arrears in accordance with 31 U.S.C. 3324.

b) Offerings under SIN 518210FM shall be in accordance with the following standards, as applicable based on offering type and components:

- *FMCF Standards and Capabilities*
- *Federal Integrated Business Framework (FIBF) FFM Functions and Activities*
- *FIBF FFM Business Use Cases*
- *FIBF FFM Business Capabilities - Federal Financial Management System Requirements (FFMSRs)*
- *FIBF FFM Business Data Elements*
- *Core FS Pre-Built Business Reports*
- *Core FS Pre-Built Business Information Exchanges (BIEs)*
- *FM Technology Design and Operation Capabilities*
- *FM Solution-Service Evaluation Criteria*
- *FM Provider Service Measures*

The most current versions of FMCF Standards are available at

<https://www.fiscal.treasury.gov/fmqsmo/financial-management-capability-framework.html>

2) Additional submission and evaluation requirements.

a) All submissions for SIN 518210FM must include a cover letter that identifies the SIN subgroups that are being proposed, the required technical evaluation form (Technical Narrative Response Template), the required Solution/Service Definition Template available at <http://www.gsa.gov/masscopeandtemplates>, and the required price proposal template. The Core FS Pre-Built BIE Response Template is only required for Core Financial Management Solutions (Core FS) subgroup, which is available at <http://www.gsa.gov/masscopeandtemplates>. Cloud computing services (e.g., IaaS, PaaS, SaaS) must adhere to the “pay as you go” pricing model and must be billed in arrears in accordance with 31 U.S.C. 3324.

b) All SIN subgroups will be subject to acceptable/unacceptable technical evaluation that will be performed by the FM QSMO Project Management Office (PMO).

c) Core Financial Management Solutions (Core FS) subgroup: submission and evaluation requirements

- i) Written/narrative technical evaluation is required for all offerings under SIN 518210FM.
 - ii) A sandbox/capabilities demonstration is required. The structure of the sandbox/capabilities demonstration will have a not-to-exceed consecutive eight (8) hour time limit. If offerors/contractors can demonstrate all capabilities in a shorter period of time, the sandbox demonstration will conclude then. FM QSMO PMO will coordinate the scheduling for each vendor's demonstration.
 - iii) For the required technical evaluation form (Technical Narrative Response Template) and the required Core FS Pre-Built BIE Response Template, please visit www.gsa.gov/masscopeandtemplates.
 - iv) A Target completion timeframe for evaluation of Core FS (including sandbox/capabilities demonstration) is 60 business days.
 - v) Addition of Core FS subgroup to awarded SIN 518210FM will require written/narrative technical evaluation and sandbox demonstration.
 - vi) Addition of new items to the awarded Core FS subgroup will require written/narrative technical evaluation and sandbox demonstration.
- d) Additional Financial Management (FM) Solutions subgroup: submission and evaluation requirements
- i) Written/narrative technical evaluation is required for all offerings under SIN 518210FM.
 - ii) For the required technical evaluation form (Technical Narrative Response Template), please visit www.gsa.gov/masscopeandtemplates.
 - iii) Target completion timeframes for evaluation of Additional Financial Management (FM) Solutions is 20 business days for service-only offerings and 40 business days for service offerings that include technology or other technology offerings.
 - iv) Addition of Additional FM Solutions subgroup to awarded SIN 518210FM will require written/narrative technical evaluation and sandbox demonstration.
 - v) Addition of new items to the Additional FM Solutions subgroup will require written/narrative technical evaluation and sandbox demonstration.
- e) Financial Management (FM) Service/Solution Adoption and Transition Services subgroup: submission and evaluation requirements
- i) Written/narrative technical evaluation is required for all offerings under SIN 518210FM.
 - ii) For the required technical evaluation form (Technical Narrative Response Template), please visit www.gsa.gov/masscopeandtemplates.
 - iii) Target completion timeframes for evaluation of FM Service/Solution Adoption and Transition Services is 20 business days for service-only offerings and 40 business days for service offerings that include technology or other technology offerings.

- iv) *Addition of FM Service/Solution Adoption and Transition Services to awarded SIN 518210FM will require written/narrative technical evaluation and sandbox demonstration.*
- v) *Addition of new items to the FM Service/Solution Adoption and Transition Services subgroup will require written/narrative technical evaluation.*
- f) *Financial Management (FM) Technology Operations Support Services subgroup: submission and evaluation requirements*
 - i) *Written/narrative technical evaluation is required for all offerings under SIN 518210FM.*
 - ii) *For the required technical evaluation form (Technical Narrative Response Template), please visit www.gsa.gov/masscopeandtemplates.*
 - iii) *Target completion timeframes for evaluation of FM Technology Operations Support Services is 20 business days for service-only offerings and 40 business days for service offerings that include technology or other technological offerings.*
 - iv) *Addition of FM Technology Operations Support Services to awarded SIN 518210FM will require written/narrative technical evaluation and sandbox demonstration.*
 - v) *Addition of new items to FM Technology Operations Support Services subgroup will require written/narrative technical evaluation.*
- 3) *SIN Subgroups: Offerors may request to be placed in any of the SIN Subgroups. Being awarded specific subgroups are dependent on passing the technical evaluation for both offers and modifications. The government will validate which of the following 4 SIN subgroups apply:*
 1. *Core Financial Management Solutions (Core FS)*
 2. *Additional Financial Management (FM) Solutions*
 3. *Financial Management (FM) Service/Solution Adoption and Transition Services*
 4. *Financial Management (FM) Technology Operations Support Services*

a) Following award notification for one or more of the 4 SIN subgroups, awarded contractors may select the corresponding subgroups by following the instructions below:

 - i) *Login to eBuy*
 - ii) *From the top menu, select "Profile"*
 - iii) *Click "Modify Subgroups"*
 - iv) *Select the applicable subgroups according to the instructions*
 - i) *All contractor selections will be monitored by the FM QSMO PMO for compliance and action will be taken against your contract if you select subgroups that have not been awarded under your contract.*

TECHNICAL RATINGS

<i>Rating</i>	<i>Definition</i>
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<i>Pass</i>	<i>The proposal clearly meets the minimum requirements of the solicitation.</i>
<i>Fail</i>	<i>The proposal does not clearly meet the minimum requirements of the solicitation.</i>

SIN 54161 Agency Human Capital Evaluation

54161 This function assesses results achieved across all Human Capital Management systems and activities in support of mission goals to identify and implement improvements.

Cooperative Purchasing: No

Set Aside: No

FSC/PSC Code: R408

Maximum Order: \$1,000,000

Subcategory Instructions and Regulations

Business Administrative Services Subcategory

SIN 541611 Management and Financial Consulting, Acquisition and Grants Management Support, and Business Program and Project Management Services

541611 Provide operating advice and assistance on administrative and management issues. Examples include strategic and organizational planning, business process improvement, acquisition and grants management support, facilitation, surveys, assessment and improvement of financial management systems, financial reporting and analysis, due diligence in validating an agency's portfolio of assets and related support services, strategic financial planning, financial policy formulation and development, special cost studies, actuarial services, economic and regulatory analysis, benchmarking and program metrics, and business program and project management.

Inherently Governmental services as identified in FAR 7.503 or by the ordering agency are prohibited. It is the responsibility of the Contracting Officer placing the order to make this determination. Ordering activities must require prospective contractors to identify potential conflicts of interest and address those, prior to task order award.

Personal services as defined in FAR 37.104 are prohibited.

Cooperative Purchasing: No

Set Aside: No

FSC/PSC Code: R408

Maximum Order: \$1,000,000

NAICS

Number	Description	Business Size
541611	Administrative Management and General Management Consulting Services	\$24.5 Million

Instructions:

Subgroup for Program Evaluation Services under SIN 541611

Contractors that are awarded SIN 541611 may request to be placed in the following subgroup:

Program Evaluation Services: Program Evaluation is defined as “assessment using systematic data collection and analysis of one or more programs, policies, and organizations intended to assess their effectiveness and efficiency” ([Office of Management and Budget Memorandum M-20-12](#)). Evaluations may address questions related to the implementation of a program, policy, or organization; the effectiveness of specific strategies related to or used by a program, policy, or organization; and/or factors that relate to variability in the effectiveness of a program, policy, organization or strategies of these. Evaluations can also examine questions related to understanding the contextual factors surrounding a program, as well as how to effectively target specific populations or groups for a particular intervention ([OMB Circular A-11, Section 200.22](#)).

Contractors seeking to add this subgroup must demonstrate technical expertise and relevant experience in developing and implementing rigorous evaluation designs, including impact evaluations (i.e., evaluations that include a counterfactual through randomization or quasi-experimental methods) and outcome evaluations (i.e., evaluations that assess outcomes but are not designed to determine causality) - see [OMB M-20-12](#) for definitions of these evaluation types. While these minimum qualifications are required for vendors to add this subgroup, we expect that qualified vendors will be capable of providing a range of program evaluation services to meet agency needs. Thus, contractors should be prepared to provide program evaluation services including conducting evaluability assessments; designing and implementing a range of evaluation types, including equitable and culturally responsive evaluation approaches and process or implementation evaluations; collecting and analyzing qualitative and quantitative evaluation data; providing evaluation technical assistance/expertise; and developing and disseminating deliverables from evaluation activities to diverse audiences.

Requests from contractors to add the Program Evaluation Services subgroup will be accepted on a continuous/rolling basis. Requests must be submitted by an authorized negotiator on the contract. The contractor must have SIN 541611 awarded on their MAS contract at the time of the initial request in order for the request to be evaluated. Contractors seeking to add the Program Evaluation Services subgroup must submit a concise description (up to 3 single-spaced pages) of the program evaluation services offered, including developing and implementing impact and outcome evaluations as noted above, and how they align with the program evaluation standards and practices outlined in [OMB M-20-12](#). The contractor must also submit 3 Relevant Project Experience examples (up to 5 single-spaced pages total) for work performed within the last three years of the date of application, which are germane to the scope of work of program evaluation services, reflect experience executing impact and outcome evaluation activities, and demonstrate

alignment with the program evaluation standards and practices in OMB M-20-12. Each Relevant Project Experience example must include the following:

- *Project title*
- *Start date and actual or projected end date*
- *Client(s)*
- *Offeror's role in project (lead, subcontractor, etc.)*
- *Point of contact for client (name and email address)*
- *Dollar value of project*
- *Description of type(s) of program evaluation services provided, including details about specific methods used and the type of evaluation (i.e., impact and/or outcome evaluation)*
- *Description of actual or expected deliverables, work products, or outputs of services provided*
- *(if available) Links to published report(s) or other documents from the project*

Submissions must be requested via email addressed to sinevalsubgroup@gsa.gov with the subject line “[Company Name] Request to Add SIN 541611 Subgroup for Program Evaluation Services.” No other method of submission is allowed.

All submissions will be assessed by a Technical Evaluation Board (TEB) consisting of evaluation professionals from multiple Federal agencies. The TEB may contact the provided points of contact to confirm the accuracy of Relevant Project Experience examples and may also review CPARS ratings for projects completed for Federal clients. Submissions will be rated on a pass/fail basis:

Technical Ratings

<i>Rating</i>	<i>Definition</i>
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<i>Pass</i>	<i>The services and past project descriptions provided by the offerors demonstrate technical expertise and relevant experience in developing and implementing rigorous evaluation designs that align with the definitions, standards, and practices in OMB M-20-12</i>
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Fail

The services and past project descriptions provided by the offeror do not clearly demonstrate technical expertise and relevant experience in developing and implementing rigorous evaluation designs that align with the definitions, standards, and practices in OMB M-20-12

Contractors whose initial submissions receive a “Pass” rating from the TEB will be asked to respond in writing (up to 3 single-spaced pages) to a specific program evaluation services scenario. The scenario response must be submitted within 15 business days of the date of notification. The response will be assessed by the TEB to determine whether the offeror has demonstrated a technically appropriate approach to tasks expected to be performed within the scope of the Program Evaluation Services subgroup. Responses will be rated on a pass/fail basis:

Technical Ratings

Rating

Pass

Fail

Definition

The response provided by the offeror demonstrates a technically appropriate approach to program evaluation services (i.e., the approach meets the standards outlined in M-20-12)
The response provided by the offeror does not clearly demonstrate a technically appropriate approach to program evaluation services (i.e., the approach does not clearly meet the standards outlined in M-20-12)

The TEB intends to make a pass/fail decision within 45 calendar days of the scenario response submission. In the event that the decision is not finalized by 45 days, GSA will notify the contractor in writing of the status and the anticipated date the decision will be finalized.

Contractors who receive “Pass” ratings on both the initial submission and the scenario response will be eligible to add the Program Evaluation Services subgroup to their eBuy profile, which will in turn be visible on the GSA eLibrary website under SIN 541611. Following notification of eligibility, contractors may select the Program Evaluation Services subgroup by following the instructions below:

1. Login to eBuy
2. From the top menu, select "Profile"
3. Click "Modify Subgroups"

4. Select the “Program Evaluation Services” subgroup according to the instructions

Contractors who receive “Fail” ratings will be notified in writing of non-eligibility. The notification will include the ratings assessed by the TEB (Pass or Fail) for each portion of the assessment. An offeror who has failed shall be ineligible to re-submit a request to add this subgroup for a period of six (6) months following the date of the non-eligibility notification.

Contractors awarded SIN 541611 will continue to hold SIN 541611 whether they receive a Pass or Fail rating on the subgroup application.

Subgroup participants will be monitored by GSA for contractor compliance. Contractors that opt into the subgroup without written approval by GSA will be required to remove the subgroup from their eBuy profile and instructed to submit an application following the procedures contained in this document.

SIN 561450 Information Services (BIS)

561450 Services include electronic and non-electronic transmission of consumer and/or business: credit reports, address verification reports, skip location reports, public information, domestic business profile, international business profile, mortgage reports, supplemental credit reference reports, bond rating, managed fund rating, institutional ranking, data processing (credit/financial) credit scoring, security freeze (lock credit file), merged credit files, business credit risk assessment, and miscellaneous business information services. Firms may provide computer software intended for BIS use and customization of reports.

Cooperative Purchasing: No

Set Aside: No

FSC/PSC Code: R704

Maximum Order: \$1,000,000

NAICS Number	Description	Business Size
561450	Credit Bureaus	\$41 million

Environmental Services Subcategory

Instructions:

The following services are not included or authorized under this Subcategory:

- 1. Construction and Architect-Engineer Services as set forth in FAR Part 36 (including construction, alteration or repair of buildings, structures, or other real property)*
- 2. Asbestos abatement*
- 3. Radon mitigation*
- 4. Paint removal and/or design*

5. Handling/disposal and/or transportation of nuclear or radioactive waste, other than low-level radioactive waste associated with medical waste.

Insurance Requirements: Offerors proposing either or both SIN 562112 Hazardous Waste Disposal

Services and 561290 Remediation Services must adhere to the following insurance requirements, at their own expense, with the costs of insurance being reflected in the proposed/awarded contract prices:

- 1. Workers' compensation and employers' liability insurance as required by law, except that if this contract is to be performed in a state which does not require or permit private insurance, then compliance with the statutory administrative requirements in any such state will be satisfactory. The required workers compensation insurance shall extend to cover the employer's liability for accidental bodily injury or death and for occupational disease with a minimum liability amount of \$100,000;*
- 2. General liability insurance with bodily injury liability insurance in the minimum of \$500,000 per occurrence on the comprehensive form of policy;*
- 3. Automotive liability insurance, required on the comprehensive form of policy and shall provide bodily injury liability and property damage liability covering the operation of all automobiles used in connection with the performance of the contract. At least a minimum of \$200,000 per person and \$500,000 per occurrence for bodily injury and \$20,000 per occurrence for property damage shall be required.*
- 4. Pollution liability insurance, with a minimum limit of \$500,000 per occurrence. A higher minimum may be requested by the ordering agency at the task order level and reimbursed as an Other Direct Cost or Order Level Material (OLM), if the OLM SIN is awarded under the subject contract.*
- 5. The certificate of insurance for other than workers compensation shall reflect the following: the policies shall exclude any claim by the insurer for subrogation against the Government by reason of any payment under the policies, and GSA shall be named as an additional insured.*

Logistical Services Subcategory

Instructions:

SERVICES NOT INCLUDED: relocation of household goods is not authorized under this subcategory.

SIN 541614 Deployment, Distribution and Transportation Logistics Services:

541614 Services include the following: Deployment Logistics such as contingency planning, identifying/utilizing regional or global resources, integrating public/private sector resources, inventory/property planning, movement, storage, end-to-end industrial relocation/expansion services, and deploying communications and logistics systems to permit rapid deployment and management of supplies and equipment; Distribution and Transportation Logistics Services such

as Planning and designing, implementing, or operating systems or facilities for the movement of supplies, equipment or people by road, air, water, rail, or pipeline.

Cooperative Purchasing: No

Set Aside: No

FSC/PSC Code: R706

Maximum Order: \$1,000,000

NAICS

Number	Description	Business Size
541614	Process, Physical Distribution and Logistics Consulting Services	\$20 Million

SIN 541614SVC Supply and Value Chain Management

541614SVC *Includes supply and value chain management, which involves all phases of the planning, acquisition, and management of logistics systems.*

Cooperative Purchasing: No

Set Aside: No

FSC/PSC Code: V122

Maximum Order: \$1,000,000

NAICS

Number	Description	Business Size
541614	Process, Physical Distribution and Logistics Consulting Services	\$20 Million

Marketing and Public Relations Subcategory

Instructions:

1. SERVICES NOT INCLUDED:

a. *Unattributed Prepackaged News Stories: The Government Accountability Office (GAO) wants agencies to know that unattributed prepackaged news stories violate the publicity and propaganda prohibition, which states, "No part of any appropriation contained in this or any other Act shall be used for publicity or propaganda purposes within the United States not heretofore authorized by Congress." In a previously released study, GAO explains that prepackaged news stories are complete, audio-video presentations that are intended to be indistinguishable from news segments broadcast to the public by independent television news organizations. While agencies generally have the right to disseminate information about their policies and activities, GAO says, agencies cannot use appropriated funds to produce or distribute prepackaged news stories intended to be viewed by TV audiences that conceal or do not clearly identify for the audience that the agency was the source of the materials. "It is not enough that the contents of an agency's communication may be unobjectionable," the study states. "Neither is it enough for an agency to identify itself to the broadcasting organization as*

the source of the prepackaged news story." The study is called, "Unattributed Prepackaged News Stories Violate Publicity and Propaganda Prohibition," GAO-05-643T, May 2005.

b. Stand Alone Call Center Operations: Stand-alone call center operations are not included under this Subcategory.

c. Sports, Promotional, Outdoor, Recreation, Trophies and Signs: Offerors interested in providing marketing trinkets such as plaques, trophies, awards, shirts, promotional products, etc. in conjunction with any SINS in this Subcategory are directed to propose those items under the applicable Large Category and Subcategory in the solicitation (i.e. Awards).

2. NO-COST CONTRACTING SERVICES

The contractor may choose to provide services within this Subcategory at no cost to the Government. As consideration, the contractor shall be entitled to all of the registration, exhibition, sponsorship, and/or other fees collected as payment for performance under the task order, provided there is no cost to the Government. Under this arrangement, the contractor shall be liable for all costs related to the performance of the task order as defined in the task order and the Government's liability for payment of services would be \$0. The contractor shall remit the Industrial Funding Fee (IFF) based on the total value of fees collected under the order. The contractor shall provide an accounting of expenses and revenues, if requested by the ordering agency. Under this arrangement, the contractor's profit, if any, shall be derived from the revenue stream created through fees collected, if any. Additionally, should there be commissions received by the contractor for conference or trade show events, planning, etc., the contractor shall be entitled to retain those commissions. GSA will not accept offers that exclusively propose no-cost contracting services.

SIN 541420 Engineering System Design and Integration Services

541420 Services include creating and developing designs and specifications that optimize the use, value, and appearance of their products. These services can include determination of the materials, construction, mechanisms, shape, color, and surface finishes of the product, taking into consideration human characteristics and needs, safety, market appeal, and efficiency in production, distribution, use, and maintenance.

Associated tasks include, but are not limited to computer-aided design, e.g. CADD, risk reduction strategies and recommendations to mitigate identified risk conditions, fire modeling, performance-based design reviews, high level detailed specification and scope preparation, configuration, management and document control, fabrication, assembly and simulation, modeling, training, consulting, analysis of single or multi spacecraft missions and mission design analysis.

NOTE: Services under this NAICs cannot include architect-engineer services as defined in the Brooks Act and FAR Part 2 or construction services as defined in the Federal Acquisition Regulation Part 36 and Part 2.

Cooperative Purchasing: No

Set Aside: No
FSC/PSC Code: R425
Maximum Order: \$1,000,000

NAICS	Description	Business Size
Number	Industrial Design Services	\$17 million

Instructions:

NOTE: This SIN is limited to research, analysis, and developmental services related to Social Sciences and

Humanities. Research and development services, as set forth in FAR Part 35, are not included under this SIN.

SIN 541990 All Other Professional, Scientific, and Technical Services (Non-IT)

541990 Services provided include professional, scientific, and technical services not covered under other SINS. Examples include, but are not limited to, the following: appraisal services (except real estate); crisis management; emergency preparedness; emergency management; commodity inspector services; mathematical (both theoretical and applied) and statistical (both theoretical and applied) professional services; performance and impact evaluation services (related to a scientific or technical project); public health planning services; and weather forecasting services.

Cooperative Purchasing: No

Set Aside: No

FSC/PSC Code: R425

Maximum Order: \$1,000,000

NAICS	Description	Business Size
Number	All Other Professional, Scientific and Technical Services	\$19.5 Million

All offerors must follow evaluation criteria and instructions outlined in the MAS solicitation, including in SCP-FSS-001. The Human Capital Category Attachment outlines additional evaluation criteria, requirements and information specific to this category only. For a list of required Schedule templates and attachments, please visit www.gsa.gov/masscopeandtemplates

For additional guidance and information for Schedule buyers and sellers, please visit our general guidance page at www.gsa.gov/schedules.

Note: GSA will not award any Drones/Unmanned Aircraft Systems (UAS), as defined in 49 USC Ch. 448, in response to this Large Category except those drones approved by the Department of Defense (DoD) Defense Innovation Unit (DIU) through its Blue sUAS Program.

Regulation Number	Regulation Title/Comments
52.222-46 EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES (FEB 1993)	
52.228-5 INSURANCE - WORK ON A GOVERNMENT INSTALLATION (JAN 1997)	
52.229-1 STATE AND LOCAL TAXES (APR 1984)	
52.222-62 PAID SICK LEAVE UNDER EXECUTIVE ORDER 13706 (JAN 2022)	
552.238-91 MARKING AND DOCUMENTATION REQUIREMENTS FOR SHIPPING (MAY 2019)	
552.238-105 DELIVERIES BEYOND THE CONTRACTUAL PERIOD - PLACING OF ORDERS (MAY 2019)	
552.238-73 IDENTIFICATION OF ELECTRONIC OFFICE EQUIPMENT PROVIDING ACCESSIBILITY FOR INDIVIDUALS WITH DISABILITIES (MAR 2022)	

Human Capital

SIN 54161 Agency Human Capital Evaluation

54161 This function assesses results achieved across all Human Capital Management systems and activities in support of mission goals to identify and implement improvements.

Cooperative Purchasing:

No Set Aside: No

FSC/PSC Code: R408

Maximum Order: \$1,000,000

NAICS

Number

541611

Million

Description

Administrative Management and

General Management Consulting Services

Business Size

\$24.5

Instructions:

OPM defines the Agency Human Capital Evaluation function as assess results achieved across all Human Capital Management systems and activities in support of mission goals to identify and implement improvements.

This function includes the following sub-function of Human Capital Programmatic Evaluation-refers to an agency's self-assessment of its human capital strategy, services, and practices to improve its return on human capital investment, quality, efficiency, and employee satisfaction.

Full Text Regulations:

Begin Regulation

**52.222-46 EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES
(FEB 1993)**

(a) Recompetition of service contracts may in some cases result in lowering the compensation (salaries and fringe benefits) paid or furnished professional employees. This lowering can be detrimental in obtaining the quality of professional services needed for adequate contract performance. It is therefore in the Government's best interest that professional employees, as defined in 29 CFR 541, be properly and fairly compensated. As part of their proposals, offerors will submit a total compensation plan setting forth salaries and fringe benefits proposed for the professional employees who will work under the contract. The Government will evaluate the plan to assure that it reflects a sound management approach and understanding of the contract requirements. This evaluation will include an assessment of the offeror's ability to provide uninterrupted high-quality work. The professional compensation proposed will be considered in terms of its impact upon recruiting and retention, its realism, and its consistency with a total plan for compensation. Supporting information will include data, such as recognized national and regional compensation surveys and studies of professional, public and private organizations, used in establishing the total compensation structure.

(b) The compensation levels proposed should reflect a clear understanding of the work to be performed and should indicate the capability of the proposed compensation structure to obtain and keep suitably qualified personnel to meet mission objectives. The salary rates or ranges must take into account differences in skills, the complexity of various disciplines, and professional job difficulty. Additionally, proposals envisioning compensation levels lower than those of predecessor contractors for the same work will be evaluated based on maintaining program continuity, uninterrupted high-quality work, and availability of required competent professional service employees. Offerors are cautioned that lowered compensation for essentially the same professional work may indicate lack of sound management judgment and lack of understanding of the requirement.

(c) The Government is concerned with the quality and stability of the workforce to be employed on this contract. Professional compensation that is unrealistically low or not in reasonable relationship to the various job categories, since it may impair the Contractor's ability to attract and retain competent professional service employees, may be viewed as evidence of failure to comprehend the complexity of the contract requirements.

(d) Failure to comply with these provisions may constitute sufficient cause to justify rejection of a proposal.

Begin Regulation

52.228-5 INSURANCE—WORK ON A GOVERNMENT INSTALLATION (JAN 1997)

(a) The Contractor shall, at its own expense, provide and maintain during the entire performance of this contract, at least the kinds and minimum amounts of insurance required in the Schedule or elsewhere in the contract.

(b) Before commencing work under this contract, the Contractor shall notify the Contracting Officer in writing that the required insurance has been obtained. The policies evidencing required insurance shall contain an endorsement to the effect that any cancellation or any material change adversely affecting the Government's interest shall not be effective—

(1) For such period as the laws of the State in which this contract is to be performed prescribe; or

(2) Until 30 days after the insurer or the Contractor gives written notice to the Contracting Officer, whichever period is longer.

(c) The Contractor shall insert the substance of this clause, including this paragraph (c), in subcontracts under this contract that require work on a Government installation and shall require subcontractors to provide and maintain the insurance required in the Schedule or elsewhere in the contract. The Contractor shall maintain a copy of all subcontractors' proofs of required insurance and shall make copies available to the Contracting Officer upon request.

Begin Regulation

52.229-1 STATE AND LOCAL TAXES (APR 1984)

Notwithstanding the terms of the Federal, State, and Local Taxes clause, the contract price excludes all State and local taxes levied on or measured by the contract or sales price of the services or completed supplies furnished under this contract. The Contractor shall state separately on its invoice's taxes excluded from the contract price, and the Government agrees either to pay the amount of the taxes to the Contractor or provide evidence necessary to sustain an exemption.

Begin Regulation

52.222-62 PAID SICK LEAVE UNDER EXECUTIVE ORDER 13706 (JAN 2022)

(a) Definitions. As used in this clause (in accordance with 29 CFR 13.2) —

“Child”, “domestic partner”, and “domestic violence” have the meaning given in 29 CFR 13.2. “Employee” —

(1) (I) Means any person engaged in performing work on or in connection with a contract covered by Executive Order (E.O.) 13706, and

(A) Whose wages under such contract are governed by the Service Contract Labor Standards statute (41 U.S.C. chapter 67), the Wage Rate Requirements (Construction) statute (40 U.S.C. chapter 31, subchapter IV), or the Fair Labor Standards Act (29 U.S.C. chapter 8),

(B) Including employees who qualify for an exemption from the Fair Labor Standards Act's minimum wage and overtime provisions,

(C) Regardless of the contractual relationship alleged to exist between the individual and the employer; and

(ii) Includes any person performing work on or in connection with the contract and individually registered in a bona fide apprenticeship or training program registered with the Department of Labor's Employment and Training Administration, Office of Apprenticeship, or with a State Apprenticeship Agency recognized by the Office of Apprenticeship

(2)(i) An employee performs "on" a contract if the employee directly performs the specific services called for by the contract; and

(ii) An employee performs "in connection with" a contract if the employee's work activities are necessary to the performance of a contract but are not the specific services called for by the contract.

"Individual related by blood or affinity whose close association with the employee is the equivalent of a family relationship" has the meaning given in 29 CFR 13.2.

"Multiemployer" plan means a plan to which more than one employer is required to contribute and which is maintained pursuant to one or more collective bargaining agreements between one or more employee organizations and more than one employer.

"Paid sick leave" means compensated absence from employment that is required by E.O. 13706 and 29 CFR part 13.

*"Parent", "sexual assault", "spouse", and "stalking" have the meaning given in 29 CFR 13.2.
"United States" means the 50 States and the District of Columbia.*

(b) Executive Order 13706.

(1) This contract is subject to E.O. 13706 and the regulations issued by the Secretary of Labor in 29 CFR part 13 pursuant to the E.O.

(2) If this contract is not performed wholly within the United States, this clause only applies with respect to that part of the contract that is performed within the United States.

(c) Paid sick leave. The Contractor shall —

(1) Permit each employee engaged in performing work on or in connection with this contract to earn not less than 1 hour of paid sick leave for every 30 hours worked;

(2) Allow accrual and use of paid sick leave as required by E.O. 13706 and 29 CFR part 13;

- (3) Comply with the accrual, use, and other requirements set forth in 29 CFR 13.5 and 13.6, which are incorporated by reference in this contract;
 - (4) Provide paid sick leave to all employees when due free and clear and without subsequent deduction (except as otherwise provided by 29 CFR 13.24), rebate, or kickback on any account;
 - (5) Provide pay and benefits for paid sick leave used no later than one pay period following the end of the regular pay period in which the paid sick leave was taken; and
 - (6) Be responsible for the compliance by any subcontractor with the requirements of E.O. 13706, 29 CFR part 13, and this clause.
 - (d) Contractors may fulfill their obligations under E.O. 13706 and 29 CFR part 13 jointly with other contractors through a multiemployer plan, or may fulfill their obligations through an individual fund, plan, or program (see 29 CFR 13.8).
 - (e) Withholding. The Contracting Officer will, upon his or her own action or upon written request of an authorized representative of the Department of Labor, withhold or cause to be withheld from the Contractor under this or any other Federal contract with the same Contractor, so much of the accrued payments or advances as may be considered necessary to pay employees the full amount owed to compensate for any violation of the requirements of E.O. 13706, 29 CFR part 13, or this clause,
- including—
- (1) Any pay and/or benefits denied or lost by reason of the violation;
 - (2) Other actual monetary losses sustained as a direct result of the violation; and
 - (3) Liquidated damages.
- (f) Payment suspension/contract termination/contractor debarment.
- (1) In the event of a failure to comply with E.O. 13706, 29 CFR part 13, or this clause, the contracting agency may, on its own action or after authorization or by direction of the Department of Labor and written notification to the Contractor take action to cause suspension of any further payment, advance, or guarantee of funds until such violations have ceased.
 - (2) Any failure to comply with the requirements of this clause may be grounds for termination for default or cause.
 - (3) A breach of the contract clause may be grounds for debarment as a contractor and subcontractor as provided in 29 CFR 13.52.

(g) The paid sick leave required by E.O. 13706, 29 CFR part 13, and this clause is in addition to the Contractor's obligations under the Service Contract Labor Standards statute and Wage Rate Requirements (Construction) statute, and the Contractor may not receive credit toward its prevailing wage or fringe benefit obligations under those Acts for any paid sick leave provided in satisfaction of the requirements of E.O. 13706 and 29 CFR part 13.

(h) Nothing in E.O. 13706 or 29 CFR part 13 shall excuse noncompliance with or supersede any applicable Federal or State law, any applicable law or municipal ordinance, or a collective bargaining agreement requiring greater paid sick leave or leave rights than those established under E.O. 13706 and 29 CFR part 13.

(i) Recordkeeping

(1) The Contractor shall make and maintain, for no less than three (3) years from the completion of the work on the contract, records containing the following information for each employee, which the Contractor shall make available upon request for inspection, copying, and transcription by authorized representatives of the Administrator of the Wage and Hour Division of the Department of Labor:

(i) Name, address, and social security number of each employee.

(ii) The employee's occupation(s) or classification(s).

(iii) The rate or rates of wages paid (including all pay and benefits provided).

(iv) The number of daily and weekly hours worked.

(v) Any deductions made.

(vi) The total wages paid (including all pay and benefits provided) each pay period.

(vii) A copy of notifications to employees of the amount of paid sick leave the employee has accrued, as required under 29 CFR 13.5(a)(2).

(viii) A copy of employees' requests to use paid sick leave, if in writing, or, if not in writing, any other records reflecting such employee requests.

(ix) Dates and amounts of paid sick leave taken by employees (unless the Contractor's paid time off policy satisfies the requirements of E.O. 13706 and 29 CFR part 13 as described in 29 CFR 13.5(f)(5), leave shall be designated in records as paid sick leave pursuant to E.O. 13706).

(x) A copy of any written responses to employees' requests to use paid sick leave, including explanations for any denials of such requests, as required under 29 CFR 13.5(d)(3).

(xi) Any records reflecting the certification and documentation the Contractor may require an

employee to provide under 29 CFR 13.5(e), including copies of any certification or documentation provided by an employee.

(xii) Any other records showing any tracking of or calculations related to an employee's accrual or use of paid sick leave.

(xiii) The relevant contract.

(xiv) The regular pay and benefits provided to an employee for each use of paid sick leave.

(xv) Any financial payment made for unused paid sick leave upon a separation from employment intended, pursuant to 29 CFR 13.5(b)(5), to relieve the Contractor from the obligation to reinstate such paid sick leave as otherwise required by 29 CFR 13.5(b)(4).

(2) (I) If the Contractor wishes to distinguish between an employee's covered and noncovered work, the Contractor shall keep records or other proof reflecting such distinctions. Only if the Contractor adequately segregates the employee's time will time spent on noncovered work be excluded from hours worked counted toward the accrual of paid sick leave. Similarly, only if the Contractor adequately segregates the employee's time may the Contractor properly refuse an employee's request to use paid sick leave on the ground that the employee was scheduled to perform noncovered work during the time he or she asked to use paid sick leave.

(ii) If the Contractor estimates covered hours worked by an employee who performs work in connection with contracts covered by the E.O. pursuant to 29 CFR 13.5(a)(i) or (iii), the Contractor shall keep records or other proof of the verifiable information on which such estimates are reasonably based. Only if the Contractor relies on an estimate that is reasonable and based on verifiable information will an employee's time spent in connection with noncovered work be excluded from hours worked counted toward the accrual of paid sick leave. If the Contractor estimates the amount of time an employee spends performing in connection with contracts covered by the E.O., the Contractor shall permit the employee to use his or her paid sick leave during any work time for the Contractor.

(3) In the event the Contractor is not obligated by the Service Contract Labor Standards statute, the Wage Rate Requirements (Construction) statute, or the Fair Labor Standards Act to keep records of an employee's hours worked, such as because the employee is exempt from the Fair Labor Standards Act's minimum wage and overtime requirements, and the Contractor chooses to use the assumption permitted by 29 CFR 13.5(a)(1)(iii), the Contractor is excused from the requirement in paragraph (i)(1)(iv) of this clause and 29 CFR 13.25(a)(4) to keep records of the employee's number of daily and weekly hours worked.

(4) (i) Records relating to medical histories or domestic violence, sexual assault, or stalking, created for purposes of E.O. 13706, whether of an employee or an employee's child, parent, spouse, domestic partner, or other individual related by blood or affinity whose close association with the employee is the equivalent of a family relationship, shall be maintained as confidential records in separate files/records from the usual personnel files.

(ii) If the confidentiality requirements of the Genetic Information Nondiscrimination Act of 2008 (GINA), section 503 of the Rehabilitation Act of 1973, and/or the Americans with Disabilities Act (ADA) apply to records or documents created to comply with the recordkeeping requirements in this contract clause, the records and documents shall also be maintained in compliance with the confidentiality requirements of the GINA, section 503 of the Rehabilitation Act of 1973, and/or ADA as described in 29 CFR 1635.9, 41 CFR 60-741.23(d), and 29 CFR 1630.14(c)(1), respectively.

(iii) The Contractor shall not disclose any documentation used to verify the need to use 3 or more consecutive days of paid sick leave for the purposes listed in 29 CFR 13.5(c)(1)(iv) (as described in 29 CFR 13.5(e)(1)(ii)) and shall maintain confidentiality about any domestic abuse, sexual assault, or stalking, unless the employee consents or when disclosure is required by law.

(5) The Contractor shall permit authorized representatives of the Wage and Hour Division to conduct interviews with employees at the worksite during normal working hours.

(6) Nothing in this contract clause limits or otherwise modifies the Contractor's recordkeeping obligations, if any, under the Service Contract Labor Standards statute, the Wage Rate Requirements (Construction) statute, the Fair Labor Standards Act, the Family and Medical Leave Act, E.O. 14026, their respective implementing regulations, or any other applicable law.

(j) Interference/discrimination.

(1) The Contractor shall not in any manner interfere with an employee's accrual or use of paid sick leave as required by E.O. 13706 or 29 CFR part 13. Interference includes, but is not limited to —

(i) Miscalculating the amount of paid sick leave an employee has accrued;

(ii) Denying or unreasonably delaying a response to a proper request to use paid sick leave;

(iii) Discouraging an employee from using paid sick leave;

(iv) Reducing an employee's accrued paid sick leave by more than the amount of such leave used;

(v) Transferring an employee to work on contracts not covered by the E.O. to prevent the accrual or use of paid sick leave;

(vi) Disclosing confidential information contained in certification or other documentation provided to verify the need to use paid sick leave; or

(vii) Making the use of paid sick leave contingent on the employee's finding a replacement worker or the fulfillment of the Contractor's operational needs.

(2) *The Contractor shall not discharge or in any other manner discriminate against any employee for—*

(i) Using, or attempting to use, paid sick leave as provided for under E.O. 13706 and 29 CFR part 13;

(ii) Filing any complaint, initiating any proceeding, or otherwise asserting any right or claim under E.O. 13706 and 29 CFR part 13;

(iii) Cooperating in any investigation or testifying in any proceeding under E.O. 13706 and 29 CFR part 13; or

(iv) Informing any other person about his or her rights under E.O. 13706 and 29 CFR part 13.

(k) Notice. The Contractor shall notify all employees performing work on or in connection with a contract covered by the E.O. of the paid sick leave requirements of E.O. 13706, 29 CFR part 13, and this clause by posting a notice provided by the Department of Labor in a prominent and accessible place at the worksite so it may be readily seen by employees. Contractors that customarily post notices to employees electronically may post the notice electronically, provided such electronic posting is displayed prominently on any website that is maintained by the Contractor, whether external or internal, and customarily used for notices to employees about terms and conditions of employment.

(l) Disputes concerning labor standards. Disputes related to the application of E.O. 13706 to this contract shall not be subject to the general disputes clause of the contract. Such disputes shall be resolved in accordance with the procedures of the Department of Labor set forth in 29 CFR part 13. Disputes within the meaning of this contract clause include disputes between the Contractor (or any of its subcontractors) and the contracting agency, the Department of Labor, or the employees or their representatives.

(m) Subcontracts. The Contractor shall insert the substance of this clause, including this paragraph (m), in all subcontracts, regardless of dollar value, that are subject to the Service Contract Labor Standards statute or the Wage Rate Requirements (Construction) statute and are to be performed in whole or in part in the United States.

Begin Regulation

***552.238-91 MARKING AND DOCUMENTATION REQUIREMENTS FOR SHIPPING
(MAY 2019)***

(a) Responsibility. It shall be the responsibility of the ordering activity to determine the full marking and documentation requirements necessary under the various methods of shipment authorized by the contract.

(b) Documentation. In the event the ordering activity fails to provide the essential information

and documentation, the Contractor shall, within three days after receipt of order, contact the ordering activity and advise them accordingly. The Contractor shall not proceed with any shipment requiring transshipment via U.S. Government facilities without the prerequisites stated in paragraph (c) of this section.

(c) Direct shipments. The Contractor shall mark all items ordered against this contract with indelible ink, paint or fluid, as follows:

(1) Traffic Management or Transportation Officer at FINAL destination.

(2) Ordering Supply Account Number.

(3) Account number.

(4) Delivery Order or Purchase Order Number.

(5) National Stock Number, if applicable; or Contractor's item number.

(6) Box of Boxes.

(7) Nomenclature (brief description of items).

Begin Regulation

***552.238-105 DELIVERIES BEYOND THE CONTRACTUAL PERIOD
- PLACING OF ORDERS (MAY 2019)***

In accordance with Clause 552.238-113, Scope of Contract (Eligible Ordering Activities), this The contract covers all requirements that may be ordered, as distinguished from delivered during the contract term. This is for the purpose of providing continuity of supply or operations by permitting ordering activities to place orders as requirements arise in the normal course of operations. Accordingly, any order mailed (or received, if forwarded by other than through the mail) to the Contractor on or before the expiration date of the contract and providing for delivery within the number of days specified in the contract shall constitute a valid order.

Begin Regulation

***552.238-73 IDENTIFICATION OF ELECTRONIC OFFICE EQUIPMENT PROVIDING
ACCESSIBILITY FOR INDIVIDUALS
WITH DISABILITIES (MAR 2022)***

(a) Definitions.

"Electronic office equipment accessibility" means the application/configuration of electronic office equipment (includes hardware, software and firmware) in a manner that accommodates the functional limitations of individuals with disabilities so as to promote productivity and provide access to work related and/or public information resources.

"Individuals with Disabilities" mean qualified individuals with impairments as cited in 29 U.S.C. 705(20) who can benefit from electronic office equipment accessibility.

"Special peripheral" means a special needs aid that provides access to electronic equipment that is, otherwise, inaccessible to individuals with disabilities.

(b) The offeror is encouraged to identify in its offer and include in any commercial catalogs and pricelists accepted by the Contracting Officer, office equipment, including any special peripheral, that will facilitate electronic office equipment accessibility for individuals with disabilities. Identification should include the type of disability accommodated and how the users with that disability would be helped.

End of Clause

Begin Regulation

**552.238-115 SPECIAL ORDERING PROCEDURES FOR THE ACQUISITION OF
ORDER-LEVEL MATERIALS (APR 2022)**

(a) *Definition.*

"Order-level materials", as used in this clause, means supplies and/or services acquired in direct support of an individual task or delivery order placed against a Federal Supply Schedule (FSS) contract or FSS blanket purchase agreement (BPA), when the supplies and/or services are not known at the time of Schedule contract or FSS BPA award. The prices of order-level materials are not established in the FSS contract or FSS BPA. Order-level materials acquired following the procedures in paragraph (d) of this clause are done so under the authority of the FSS program, pursuant to 41 U.S.C. 152(3), and are not open market items, which are discussed in FAR 8.402(f).

(b) FAR 8.403(b) provides that GSA may establish special ordering procedures for a particular FSS.

(c) The procedures in FAR subpart 8.4 apply to this contract, with the exceptions listed in this clause. If a requirement in this clause is inconsistent with FAR subpart 8.4, this clause takes precedence pursuant to FAR 8.403(b).

(d) Procedures for including order-level materials when placing an individual task or delivery order against an FSS contract or FSS BPA.

(1) The procedures discussed in FAR 8.402(f) do not apply when placing task and delivery orders that include order-level materials.

(2) Order-level materials are included in the definition of the term "material" in FAR clause 52.212-4 Alternate I, and, therefore, all provisions of FAR clause 52.212-4 Alternate I that apply to "materials" also apply to order-level materials.

(3) Order-level materials shall only be acquired in direct support of an individual task or

delivery order and not as the primary basis or purpose of the order.

(4) The value of order-level materials in a task or delivery order, or the cumulative value of order-level materials in orders against an FSS BPA awarded under a FSS contract, shall not exceed 33.33%.

(5) All order-level materials shall be placed under the Order-Level Materials SIN.

(6) Prior to the placement of an order that includes order-level materials, the Ordering Activity shall follow the procedures in FAR 8.404(h).

(7) To support the price reasonableness of order-level materials—

(i) The Contractor proposing order-level materials as part of a solution shall obtain a minimum of three quotes for each order-level material above the simplified acquisition threshold.

(A) One of these three quotes may include materials furnished by the Contractor under paragraph (i)(1)(ii)(A) of FAR clause 52.212-4 Alternate I.

(B) If the Contractor cannot obtain three quotes, the Contractor shall maintain documentation of why three quotes could not be obtained to support their determination.

(C) A Contractor with an approved purchasing system, per FAR subpart 44.3, shall instead follow its purchasing system requirement and is exempt from the requirements in paragraphs (d)(7)(i)(A) through (B) of this clause.

(ii) The Ordering Activity Contracting Officer must make a determination that prices for all order-level materials are fair and reasonable. The Ordering Activity Contracting Officer may base this determination on a comparison of the quotes received in response to the task or delivery order solicitation or other relevant pricing information available.

(iii) If indirect costs are approved per paragraph (i)(1)(ii)(D)(2) of FAR clause 52.212-4 Alternate I, the Ordering Activity Contracting Officer must make a determination that all indirect costs approved for payment are fair and reasonable. Supporting data shall be submitted in a form acceptable to the Ordering Activity Contracting Officer.

(8) Prior to an increase in the ceiling price of order-level materials, the Ordering Activity Contracting Officer shall follow the procedures at FAR 8.404(h)(3)(iv).

(9) In accordance with GSAR clause 552.238-83, Examination of Records by GSA (Federal Supply Schedules), GSA has the authority to examine the Contractor's records for compliance with the pricing provisions in FAR clause 52.212-4 Alternate I, to include examination of any books, documents, papers, and records involving transactions related to the contract for

overbillings, billing errors, and compliance with the Industrial Funding Fee (IFF) and the Sales Reporting clauses of the contract.

(10) Order-level materials are exempt from the following clauses:

- (i) 552.216-70 Economic Price Adjustment - FSS Multiple Award Schedule Contracts.*
- (ii) 552.238-77 Submission and Distribution of Authorized Federal Supply Schedule (FSS) Price Lists.*
- (iii) 552.238-81 Price Reductions.*

End of Clause

Information Technology Category Instructions and Regulations

Instructions:

All offerors must follow evaluation criteria and instructions outlined in the MAS solicitation, including in SCP-FSS-001. The Information Technology Category Attachment outlines additional evaluation criteria, requirements and information specific to this category only. For a list of required Schedule templates and attachments, please visit www.gsa.gov/mascategoryrequirement.

For additional guidance and information for Schedule buyers and sellers, please visit our general guidance page at www.gsa.gov/schedules.

Section I Instructions for all IT Offerors

1) Technical Evaluation. All technical evaluation factors, subcategory and SIN specific requirements will be reviewed, evaluated, and rated acceptable or unacceptable based on criteria defined in the solicitation. The award will be made on a SIN-by-SIN basis. A rating of "unacceptable" under any technical evaluation factor by SIN will result in an "unacceptable" overall rating for that SIN, and that SIN will be rejected. Offers determined unacceptable for all proposed SIN(s) will be rejected.

2) Commercial Supplier Agreement (CSA) Terms. If offering Commercial Supplier Agreement (CSA) Terms (e.g. standard terms of sales or lease, Terms of Service (TOS), End User License Agreements (EULA), or other similar legal instruments or agreements) - Often ordering activities will decline to place an order because of Federally non-compliant terms (e.g., customer indemnification). This results in a loss of business for the Schedule holder. In order to facilitate GSA's review and negotiation of each individual set of terms for compliance with Federal law, the Offeror is required to submit its CSA in an editable format, and preferably with the Federally non-compliant terms and conditions already removed. Such submissions may help GSA avoid delays in reviewing and negotiating each individual agreement. "Clickwrap" submissions or links to agreements are not acceptable. The Offeror must clearly define what additional products, services, and prices are included with its CSA.

3) Part Numbers. Offeror must ensure the Original Equipment Manufacturer (OEM), Manufacturer Part Number or Wholesaler Number for each product proposed reflects the actual part number assigned. If the OEM, Manufacturer, or Wholesaler Part Number is submitted incorrectly or not submitted, the product offering will not be awarded.

4) Ancillary Supplies and/or Services.

a) Ancillary products and services are not within the scope of any ITC SIN and must be offered under a SIN that specifically covers the proposed products and services.

b) Non-professional labor categories must be incidental to and used solely to support hardware, software and/or professional services and cannot be purchased separately. Non-professional labor categories must be offered under a SIN that specifically covers the proposed services.

5) Energy Star or Electronic Product Environmental Assessment Tool (EPEAT) programs. Commercially available products under this solicitation may be covered by the Energy Star or Electronic Product Environmental Assessment Tool (EPEAT) programs. For applicable products, offerors are encouraged to offer Energy Star-qualified products and EPEAT-registered products, at the Bronze level or higher. If offerors opt to offer Energy Star or Electronic Product Environmental Assessment Tool (EPEAT) products then they shall identify by model which products offered are Energy Star-qualified and EPEAT-registered, broken out by registration level of bronze, silver, or gold. Visit the Green Procurement Compilation, sftool.gov/green procurement for a complete list of products covered by these programs.

6) Relevant Project Experience Evaluation.

a) The Offeror must submit a narrative demonstrating relevant project experience. A narrative is required for the following SINs:

IT Services Subcategory

1. 54151HACS - Highly Adaptive Cybersecurity Services (HACS)
2. 54151S - Information Technology Professional Services

IT Solutions Subcategory

1. 518210C - Cloud Computing and Cloud Related IT Professional Services
2. 518210FM – Financial Management Quality Service Management Office (FM QSMO)
Core Financial Management (FM) Solutions and IT Professional Services

Telecommunications Subcategory

1. 517312 - Wireless Mobility Solutions

517410 - Commercial Satellite Communications Solutions (COMSATCOM)

1. Provide a description of the offeror's experience delivering COMSATCOM services as

described in 552.238-110 Commercial Satellite Communication (COMSATCOM) Services.

2. All completed projects shall have been completed within the last two years prior to submission of the COMSATCOM SIN proposal.

3. If the offeror cannot provide two (2) projects, it may provide additional documentation to substantiate project experience to be evaluated by the contracting officer.

4. Provide background information on the project presented to demonstrate familiarity and expertise servicing COMSATCOM requirements.

5. Outline how the project is related to the COMSATCOM SIN.

6. Information Assurance Minimum Security Controls Compliance for SIN 517410 COMSATCOM

A. Federal policy specifies Government customer compliance with the Federal Information Security Management Act of 2002, as implemented by Federal Information Processing Standards Publication 200 (FIPS 200), "Minimum Security Requirements for Federal Information and Information Systems." This standard specifies minimum security requirements Federal agencies must meet, defined through the use of security controls described in the National Institute of Standards and Technology (NIST) Special Publication (SP) 800-53, "Recommended Security Controls for Federal Information Systems and Organizations," DoD Instruction (DoDI) 8500.2, "Information Assurance Implementation," and associated documents.

B. Complete the Information Assurance Checklist found on the GSA SATCOM Services Program Management Office website (<http://www.gsa.gov/portal/content/122627>).

C. The Government will evaluate the Information Assurance checklist submitted as part of offeror's proposal to determine whether the offeror understands the minimum security controls, and has processes, personnel, and infrastructure that currently complies or demonstrates a reasonable approach to becoming compliant with all the minimum security controls for at least a low-impact information system or MAC III system.

Section II Terms and Conditions for all IT Contractors

1) Organizational Conflicts of Interest

a) Definitions.

"Contractor" means the person, firm, unincorporated association, joint venture, partnership, or corporation that is a party to this contract.

"Contractor and its affiliates" and "Contractor or its affiliates" refer to the Contractor, its chief executives, directors, officers, subsidiaries, affiliates, subcontractors at any tier, and consultants and any joint venture involving the Contractor, any entity into or with which the Contractor subsequently merges or affiliates, or any other successor or assignee of the

Contractor.

An "Organizational conflict of interest" exists when the nature of the work to be performed under a proposed ordering activity contract, without some restriction on ordering activities by the Contractor and its affiliates, may either (i) result in an unfair competitive advantage to the Contractor or its affiliates or (ii) impair the Contractor's or its affiliates' objectivity in performing contract work.

b) To avoid an organizational or financial conflict of interest and to avoid prejudicing the best interests of the ordering activity, ordering activities may place restrictions on the Contractors, its affiliates, chief executives, directors, subsidiaries and subcontractors at any tier when placing orders against schedule contracts. Such restrictions shall be consistent with FAR 9.505 and shall be designed to avoid, neutralize, or mitigate organizational conflicts of interest that might otherwise exist in situations related to individual orders placed against the schedule contract. Examples of situations, which may require restrictions, are provided at FAR 9.508

2) Services Performed

a) All services performed by the Contractor under the terms of this contract shall be as an independent Contractor, and not as an agent or employee of the ordering activity.

b) The Contractor shall commence performance of services on the date agreed to by the Contractor and the ordering activity.

c) The Contractor agrees to render services only during normal working hours, unless otherwise agreed to by the Contractor and the ordering activity.

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3) Travel. Any Contractor travel required in the performance of services must comply with the Pub. L.99-234 and FAR Part 31.205-46, as applicable, in effect on the date(s) the travel is performed. Established Federal Government per diem rates will apply to all Contractor travel.

4) Warranty

a) Unless otherwise specified in the contract, the Contractor's standard commercial warranty applies.

b) The Contractor's commercial guarantee/warranty shall be included in the Commercial Supplier Agreement to include Enterprise User License Agreements or Terms of Service (TOS) agreements, if applicable.

c) Except as otherwise provided by an express or implied warranty, the Contractor will not be liable to the ordering activity for consequential damages resulting from any defect or deficiencies in accepted items.

Note: GSA will not award any Drones/Unmanned Aircraft Systems (UAS), as defined in 49 USC Ch. 448, in response to this Large Category except those drones approved by the Department of Defense (DoD) Defense Innovation Unit (DIU) through its Blue sUAS Program.

Professional Services and Human Capital Categories PSHC)

- *Scope*
 - a. *Minority Owned Small Disadvantaged Businesswoman of Color. General Partnerships/Subcontractors' Contract Agreement, Shipper's, Carrier's, and Dispatch Agreement involvement. Emergency Disaster Preparedness. Increasing productivity and collaboration all while improving transparency. Build sustainable relationships and increase revenues. Using commercial products and human capital to streamline day-to-day operations of logistics consultant firm.*
The commercial products and solutions include Salesforce and Cloud Services. Programmers will start by creating AI BOT +Data + CRM. Enable through the implementation of Salesforces Commerical product. This includes Salesforce Sales Cloud CRM package, AI BOT, Customize Analytical Data, Salesforce Service Cloud helps businesses manage their client/customer relationship and partnerships based. Main purpose to provide services and customer/client support. Maintaining relationships through routines marketing strategies. Capable of collecting and responding to raw data tailored marketing surveys and insight to improve upon brand/firm development.
 - a. *Increase Sales*
 - b. *Increase productivity*
 - c. *Customer Services Feedback*
 - d. *Customized Analytical database*
 - e. *Relationship and partnerships based.*

- f. Main purpose to provide services and customer/client support*
- g. Maintaining relationships through routines marketing strategies.*
- h. Capable of collecting and responding to raw data tailored marketing.*
- i. Create and contain interchangeable interactive content AI BOT*
- j. Surveys and insight to improve upon brand/firm development.*
- k. (Virtual Assistance)*
 - o. AI BOT (Virtual Assistance) Navigate clients through on-line applications.*
- l. AI BOT can carry out interviews and suggest other available services.*
- m. Manage and resolve on-line client/customer complaints*
- n. Capable of summarizing complaints and prioritizing the actions taken.*
- o. Hyperlinks to Federal Motor Carrier Safety Administration (FMCSA)*
- p. Check Commercial Driver's License (CDL) Status.*
- q. Updates on Regulations and Guidelines etc.*
- r. Safety Rating*
- s. Resources*
- t. Hyperlinks to Drug and Alcohol testing and nearest location*

4. *TruckStop Commercial Products and Services Transportation Management System (TMS)* .

- a. *GPS Navigation integrated System Software*
- b. *Safer*
- c. *Tracking System*
- d. *Load board*
- e. *Partnerships Agreements*
- f. *Liability Insurance 100,000.*
- g. *Surety Bond covers 75,000.*
- h. *Errors and Omission coverage 50,000*
- i. *Online Applications for Professional Services*
- j. *Online Credit Application*
- k. *Shipper's Agreement*
- l. *General Partnership's Agreement*
- m. *Carrier's Agreement*
- n. *Dispatch Agreement*

Objectives

Create and implement sustainable solutions usings AI, innovative technology and commercial products and services. Eco-friendly Programmable AI Bot capable of creating minor resolutions, customized navigation system to obtain data content to analyze, report findings, and resolve issues. Equipped with human capital in case of unresolved client/issues and emergencies. The products are used by programmers to implement an interactive AI Bot. Capable of assisting clients through firm website interactions. Access to secured site to retrieve client documents/records. Assistance to help streamline the application process, provide available resources, analytical data, active interaction and communication with AI BOT. Helps minimize the day-to-day operations of logistics consulting firm. Increase carrier's participation. Maximize marketing tools and strategies. Programmer would then integrate commercial software products. Built in hyperlinks for resources such as Federal Motor Carrier Safety Administration, Drug and Alcohol testing facilities. All services can be obtained in all 50 states including outlying Canada and Mexico.

This Professional Services Human Capital, General Management, Logistics Services, Administrative and Management of Outsourcing Contracts and Procurement Specialist. Through these established subcategories provides enhancements as necessary, to streamline day-to-day office operation. Services are applicable for small

SBA strongly supports the participation of small business concerns in the Federal Supply Schedules Program. To enhance Small Business Participation SBA policy allows agencies to include in their procurement base and goals, the dollar value of orders expected to be placed against the Federal Supply Schedules, and to report accomplishments against these goals. For orders exceeding the micro purchase threshold, FAR 8.404 requires agencies to consider the catalogs/price lists of at least three schedule contractors or consider reasonably available information by using the GSA Advantage!™ on-line shopping service (www.fss.gsa.gov). The catalogs/price lists, GSA Advantage!™ and the Federal Supply Service Home Page (www.fss.gsa.gov) contain information on a broad array of products and services offered by small business concerns. This information should be used as a tool to assist ordering activities in meeting or exceeding established small business goals. It should also be used as a tool to assist in including small, small disadvantaged, and women-owned small businesses among those considered when selecting price-lists for a best value determination. For orders exceeding the micro purchase threshold, customers are to give preference to small business concerns when two or more items at the same delivered price will satisfy their requirement.

Professional Services and Human Capital Categories (PSHC)

NOTICE REGARDING PROHIBITION OF INHERENTLY GOVERNMENTAL SERVICES UNDER THE GSA MULTIPLE AWARD SCHEDULE

Some acquisition services are inherently governmental in nature and shall not be performed by contractors. Pursuant to the [Office of Federal Policy \(OFPP\) Policy Letter 11-01](#), Performance of Inherently Governmental and Critical Functions. The following federal procurement services are illustrative of inherently governmental activities and thus are **prohibited** under the GSA Multiple Award Schedule, [SIN 541611](#).

- Determining what supplies or services are to be acquired by the Government (although an agency may give contractors authority to acquire supplies at prices within specified ranges and subject to other reasonable conditions deemed appropriate by the agency)
- Participating as a voting member on any source selection boards;
- Approving any contractual documents, to include documents defining requirements, incentive plans, and evaluation criteria;
- Awarding contracts;
- Administering contracts (including ordering changes in contract performance or contract quantities, making final determinations about a contractor's performance, including approving award fee determinations or past performance evaluations and taking action based on those evaluations, and accepting or rejecting contractor products or services);
- Terminating contracts;
- Determining whether contract costs are reasonable, allocable, and allowable; and
- Performing as a voting member on performance evaluation boards

Pursuant to OFPP Policy Letter 11-01, the following acquisition support services are examples of functions closely associated with the performance of inherently governmental functions. This list should be reviewed in conjunction with the list of inherently governmental functions depicted in Appendix A of OFPP Policy Letter 11- 01 to better understand differences between the actions identified on each list.

Professional Services and Human Capital Categories (PSHC)

- 1) Services supporting acquisition, including in the areas of:
 - a) Acquisition planning, such as by –
 - i) Conducting market research
 - ii) Developing inputs for government cost estimates, and
 - iii) Drafting statements of work and other pre-award documents;
 - b) Source selection, such as by –
 - i) Preparing a technical evaluation and associated documentation;
 - ii) Participating as a technical advisor to a source selection board or as a nonvoting member of a source selection evaluation board; and
 - iii) Drafting the price negotiations memorandum; and
 - c) Contract management, such as by –
 - i) Assisting in the evaluation of a contractor's performance(e.g., by collecting information performing an analysis, or making a recommendation for a proposed performance rating), and
 - ii) Providing support for assessing contract claims and preparing termination settlement documents

If the agency determines that contractor performance of a function closely associated with an inherently governmental function is appropriate, the agency shall –

- 1) Limit or guide a contractor's exercise of discretion and retain control of government operations by both –
 - a) Establishing in the contract specified ranges of acceptable decisions and/or conduct; and
 - b) Establishing in advance a process for subjecting the contractor's discretionary decisions and conduct to meaningful oversight and, whenever necessary, final approval by an agency official;
- 2) Assign a sufficient number of qualified government employees, with expertise to administer or perform the work, to give special management attention to the contractor's activities, in particular, to ensure that they do not expand to include inherently governmental functions, are not performed in ways not contemplated by the contract so as to become inherently governmental, do not undermine the integrity of the government's decision-making process, and do not interfere with Federal employees' performance of the closely-associated inherently governmental functions;
- 3) Ensure that the level of oversight and management that would be needed to retain

Professional Services and Human Capital Categories (PSHC)

government control of contractor performance and preclude the transfer of inherently governmental responsibilities to the contractor would not result in unauthorized personal services as provided by FAR 37.104;

- 4) Ensure that a reasonable identification of contractors and contractor work products is made whenever there is a risk that Congress, the public, or other persons outside of the government might confuse contractor personnel or work products with government officials or work products, respectively; and
- 5) Take appropriate steps to avoid or mitigate conflicts of interest, such as by conducting pre-award conflict of interest reviews, to ensure contract performance is in accordance with objective standards and contract specifications, and developing a conflict of interest mitigation plan, if needed, that identifies the conflict and special actions that will be taken to lessen the potential for conflict of interest or reduce the risk involved with a potential conflict of interest.

If agencies intend to procure services that are closely related to inherently governmental services, GSA recommends that agency officials document the above items in an approved agency-prescribed format (i.e., memorandum to the file, or a Determination and Findings (D&F)) and include this documentation in the procurement file.

Special Item Number 518210C - Cloud and Cloud-Related IT Professional Services
Specific Information for Offerors

Table 1: Cloud Computing Services (IaaS/PaaS/SaaS)

SIN Description	Sub-Categories
<ul style="list-style-type: none"> Commercially available cloud computing services Meets the National Institute for Standards and Technology (NIST) Definition of Cloud Computing (SP 800-145) essential characteristics Open to all deployment models (private, public, community or hybrid), vendors specify deployment models 	<p>1. Software as a Service (SaaS): Consumer uses provider's applications on cloud infrastructure. Does not manage/control platform or infrastructure. Limited application level configuration may be available.</p> <p>2. Platform as a Service (PaaS): Consumer deploys applications onto cloud platform service using provider-supplied tools. Has control over deployed applications and some limited platform configuration but does not manage the platform or infrastructure.</p> <p>3. Infrastructure as a Service (IaaS): Consumer provisions computing resources. Has control over OS, storage, platform, deployed applications and some limited infrastructure configuration, but does not manage the infrastructure.</p>

- **DESCRIPTION OF CLOUD COMPUTING SERVICES (IaaS/PaaS/SaaS) AND PRICING**
 - The information provided below is designed to assist Offerors to categorize cloud computing services and provide complete descriptions.
 - In addition to standard pricing requirements, all pricing models must have the core capability to meet the NIST Essential Cloud Characteristics, particularly with respect to on-demand self-service, while allowing alternate variations at the task order level at agency discretion, pursuant to the guidance on the NIST Essential Characteristics.

Table 2: Cloud Service Description Requirements (below) summarizes the additional Offeror provided description requirements for services proposed under the Cloud Computing Services (IaaS/PaaS/SaaS). All mandatory description requirements must be complete, and adequate according to evaluation criteria.

- The NIST Service Model provides sub-categories for SIN 518210C (Cloud SIN) and is strongly encouraged, and offerors are not required to submit sub-categories. Contractors may select the single service model most closely corresponding to the specific service offering.
- If a sub-category is selected, it will be evaluated with respect to the NIST Service Model definitions and guidelines in "Guidance for Contractors."

Table 2: Cloud Service Description Requirements

#	Description Requirement	Reporting Type	Instructions
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1	Provide a brief written description of how the proposed cloud computing services (IaaS/PaaS/SaaS) satisfies each individual essential NIST Characteristic	Mandatory	<p>The cloud service must be capable of satisfying each of the five NIST essential Characteristics as outlined in NIST Special Publication 800-145.</p> <p>For all offers of IaaS/PaaS/SaaS the appropriate maximum measured increment of pricing shall be no more than one month per user, or some other equivalent discrete measurement that provides the Government with the advantage of frequent (every month or less) “pay as you go” metering cycles.</p> <p>For all offers of IaaS/PaaS/SaaS a pricing increment of greater than one month may be offered under SIN 518210C only if a pricing increment that is one month or less pricing offer is also made for that particular item.</p>
2	Select NIST deployment models for the cloud computing service proposed.	Mandatory	<p>Contractors must select at least one NIST deployment model as outlined in NIST Special Publication 800- 145 describing how the proposed cloud computing service is deployed. Select multiple deployment models if the service is offered in more than one deployment model.</p> <p>See ‘GUIDANCE FOR CONTRACTORS: NIST Deployment Model’ below in this document for detailed directions on how to best categorize a service for the NIST deployment models.</p>
3	Optionally select the most appropriate NIST service model that will be the designated sub-category, or may select no sub-category.	Optional	<p>Contractor may select a single NIST Service model to sub-categorize the service as outlined in NIST Special Publication 800-145. Sub-category selection is optional, but recommended. See ‘GUIDANCE FOR CONTRACTORS: NIST Service Model’ below in this document for detailed direction on how to best categorize a service for the NIST IaaS, PaaS, and SaaS service models.</p>

- **GUIDANCE FOR OFFERORS**

This section offers guidance for interpreting Table 2 (above), including the NIST essential cloud characteristics, service models, and deployment models. This section is for offeror’s reference only.

Offeror specific definitions of cloud computing characteristics and models or significant variances from the NIST essential characteristics or models will not be considered in the scope of this SIN or accepted in response to evaluation factors. The only applicable cloud characteristics, service model/sub-categories, and deployment models for this SIN will be drawn from the NIST SP 800-145. Services qualifying for listing as cloud computing services

(IaaS/PaaS/SaaS) under this SIN must substantially satisfy the essential characteristics of cloud computing as documented in the NIST Definition of Cloud Computing, [HYPERLINK "http://csrc.nist.gov/publications/nistpubs/800-145/SP800-145.pdf"](http://csrc.nist.gov/publications/nistpubs/800-145/SP800-145.pdf) SP 800-145.

Both Cloud service model (IaaS/PaaS/SaaS) and deployment model (public, etc.) designations must align with NIST definitions. Guidance is offered in this document on making the most appropriate selection.

General Guidance

NIST's essential cloud characteristics provide a consistent metric for whether a service is eligible for inclusion in this SIN. It is understood that due to legislative, funding, and/or other constraints, Government entities cannot always leverage a cloud service to the extent that all NIST essential characteristics are commercially available. For the purposes of SIN 518210C (Cloud SIN), meeting the NIST essential characteristics is determined by whether each essential capability of the commercial service is available for the service, not whether the Ordering Activity actually requests or implements the capability. The guidance in Table 3: Guidance on Meeting NIST Essential Characteristics (below) offers examples of how services might or might not be included based on the essential characteristics, and how the Contractor should interpret the characteristics in light of current Government contracting processes.

Table 3: Guidance on Meeting NIST Essential Characteristics

Characteristic	Capability	Guidance
On-demand self-service	<ul style="list-style-type: none">Ordering activities can directly provision services without requiring Contractor interventionThis characteristic is typically implemented via a service console or programming interface for provisioning	<p>Guidance varies on how to implement on-demand provisioning at this time.</p> <p>Ordering activities may approach on-demand in a variety of ways, including “not-to-exceed” limits, or imposing monthly or other appropriate payment cycles on what are essentially on demand services.</p> <p>Services under this SIN must be capable of true on-demand self-service, and ordering activities and Contractors must negotiate how they implement on-demand capabilities in practice at the task order level:</p> <ul style="list-style-type: none">Ordering activities must specify their procurement approach and requirements for on-demand serviceContractors must propose how they intend to meet the approach
Broad Network Access	<ul style="list-style-type: none">Ordering activities are able to access services over standard agency networksService can be accessed and provisioned using	<ul style="list-style-type: none">Broad network access must be available without significant qualification and in relation to the deployment model and security domain of the serviceContractors must specify any ancillary activities, services or equipment required to

	standard devices such as browsers on computers, tablets, and mobile phones	access cloud services, or integrate cloud with other cloud or non-cloud networks and services.
Resource Pooling	<ul style="list-style-type: none"> ● Pooling distinguishes cloud services from simple offsite hosting ● Ordering activities draw resources from a common pool maintained by the Contractor ● Resources may have general characteristics such as regional location 	<ul style="list-style-type: none"> ● The cloud service must draw from a pool of resources and provide an automated means for the Ordering Activity to dynamically allocate them ● Manual allocation, e.g., manual operations at a physical server farm where Contractor staff configure servers in response to Ordering Activity requests, does not meet this requirement ● Similar concerns apply to software and platform models; automated provisioning from a pool is required ● Ordering activities may request dedicated physical hardware, software, or platform resources to access a private cloud deployment service. However, the provisioned cloud resources must be drawn from a common pool and automatically allocated on request.
Rapid Elasticity	<ul style="list-style-type: none"> • Rapid provisioning and de-provisioning commensurate with demand 	<ul style="list-style-type: none"> ● Rapid elasticity is a specific demand-driven case of self-service ● ‘Rapid’ should be understood as measured in minutes and hours, not days or weeks ● Elastic capabilities by manual request, e.g., via a console operation or programming interface call, are required ● Automated elasticity, which is driven dynamically by system load, etc. is optional. Contractors must specify whether automated demand-driven elasticity is available and the general mechanisms that drive the capability
Measured Service	<ul style="list-style-type: none"> • Measured service should be understood as a reporting requirement that enables an Ordering Activity to control their use in cooperation with self-service 	<ul style="list-style-type: none"> ● Guidance for on-demand self-service applies to measured service as well, e.g., rapid elasticity must be technically available but ordering activities and Contractors may mutually designate other contractual arrangements ● Regardless of specific contractual arrangements, reporting must indicate actual usage, be continuously available to the Ordering Activity, and provide meaningful metrics appropriate to the service measured ● Contractors must specify that measured

		<p>service is available and the general sort of metrics and mechanisms available</p> <ul style="list-style-type: none"> ● The goal of the measured service requirement is to ensure Ordering Activities realize the full benefit of “pay as you go” consumption models. • For all offers of IaaS/PaaS/SaaS the appropriate maximum measured increment of pricing shall be no more than one month per user, or some other equivalent discrete measurement that provides the Government with the advantage of frequent (every month or less) “pay as you go” metering cycles • For all offers of IaaS/PaaS/SaaS a pricing increment of greater than one month may be offered under SIN 518210C only if a pricing increment that is one month or less pricing offer is also made for that particular item
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Inheriting Essential Characteristics

Cloud Services (IaaS/PaaS/SaaS) may depend on other cloud services, and cloud service models such as PaaS and SaaS are able to inherit essential characteristics from other cloud services that support them. For example, a PaaS can inherit the broad network access made available by the IaaS it runs on, and in such a situation would be fully compliant with the broad network access essential characteristic. Cloud Services (IaaS/PaaS/SaaS) inheriting essential characteristics must make the inherited characteristic fully available at their level of delivery to claim the relevant characteristic by inheritance.

Inheriting characteristics does not require the inheriting provider to directly bundle or integrate the inherited service, but it does require a reasonable measure of support and identification. For example, the Ordering Activity may acquire an IaaS service from “Provider A” and a PaaS service from “Provider B.” The PaaS service may inherit broad network access from “Provider A,” but must identify and support the inherited service as an acceptable IaaS provider.

Assessing Broad Network Access

Typically broad network access for public deployment models implies high bandwidth access from the public internet for authorized users. In a private cloud deployment internet access might be considered broad access, as might be access through a dedicated shared high bandwidth network connection from the Ordering Activity, in accordance with the private nature of the deployment model.

Resource Pooling and Private Cloud

All cloud resource pools are finite and only give the appearance of infinite resources when sufficiently large, as is sometimes the case with a public cloud. The resource pool supporting a private cloud is typically smaller with more visible limits. A finite pool of resources purchased as a private cloud service qualifies as resource pooling so long as the resources within the pool can be dynamically allocated to the ultimate users of the resource, even though the pool itself appears finite to the Ordering Activity that procures access to the pool as a source of dynamic service allocation.

- NIST Service Model

The Contractor may optionally document the service model of cloud computing (e.g. IaaS, PaaS, SaaS) that most closely describes their offering, using the definitions in The NIST Definition of Cloud Computing SP 800-145. Contractors should carefully select the NIST service model most closely corresponding to each service offered. Contractors should not invent, proliferate, or select multiple cloud service model sub-categories to distinguish their offerings, because ad-hoc categorization prevents consumers from comparing similar offerings. Instead, vendors should fully make use of the existing NIST categories possible. The following guidance is offered for the proper selection of service models.

NIST's service models provide this SIN with a set of consistent sub-categories to assist ordering activities in locating and comparing Cloud services (IaaS/PaaS/SaaS) of interest. The service model is primarily concerned with the nature of the service offered and the staff and activities most likely to interact with the service. Contractors should select a single service model most closely corresponding to their proposed service based on the guidance below. It is understood that cloud services can technically incorporate multiple service models and the intent is to provide the single best categorization of the service.

For example, in this SIN, an offering commercially marketed by a Contractor as "Storage as a Service" would be properly characterized as Infrastructure as a Service (IaaS), storage being a subset of infrastructure. Services commercially marketed as "LAMP as a Service" or "Database as a Service" would be properly characterized under this SIN as Platform as a Service (PaaS), as they deliver two kinds of platform services. Services commercially marketed as "Travel Facilitation as a Service" or "Email as a Service" would be properly characterized as species of Software as a Service (SaaS) for this SIN.

However, Contractors can and should include appropriate descriptions (including commercial marketing terms) of the service in the full descriptions of the service's capabilities.

When choosing between equally plausible service model sub-categories, Contractors should consider several factors:

- Visibility to the Ordering Activity: Service model sub-categories in this SIN exist to help Ordering Activities match their requirements with service characteristics. Contractors should select the most intuitive and appropriate service model from the point of view of an Ordering Activity.
- Primary Focus of the Cloud Service (IaaS/PaaS/SaaS): Services may offer a mix of capabilities that span service models in the strict technical sense. For example, a service may offer both IaaS capabilities for processing and storage, along with some PaaS capabilities for application deployment, or SaaS capabilities for specific applications. In a service mix situation, the Contractor should select the service model that is their primary focus. Alternatively, contractors may choose to submit multiple service offerings for the SIN, each optionally and separately subcategorized.
- Ordering Activity Role: Contractors should consider the operational role of the Ordering Activity's primary actual consumer or operator of the service. For example, services most often consumed by system managers are likely to fit best as IaaS; services most often consumed by application deployers or developers as PaaS, and services most often consumed by business users as SaaS.

- Lowest Level of Configurability: Contractors can consider IaaS, PaaS, and SaaS as an ascending hierarchy of complexity, and select the model with the lowest level of available Ordering Activity interaction. As an example, virtual machines are an IaaS service often bundled with a range of operating systems, which are PaaS services. The Ordering Activity usually has access to configure the lower level IaaS service, and the overall service should be considered IaaS. In cases where the Ordering Activity cannot configure the speed, memory, network configuration, or any other aspect of the IaaS component, consider categorizing as a PaaS service.

Cloud management and cloud broker services should be categorized based on their own characteristics and not those of the other cloud services that are their targets. Management and broker services typically fit the SaaS service model, regardless of whether the services they manage are SaaS, PaaS, or IaaS. Use Table 3 to determine which service model is appropriate for the cloud management or cloud broker services or, alternately, choose not to select a service model for the service.

The guidance in Table 4: Guidance on Mapping to NIST Service Models (below) offers examples of how services might be properly mapped to NIST service models and how a Contractor should interpret the service model sub-categories.

Table 4: Guidance on Mapping to NIST Service Models

Service Model	Guidance
Infrastructure as a Service (IaaS)	<p>Select an IaaS model for service-based equivalents of hardware appliances such as virtual machines, storage devices, routers, and other physical devices.</p> <ul style="list-style-type: none"> • IaaS services are typically consumed by system or device managers who would configure physical hardware in a non-cloud setting • The principal customer interaction with an IaaS service is provisioning then configuration, equivalent to procuring and then configuring a physical device <p>Examples of IaaS services include virtual machines, object storage, disk block storage, network routers and firewalls, and software defined networks.</p> <p>Gray areas include services that emulate or act as dedicated appliances and are directly used by applications, such as search appliances, security appliances, etc. To the extent that these services or their emulated devices provide direct capability to an application they might be better classified as Platform services (PaaS). To the extent that they resemble raw hardware and are consumed by other platform services they are better classified as IaaS.</p>
Platform as a Service (PaaS)	<p>Select a PaaS model for service based equivalents of complete or partial software platforms. For the purposes of this classification, consider a platform as a set of software services capable of deploying all or part of an application.</p> <ul style="list-style-type: none"> • A complete platform can deploy an entire application. Complete platforms can be proprietary or open source

- Partial platforms can deploy a component of an application which, combined with other components, make up the entire deployment
- PaaS services are typically consumed by application deployment staff whose responsibility is to take a completed agency application and cause it to run on the designated complete or partial platform service
- The principal customer interaction with a PaaS service is deployment, equivalent to deploying an application or portion of an application on a software platform service
- A limited range of configuration options for the platform service may be available

Examples of complete PaaS services include:

- A Linux/Apache/MySQL/PHP (LAMP) platform ready to deploy a customer PHP application
- A Windows .Net platform ready to deploy a .Net application
- A custom complete platform ready to develop and deploy a customer application in a proprietary language
- A multiple capability platform ready to deploy an arbitrary customer application on a range of underlying software services

The essential characteristic of a complete PaaS is defined by the customer's ability to deploy a complete custom application directly on the platform.

PaaS includes partial services as well as complete platform services.

Illustrative examples of individual platform enablers or components include:

- A database service ready to deploy a customer's tables, views, and procedures
- A queuing service ready to deploy a customer's message definitions
- A security service ready to deploy a customer's constraints and target applications for continuous monitoring

The essential characteristic of an individual PaaS component is the customer's ability to deploy their unique structures and/or data onto the component for a partial platform function.

Note that both the partial and complete PaaS examples all have two things in common:

- They are software services, which offer significant core functionality out of the box; and
- They must be configured with customer data and structures to deliver results.

As noted in IaaS, operating systems represent a gray area in that OS is definitely a platform service, but is typically bundled with IaaS infrastructure. If your service provides an OS but allows for interaction with infrastructure, please sub-categorize it as IaaS. If your service "hides" underlying infrastructure, consider it as PaaS.

Software as a	Select a SaaS model for service-based equivalents of software applications.
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<p>Service (SaaS)</p>	<ul style="list-style-type: none"> • SaaS services are typically consumed by business or subject-matter staff who would interact directly with the application in a non-cloud setting • The principal customer interaction with a SaaS service is actual operation and consumption of the application services that the SaaS service provides. <p>Some minor configuration may be available, but the scope of the configuration is limited to the scope and then the permissions of the configuring user. For example, an agency manager might be able to configure some aspects of the application for their agency but not all agencies. An agency user might be able to configure some aspects for themselves, but not everyone in their agency. Typically, only the Contractor would be permitted to configure aspects of the software for all users.</p> <p>Examples of SaaS services include email systems; business systems of all sorts, such as travel systems, inventory systems, etc.; wiki's; websites or content management systems; management applications that allow a customer to manage other cloud or non-cloud services; and, in general, any system where customers interact directly for a business purpose.</p> <p>Gray areas include services that customers use to configure other cloud services, such as cloud management software, cloud brokers, etc. In general, these sorts of systems should be considered SaaS, per guidance in this document.</p>
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- Deployment Model

Deployment models (i.e., private, public, community, or hybrid) are not restricted at the SIN level and any specifications for a deployment model are the responsibility of the Ordering Activity.

Multiple deployment model selection is permitted, but at least one model must be selected. The guidance in Table 4 offers examples of how services might be properly mapped to NIST deployment models and how the contractor should interpret the deployment model characteristics. Contractors should take care to select the range of NIST deployment models most closely corresponding to each service offered.

Note that the scope of this SIN does not include hardware or software components used to construct a cloud, only cloud capabilities delivered as a service, as noted in the Scope section.

Table 5: Guidance for Selecting a Deployment Model

Deployment Model	Guidance
Private Cloud	The service is provided exclusively for the benefit of a definable organization and its components; access from outside the organization is prohibited. The actual services may be provided by third parties and may be physically located as required, but access is strictly defined by membership in the owning organization.
Public Cloud	The service is provided for general public use and can be accessed by any entity or organization willing to contract for it.
Community Cloud	The service is provided for the exclusive use of a community with a definable shared boundary such as a mission or interest. As with private cloud, the service may be in any suitable location

	and administered by a community member or a third party.
Hybrid Cloud	The service is composed of one or more of the other models. Typically hybrid models include some aspect of transition between the models that make them up, for example, a private and public cloud might be designed as a hybrid cloud where events like increased load permit certain specified services in the private cloud to run in a public cloud for extra capacity, e.g., bursting.

Video



If you create a video that will contain Controlled Unclassified Information (CUI) you should:

1. Include in the opening section of the video a black screen with text stating “This Video Contains Controlled Unclassified Information.”
 - ❖ If CUI Specified is included in the video, place the appropriate CUI marking* below the disclaimer.
 - ❖ Only use this method if permitted by law or government policy.
 - ❖ If you are having difficulty contact your agency’s Program Manager.
2. Physically mark the storage media (if used) with the appropriate CUI marking.*

Note: Alternate methods of indicating CUI may be used, provided that the presence of CUI is explicitly indicated as well as (if applicable) categories, subcategories, and limited dissemination markings.

Controlled Unclassified Information (CUI) Audio, Photography, and Video Markings



700 Pennsylvania Ave., N.W., Room 100
Washington, DC 20408-0001
Phone: (202) 357-6870
E-mail: cui@nara.gov

Audio



Disclaimer: If you see text marked with an (*), refer to the CUI Banner Marking section of the marking handbook as well as agency policy for more specific marking instructions

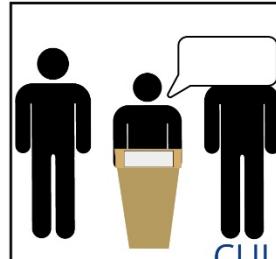
If you create an audio file that contains Controlled Unclassified Information, you should record the following at the beginning of the file:

1. The statement that “This Recording Contains Controlled Unclassified Information”; and
2. A reading of the appropriate CUI Marking* for the content contained in the audio file, including all CUI Specified categories.

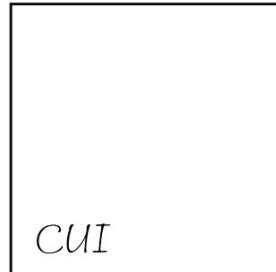
You also should physically mark the storage media (such as a CD) that contains the audio file with the appropriate CUI Marking.*

Note: Alternate methods of indicating CUI may be used, provided that the presence of CUI is explicitly indicated as well as (if applicable) categories, subcategories, and limited dissemination markings.

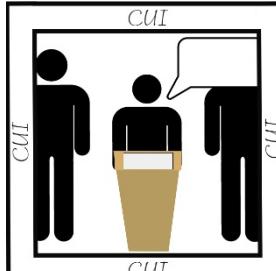
Photography



Electronic Photo Labeling Example



Physical Photo Labeling Example



Physical Unalterable Photo Labeling Example

❖ If you create an electronic photo that contains Controlled Unclassified Information (CUI), you should watermark the photo with the appropriate CUI markings.*

- ◆ If you are having difficulty watermarking the photos, contact your agency’s Program Manager.

❖ If you create a document that contains pictures that include CUI, you do not need to indicate that the pictures are CUI unless they can be physically removed from the document or they are placed in a part of the document that has not been marked as CUI.

❖ If you create a physical photo that contains CUI, you should place appropriate CUI markings* on the back of the photo. You should also place the photo in a similarly marked envelope or folder.

❖ If the photo cannot be altered to include CUI markings (if it is evidence, for example), we recommend tape, frames, or envelopes which bear the appropriate CUI marking.*

Note: Alternate methods of indicating CUI may be used, provided that the presence of CUI is explicitly indicated as well as (if applicable) categories, subcategories, and limited dissemination markings.



**National Institute of
Standards and Technology**
U.S. Department of Commerce

Special Publication 800-145

The NIST Definition of Cloud Computing

Recommendations of the National Institute of Standards and Technology

Peter Mell
Timothy Grance

NIST Special Publication 800-145

The NIST Definition of Cloud Computing

Peter Mell

Timothy Grance

C O M P U T E R S E C U R I T Y

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Information Technology Laboratory
National Institute of Standards and Technology
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U.S. Department of Commerce

Rebecca M. Blank, Acting Secretary

National Institute of Standards and Technology

Patrick D. Gallagher, Under Secretary for Standards and
Technology and Director

Reports on Computer Systems Technology

The Information Technology Laboratory (ITL) at the National Institute of Standards and Technology (NIST) promotes the U.S. economy and public welfare by providing technical leadership for the nation's measurement and standards infrastructure. ITL develops tests, test methods, reference data, proof of concept implementations, and technical analysis to advance the development and productive use of information technology. ITL's responsibilities include the development of technical, physical, administrative, and management standards and guidelines for the cost-effective security and privacy of sensitive unclassified information in Federal computer systems. This Special Publication 800-series reports on ITL's research, guidance, and outreach efforts in computer security and its collaborative activities with industry, government, and academic organizations.

National Institute of Standards and Technology Special Publication 800-145
7 pages (September 2011)

Certain commercial entities, equipment, or materials may be identified in this document in order to describe an experimental procedure or concept adequately. Such identification is not intended to imply recommendation or endorsement by the National Institute of Standards and Technology, nor is it intended to imply that the entities, materials, or equipment are necessarily the best available for the purpose.

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Errata

The following changes have been incorporated into Special Publication 800-145, as of the date indicated in the table.

DATE	TYPE	CHANGE	PAGE NUMBER
4/27/2012	Editorial	Corrected page number from "2" to "1"	1

1. Introduction

1.1 Authority

The National Institute of Standards and Technology (NIST) developed this document in furtherance of its statutory responsibilities under the Federal Information Security Management Act (FISMA) of 2002, Public Law 107-347.

NIST is responsible for developing standards and guidelines, including minimum requirements, for providing adequate information security for all agency operations and assets; but such standards and guidelines shall not apply to national security systems. This guideline is consistent with the requirements of the Office of Management and Budget (OMB) Circular A-130, Section 8b(3), "Securing Agency Information Systems," as analyzed in A-130, Appendix IV: Analysis of Key Sections. Supplemental information is provided in A-130, Appendix III.

This guideline has been prepared for use by Federal agencies. It may be used by nongovernmental organizations on a voluntary basis and is not subject to copyright, though attribution is desired.

Nothing in this document should be taken to contradict standards and guidelines made mandatory and binding on Federal agencies by the Secretary of Commerce under statutory authority, nor should these guidelines be interpreted as altering or superseding the existing authorities of the Secretary of Commerce, Director of the OMB, or any other Federal official.

1.2 Purpose and Scope

Cloud computing is an evolving paradigm. The NIST definition characterizes important aspects of cloud computing and is intended to serve as a means for broad comparisons of cloud services and deployment strategies, and to provide a baseline for discussion from what is cloud computing to how to best use cloud computing. The service and deployment models defined form a simple taxonomy that is not intended to prescribe or constrain any particular method of deployment, service delivery, or business operation.

1.3 Audience

The intended audience of this document is system planners, program managers, technologists, and others adopting cloud computing as consumers or providers of cloud services.

2. The NIST Definition of Cloud Computing

Cloud computing is a model for enabling ubiquitous, convenient, on-demand network access to a shared pool of configurable computing resources (e.g., networks, servers, storage, applications, and services) that can be rapidly provisioned and released with minimal management effort or service provider interaction. This cloud model is composed of five essential characteristics, three service models, and four deployment models.

Essential Characteristics:

On-demand self-service. A consumer can unilaterally provision computing capabilities, such as server time and network storage, as needed automatically without requiring human interaction with each service provider.

Broad network access. Capabilities are available over the network and accessed through standard mechanisms that promote use by heterogeneous thin or thick client platforms (e.g., mobile phones, tablets, laptops, and workstations).

Resource pooling. The provider's computing resources are pooled to serve multiple consumers using a multi-tenant model, with different physical and virtual resources dynamically assigned and reassigned according to consumer demand. There is a sense of location independence in that the customer generally has no control or knowledge over the exact location of the provided resources but may be able to specify location at a higher level of abstraction (e.g., country, state, or datacenter). Examples of resources include storage, processing, memory, and network bandwidth.

Rapid elasticity. Capabilities can be elastically provisioned and released, in some cases automatically, to scale rapidly outward and inward commensurate with demand. To the consumer, the capabilities available for provisioning often appear to be unlimited and can be appropriated in any quantity at any time.

Measured service. Cloud systems automatically control and optimize resource use by leveraging a metering capability¹ at some level of abstraction appropriate to the type of service (e.g., storage, processing, bandwidth, and active user accounts). Resource usage can be monitored, controlled, and reported, providing transparency for both the provider and consumer of the utilized service.

Service Models:

Software as a Service (SaaS). The capability provided to the consumer is to use the provider's applications running on a cloud infrastructure². The applications are accessible from various client devices through either a thin client interface, such as a web browser (e.g., web-based email), or a program interface. The consumer does not manage or control the underlying cloud infrastructure including network, servers, operating systems, storage, or even individual application capabilities, with the possible exception of limited user-specific application configuration settings.

Platform as a Service (PaaS). The capability provided to the consumer is to deploy onto the cloud infrastructure consumer-created or acquired applications created using programming

¹ Typically this is done on a pay-per-use or charge-per-use basis.

² A cloud infrastructure is the collection of hardware and software that enables the five essential characteristics of cloud computing. The cloud infrastructure can be viewed as containing both a physical layer and an abstraction layer. The physical layer consists of the hardware resources that are necessary to support the cloud services being provided, and typically includes server, storage and network components. The abstraction layer consists of the software deployed across the physical layer, which manifests the essential cloud characteristics. Conceptually the abstraction layer sits above the physical layer.

languages, libraries, services, and tools supported by the provider.³ The consumer does not manage or control the underlying cloud infrastructure including network, servers, operating systems, or storage, but has control over the deployed applications and possibly configuration settings for the application-hosting environment.

Infrastructure as a Service (IaaS). The capability provided to the consumer is to provision processing, storage, networks, and other fundamental computing resources where the consumer is able to deploy and run arbitrary software, which can include operating systems and applications. The consumer does not manage or control the underlying cloud infrastructure but has control over operating systems, storage, and deployed applications; and possibly limited control of select networking components (e.g., host firewalls).

Deployment Models:

Private cloud. The cloud infrastructure is provisioned for exclusive use by a single organization comprising multiple consumers (e.g., business units). It may be owned, managed, and operated by the organization, a third party, or some combination of them, and it may exist on or off premises.

Community cloud. The cloud infrastructure is provisioned for exclusive use by a specific community of consumers from organizations that have shared concerns (e.g., mission, security requirements, policy, and compliance considerations). It may be owned, managed, and operated by one or more of the organizations in the community, a third party, or some combination of them, and it may exist on or off premises.

Public cloud. The cloud infrastructure is provisioned for open use by the general public. It may be owned, managed, and operated by a business, academic, or government organization, or some combination of them. It exists on the premises of the cloud provider.

Hybrid cloud. The cloud infrastructure is a composition of two or more distinct cloud infrastructures (private, community, or public) that remain unique entities, but are bound together by standardized or proprietary technology that enables data and application portability (e.g., cloud bursting for load balancing between clouds).

³ This capability does not necessarily preclude the use of compatible programming languages, libraries, services, and tools from other sources.

White Lotus Freight Bonded Broker and Dispatch, LLC

SYSTEM SECURITY PLAN

REQUIREMENTS

(Note: The source of the requirements is NIST Special Publication 800-171, dated December 2016)

Provide a thorough description of how all the security requirements are being implemented or planned to be implemented. The description for each security requirement contains: 1) the security requirement number and description; 2) how the security requirement is being implemented or planned to be implemented; and 3) any scoping guidance that has been applied (e.g., compensating mitigations(s) in place due to implementation constraints in lieu of the stated requirement). If the requirement is not applicable to the system, provide rationale.



DoD INSTRUCTION 5000.79

DEFENSE-WIDE SHARING AND USE OF SUPPLIER AND PRODUCT PERFORMANCE INFORMATION (PI)

Originating Component: Office of the Under Secretary of Defense for Acquisition and Sustainment

Effective: October 15, 2019

Releasability: Cleared for public release. Available on the Directives Division Website at <https://www.esd.whs.mil/DD/>.

Incorporates and Cancels: Deputy Under Secretary of Defense for Acquisition and Technology Memorandum, “DoD Deployment of Past Performance Information Retrieval System Statistical Reporting (PPIRS-SR),” December 21, 2007

Approved by: Ellen M. Lord, Under Secretary of Defense for Acquisition and Sustainment

Purpose: In accordance with the authority in DoD Directive 5134.01 and the July 13, 2018 Deputy Secretary of Defense Memorandum, this issuance:

- Establishes policy and assigns responsibilities for managing the Defense-wide collection and sharing of supplier and product PI reported on supplies and services.
- Prescribes procedures for the use of supplier PI to:
 - Determine performance risk to prospective supplier or product performance.
 - Assess risk of ongoing supplier performance.
- Directs that the commercial and government entity code is the primary supplier identifier to be used for the collection of PI.

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SECTION 1: GENERAL ISSUANCE INFORMATION

1.1. APPLICABILITY. This issuance:

- a. Applies to OSD, the Military Departments, the Office of the Chairman of the Joint Chiefs of Staff and the Joint Staff, the Combatant Commands, the Office of the Inspector General of the Department of Defense, the Defense Agencies, the DoD Field Activities, and all other organizational entities within the DoD (referred to collectively in this issuance as the “DoD Components”).
- b. Does not apply to:
 - (1) DoD cryptologic special component information systems and classified cryptographic products, pursuant to DoD Instruction (DoDI) 8500.01.
 - (2) DoD military treatment facilities, medical or dental, and DoD healthcare practitioners who are involved in the delivery of healthcare services to eligible beneficiaries, in accordance with DoDI 6025.13.
 - (3) DoD management of bulk petroleum products, natural gas, and coal, in accordance with Volume 1 of DoD Manual 4140.25.

1.2. POLICY.

- a. Pursuant to DoD Directive 8000.01 and DoDI 5000.74, supplier PI on supplies and services acquired from industry sources is a strategic asset to the DoD. Supplier PI will be secured and shared with members of the DoD acquisition community to the maximum extent allowed by law and DoD policy.
 - (1) The requirements of this issuance will be incorporated into the Business Enterprise Architecture to assure that investments in systems modernization needed to secure and share supplier PI will be approved and resourced, in accordance with DoDI 8320.02.
 - (2) The latest version of the Supplier Performance Risk System (SPRS) is the authoritative source to retrieve supplier and product PI assessments for the DoD acquisition community to use in identifying, assessing, and monitoring unclassified performance.
- b. The DoD-wide sharing and use of supplier PI will be used to:
 - (1) Evaluate and monitor performing suppliers to assess risk for on-going performance and reduce counterfeiting risk pursuant to DoDI 4140.67.
 - (2) Assess corporate business practices related to DoD contracts and the supplier’s management of risk.
 - (3) Conduct market research by members of the DoD acquisition community.

(4) Minimize the risk that DoD's warfighting mission capability will be impaired due to vulnerabilities in system design or sabotage or subversion of a system's mission critical functions or critical components, as defined in this issuance by foreign intelligence, terrorists, or other hostile element pursuant to DoDI 5200.44.

c. The DoD-wide sharing and use of supplier PI and other relevant supplier information will be used in source selection for procurements of supplies and services pursuant to the provisions and clauses of the Federal Acquisition Regulation (FAR) and the Defense Federal Acquisition Regulation Supplement (DFARS) that require the use of supplier PI.

d. The supplies and services purchased by DoD must be identified in purchase requests, solicitations, and contracts by product service code (PSC) for supplies and services, when appropriate. PSC must be used to identify supplies in supplier performance reporting systems managed by the DoD Components. The performance history of potential industry items must be reported by the applicable PSC and should be identified to the national item identification number or part number level where applicable and economically achievable.

SECTION 2: RESPONSIBILITIES

2.1. ASSISTANT SECRETARY OF DEFENSE FOR SUSTAINMENT (ASD(S)). Under the authority, direction, and control of the Under Secretary of Defense for Acquisition and Sustainment (USD(A&S)), the ASD(S) acts as principal point of contact for DoD procedures for the prevention, detection, reporting, and disposition of counterfeit materiel in the DoD supply chain.

2.2. PRINCIPAL DIRECTOR, DEFENSE PRICING AND CONTRACTING. Under the authority, direction and control of the Assistant Secretary of Defense for Acquisition, the Principal Director, Defense Pricing and Contracting:

- a. Oversees the development and modification of procurement policies, procedures, regulations, and guidance to support the policies in this issuance.
- b. Develops integrated DoD policy and implementing guidance on the management of supplier and product PI sharing.
- c. Coordinates with the Military Department and Defense Agencies in the development and implementation of procedures for the evaluation and use of supplier and product PI on industry sources.
- d. Develops acquisition and procurement policies, procedures, regulations, and guidance for the development and use of supplier and product PI in source selection and contract award.
- e. Develops and implements defense acquisition workforce education and training programs on the management and use of supplier and product PI in contracting.
- f. Oversees collaboration and consultation with the DoD acquisition community and other federal agencies on the policies of reporting and assessing supplier PI on quality and delivery performance on contracts.
- g. Ensures determinations made in accordance with the Department's implementation of Section 2339a of Title 10, United States Code, are in SPRS.

2.3. DIRECTOR, DEFENSE LOGISTIC AGENCY (DLA). Under the authority, direction, and control of the USD(A&S) and in addition to the responsibilities in Paragraph 2.7., the Director, DLA, provides operational and funding support of the SPRS enterprise transactional capability.

2.4. UNDER SECRETARY OF DEFENSE FOR RESEARCH AND ENGINEERING (USD(R&E)). The USD(R&E):

- a. Leads the development and modification of quality assurance policy, procedures, and standards to support the policies in this issuance.
- b. Provides supplier software and hardware supply chain assurances capabilities and risk mitigation information in accordance with DoDI 5200.44 and in coordination with USD(A&S), the DoD Chief Information Officer and the Under Secretary of Defense for Intelligence (USD(I)).

2.5. USD(I). The USD(I) assesses supply chain risk to covered systems to inform, in coordination with USD(A&S) and the DoD Chief Information Officer, recommendations for determinations made in accordance with the Department's implementation of Section 2339a of Title 10, United States Code.

2.6. UNDER SECRETARY OF DEFENSE FOR PERSONNEL AND READINESS. The Under Secretary of Defense for Personnel and Readiness oversees dental and medical supplier PI reports through the Assistant Secretary of Defense for Health Affairs. These reports are made available for use by SPRS for development of PI on relevant industry sources of dental and medical materiel in accordance with DoDI 6430.02.

2.7. DOD COMPONENT HEADS The DoD Component heads:

- a. Integrate DoD supplier PI management policy into all relevant issuances, regulations, guidance, contract requirements, and procedures to comply with this issuance.
- b. Implement DoD policies, procedures, practices, and contract requirements for use of PI in solicitations and contract awards in accordance with the requirements of the FAR and DFARS.
- c. Share supplier PI across the DoD.

SECTION 3: PROCEDURES

3.1. USE OF PI. The DoD Components heads will:

- a. Use the Contractor Performance Assessment Reporting System and SPRS capability pursuant to the FAR and DFARS.
- b. Identify the supplies and services purchased in solicitations and contracts by PSC; use the PSCs in deficiency, discrepancy, and supplier PI reporting; and report the past performance history of industry sources by the applicable PSC.

3.2. SHARING OF PI. DoD Components capturing supplier PI on supplies and services will:

- a. Share supplier PI with other DoD Components to facilitate root cause determinations, corrective actions, reliability analysis, and recoupment actions for contractor, supplier-identified deficiencies and discrepancies during contract performance.
- b. Facilitate industry rebuttal of supplier PI considered with FAR procedures for past performance information; where appropriate, provide for the evaluation and adjudication of SPRS quality and delivery records that have been challenged by objective evidence submitted by suppliers.
- c. Use the commercial and government entity code as the primary data element to capture and record supplier PI.
- d. Validate supplier PI prior to its exchange between DoD Components pursuant to this issuance; including, but not limited to, those data identified in Paragraph 3.2.e.
- e. Use materiel quality and supplier performance information available within the Department of the Navy (DoN) Product Data Reporting and Evaluation Program (PDREP) system as directed by DoD and in accordance with Secretary of Navy Instruction 4855.3 and Navy Standard Operating Procedure 3683.

3.3. OPERATION OF THE SPRS SYSTEM. The Director, Naval Sea Logistics Center-Portsmouth, will:

- a. Act as the executive agent for supplier performance programs including the Contractor Performance Assessment Reporting System, PDREP, SPRS, and the Federal Awardee Performance and Integrity Information System for all federal agencies on behalf of DoD and the Integrated Award Environment. Functional enhancements to SPRS will be funded by the agency requesting a change.
- b. Develop and sustain SPRS based on joint DoD requirements.
- c. Establish and manage the SPRS Program Management Office.

- d. Provide, distribute, and maintain a procedures manual to support the DoD implementation and execution of the SPRS program requirements of this issuance.
- e. Use the DoN PDREP to:
 - (1) Provide and maintain a DoD enterprise solution as a centralized database, with application capabilities for reporting, processing, collecting, storing, and sharing supplier PI internally and with other DoD Components, in support of the requirements of this issuance.
 - (2) Validate and screen, prior to being incorporated into SPRS, materiel quality data or other supplier PI received electronically by the DoN PDREP in accordance with the procedures in Volume 2 of Defense Logistics Manual 4000.25.
 - (3) Share and store material quality data or other supplier PI electronically using the procedures in Defense Logistics Manual 4000.25.
- f. Provide SPRS application training and customer support for authorized DoD and contractor personnel granted official access to the system.
- g. Assist DoD Components with technical solutions to achieve a uniform means and common approach for reporting material quality data or other supplier PI.

GLOSSARY

G.1. ACRONYMS.

ASD(S)	Assistant Secretary of Defense for Sustainment
DFARS	Defense Federal Acquisition Regulation Supplement
DLA	Defense Logistics Agency
DoDI	DoD instruction
DoN	Department of the Navy
FAR	Federal Acquisition Regulation
PDREP	Product Data Reporting and Evaluation Program
PI	performance information
PSC	product service code
SPRS	Supplier Performance Risk System
USD(A&S)	Under Secretary of Defense for Acquisition and Sustainment
USD(I)	Under Secretary of Defense for Intelligence
USD(R&E)	Under Secretary of Defense for Research and Engineering

G.2. DEFINITIONS. Unless otherwise noted, these terms and their definitions are for the purpose of this issuance.

counterfeit. Defined in DoDI 4140.67.

Integrated Award Environment. A collection of statutory and regulatory mandated federal-wide capabilities supporting procurement, grants, and payment processes. They include capabilities such as vendor identification, management, government business opportunities contract and sub-award reporting, tracking past performance, and vendor reporting in accordance with a variety of regulations. The Integrated Award Environment portfolio is managed by the General Services Administration.

PDREP. The DoN central automated source for reporting, collection, and evaluation of supplier performance information identified in Section 1126 of Title 41, United States Code, the FAR, the DFARS, and the Navy Marine Corps Acquisition Regulation Supplement. PDREP tracks supplier performance on an individual component basis and links that material to the supplying contractor. PDREP is used by DoD for collecting the required supplier information from the Navy and other DoD organizations. The PDREP reports to the DoD SPRS for use by all of the DoD.

PSC. Defined in the Federal Procurement Data System Product and Service Codes Manual.

quality deficiency. A defect or nonconforming condition that limits or prohibits the product or service from fulfilling its intended purpose. Included are deficiencies in design, specification, material, manufacturing, workmanship, and standards of performance.

source. Defined in Subpart 217.7506, Part 1, 1-103.29 of DFARS Procedures, Guidance and Information.

SPRS. Defined in the Department of Defense Supplier Performance Risk System Software User's Manual.

supplier PI. The actions or processes of carrying out or accomplishing actions, tasks, or functions of contractor performance.

REFERENCES

- Business Enterprise Architecture, current edition
- Defense Federal Acquisition Regulation Supplement, current edition
- Defense Logistics Manual 4000.25, Volumes 1-7, “Defense Logistics Management System,” date varies by volume
- Department of Defense Supplier Performance Risk System (SPRS) Software User’s Manual, current edition
- Deputy Secretary of Defense Memorandum, “Establishment of the Office of the Under Secretary of Defense for Research Engineering and the Office of the Under Secretary of Defense for Acquisition and Sustainment,” July 13, 2018
- DoD Directive 5134.01, “Under Secretary of Defense for Acquisition, Technology, and Logistics (USD (AT&L)),” December 9, 2005, as amended
- DoD Directive 8000.01, “Management of the Department of Defense Information Enterprise (DoD IE),” March 17, 2016, as amended
- DoD Instruction 4140.67, “DoD Counterfeit Prevention Policy,” April 26, 2013, as amended
- DoD Instruction 5000.74, “Defense Acquisition of Services,” January 5, 2016, as amended
- DoD Instruction 5200.44, “Protection of Mission Critical Functions to Achieve Trusted Systems and Networks (TSN),” November 5, 2012, as amended
- DoD Instruction 6025.13, “Medical Quality Assurance (MQA) and Clinical Quality Management in the Military Health System (MHS),” February 17, 2011, as amended
- DoD Instruction 6430.02, “Defense Medical Logistics Program,” August 23, 2017
- DoD Instruction 8320.02, “Sharing Data, Information, and Information Technology (IT) Services in the Department of Defense,” August 5, 2013
- DoD Instruction 8500.01, “Cybersecurity,” March 14, 2014
- DoD Manual 4140.25, Volume 1, “DoD Management of Energy Commodities: Overview,” March 2, 2018, as amended
- Federal Procurement Data System Product and Service Codes Manual, current edition
- Navy Marine Corps Acquisition Regulation Supplement, current edition
- Navy Standard Operating Procedure 3683, “Navy and Marine Corps Product Data Reporting and Evaluation Program,” Revision C, April 22, 2013
- Secretary of Navy Instruction 4855.3, “Product Data Reporting and Evaluation Program (PDREP),” June 27, 2014
- United States Code, Title 10, Section 2339a
- United States Code, Title 41, Section 1126

To prevent firm from inherently using contractual awarded contracts. The firm shall implement progression period performance based upon the quasi-experimental design theory. This type of research method resembles an experiment but does not use random assignment of participants to groups or conditions. Instead, the experiment relies on other methods, such as pre-existing subcontractors, pretests, or regression discontinuity, to estimate the causal impact of an intervention or treatment on a target population.

Quasi-experimental designs are often used when true experiments are not possible or ethical complications for practical reasons.

The subcontractors' weekly collections of their progression period and monthly hybrid/virtual meeting. Can be customized to the use of quasi-experimental design. This design compares the outcomes of the firm and subcontractors contracts. The firm chose to use the normal process of posting on Transportation Management System Load boards, which is considered to be the standards in the supply chain industry. Quasi-experimental designs have some advantages, such as being more feasible, ethical, and realistic than true experiments, but they also have some disadvantages, such as having lower internal validity and being more susceptible to confounding variables and selection being bias. However, the firm uses a random methods such as, networking, attending supply chain industry events, other vendors, seminars, blogs and professional and social media platforms.

the progression of the Subcontractor contract and services are being met versus our firm normal protocol when using varies TMS Load Boards. Although, the subcontractors were not randomly assigned, if firm properly account for any systematic differences between primary contractor and subcontractors, the firm be reasonably confident any differences must arise from the treatment of the contract and no other confounding variables.

(Scenario) my firm discovered we were awarded several contracts and decided to try to fulfill the requirements of those contracts on our own. The firm decides to execute the contracts using the same methods by posting the varies contracts on Transportation Management System (TMS) load boards using the normal protocol. The firm can use these pre-existing Transportation Management System (TMS) and Load Board to study the resolution Based upon our firm's awarded contracts we shall offer a general partnership agreement. This general partnership agreement shall be transparent to all parties involved within the scope of the awarded contracts. The Firm shall require subcontractors to be held legally responsible for any contracts accepted as part of the general partnership agreement. The firm shall require potential subcontractors to complete their company profile on the firm's website page. Once subcontractors vetted process has been completed by firm. The firm shall send a private invitation to join and adhere to the general partnership agreement. Which subcontractors shall be legally responsible for contracts that the subcontractors hold in their possession.

Subcontractors shall not share nor change any general partnership agreement.

However, the firm is held responsible for all contractually awarded contracts. The firm shall remain covered under the standard requirements of Liability Insurance, Surety Bond including Errors and Omission coverages. The regulations, guidelines, and policies governed by the firm contractual awarded contracts. Subcontractors shall be held legally and equally responsible by the binding of general partnerships agreement. The subcontractor's general partnership agreement shall require periodic progression of services. Periodic progression phases shall require recording of daily operation schedule to measure progression. Each week the firm shall track, analyzing the progression of data submitted by the subcontractor. This includes a survey submitted by client/customer after delivery has been confirmed. To improve upon existing services or reevaluate subcontractors' weekly progression reports.

Note: throughout the context of this information, you will find the writer reference the firm. White Lotus Freight Bonded Broker and Dispatch, LLC, presents itself as the firm. Contractor also is represented as the firm.

During the first 3 months of the progression period. By the end of the subcontractor's third month of it required progression period. The firm's data collections can be easily accessed online. This shows the transparency of both the firm and subcontractors' services, surveys taken by customers/clients. Once the firm meets contractual obligations and close the account. The firm shall request completed contracts evaluation of its own services provided. This increases the firm's reputable standing within the supply chain industry. Access to complex logistics services contracts. Marketing the services data and allowing the firms and subcontractors to maximize logistical consultant exposures.

Provide the best end-to-end delivery services. Data progression provides insight on firm targeted population and a proven niche for providing professional services.

Research

Starts with completing a business profile on firms' website. Using customized programmable applications using Salesforce products and problem-solving solutions align with firms' obligations requirement set forth by the enforceable awarded contracts.

The business profile is vetted through the potential subcontractor's business profile.

Ensuring validity of the potential subcontractor business meets the same normal protocol for logistics consultants. The firm shall send a private invitation to join and complete a general partnership agreement. Once the terms of the general partnership agreement have been agreed upon. The firm has three months to plan and validate the subcontractors' services provided through the firm. During the progression period the subcontractor shall submit weekly reports to the firm. The firm shall hold a monthly meeting with the subcontractor using a hybrid/virtual meeting platform service.

Following the progression of subcontractors' three months ending of their progression period. The subcontractor contract shall receive a transparency letter.

The letter shall provide a check and balance of the data received from subcontractors, weekly report submissions, monthly meetings to address any issues that may affect customers' delivery services. The outcome of the subcontractor services and performance during the progression period will be used for its analytical property. Through this process the weekly submissions of the subcontractor's progression report, and end of the month meetings and selection of surveys and submitted by clients and customers. Can provide transparency whether the subcontractor shall be given an opportunity to extend the general partnership agreement. Over the next 9 months or until contractual obligations have been met. The subcontractors shall continue with the responsibility of maintaining the contractual partnership agreement in good standing. The subcontractors shall continue to report progression this time bi-weekly. The firm shall require an end to the month's meeting with subcontractors. Here's some of the reasoning behind the progression period of the extended general partnership agreement. The analytical process of information given during this period provides insight on the quasi-experimental design.

- a. *The research question is about the effect of fulfilling the firm's contracts on its own versus using subcontractors for the 3 months progression period of the contract services.*
- b. *The firm's intervention or treatment is fulfilling the contracts on your own, which is a change from your normal protocol of using subcontractors.*
- c. *The firm's target population is the contracts that you were awarded.*
- d. *The contracts are contractual awarded contracts conditions are the contracts that the firm fulfilled on their own and the contracts that subcontractors fulfilled using the same protocol and traditions the firm uses. These subcontractors were not randomly assigned but were pre-existing based on the Transportation Management System (TMS), load boards and knowledgeable understanding and experience with fulfilling contracts requirements.*
- e. *The firm outcome measure is the progression of the contract services, which can be quantified and compared between the firm and the subcontractor. These details match the definition and characteristics of a quasi-experimental design that I have learned from my sources. However, you should also be aware of some potential limitations of your design, such as: There may be confounding variables that affect the outcome, such as the quality of service, availability, and cost of subcontractors, or the complexity and urgency of the contracts.*
- f. *There may be selection bias in the groups, such as some contracts being more suitable or profitable for fulfilling on your own than others, or some subcontractors being more reliable or experienced than others.*

g. There may be low internal validity in your design, meaning that you cannot be sure that the difference in the outcome is caused by the intervention or treatment, and not by other factors to address these limitations, you may want to consider some strategies, such as controlling for some confounding variables by matching or adjusting them across the subcontractors or using statistical methods to account for both contractor and subcontractors when being analysis.

h. Using a pretest - post test design, where the contractor measure the outcome before and after the intervention or treatment for both groups, and compare the changes over time.

i. I Using a regression discontinuity design, where you assign the groups based on a cutoff score on a continuous variable that is related to the outcome, such as the contract value or duration.

FEDERAL BROKER REQUIREMENTS AND RECORDS TO BE KEPT

FMCSA: 400 7TH STREET, S.W., WASHINGTON, DC 20590

FMCSA – Broker of Property (except household goods)

Law§371.2 Definitions:

- (a) *Broker* means a person who, for compensation, arranges or offers to arrange the transportation of property by an authorized motor carrier. A motor carrier, or person who is an employee or bona fide agent of a carrier, is not a broker within the meaning of this section when it arranges or offers to arrange the transportation of shipments which it is authorized to transport and which it has accepted and legally bound itself to transport.
- (b) *Bona Fide agents* are persons who are part of the normal organization of a motor carrier and perform duties under the carrier's directions pursuant to a preexisting agreement which provides for a continuing relationship, precluding the exercise of discretion on the part of the agent in allocating traffic between the carrier and others.
- (c) *Brokerage or brokerage service* is the arranging of transportation or the physical movement of a motor vehicle or of property. It can be performed on behalf of a motor carrier, consignor, or consignee.
- (d) *Non-brokerage service* is all other service performed by a broker on behalf of a motor carrier, consignor, or consignee.

§371.3 Records to be kept by brokers:

- (a) A broker shall keep a record of each transaction. For purposes of this section, broker may keep master lists of consignors and the address and registration number of the carrier, rather than repeating this information for each transaction. The shall show:
 - (1) The name and address of the consignor;
 - (2) The name, address, and registration number of the originating motor carrier;
 - (3) The bill of lading or freight bill number;
 - (4) The amount of compensation received by the broker for the brokerage service performed and the name of the payer;
 - (5) A description of any non-brokerage service performed in connection with each shipment or other activity, the amount of compensation received for the service, and the name of the payer; and
 - (6) The amount of any freight charges collected by the broker and the date of the payment to the carrier.
- (b) Brokers shall keep the records required by this section for a period of three (3) years.
- (c) Each party to a brokered transaction has the right to review the record of the transaction required to be kept by these rules.

[45 FR 68942, Oct 17, 1980. Redesignated at 61 FR 54707, Oct. 21, 1996, as amended at 62 FR 15421, Apr. 1, 1997]

§371.7 Misrepresentation:

- (a) A broker shall not perform or offer to perform any brokerage service (including advertising), in any name other than that in which its registration is issued.
- (b) A broker shall not, directly or indirectly, represent its operation to be that of a carrier. **Any advertising shall show the broker status of the operation.**

[45 FR 58942, Oct 17, 1980, Redesignated at 61 FR 54707, Oct. 21, 1996, as amended at 62 FR 15421, Apr. 1, 1997.]

§371.9 Rebating and Compensation:

- (a) A broker shall not charge or receive compensation from a motor carrier for brokerage service where:
 - (1) The broker owns or has a material beneficial interest in the shipment, or
 - (2) The broker is able to exercise control over the shipment because the broker owns the shipper, the shipper owns the broker, or there is common ownership of the two.
- (b) A broker shall not give or offer to give anything of value to any shipper, consignor or consignee, their officers or employees, except inexpensive advertising items given for promotional purposes.

§371.10 Duties and obligations of brokers:

- (a) Where the broker acts on behalf of a person bound by law of the FMCSA regulation as to the transmittal of bills or payments, the broker must also abide by the law or regulations which apply to that person.

[45 FR 68942, Oct 17, 1980, as amended at 62 FR 15421, Apr. 1, 1997, 66 FR 49871, Oct. 1, 2001.]

§371.13 Accounting:

Each broker who engages in any other business shall maintain accounts so that the **revenues and expenses relating to the brokerage portion of its business are segregated from its other activities.** Expenses that are common shall be allocated on an equitable basis; however, the broker must be prepared to explain the basis for the allocation.

**STANDARD MANDATORY NOTICE AND CONSENT PROVISION
FOR ALL DOD INFORMATION SYSTEM USER AGREEMENTS
(STANDARD AGREEMENT TRAINING)**

By signing this document, you acknowledge and consent that when you access Department of Defense (DoD) information systems:

- You are accessing a U.S. Government (USG) information system (IS) (which includes any device attached to this information system) that is provided for U.S. Government-authorized use only.
- You consent to the following conditions:
 - The U.S. Government routinely intercepts and monitors communications on this information system for purposes including, but not limited to, penetration testing, communications security (COMSEC) monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counter-intelligence (CI) investigations.
 - At any time, the U.S. Government may inspect and seize data stored on this information system.
 - Communications using, or data stored on, this information system are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any U.S. Government-authorized purpose.
 - This information system includes security measures (e.g., authentication and access controls) to protect U.S. Government interests--not for your personal benefit or privacy.
 - Notwithstanding the above, using an information system does not constitute consent to personnel misconduct, law enforcement or counterintelligence investigative searching or monitoring of the content of privileged communications or data (including work product) that are related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Under these circumstances, such communications and work product are private and confidential as further explained below:
 - Nothing in the User Agreement shall be interpreted to limit the user's consent to, or in any other way restrict or affect, any U. S. Government actions for purposes of network administration, operation, protection, or defense, or for communications security. This includes all communications and data on an information system, regardless of any applicable privilege or confidentiality.
 - The user consents to interception/capture and seizure of ALL communications and data for any authorized purpose (including personnel misconduct, law enforcement, or counterintelligence investigation). However, consent to interception/capture or seizure of communications and data is not consent to the use of privileged communications or data for personnel misconduct, law enforcement, or counterintelligence investigation against any party and does not negate any applicable privilege or confidentiality that otherwise applies.

- Whether any particular communication or data qualifies for the protection of a privilege, or is covered by a duty of confidentiality, is determined in accordance with established legal standards and DoD policy. Users are strongly encouraged to seek personal legal counsel on such matters prior to using an information system if the user intends to rely on the protections of a privilege or confidentiality.
 - Users should take reasonable steps to identify such communications or data that the user asserts are protected by any such privilege or confidentiality. However, the user's identification or assertion of a privilege or confidentiality is not sufficient to create such protection where none exists under established legal standards and DoD policy.
 - A user's failure to take reasonable steps to identify such communications or data as privileged or confidential does not waive the privilege or confidentiality if such protections otherwise exist under established legal standards and DoD policy. However, in such cases the U.S. Government is authorized to take reasonable actions to identify such communication or data as being subject to a privilege or confidentiality, and such actions do not negate any applicable privilege or confidentiality.
 - These conditions preserve the confidentiality of the communication or data, and the legal protections regarding the use and disclosure of privileged information, and thus such communications and data are private and confidential. Further, the U.S. Government shall take all reasonable measures to protect the content of captured/seized privileged communications and data to ensure they are appropriately protected.
- o In cases when the user has consented to content searching or monitoring of communications or data for personnel misconduct, law enforcement, or counterintelligence investigative searching, (i.e., for all communications and data other than privileged communications or data that are related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants), the U.S. Government may, solely at its discretion and in accordance with DoD policy, elect to apply a privilege or other restriction on the U.S. Government's otherwise-authorized use or disclosure of such information.
 - o All of the above conditions apply regardless of whether the access or use of an information system includes the display of a Notice and Consent Banner ("banner"). When a banner is used, the banner functions to remind the user of the conditions that are set forth in this User Agreement, regardless of whether the banner describes these conditions in full detail or provides a summary of such conditions, and regardless of whether the banner expressly references this User Agreement.

System Security Rules of Behavior (ROB)/Acceptable Use Policy (AUP) Training

All Users shall:

- Hold US Government security clearances and have completed background checks commensurate with the level of information to which they are being granted access.
- Access only that data, control information, software, hardware, and firmware for which they are authorized access and have a need-to-know, and assume only those roles and privileges for which they are authorized.
- Protect information and system resources against occurrences of sabotage, tampering, denial of service, espionage, fraud, misappropriation, misuse or release to unauthorized persons. Immediately report all such occurrences described above to their Information Assurance Manager (IAM).
- Follow current DoD password (PW) configuration rules mandated by Joint Task Force - Global Network Operations (JTF-GNO), when a User ID and PW are required to access a system.
- Protect their password(s) and/or Common Access Card (CAC) personal identification number (PIN). Promptly change their password/PIN when possibly compromised, forgotten or when it appears in an audit document. Immediately notify their Terminal Area Security Officer (TASO) or their IAM if they believe their password/PIN has been compromised and promptly change their password/PIN. (Your TASO or IAM will verify that your password changed and/or PIN has been reset.)
- Ensure that system media and output are properly marked, controlled, stored, transported, and destroyed based on classification or sensitivity and need-to-know.
- Ensure all documents, equipment, and machine-readable media containing sensitive data are cleared, properly marked, and sanitized before being released outside of the Department of Defense. Contractors shall ensure documents, equipment, and machine-readable media containing sensitive data are cleared, properly marked, and sanitized before these items are used to support another contract. (See DoD 5200.1-R, Information Security Program for releasing documents outside of DoD.)
- Protect terminals or workstations from unauthorized access. Remove their CAC from the reader when leaving their workstation. If the workstation has not been CAC-enabled, lock it before leaving. Also, activate the desktop screen saver and set the idle time out period to 15 minutes. Contact the Service Desk for assistance in locking the workstation and activating the screen saver.
- Ensure that devices that display or output sensitive information in human-readable form are positioned to deter unauthorized individuals from reading the information and/or obtain a Privacy screen filter for your monitor.
- Inform the supervisor when access to a particular DoD information system or enclave is no longer required (e.g., completion of project, transfer, retirement, and resignation).
- Observe rules and regulations governing the secure operation and authorized use of a DoD information system or enclave; Use the DoD information system or enclave only for authorized purposes; Not introduce malicious code into any DoD information system or enclave or physically damage the system or enclave.

- Not unilaterally bypass, strain, or test IA mechanisms. If IA mechanisms must be bypassed; users shall coordinate the procedure with the IAM and receive written approval.
- Not introduce or use unauthorized software, firmware, or hardware onto the DoD information system or enclave.
- Not relocate or change DoD information system or enclave equipment or the network connectivity of equipment without proper IA authorization.
- Not use wireless enabled equipment while physically connected to the system
- Understand that system use constitutes consent to monitoring, recording and auditing.

Privacy Rules of Behavior (ROB)/Acceptable Use Policy (AUP) Training

- You may be granted access to personal information about an individual that identifies, links, relates, or is unique to, or describes him or her, e.g., social security number, age, rank/grade, marital status, race, salary, medical information or complete personal bank account number, etc. Such information is also known as personally identifiable information (PII).
- The computer screen where personally identifiable information appears must be labeled with "For Official Use Only" Privacy Act of 1974, As amended." If the system cannot be changed to have this appear on each screen, it must be on the log-in screen to the system, or a Privacy label may be placed on the computer monitor. The Privacy label shall read, "Personal Data, Privacy Act of 1974, as Amended, 5 U.S.C. 522a.
- Printed output products must be properly labeled with "For Official Use Only" "Privacy Act of 1974, As amended." The policy for labeling output products containing Privacy Act information is in DoD 5200.1-R, Appendix 3, page 141 and DoD 5400.11-R, paragraph C1.4.
- Place the standard Privacy Act warning label on the top of your computer monitor if names and social security numbers/personal bank account numbers, etc., are on your computer screen while you do your work. These labels can be generated on a plain white label that must read: "Personal Data, Privacy Act of 1974, as Amended, 5 U.S.C. 552a."
- PII in DoD systems must be protected from unauthorized access especially when the system is in use and when the information is printed. The Privacy Act of 1974, As amended, 5 U.S.C. § 552a(i) also provides for criminal penalties.
 - (1) Any officer or employee of an agency, who by virtue of his employment or official position, has possession of, or access to, agency records which contain personally identifiable information the disclosure of which is prohibited by this section or by rules or regulations established there under, and who knowing that disclosure of the specific material is so prohibited, willfully discloses the material in any manner to any person or agency not entitled to receive it, may be found guilty in a court of law of a misdemeanor and fined not more than \$5,000.
 - (2) Any officer or employee of any agency who willfully maintains a system of records without meeting the notice requirements of subsection (e) (4) of this section shall be guilty of a misdemeanor and fined not more than \$5,000.
- (3) Any person who knowingly and willfully requests or obtains any record concerning an individual from an agency under false pretenses may be found guilty in a court of law of a misdemeanor and fined not more than \$5,000.
- If you have any questions or comments about the information presented here, please contact the Service Desk.

User's Acknowledgement of Standard Agreement, Security and Privacy Training

By acknowledging this document, you acknowledge and consent that when you access Department of Defense (DoD) information systems:

I have read and consent to the terms in the Standard Mandatory Notice & Consent Provision For All DoD Information System User Agreements (Standard Agreement Training).

I have read and consent to the terms in the System Security Rules of Behavior (ROB)/Acceptable Use Policy (AUP) Training.

I have read and consent to the terms in the Privacy Rules of Behavior (ROB)/Acceptable Use Policy (AUP) Training.

I also agree to follow the standard agreement and these rules as a condition of being granted system access.

Acknowledge

White Lotus Freight Bonded
Broker and Dispatch LLC.

Tiawana P. White
7645 Crossgate Boulevard
North Charleston, SC 29420

EPA MECHANISM

White Lotus Freight Bonded Broker and Dispatch, LLC align their logistics consultant services to EPA mechanism, The firm needed to know and understand what Scope 3 emissions are and how they relate to our business activities. Scope 3 emissions are the result of activities from assets not owned or controlled by the reporting organization, but that the organization indirectly affects in its value in the supply-chain industry. Scope 3 emissions include all sources not within an organization's scope 1 and 2 boundary. The scope 3 emissions for one organization are the scope 1 and 2 emissions of another organization.

Scope 3 emissions often represent the majority of an organization's total greenhouse gas (GHG) emissions. The GHG Protocol defines 15 categories of scope 3 emissions, though not every category will be relevant to all organizations. Some examples of scope 3 categories are:

- *Upstream emissions generated by suppliers and business partners that source, produce and transport the materials your company uses to produce products and services*
- *Downstream emissions from the logistics, use and disposal of your products*
- *Investments and leased assets*
- *Business travel and employee commuting*

For our firm measure and manage our scope 3 emissions, you need to follow these steps:

- *Determine which scope 3 categories are relevant to your organization based on size, influence, risk, stakeholders, outsourcing sector guidance and other criteria*
- *Estimate the GHG emissions from each relevant category using a methodology that is consistent with the GHG Protocol standards*

- *Report the GHG emissions from each relevant category using a format that is approved by the GHG Protocol or another recognized standard*
- *Identify opportunities for reducing or avoiding scope 3 emissions by collaborating with your suppliers, business partners, customers and other stakeholders*

By aligning your logistics consultant services to EPA mechanism, you can demonstrate your commitment to environmental sustainability and reduce your carbon footprint. You can also benefit from improved customer satisfaction, cost savings, brand reputation and competitive advantage.

There are several ways to estimate your scope 3 emissions, depending on the level of detail and accuracy you need. One option is to use a web-based tool that can help you calculate your scope 3 emissions based on your supply chain spending or facility-level energy use data. For example, you can try the following tools:

- *Scope 3 Evaluator: This is a free tool from Greenhouse Gas Protocol and Quantis that allows you to estimate emissions for all 15 scope 3 categories defined in the GHG Protocol Corporate Value Supply Chain Industry (Scope 3) Standard. You can use this tool to get a rough approximation of your full scope 3 footprint and identify opportunities for reduction.*
- *GZA Scope 3 Calculator: This is a paid tool from GZA that enables you to evaluate and assess the greenhouse gas emissions from your supply chain, also known as upstream scope 3 emissions. You can use this tool to enter your organization's supply chain spend and assign an industry or commodity to each entry. The tool will automatically assign the related emissions factor and adjust it for inflation and electric grid decarbonization.*
- *Facility Greenhouse Gas Emissions Calculator: This is a turnkey solution from SupplyShift that collects and calculates your scope 3 emissions data based on facility-level energy-use*

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data. You can use this tool to ask your suppliers to input their energy consumption and emissions data and automatically convert it into greenhouse gas emissions intensities.

These tools can help you measure and report your scope 3 emissions, but they may not capture all the nuances and complexities of your value chain. For a more accurate and comprehensive assessment, you may need to conduct a detailed inventory following the GHG Protocol Corporate Value Chain (Scope 3) Standard or another recognized standard. You may also need to collaborate with your suppliers, business partners, customers and other stakeholders to collect and verify the data and identify reduction opportunities.

FY 2022-2026 EPA STRATEGIC PLAN

OVERVIEW

What is EPA's Strategic Plan?

- Communicates EPA's vision, priorities, and strategies to accomplish the agency's mission over the next four years.
- Serves as the framework for annual planning and budgeting and development of grant work plans.
- Provides the basis for monitoring progress and adjusting strategies.
- Meets government-wide requirements ([Government Performance Results Act \(GPRA\) Modernization Act](#) amended by [Evidence Act](#)).



EPA Planning and Performance Framework

What are the Key Takeaways in EPA's Strategic Plan?

- The *Plan* renews commitment to EPA's three principles— follow the science, follow the law, and be transparent, while adding a fourth foundational principle: advance justice and equity.
- For the first time, EPA's *Plan* includes a strategic goal focused exclusively on addressing climate change and an unprecedented strategic goal to advance environmental justice and civil rights. These priorities are integrated throughout the *Plan*'s programmatic goals and cross-agency strategies.
- EPA's four cross-agency strategies articulate essential ways of working to accomplish mission outcomes, including collaborating with traditional and new partners – Tribal nations, state and local governments, and communities.
- Three Agency Priority Goals will jump start action on climate change, environmental justice, and civil rights.

FY 2022-2026 EPA Strategic Plan Framework

Mission: To Protect Human Health and the Environment

Principles: Follow the Science, Follow the Law, Be Transparent, Advance Justice and Equity



Strategy 1:

Ensure Scientific Integrity and Science-Based Decision Making



Strategy 2:

Consider the Health of Children at All Life Stages and Other Vulnerable Populations



Strategy 3:

Advance EPA's Organizational Excellence and Workforce Equity



Strategy 4:

Strengthen Tribal, State, and Local Partnerships and Enhance Engagement



Goal 1:

Tackle the Climate Crisis



Goal 2:

Take Decisive Action to Advance Environmental Justice and Civil Rights



Goal 3:

Enforce Environmental Laws and Ensure Compliance



Goal 4:

Ensure Clean and Healthy Air for All Communities



Goal 5:

Ensure Clean and Safe Water for All Communities



Goal 6:

Safeguard and Revitalize Communities



Goal 7:

Ensure Safety of Chemicals for People and the Environment

- **Obj 1.1:** Reduce Emissions that Cause Climate Change
- **Obj 1.2:** Accelerate Resilience and Adaptation to Climate Change Impacts
- **Obj 1.3:** Advance International and Subnational Climate Efforts

- **Obj 2.1:** Promote Environmental Justice and Civil Rights at the Federal, Tribal, State, and Local Levels
- **Obj 2.2:** Embed Environmental Justice and Civil Rights into EPA's Programs, Policies, and Activities
- **Obj 2.3:** Strengthen Civil Rights Enforcement in Communities with Environmental Justice Concerns

- **Obj 3.1:** Hold Environmental Violators and Responsible Parties Accountable
- **Obj 3.2:** Detect Violations and Promote Compliance

- **Obj 4.1:** Improve Air Quality and Reduce Localized Pollution and Health Impacts
- **Obj 4.2:** Reduce Exposure to Radiation and Improve Indoor Air

- **Obj 5.1:** Ensure Safe Drinking Water and Reliable Water Infrastructure
- **Obj 5.2:** Protect and Restore Waterbodies and Watersheds

- **Obj 6.1:** Clean Up and Restore Land for Productive Uses and Healthy Communities
- **Obj 6.2:** Reduce Waste and Prevent Environmental Contamination
- **Obj 6.3:** Prepare for and Respond to Environmental Emergencies

- **Obj 7.1:** Ensure Chemical and Pesticide Safety
- **Obj 7.2:** Promote Pollution Prevention

FY 2022-2026 Long-Term Performance Goals – Strategic Goals 1-3

Goal 1: Climate	Obj 1.1	Promulgate final rules to reduce greenhouse gas emissions from light duty, medium-duty, and heavy-duty vehicles; electric utility generating units; and the oil and gas industry. EPA's climate partnership programs will reduce expected annual GHG emissions by 545 million metric tons of carbon dioxide equivalent.
		Implement all priority actions in EPA's Climate Adaptation Action Plan and the 20 National Program and Regional Climate Adaptation Implementation Plans to account for the impacts of the changing climate on human health and the environment.
	Obj 1.2	Assist at least 400 federally recognized Tribes to take action to anticipate, prepare for, adapt to, or recover from the impacts of climate change.
	Obj 1.3	Assist at least 450 states, territories, local governments, and communities, especially communities that are underserved and disproportionately at risk from climate change, to take action to anticipate, prepare for, adapt to, or recover from the impacts of climate change.
	Obj 1.3	Implement at least 40 international climate engagements that result in an individual partner commitment or action to reduce greenhouse gas emissions, adapt to climate change, or improve resilience in a manner that promotes equity.
Goal 2: Environmental Justice	Obj 2.1	All EPA programs that seek feedback and comment from the public will provide capacity-building resources to communities with environmental justice concerns to support their ability to meaningfully engage and provide useful feedback to those programs.
		Include commitments to address disproportionate impacts in all written agreements between EPA and Tribes and states (e.g., grant work plans) implementing delegated authorities.
		EPA programs with direct implementation authority will take at least 100 significant actions that will result in measurable improvements in Indian country.
		All state recipients of EPA financial assistance will have foundational civil rights programs in place.
		Increase by 40% the number of Office of Research and Development activities related to environmental justice that involve or are applicable to Tribes, states, territories, local governments, and communities.
	Obj 2.2	Reduce disparities in environmental and public health conditions represented by the indicators identified through the FY 2022-2023 Agency Priority Goal.
		80% of significant EPA actions with environmental justice implications will clearly demonstrate how the action is responsive to environmental justice concerns and reduces or otherwise addresses disproportionate impacts.
		All EPA programs that work in and with communities will do so in ways that are community-driven, coordinated and collaborative, support equitable and resilient community development, and provide for meaningful involvement and fair treatment of communities with environmental justice concerns.
		All EPA programs and regions will identify and implement areas and opportunities to integrate environmental justice considerations and achieve civil rights compliance in their planning, guidance, policy directives, monitoring, and review activities.
		All EPA programs and regions will implement program and region-specific language assistance plans.
	Obj 2.3	All EPA programs and regions will implement program and region-specific disability access plans.
		Initiate 45 proactive post-award civil rights compliance reviews to address discrimination issues in environmentally overburdened and underserved communities.
		Complete 305 audits to ensure EPA financial assistance recipients are complying with nondiscrimination program procedural requirements.
Goal 3: Enforcement/ Compliance	Obj 3.1	Complete 84 information sharing sessions and outreach and technical assistance events with overburdened and underserved communities and environmental justice advocacy groups on civil rights and environmental justice issues.
	Obj 3.2	Reduce to not more than 93 the number of open civil judicial cases more than 2.5 years old without a complaint filed.
	Obj 3.2	Send 75% of EPA inspection reports to facilities within 70 days of inspection.
	Obj 3.2	Conduct 55% of annual EPA inspections at facilities that affect communities with potential environmental justice concerns.

FY 2022-2026 Long-Term Performance Goals – Strategic Goals 4-7

Goal 4: Air	Obj 4.1	Reduce ozone season emissions of nitrogen oxides from electric power generation sources by 21% from the 2019 baseline of 390,354 tons.
		Improve measured air quality in counties not meeting the current National Ambient Air Quality Standards from the 2016 baseline by 10%.
		Strive to ensure all people with low socio-economic status live in areas where the air quality meets the current fine particle pollution National Ambient Air Quality Standards.
		Ensure U.S. consumption of hydrochlorofluorocarbons is less than 76.2 tons per year of ozone depletion potential.
Goal 5: Water	Obj 4.2	Prevent 2,250 lung cancer deaths annually through lower radon exposure as compared to the FY 2020 baseline of 1,684 prevented lung cancer deaths.
		Reduce the number of community water systems still in noncompliance with health-based standards since March 31, 2021 from 752 to 500.
	Obj 5.1	Reduce the number of community water systems in Indian country still in noncompliance with health-based standards since March 31, 2021 from 110 to 70.
		Leverage an additional \$45 billion in non-federal dollars through EPA's water infrastructure finance programs (CWSRF, DWSRF and WIFIA).
		In coordination with other federal agencies, provide access to basic sanitation for an additional 36,500 American Indian and Alaska Native homes.
	Obj 5.2	Provide 2,203 Tribal, small, rural, or underserved communities with technical, managerial, or financial assistance to improve operations of their drinking water or wastewater systems.
		Increase by 41,000 square miles the area of watersheds with surface water meeting standards that previously did not meet standards.
Goal 6: Land	Obj 6.1	Bring human exposures under control at an additional 60 Superfund sites.
		Complete 225 Superfund cleanup projects that address lead as a contaminant.
		Clean up an additional 650 brownfields properties.
		Make an additional 425 RCRA corrective action cleanups Ready for Anticipated Use.
		Conduct an additional 35,000 cleanups at Leaking Underground Storage Tank facilities.
	Obj 6.2	Increase the percentage of updated permits at RCRA facilities to 80% from the FY 2021 baseline of 72.7%.
		Ensure that 40% of annual emergency response and removal exercises that EPA conducts or participates in incorporate environmental justice.
Goal 7: Chemicals	Obj 7.1	Complete at least eight High Priority Substance TSCA risk evaluations annually within statutory timelines compared to the FY 2020 baseline of one.
		Initiate all TSCA risk management actions within 45 days of the completion of a final existing chemical risk evaluation.
		Review 90% of past risk mitigation requirements for TSCA new chemical substances decisions compared to the FY 2021 baseline of none.
		Recertify before the expiration date 36% of lead-based paint Renovation, Repair, and Painting firms whose certifications are scheduled to expire compared to the FY 2021 baseline of 32%.
		Complete 78 pesticide registration review cases with statutory due dates that fall after October 1, 2022.
		Consider the effects determinations or protections of federally threatened and endangered species for new active ingredients in 90% of the risk assessments supporting pesticide registration decisions for new active ingredients compared to the FY 2020 baseline of 50%.
		Consider the effects determinations or protections of federally threatened and endangered species in 50% of the risk assessments supporting pesticide registration review decisions compared to the FY 2020 baseline of 27%.
		Support Agricultural Worker Protection Standard pesticide safety training for 20,000 farmworkers annually compared to the FY 2018-2020 annual average baseline of 11,000.
	Obj 7.2	Reduce a total of 6 million metric tons of carbon dioxide equivalent released attributed to EPA pollution prevention grants.
		EPA's Safer Choice program will certify a total of 2,300 products compared to the FY 2021 baseline of 1,950 total certified products.

FY 2022-2026 Long-Term Performance Goals – Cross-Agency Strategies

Strategy 1: Science	<p>Increase the annual percentage of Office of Research and Development research products meeting partner needs to 95% from a baseline of 93% in FY 2021.</p> <p>Implement 126 actions for scientific integrity objectives that are certified by Deputy Scientific Integrity Officials in each EPA program and region.</p>
Strategy 2: Children's Health	<p>Assess and consider environmental health information and data for children at all life stages for all completed EPA actions that concern human health.</p>
Strategy 3: Workforce	<p>EPA will be in full compliance with the five high-priority directives in Executive Order 14028: <i>Improving the Nation's Cybersecurity</i>.</p> <p>Award 4% of EPA contract spending to small businesses located in Historically Underutilized Business Zones compared to the FY 2018-2020 average annual baseline of 2.2%.</p> <p>Initiate all priority climate resiliency projects for EPA-owned facilities within 24 months of a completed facility climate assessment and project prioritization.</p> <p>EPA will achieve the highest Diversity, Equity, Inclusion and Accessibility Maturity Level of “Leading and Sustaining” as defined by the November 2021 <i>Government-wide Strategic Plan to Advance DEIA in the Federal Workforce</i> and achieve all EPA goals identified in the Agency’s Gender Equity and Equality Action Plan.</p> <p>Automate all priority internal administrative processes.</p> <p>Automate the major EPA permitting programs.</p> <p>Improve 1,000 operational processes.</p>
	Consider Tribal treaty rights as part of all EPA Tribal consultations that may affect Tribal treaty rights.
	Eliminate the backlog of overdue Freedom of Information Act responses, compared to the FY 2021 baseline of 1,056.
Strategy 4: Partnerships	

FY 2022-2023 Agency Priority Goals

Phase down the production and consumption of hydrofluorocarbons (HFCs). By September 30, 2023, annual U.S. consumption of HFCs will be 10% below the baseline of 303.9 million metric tons of carbon dioxide equivalent (MMTCO₂e) consistent with the HFC phasedown schedule in the American Innovation and Manufacturing Act and codified in the implementing regulations. A 10% reduction would decrease the U.S. consumption limit to less than 273.5 MMTCO₂e in 2023.

Deliver tools and metrics for EPA and its Tribal, state, local, and community partners to advance environmental justice and external civil rights compliance. By September 30, 2023, EPA will develop and implement a cumulative impacts framework, issue guidance on external civil rights compliance, establish at least 10 indicators to assess EPA’s performance in reducing disparities in environmental and public health conditions, and train staff and partners on how to use these resources.

Clean up contaminated sites and invest in water infrastructure to enhance the livability and economic vitality of overburdened and underserved communities. By September 30, 2023, EPA will provide technical assistance to at least 10 communities to help achieve clean and safe water and reduced exposures to hazardous substances.

Vendor Certification for Electronic Records Management Solutions

For the purposes of the MAS Solicitation, eleven (11) specific elements of Electronic Records Management (ERM) Services have been identified. These 11 elements are fully defined and the corresponding requirements are identified in the Universal Electronic Records Management Requirements attachment to the Solicitation. These requirements have been established and are administered by the National Archives & Records Administration (NARA).

*Vendors may provide any combination of the 11 elements of ERM Services; however, vendors must certify that they are capable of meeting all standards associated with the elements they propose by completing this certification. **Vendors must include a completed copy of this certification in their published GSA catalog to illustrate their ERM capabilities.***

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7645 Crossgate Boulevard North Charleston, SC 29420*

Proposed Elements of Electronic Records Management Services:

[Select all that apply]

- Element 1 - Office Management Applications (formerly “Desktop Applications”)
- Element 2 - Electronic Messages
- Element 3 - Social Media
- Element 4 - Cloud Services
- Element 5 - Websites
- Element 6 - Digital Media (Photo)
- Element 7 - Digital Media (Audio)
- Element 8 - Digital Media (Video)
- Element 9 - Structured Data (formerly “Databases”)
- Element 10 - Shared Drives
- Element 11 - Engineering Drawings

White Lotus Freight Bonded Broker And Dispatch, LLC hereby certifies that we are capable of meeting all standards described in the solicitation and the Universal Electronic Records Management Requirements attachment for each of the sections of ERM Services we have proposed, as indicated above. Tiawana White

Offeror (*To be signed only by authorized principal, with authority to bind the undersigned contractor*)

Tiawana White

Chief Executive Officer

11/09/2023

Name (Printed)

Title

Date

White Lotus Freight Bonded
Broker and Dispatch LLC.

Tiawana P. White
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References

<https://www.epa.gov/climateleadership/scope-3-inventory-guidance>

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