

Office of Human Resources (OHR) DATA BOOTCAMP

PROCUREMENT OBJECTIVE

The purpose of this Task Order is to acquire a high-quality data bootcamp program for the NIH Office of Human Resources (OHR).

TASK ORDER TYPE

- A. NIH anticipates one award will be made from this solicitation.
- B. It is anticipated that the award from this solicitation will be a firm fixed priced task order.
- C. The period of performance shall be (1) one base period of 1 year with four one-year option periods.
- D. This requirement is set aside for small business. All quoters must be a small business under its GSA Federal Supply Schedule.

PRICING SCHEDULE

The Government intends to award firm fixed price (FFP) task order as a result of this Request for Quote (RFQ) that will include the terms and conditions set forth herein.

SECTION I---THE SCHEDULE

Vendor shall respond to this RFQ using the below table. Please complete the pricing for the Base + Option Periods and refer to the Statement of Work (SOW) as needed. The NIH requests discounted pricing against the vendor's GSA Federal Supply Schedule.

Performance Period (base + option periods):

Base Year September 2021 (day TBD) through September 2026 (day TBD)

Task Order Line Items

The vendor shall respond to this RFQ using the table provided below. In addition, the National Institutes of Health is requesting a discount against the vendor's GSA Federal Supply Schedule.

Line Item	Description	Period of Performance	Rate per Month	Number of Months	Total
1	Data Bootcamp	9/21-9/22 (Base)	TBD*	12	TBD*
2	Data Bootcamp	9/22-9/23 (Opt 1)	TBD*	12	TBD*
3	Data Bootcamp	9/23-9/24 (Opt 2)	TBD*	12	TBD*
4	Data Bootcamp	9/24-9/25 (Opt 3)	TBD*	12	TBD*
5	Data Bootcamp	9/25-9/26 (Opt 4)	TBD*	12	TBD*

***PRICING TO BE PROVIDED BY QUOTER**

NIH/OD/OM/OHR

Statement of Work (SOW) OHR Data Bootcamp

Office of Human Resources

1. INTRODUCTION/OVERVIEW

1.1 BACKGROUND

The purpose of this Statement of Work (SOW) is to obtain a vendor to deliver a high-quality data bootcamp program for employees in the Office of Human Resources (OHR) within the National Institutes of Health (NIH).

The NIH is a part of the U.S. Department of Health and Human Services and is the largest biomedical research agency in the world. The OHR is a unit within the NIH Office of the Director, Office of Management. The OHR mission is to recruit and retain a highly skilled and diverse workforce for the NIH. The OHR vision is to be a catalyst for a thriving workforce that best meets the ever-changing needs of biomedical research.

The OHR has identified data management and analysis as a core organizational competency for employees. Therefore, the OHR is seeking a practical learning program with the objective to understand data concepts, data usage within the organization, and techniques for collecting, analyzing, and communicating data. This learning program is called the “OHR Data Bootcamp.”

The Engagement and Development Branch (EDB) is a unit within the OHR that manages centrally coordinated employee development and engagement services and resources, specifically for internal OHR employees, supervisors, and leaders. For the OHR Data Bootcamp, EDB is the client providing programmatic oversight and coordination.

1.2 SCOPE

Program Format

The program year will consist of two cohorts per year with up to 16 participants in each cohort. In a facilitated serial-based curriculum, participants will be introduced to data science, learn how data is used within NIH/OHR, develop skills in data management (collection and analytics), and learn how to communicate data through visualization and storytelling.

The OHR Data Bootcamp is comprised of instructor-led training courses and supplemental Learning Labs that are facilitated by OHR Data Mentors. Throughout the program, participants will work on Data Capstone Projects using learned concepts and skills and share their project results during an OHR Data Café (coordinated and facilitated by the client).

Each instructor-led training course (delivered by contractor) will be followed by a learning lab (delivered by internal client); outlined as follows:

1. Introduction to Data Analytics

- ❑ Learning Lab: Introduction to Data Science + Introduction to how OHR uses data across its divisions

2. Data Collection

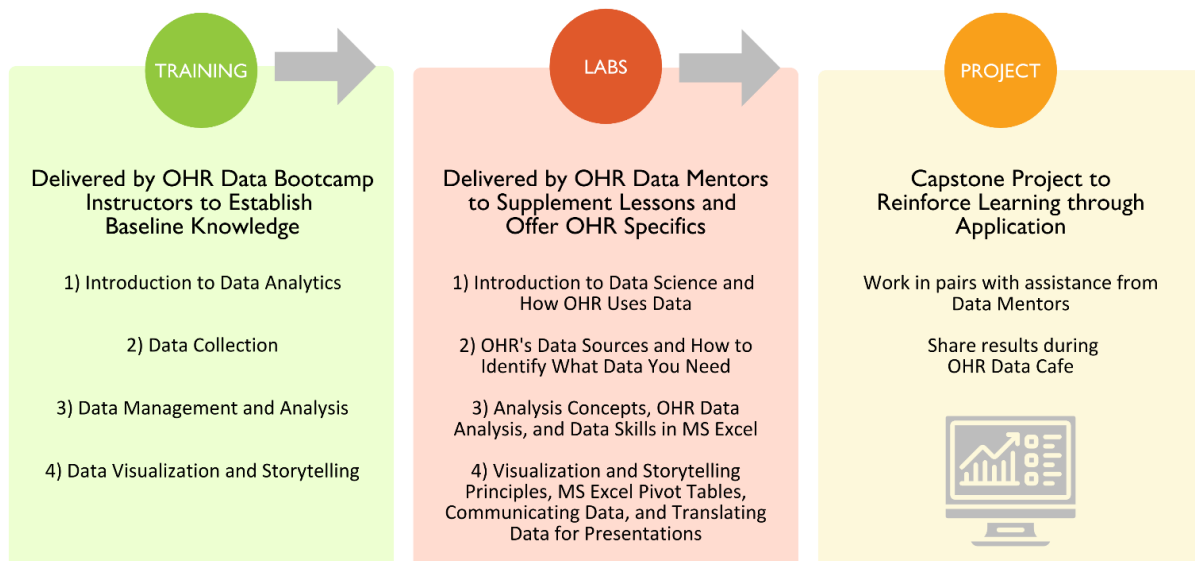
- ❑ Learning Lab: Identifying typical data sources used across OHR + Identifying necessary data (working with customers, understanding the question being asked, etc.)

3. Data Management and Analysis (including reference to PowerBI and Qlik)

- ❑ Learning Lab: Analysis Concepts + OHR Data Analytics + Excel data skills (Data Analysis, Pivot Tables, Formulas and other functions)

4. Visualization and Storytelling

- ❑ Learning Lab: Visualization and Storytelling Principles + Communicating Data



Training Courses

The contractor shall deliver trainings through a customized solution, off-the-shelf products, or a combination of both. Training courses may range from half-day to multi-day trainings. Full and multi-day training may be divided across multiple days

Learning Labs

The contractor shall support Learning Labs designed for practical skill development. Learning Labs may be scheduled on the same or different day from their respective formal learning sessions. So that the content is specific to the OHR, the labs will be designed, developed, and facilitated by both internal OHR SMEs with support from the contractor. At minimum, the contractor shall observe and provide feedback to the OHR SMEs to ensure sound design and content. Each Learning Lab is 3 hours in duration.

Capstone Data Projects

Participants will work in pairs on a data project throughout the course of the program, with guidance from their data mentor (internal OHR staff) and will be assigned by OHR). These projects will serve as a practicum and include all the elements of data collection, analysis, and visualization techniques. Projects are to be simple but challenging – requiring data analysis skills at levels no higher than that of existing analysts. There are no contractor deliverables related to the capstone data projects.

1.3 OBJECTIVES

- To design assessments to gather data to understand the level of learner knowledge before and after participating in the program.
- To deliver the instructor-led training for the OHR Data Bootcamp as indicated in the SOW.
- To collaborate with the client and stakeholders to ensure the program components have sound content and instructional design and support a positive learning experience.

2.0 REQUIREMENTS

2.1 TASKS

The Contractor shall furnish all materials necessary for the program.

1. Develop a program that includes the content, topics, and format listed in this SOW.
2. Work closely with the client and other parties as identified during program development phase to ensure content meets developmental needs and expectations. This includes emails, phone calls and occasional in-person and virtual meetings as required.
3. Pursuant to Section 508 of the Rehabilitation Act of 1973 (29 U.S.C. 794d), as amended by the Workforce Investment Act of 1998, the contractor will make sure all materials are 508 compliant.
4. During the program, the contractor shall maintain a shared electronic library of all training materials. All training materials will be accessible electronically to participants and NIH/OHR staff except when proprietary or copyright restrictions make doing so prohibitive.
5. Except if proprietary or copyrighted, all developed materials will be the final property of the NIH.
6. The contractor's staff and all products and activities related to the contract shall clearly identify the NIH/OHR as the sponsor of this program. In addition, whenever possible the text and other materials such as handouts, presentations, slides, and other instructional material shall also be identified by the NIH and OHR logos, banners, and program title.

7. The contractor shall ensure learners have access to all course materials and provide copies to client.
8. The contractor shall deliver all scheduled training sessions as outlined per this SOW.
9. The contractor will communicate with client via email about necessary logistical information.
10. Up to two client staff shall be permitted to observe all program sessions (typically, the EDB Program Manager and Training Coordinator).
11. All work done under this program shall be under the general guidance and technical monitoring of the COR. The COR has final approval on all plans, materials, logistical arrangements, etc. developed under the task order.
12. Payment for Emergency Closure – During an emergency closure of the government and/or the National Institutes of Health (NIH) taken for the public good, the NIH will issue either written or oral orders to stop work to the contractor. The contractor shall provide the NIH Contracting Officer and COR with verifiable documentation of expenses incurred which will be reviewed for equitable adjustment in the program delivery schedule, task order price, or both.

2.2 DELIVERABLES

Primary Location

The NIH Office of Human Resources is currently in a state of maximum telework. As such, training sessions shall be facilitated virtually.

In the event NIH/OHR returns to delivering onsite trainings in the future, onsite sessions would be delivered at an NIH location in the Bethesda/Rockville, MD area. If onsite trainings do resume in the future, the OHR will revisit the task order accordingly.

Training Courses

The contractor shall deliver materials and expertly facilitate courses covering the following topics:

1. Introduction to Data Analytics
2. Data Collection
3. Data Management and Analysis (including reference to PowerBI and Qlik)
4. Data Visualization and Storytelling

Personnel Qualifications

The contractor shall provide a faculty of qualified personnel as follows:

1. Instructors (KEY PERSONNEL) (Level of effort (1-2); Part-time resources up to 40 hours per cohort for Learning Labs and Café attendance; in addition to the training hours)
 - Instructors shall be highly knowledgeable in various facets of data management and analytics within an organizational structure like Human Resources.
 - Instructors shall have at least 5 years of experience delivering training specified in this SOW to organizations like the NIH/OHR.
 - Instructors shall also have knowledge of current federal data management issues and trends.
 - Instructors must possess knowledge of the topics listed under 1.2 Scope, including thorough understanding of systems such as Excel, PowerBi, and Qlik.
2. Program Coordinator (KEY PERSONNEL)

- The Program Coordinator shall have at least 5 years of experience managing similar programs for a federal client similar to the NIH OHR.

	Expected Timeframe*	Contractor Deliverables**	Details
C O H O R T I	Sept 2021	Participate in a kickoff meeting with client and stakeholders	To ensure clarity in roles and responsibilities, deliverables, program expectations, etc.
		Participate in meeting with client and stakeholders and develop pre-program and post-program assessments	To understand level of participants' knowledge of data principles, analysis, etc. before and after program participation
		Develop and deliver electronic (PDF) training guides and supporting materials for the training courses	To ensure participants have supporting learning tools
	Nov 2021	Attend cohort orientation (will be no more than one hour and scheduled/facilitated by client) and answer any immediate questions re: contractor-facilitated program elements	To demonstrate unified support for cohort participants and answer any immediate questions regarding program elements delivered by contractor Coordinated and facilitated by client and attended by participants and contractor
		Deliver training course: Introduction to Data Analytics	Coordinated by client, session facilitated by contractor, and attended by participants
		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	Learning Lab topics: (1) Introduction to data science (2) Introduction to how OHR uses data across the divisions Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor
		Deliver training course: Data Collection	Coordinated by client, session facilitated by contractor, and attended by participants

		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	<p>Learning Lab topics:</p> <p>(1) How to identify typical data sources used across OHR</p> <p>(2) How to identify necessary data</p> <p>Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor</p>
	Dec 2021	Deliver training course: Data Management & Analysis	Coordinated by client, session facilitated by contractor, and attended by participants
		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	<p>Learning Lab topics:</p> <p>(1) Analysis concepts</p> <p>(2) OHR data analytics</p> <p>(3) MS Excel data skills</p> <p>Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor</p>
		Deliver training course: Data Visualization and Storytelling	Coordinated by client, session facilitated by contractor, and attended by participants
		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	<p>Learning Lab topics:</p> <p>(1) Visualization and storytelling principles</p> <p>(2) Communicating data</p> <p>(3) Translating data into PowerPoint/ other presentation software</p> <p>Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor</p>
	Jan 2021	Attend OHR Café: Data Capstone Project Presentation	Coordinated and facilitated by client and attended by participants, data mentors, and other OHR staff
		Participate in a debrief meeting with client and data mentors	<p>To develop an after-action summary, determine next steps for any modifications, etc.</p> <p>Coordinated by client and attended by client, contractor, and data</p>
	Feb 2021	Implement approved changes and submit revised materials for next cohort at least two weeks prior to next cohort orientation	To ensure ongoing effectiveness of program content and design

C O H O R T 2	Mar 2022	Participate in a kickoff meeting with client and stakeholders	
		Provide electronic (PDF) training guides and supporting materials for the training courses	
	May 2022	Attend cohort orientation and answer any immediate questions re: contractor-facilitated program elements	To demonstrate unified support for cohort participants and answer any immediate questions regarding program elements delivered by contractor Coordinated and facilitated by client and attended by participants and contractor
		Deliver training course: Introduction to Data Analytics	Coordinated by client, session facilitated by contractor, and attended by participants
		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	Learning Lab topics: (1) Introduction to data science (2) Introduction to how OHR uses data across the divisions Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor
		Deliver training course: Data Collection	Coordinated by client, session facilitated by contractor, and attended by participants
		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	Learning Lab topics: (1) How to identify typical data sources used across OHR (2) How to identify necessary data Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor
	Jun 2022	Deliver training course: Data Management & Analysis	Coordinated by client, session facilitated by contractor, and attended by participants

		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	<p>Learning Lab topics:</p> <ul style="list-style-type: none"> (1) Analysis concepts (2) OHR data analytics (3) MS Excel data skills <p>Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor</p>
		Deliver training course: Data Visualization and Storytelling	Coordinated by client, session facilitated by contractor, and attended by participants
		Attend and support learning lab (no more than 3 hours) and provide feedback to ensure sound approach and design	<p>Learning Lab topics:</p> <ul style="list-style-type: none"> (1) Visualization and storytelling principles (2) Communicating data (3) Translating data into PowerPoint/ other presentation software <p>Coordinated by client, designed by mentors, attended by contractor, and feedback provided by contractor</p>
	Jul 2022	Attend OHR Café: Data Capstone Project Presentation (no more than 3 hours)	Coordinated and facilitated by client and attended by participants, data mentors, and other OHR staff
		Participate in a debrief meeting with client and data mentors	<p>To develop an after-action summary, determine next steps for any modifications, etc.</p> <p>Coordinated by client and attended by client, contractor, and data</p>
	Aug 2022	Implement approved changes and submit revised materials for next cohort at least two weeks prior to next cohort orientation	To ensure ongoing effectiveness of program content and design

**Expected timeframe for delivery of course offerings is negotiable within reason and as agreed upon by the client.*

*** The vendor deliverables will be assessed by way of class evaluations and overall program evaluation.*

2.3 SCHEDULE

Period of Performance

This is a 12-month base year contract with the option to exercise up to 4 optional years. The Contractor shall submit pricing for the following:

- Base Year: September 2021-September 2022
- Option Year 1: September 2022-September 2023
- Option Year 2: September 2023-September 2024
- Option Year 3: September 2024-September 2025
- Option Year 4: September 2025-September 2026

Bootcamp Cohorts

- Number of Cohorts per Period of Performance: 2
- Duration per Cohort (for Participants): 3 months
 - Cohort 1: November-January
 - Cohort 2: May-July
- Number of Participants per Cohort: Up to 16

2.4 ASSUMPTIONS

- Online meeting and training platform will be held in Zoom or WebEx. Contractors should be familiar with at least one of these platforms and able to effectively facilitate training virtually.
- Contractors shall wear business casual attire and have a professional meeting background for meetings, training sessions, and learning labs.
- Contractors shall log into sessions at least 30 minutes prior to start.

The Government will perform/provide the following:

- Provide virtual platform unless the Contractor has a preferred platform.
- Solicit participant nominations from the OHR.
- Notify selectees and non-selectees four weeks prior to the first day of the program.
- Compile a spreadsheet with the selectee's contact and general information (no PII) and present to the Contractor two weeks prior to the first day of a program series.
- Provide SMEs for the collaborative development of OHR specific content, resources, or tools.
- Provide data mentors for capstone project pairs.
- Provide SMEs for the collaborative development of OHR specific content, resources, or tools.
- Provide data mentors for capstone project pairs.

3.0 GOVERNMENT FURNISHED PROPERTY

No government property will be provided under this task order.

4.0 SECURITY REQUIREMENTS

1. Notification. The Contractor (and/or any subcontractor) shall notify the CO and COR immediately when an employee stops working under this task order.
2. Contractor Responsibilities Upon Physical Completion of the Task Order. The contractor (and/or any subcontractors) shall return all government information and IT resources (i.e., government information in non-government-owned systems, media, and backup systems) acquired during the term of this task order to the CO and/or COR. Additionally, the Contractor shall provide a certification that all government information has been properly sanitized and purged from Contractor-owned systems, including backup systems and media used during contract performance, in accordance with HHS and/or NIH policies.
3. The Contractor (and/or any subcontractor) shall perform and document the actions identified in a Contractor Employee Separation Checklist (if applicable) when an employee terminates work under this task order. All documentation shall be made available to the CO and/or COR upon request.
4. Additional security requirements listed under Task Order clauses.

Task Order Terms and Conditions

1. CONTRACTING OFFICER'S REPRESENTATIVE (COR)

The following Contracting Officer's Representative (COR) will represent the Government for the purpose of this task order:

TBD

The COR is responsible for: (1) monitoring the Contractor's technical progress, including the surveillance and assessment of performance and recommending to the Contracting Officer changes in requirements; (2) interpreting the statement of work and any other technical performance requirements; (3) performing technical evaluation as required; (4) performing technical inspections and acceptances required by this task order; and (5) assisting in the resolution of technical problems encountered during performance.

[The alternate COR is responsible for carrying out the duties of the COR only in the event that the COR can no longer perform his/her duties as assigned.]

The Contracting Officer is the only person with authority to act as agent of the Government under this task order. Only the Contracting Officer has authority to: (1) direct or negotiate any changes in the statement of work; (2) modify or extend the period of performance; (3) change the delivery schedule; (4) authorize reimbursement to the Contractor for any costs incurred during the performance of this task order; (5) otherwise change any terms and conditions of this task order; or (6) sign written licensing agreements. Any signed agreement shall be incorporated by reference. The Government may unilaterally change its COR designation.

2. ACKNOWLEDGEMENT OF FEDERAL FUNDING

The Contractor shall clearly state, when issuing statements, press releases, requests for proposals, bid solicitations and other documents describing projects or programs funded in whole or in part with Federal money: (1) the percentage of the total costs of the program or project which will be financed with Federal money; (2) the dollar amount of Federal funds for the project or program; and (3) the percentage and dollar amount of the total costs of the project or program that will be financed by nongovernmental sources.

3. RESTRICTION ON PORNOGRAPHY ON COMPUTER NETWORKS

The Contractor shall not use task order funds to maintain or establish a computer network unless such network blocks the viewing, downloading, and exchanging of pornography.

4. GUN CONTROL

The Contractor shall not use task order funds in whole or in part, to advocate or promote gun control.

5. CONFIDENTIALITY OF INFORMATION

- a. Confidential information, as used in this article, means information or data of a personal nature about an individual, or proprietary information or data submitted by or pertaining to an institution or organization.
- b. The Contracting Officer and the Contractor may, by mutual consent, identify elsewhere in this task order specific information and/or categories of information which the Government will furnish to the Contractor or that the Contractor is expected to generate which is confidential. Similarly, the Contracting Officer and the Contractor may, by mutual consent, identify such confidential information from time to time during the performance of the task order. Failure to agree will be settled pursuant to the "Disputes" clause.
- c. If it is established elsewhere in this task order that information to be utilized under this task order, or a portion thereof, is subject to the Privacy Act, the Contractor will follow the rules and procedures of disclosure set forth in the Privacy Act of 1974, 5 U.S.C. 552a, and implementing regulations and policies, with respect to systems of records determined to be subject to the Privacy Act.
- d. Confidential information, as defined in paragraph (a) of this article, shall not be disclosed without the prior written consent of the individual, institution, or organization.
- e. Whenever the Contractor is uncertain with regard to the proper handling of material under the task order, or if the material in question is subject to the Privacy Act or is confidential information subject to the provisions of this article, the Contractor should obtain a written determination from the Contracting Officer prior to any release, disclosure, dissemination, or publication.
- f. Contracting Officer determinations will reflect the result of internal coordination with appropriate program and legal officials.
- g. The provisions of paragraph (d) of this article shall not apply to conflicting or overlapping provisions in other Federal, State or local laws.

6. REPORTING MATTERS INVOLVING FRAUD, WASTE AND ABUSE

Anyone who becomes aware of the existence or apparent existence of fraud, waste and abuse in NIH funded programs is encouraged to report such matters to the HHS Inspector General's Office in writing or on the Inspector General's Hotline. The toll free number is **1-800-HHS-TIPS (1-800-447-8477)**. All telephone calls will be handled confidentially. The website to file a complaint on-line is: <http://oig.hhs.gov/fraud/hotline/> and the mailing address is:

US Department of Health and Human Services
Office of Inspector General
ATTN: OIG HOTLINE OPERATIONS
P.O. Box 23489
Washington, D.C. 20026

7. POST AWARD EVALUATION OF TASK ORDER FOR PERFORMANCE

- a. Contractor Performance Evaluations

Interim and Final evaluations of Contractor performance will be prepared on this task order in accordance with FAR Subpart 42.15. The Final performance evaluation will be prepared at the time of completion of work. In addition to the Final evaluation, Interim evaluation(s) will be prepared Annually as follows on TBD [Insert Dates].

Interim and Final evaluations will be provided to the Contractor as soon as practicable after completion of the evaluation. The Contractor will be permitted thirty days to review the document and to submit additional information or a rebutting statement. If agreement cannot be reached between the parties, the matter will be referred to an individual one level above the Contracting Officer, whose decision will be final.

Copies of the evaluations, Contractor responses, and review comments, if any, will be retained as part of the task order file, and may be used to support future award decisions.

b. Electronic Access to Contractor Performance Evaluations

Contractors may access evaluations through a secure Web site for review and comment at the following address:

<http://www.cpars.gov>

8. FAR Clause 52.217-8 Option to Extend Services (Nov 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the task order. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed **6 months**. The Contracting Officer may exercise the option by written notice to the Contractor within **15 days** of expiration.

9. FAR CLAUSE 52.217-9 Option to Extend the Term of the contract (TASK ORDER) (Mar 2000)

(a) The Government may extend the term of this task order by written notice to the Contractor within **5 days**; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least **15 days** before the task order expires. The preliminary notice does not commit the Government to an extension.

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

(c) The total duration of this task order, including the exercise of any options under this clause, shall not exceed **5 years**.

10. Key Personnel Clause (HHSAR 352.270-5) (APR 1984).

The key personnel specified in this contract are considered to be essential to work performance. At least 30 days prior to the contractor voluntarily diverting any of the specified individuals to other programs or contracts the Contractor shall notify the Contracting Officer and shall submit a justification for the diversion or replacement and a request to replace the individual. The request must identify the proposed replacement and provide an explanation of how the replacement's skills, experience, and credentials meet or exceed the requirements of the contract (including, when applicable, Human Subjects Testing requirements). If the employee of the contractor is terminated for cause or separates from the contractor voluntarily with less than **thirty days' notice**, the Contractor shall provide the maximum notice practicable under the circumstances. The Contractor shall not divert, replace, or announce any such change to key personnel without the written consent of the Contracting Officer. The contract will be modified to add or delete key personnel as necessary to reflect the agreement of the parties.

(End of clause)

Personnel specified below in this SOW are considered to be essential to the work being performed herein. Prior to diverting any of the specified individuals to other programs, the contractor will notify the contracting officer or the COR reasonably in advance and will submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the program. No diversion will be made by the contractor without the written consent of the contracting officer or the COR; provided, that the officer may ratify in writing such diversion and such ratification will constitute the consent of contracting officer required by this clause. The contract may be amended from time to time during the course of the contract to either add or delete personnel, as appropriate.

Title	Name
Instructor(s)	TBD
Program Coordinator	TBD

11. Information Security and/or Physical Access Security**A. Baseline Security Requirements**

1. **Applicability-** The requirements herein apply whether the entire contract or order (hereafter "contract"), or portion thereof, includes either or both of the following:
 - a. Access (Physical or Logical) to Government Information: A Contractor (and/or any subcontractor) employee will have or will be given the ability to have, routine physical (entry) or logical (electronic) access to government information.

- b. Operate a Federal System Containing Information: A Contractor (and/or any subcontractor) will operate a federal system and information technology containing data that supports the HHS mission. In addition to the Federal Acquisition Regulation (FAR) Subpart 2.1 definition of "information technology" (IT), the term as used in this section includes computers, ancillary equipment (including imaging peripherals, input, output, and storage devices necessary for security and surveillance), peripheral equipment designed to be controlled by the central processing unit of a computer, software, firmware and similar procedures, services (including support services), and related resources.
2. **Safeguarding Information and Information Systems-** In accordance with the Federal Information Processing Standards Publication (FIPS)199, Standards for Security Categorization of Federal Information and Information Systems, the Contractor (and/or any subcontractor) shall:
 - a. Protect government information and information systems in order to ensure:
 - **Confidentiality**, which means preserving authorized restrictions on access and disclosure, based on the security terms found in this contract, including means for protecting personal privacy and proprietary information;
 - **Integrity**, which means guarding against improper information modification or destruction, and ensuring information non-repudiation and authenticity; and
 - **Availability**, which means ensuring timely and reliable access to and use of information.
 - b. Provide security for any Contractor systems, and information contained therein, connected to an HHS network or operated by the Contractor on behalf of HHS regardless of location. In addition, if new or unanticipated threats or hazards are discovered by either the agency or contractor, or if existing safeguards have ceased to function, the discoverer shall immediately, **within one (1) hour or less** , bring the situation to the attention of the other party.
 - c. Adopt and implement the policies, procedures, controls, and standards required by the HHS Information Security Program to ensure the confidentiality, integrity, and availability of government information and government information systems for which the Contractor is responsible under this contract or to which the Contractor may otherwise have access under this contract. Obtain the HHS Information Security Program security requirements, outlined in the HHS Information Security and Privacy Policy (IS2P), by contacting the CO/COR or emailing fisma@hhs.gov .
 - d. Comply with the Privacy Act requirements.
3. **Information Security Categorization-** In accordance with FIPS 199 and National Institute of Standards and Technology (NIST) Special Publication (SP) 800-60, Volume II: Appendices to Guide for Mapping Types of Information and Information Systems to Security Categories, Contractor Non-Disclosure Agreement and based on information provided by the ISSO, CISO, or other security representative, the risk level for each Security Objective and the Overall Risk Level, which is the highest watermark of the three factors (Confidentiality, Integrity, and Availability) of the information or information system are the following:

Confidentiality:	<input checked="" type="checkbox"/> Low	<input type="checkbox"/> Moderate	<input type="checkbox"/> High
Integrity:	<input checked="" type="checkbox"/> Low	<input type="checkbox"/> Moderate	<input type="checkbox"/> High

Availability: ☒ Low ☐ Moderate ☐ High
Overall Risk Level: ☒ Low ☐ Moderate ☐ High

Based on information provided by the ISSO, Privacy Office, system/data owner, or other security or privacy representative, it has been determined that this solicitation/contract involves:

☒ No PII ☐ Yes PII

Personally Identifiable Information (PII). Per the Office of Management and Budget (OMB) Circular A-130, "PII is information that can be used to distinguish or trace an individual's identity, either alone or when combined with other information that is linked or linkable to a specific individual." Examples of PII include, but are not limited to the following: social security number, date and place of birth, mother's maiden name, biometric records, etc.

PII Confidentiality Impact Level has been determined to be: ☐ Low ☐ Moderate ☐ High

4. **Controlled Unclassified Information (CUI)-** CUI is defined as "information that laws, regulations, or Government-wide policies require to have safeguarding or dissemination controls, excluding classified information." The Contractor (and/or any subcontractor) must comply with Executive Order 13556, Controlled Unclassified Information, (implemented at 3 CFR, part 2002) when handling CUI. 32 C.F.R. 2002.4(aa) As implemented the term "handling" refers to "...any use of CUI, including but not limited to marking, safeguarding, transporting, disseminating, re-using, and disposing of the information." 81 Fed. Reg. 63323. All sensitive information that has been identified as CUI by a regulation or statute, handled by this solicitation/contract, shall be:
 - a. Marked appropriately;
 - b. Disclosed to authorized personnel on a Need-To-Know basis;
 - c. Protected in accordance with NIST SP 800-53, Security and Privacy Controls for Federal Information Systems and Organizations applicable baseline if handled by a Contractor system operated on behalf of the agency, or NIST SP 800-171, Protecting Controlled Unclassified Information in Nonfederal Information Systems and Organizations if handled by internal Contractor system; and
 - d. Returned to HHS control, destroyed when no longer needed, or held until otherwise directed. Destruction of information and/or data shall be accomplished in accordance with NIST SP 800-88, Guidelines for Media Sanitization.
5. **Protection of Sensitive Information-** For security purposes, information is or may be sensitive because it requires security to protect its confidentiality, integrity, and/or availability. The Contractor (and/or any subcontractor) shall protect all government information that is or may be sensitive in accordance with OMB Memorandum M-06-16, Protection of Sensitive Agency Information by securing it with a FIPS 140-2 validated solution.
6. **Confidentiality and Nondisclosure of Information-** Any information provided to the contractor (and/or any subcontractor) by HHS or collected by the contractor on behalf of HHS shall be used only for the purpose of carrying out the provisions of this contract and shall not be disclosed or

made known in any manner to any persons except as may be necessary in the performance of the contract. The Contractor assumes responsibility for protection of the confidentiality of Government records and shall ensure that all work performed by its employees and subcontractors shall be under the supervision of the Contractor. Each Contractor employee or any of its subcontractors to whom any HHS records may be made available or disclosed shall be notified in writing by the Contractor that information disclosed to such employee or subcontractor can be used only for that purpose and to the extent authorized herein.

The confidentiality, integrity, and availability of such information shall be protected in accordance with HHS and NIH policies. Unauthorized disclosure of information will be subject to the HHS/NIH sanction policies and/or governed by the following laws and regulations:

- a. 18 U.S.C. 641 (Criminal Code: Public Money, Property or Records);
- b. 18 U.S.C. 1905 (Criminal Code: Disclosure of Confidential Information); and
- c. 44 U.S.C. Chapter 35, Subchapter I (Paperwork Reduction Act).

Each employee, including subcontractors, having access to non-public Department information under this acquisition shall complete the "Commitment to Protect Non-Public Information - Contractor Employee Agreement" located at: <https://ocio.nih.gov/aboutus/publicinfosecurity/acquisition/Documents/Nondisclosure.pdf>. A copy of each signed and witnessed Non-Disclosure agreement shall be submitted to the Project Officer/COR prior to performing any work under this acquisition.

7. **Internet Protocol Version 6 (IPv6)**- All procurements using Internet Protocol shall comply with OMB Memorandum M-05-22, Transition Planning for Internet Protocol Version 6 (IPv6).
8. **Government Websites**- All new and existing public-facing government websites must be securely configured with Hypertext Transfer Protocol Secure (HTTPS) using the most recent version of Transport Layer Security (TLS). In addition, HTTPS shall enable HTTP Strict Transport Security (HSTS) to instruct compliant browsers to assume HTTPS at all times to reduce the number of insecure redirects and protect against attacks that attempt to downgrade connections to plain HTTP. For internal-facing websites, the HTTPS is not required, but it is highly recommended.
9. **Contract Documentation**- The Contractor shall use provided templates, policies, forms and other agency documents provided by the Contracting Officer and the Contracting Officer's Representative to comply with contract deliverables as appropriate.
10. **Standard for Encryption**- The Contractor (and/or any subcontractor) shall:
 - a. Comply with the HHS Standard for Encryption of Computing Devices and Information to prevent unauthorized access to government information.
 - b. Encrypt all sensitive federal data and information (i.e., PII, protected health information [PHI], proprietary information, etc.) in transit (i.e., email, network connections, etc.) and at rest (i.e., servers, storage devices, mobile devices, backup media, etc.) with FIPS 140-2 validated encryption solution.
 - c. Secure all devices (i.e.: desktops, laptops, mobile devices, etc.) that store and process government information and ensure devices meet HHS and NIH-specific encryption standard requirements. Maintain a complete and current inventory of all laptop computers, desktop computers, and other mobile devices and portable media that store or process sensitive government information (including PII).
 - d. Verify that the encryption solutions in use have been validated under the Cryptographic Module Validation Program to confirm compliance with FIPS 140-2. The Contractor shall provide a written copy of the validation documentation to the Contracting Officer and the Contracting Officer's Technical Representative within **15 days** of the validation .

- e. Use the Key Management system on the HHS personal identification verification (PIV) card or establish and use a key recovery mechanism to ensure the ability for authorized personnel to encrypt/decrypt information and recover encryption keys. Encryption keys shall be provided to the COR upon request and at the conclusion of the contract.
- 11. **Contractor Non-Disclosure Agreement (NDA)**- Each Contractor (and/or any subcontractor) employee having access to non-public government information under this contract shall complete the NIH non-disclosure agreement <https://ocio.nih.gov/aboutus/publicinfosecurity/acquisition/Documents/Nondisclosure.pdf>, as applicable. A copy of each signed and witnessed NDA shall be submitted to the Contracting Officer (CO) and/or CO Representative (COR) prior to performing any work under this acquisition.
- 12. **Privacy Threshold Analysis (PTA)/Privacy Impact Assessment (PIA)**- The Contractor shall assist the NIH Office of the Senior Official for Privacy (SOP) or designee with conducting a PTA for the information system and/or information handled under this contract to determine whether or not a full PIA needs to be completed. The NIH PIA guide is located at <https://oma.od.nih.gov/forms/Privacy%20Documents/Documents/NIH%20PIA%20Guide.pdf> .
 - a. If the results of the PTA show that a full PIA is needed, the Contractor shall assist the OpDiv SOP or designee with completing a PIA for the system or information within **60 days** after completion of the PTA and in accordance with HHS policy and OMB M-03-22, Guidance for Implementing the Privacy Provisions of the E-Government Act of 2002.
 - b. The Contractor shall assist the NIH Office of the SOP or designee in reviewing the PIA at least every three years throughout the system development lifecycle (SDLC)/ information lifecycle, or when determined by the agency that a review is required based on a major change to the system, or when new types of PII are collected that introduces new or increased privacy risks, whichever comes first.

B. TRAINING

- 1. **Mandatory Training for All Contractor Staff**- All Contractor (and/or any subcontractor) employees assigned to work on this contract shall complete the applicable HHS/NIH Contractor Information Security Awareness, Privacy, and Records Management training course at <http://irtsectraining.nih.gov/> before performing any work under this contract. Thereafter, the employees shall complete NIH Information Security Awareness, Privacy, and Records Management training at least annually, during the life of this contract. All provided training shall be compliant with HHS training policies.
- 2. **Role-based Training**- All Contractor (and/or any subcontractor) employees with significant security responsibilities (as determined by the program manager) must complete role-based training annually commensurate with their role and responsibilities in accordance with HHS policy and the HHS Role-Based Training (RBT) of Personnel with Significant Security Responsibilities Memorandum. Read further guidance about the NIH Role-based Training <https://ocio.nih.gov/aboutus/publicinfosecurity/securitytraining/Pages/rolebasedtraining.aspx>
- 3. **Training Records**- The Contractor (and/or any subcontractor) shall maintain training records for all its employees working under this contract in accordance with HHS policy. A copy of the training records shall be provided to the CO and/or COR within 30 days after contract award and **annually** thereafter or upon request.

C. RULES OF BEHAVIOR

The Contractor (and/or any subcontractor) shall ensure that all employees performing on the contract comply with the HHS Information Technology General Rules of Behavior, and comply with the NIH Information Technology General Rules of Behavior <https://ocio.nih.gov/InfoSecurity/training/Pages/nihitrob.aspx>, which are contained in the NIH Information Security Awareness Training Course <http://irtsectraining.nih.gov>

1. All Contractor employees performing on the contract must read and adhere to the Rules of Behavior before accessing Department data or other information, systems, and/or networks that store/process government information, initially at the beginning of the contract and at least annually thereafter, which may be done as part of annual NIH Information Security Awareness Training. If the training is provided by the contractor, the signed Rules of Behavior must be provided as a separate deliverable to the CO and/or COR per defined timelines above.

D. INCIDENT RESPONSE

The Contractor (and/or any subcontractor) shall respond to all alerts/Indicators of Compromise (IOCs) provided by HHS Computer Security Incident Response Center (CSIRC)/NIH IRT teams within 24 hours, whether the response is positive or negative.

FISMA defines an incident as "an occurrence that (1) actually or imminently jeopardizes, without lawful authority, the integrity, confidentiality, or availability of information or an information system; or (2) constitutes a violation or imminent threat of violation of law, security policies, security procedures, or acceptable use policies. The HHS Policy for IT Security and Privacy Incident Reporting and Response further defines incidents as events involving cyber security and privacy threats, such as viruses, malicious user activity, loss of, unauthorized disclosure or destruction of data, and so on.

A privacy breach is a type of incident and is defined by Federal Information Security Modernization Act (FISMA) as the loss of control, compromise, unauthorized disclosure, unauthorized acquisition, or any similar occurrence where (1) a person other than an authorized user accesses or potentially accesses personally identifiable information or (2) an authorized user accesses or potentially accesses personally identifiable information for an other than authorized purpose. The HHS Policy for IT Security and Privacy Incident Reporting and Response further defines a breach as "a suspected or confirmed incident involving PII"

In the event of a suspected or confirmed incident or breach, the Contractor (and/or any subcontractor) shall:

1. Protect all sensitive information, including any PII created, stored, or transmitted in the performance of this contract so as to avoid a secondary sensitive information incident with FIPS 140-2 validated encryption.
2. NOT notify affected individuals unless so instructed by the Contracting Officer or designated representative. If so instructed by the Contracting Officer or representative, the Contractor shall send NIH approved notifications to affected individuals in accordance with https://ocio.nih.gov/InfoSecurity/IncidentResponse/Pages/ir_guidelines.aspx

3. Report all suspected and confirmed information security and privacy incidents and breaches to the NIH Incident Response Team (IRT) via email at IRT@mail.nih.gov, COR, CO, the NIH Office of the SOP (or his or her designee), and other stakeholders, including incidents involving PII, in any medium or form, including paper, oral, or electronic, as soon as possible and without unreasonable delay, no later than one (1) hour, and consistent with the applicable NIH and HHS policy and procedures, NIST standards and guidelines, as well as US-CERT notification guidelines. The types of information required in an incident report must include at a minimum: company and point of contact information, contract information, impact classifications/threat vector, and the type of information compromised. In addition, the Contractor shall:
 - c. cooperate and exchange any information, as determined by the Agency, necessary to effectively manage or mitigate a suspected or confirmed breach;
 - d. not include any sensitive information in the subject or body of any reporting e-mail; and
 - e. encrypt sensitive information in attachments to email, media, etc.
4. Comply with OMB M-17-12, Preparing for and Responding to a Breach of Personally Identifiable Information HHS and NIH incident response policies when handling PII breaches.
 - a. Provide full access and cooperate on all activities as determined by the Government to ensure an effective incident response, including providing all requested images, log files, and event information to facilitate rapid resolution of sensitive information incidents. This may involve disconnecting the system processing, storing, or transmitting the sensitive information from the Internet or other networks or applying additional security controls. This may also involve physical access to contractor facilities during a breach/incident investigation within an hour of discovery.

E. POSITION SENSITIVITY DESIGNATIONS

All Contractor (and/or any subcontractor) employees must obtain a background investigation commensurate with their position sensitivity designation that complies with Parts 1400 and 731 of Title 5, Code of Federal Regulations (CFR). The following position sensitivity designation levels apply to this solicitation/contract:

[] Level 6: Public Trust - High Risk. Contractor/subcontractor employees assigned to Level 6 positions shall undergo a Suitability Determination and Background Investigation (MBI).

[] Level 5: Public Trust - Moderate Risk. Contractor/subcontractor employees assigned to Level 5 positions with no previous investigation and approval shall undergo a Suitability Determination and a Minimum Background Investigation (MBI), or a Limited Background Investigation (LBI).

[X] Level 1: Non-Sensitive. Contractor/subcontractor employees assigned to Level 1 positions shall undergo a Suitability Determination and National Check and Inquiry Investigation (NACI).

F. HOMELAND SECURITY PRESIDENTIAL DIRECTIVE (HSPD)-12

The Contractor (and/or any subcontractor) and its employees shall comply with Homeland Security Presidential Directive (HSPD)-12, Policy for a Common Identification Standard for Federal Employees and Contractors; OMB M-05-24; FIPS 201, Personal Identity Verification (PIV) of Federal Employees and Contractors; HHS HSPD-12 policy; and Executive Order 13467, Part 1 §1.2.

For additional information, see HSPD-12 policy at: <https://www.dhs.gov/homeland-security-presidential-directive-12>)

Roster-

The Contractor (and/or any subcontractor) shall submit a roster by name, position, e-mail address, phone number and responsibility, of all staff working under this acquisition where the Contractor will develop, have the ability to access, or host and/or maintain a government information system(s). The roster shall be submitted to the COR and/or CO within fourteen (14) calendar days after the effective date of this contract. Any revisions to the roster as a result of staffing changes shall be submitted within seven (7) calendar days of the change. The COR will notify the Contractor of the appropriate level of investigation required for each staff member. An electronic template, "Roster of Employees Requiring Suitability Investigations," is available for contractor use at: https://ocio.nih.gov/aboutus/publicinfosecurity/acquisition/Documents/SuitabilityRoster_10-15-12.xlsx.

- a. If the Contractor is filling a new position, the Contractor shall provide a position description and the Government will determine the appropriate suitability level. Upon receipt of the Government's notification of applicable Suitability Investigations required, the Contractor shall complete and submit the required forms within 30 days of the notification.
- b. Upon receipt of the Government's notification of applicable Suitability Investigations required, the Contractor shall complete and submit the required forms within 30 days of the notification.
- c. The Contractor shall notify the Contracting Officer in advance when any new personnel, who are subject to a background check/investigation, will work under the contract and if they have previously been the subject of national agency checks or background investigations.
- d. All contractor and subcontractor employees shall comply with the conditions established for their designated position sensitivity level prior to performing any work under this contract. Contractors may begin work after the fingerprint check has been completed.
- e. Investigations are expensive and may delay performance, regardless of the outcome of the investigation. Delays associated with rejections and consequent re-investigations may not be excusable in accordance with the FAR clause, Excusable Delays - see FAR 52.249-14. Accordingly, the Contractor shall ensure that any additional employees whose names it submits for work under this contract have a reasonable chance for approval.
- f. Typically, the Government investigates personnel at no cost to the Contractor. However, multiple investigations for the same position may, at the Contracting Officer's discretion, justify reduction(s) in the contract price of no more than the cost of the additional investigation(s).
- g. The Contractor shall include language similar to this "HHS Controlled Facilities and Information Systems Security" language in all subcontracts that require subcontractor personnel to have the same frequency and duration of (1) physical

access to an HHS-controlled facility; (2) logical access to an HHS-controlled information system; (3) access to sensitive HHS data/information, whether in an HHS-controlled information system or in hard copy; or (4) any combination of circumstances (1) through (3).

- h. The Contractor shall direct inquiries, including requests for forms and assistance, to the Contracting Officer or designee.
- i. Within 7 calendar days after the Government's final acceptance of the work under this contract, or upon termination of the contract, the Contractor shall return all identification badges to the Contracting Officer or designee.

G. CONTRACT INITIATION AND EXPIRATION

1. **General Security Requirements-** The Contractor (and/or any subcontractor) shall comply with information security and privacy requirements, Enterprise Performance Life Cycle (EPLC) processes, HHS Enterprise Architecture requirements to ensure information is appropriately protected from initiation to expiration of the contract. All information systems development or enhancement tasks supported by the contractor shall follow the HHS EPLC framework and methodology or and in accordance with the HHS Contract Closeout Guide (2012).

HHS EA requirements may be located here: <https://www.hhs.gov/ocio/ea/documents/proplans.html>

2. **System Documentation-** Contractors (and/or any subcontractors) must follow and adhere to NIST SP 800-64, Security Considerations in the System Development Life Cycle, at a minimum, for system development and provide system documentation at designated intervals (specifically, at the expiration of the contract) within the EPLC that require artifact review and approval.
3. **Sanitization of Government Files and Information-** As part of contract closeout and at expiration of the contract, the Contractor (and/or any subcontractor) shall provide all required documentation in accordance with the NIH Media Sanitization and Disposal Policy to the CO and/or COR to certify that, at the government's direction, all electronic and paper records are appropriately disposed of and all devices and media are sanitized in accordance with NIST SP 800-88, Guidelines for Media Sanitization.
4. **Notification-** The Contractor (and/or any subcontractor) shall notify the CO and/or COR and system ISSO within **fifteen (15) days** before an employee stops working under this contract.
5. **Contractor Responsibilities Upon Physical Completion of the Contract-** The contractor (and/or any subcontractors) shall return all government information and IT resources (i.e., government information in non-government-owned systems, media, and backup systems) acquired during the term of this contract to the CO and/or COR. Additionally, the Contractor shall provide a certification that all government information has been properly sanitized and purged from Contractor-owned systems, including backup systems and media used during contract performance, in accordance with HHS and/or NIH policies.
6. The Contractor (and/or any subcontractor) shall perform and document the actions identified in the NIH Contractor Employee Separation Checklist <https://ocio.nih.gov/aboutus/publicinfosecurity/acquisition/Documents/Emp-sep-checklist.pdf> when an employee terminates work under this contract within 2 days of the employee's exit from

the contract. All documentation shall be made available to the CO and/or COR upon request.

H. RECORDS MANAGEMENT AND RETENTION

The Contractor (and/or any subcontractor) shall maintain all information in accordance with Executive Order 13556 -- Controlled Unclassified Information, National Archives and Records Administration (NARA) records retention policies and schedules and HHS/NIH policies and shall not dispose of any records unless authorized by HHS/NIH.

In the event that a contractor (and/or any subcontractor) accidentally disposes of or destroys a record without proper authorization, it shall be documented and reported as an incident in accordance with HHS/NIH policies.

12. Additional Task Order Terms and Conditions

The Task Order will follow the terms and conditions within the GSA Federal Supply Schedule task order. In addition, the following Federal Acquisition Regulation (FAR) and HHS Acquisition Requisition (HHSAR) Clauses are incorporated by reference. The full clauses can be found at www.acquisition.gov and <http://www.hhs.gov/policies/hhsar/>.

HHSAR Clauses

- 352.203-70 Anti-Lobbying (Dec 2015)
- 352.208-70 Printing and Duplication (Dec 2015)
- 352.222-70 Contractor Cooperation in Equal Employment Opportunity Investigations (Dec 2015)
- 352.224-70 Privacy Act (Dec 2015)
- 352.224-71 Confidential Information (Dec 2015)
- 352.233-71 Litigation and Claims (Dec 2015)
- 352.239-73 Electronic Information and Technology Accessibility Notice (Dec 2015)
- 352.239-74 Electronic Information and Technology Accessibility Notice (Dec 2015)

Attachments

1. Invoicing Instructions.

Solicitation Instructions and Evaluation

General

The major evaluation factors for this solicitation include technical (which encompasses understanding of the requirements, key personnel and personnel management, and technical approach) and price factors. Although technical factors are of paramount consideration in the award of the task order, price is also important to the overall award decision. **All evaluation factors other than price, when combined, are significantly more important than price. In any case, the Government reserves the right to make an award to that Contractor whose quote provides the best overall value to the Government.**

Contractors are advised that award will be made to that Contractor whose quote provides the combination of features that offers the best or greatest overall value to the Government. The Government is more concerned with obtaining performance capability superiority rather than lowest overall price. However, the Government will not make an award at a significantly higher overall price to the Government to achieve only slightly superior performance. Overall price to the Government may become the ultimate factor for award as quotes become more equal based on other factors.

The evaluation will be based on the demonstrated capabilities of the prospective Contractors in relation to the needs of the project as set forth in the Request for Quotation (RFQ). The merits of each quote will be evaluated carefully. Each quote must document the feasibility of successful implementation of requirements of the RFQ. Contractors must submit information sufficient to evaluate their quotes based on the detailed criteria below.

SMALL BUSINESS SET ASIDE NOTICE

This requirement is set aside for those who are listed as a small business under their GSA Federal Supply Schedule Contract.

INSTRUCTIONS TO QUOTERS

Technical Quote Instructions:

Please provide a technical quote that addresses the below technical criteria. Please do not provide pricing in technical quote.

Business Quote Instruction Basic Price Information:

The business quote must contain sufficient information to allow the Government to perform a basic analysis of the quoted prices of the work. The vendor must fill out the pricing schedule for all line items listed in the solicitation as well as all option periods. Also include any signed amendments (SF30s) in your business quote.

Business Quote Cover Sheet

The following information shall be provided on the first page of your business quote:

1. RFQ Number

2. Size Status on GSA Federal Supply Schedule
3. Name and address of Quoter
4. Name and telephone number of point of contact
5. Name, address, and telephone number of Contract administration Office, (if available)
6. The following statement: By submitting this quote, the quoter, if selected for discussions, grants the contracting officer authorized representative the right to examine, at any time before award, any documents, or other records directly pertinent to the information requested or submitted.
7. Date of submission; and name, title and signature of authorized representative.
8. Statement in regards to the quote being valid for 120 days from quote due date.

Instruction to Quoters General

The vendor will respond to the quote with the pricing information for each of the periods of the Order. Please complete the spreadsheet listed near the beginning of the RFQ (Pricing Table) with all the applicable information. This attachment will assist in evaluating best value.

The vendor shall submit both a Technical and Price Quote (the technical and price quotes are to be separate documents/attachments) due to Mr. Zedekiah J. Worsham (Contracting Officer), via **email at worshamz@od.nih.gov by August 4, 2021 at 3PM EST.**

The technical quote is not to contain any pricing information and has **a page limitation of 35 pages excluding resumes and letters of commitment.**

Any questions can be sent to Mr. Worsham via email at worshamz@od.nih.gov by **July 27, 2021 at 3PM EST** or earlier. Please contact Mr. Worsham at 301-402-3079 or worshamz@od.nih.gov to verify your quote was received. All quotes must state that they are valid for 120 calendar days.

Quotes delivered through fax, hand delivery, or mail will not be accepted. Electronic Quotes shall be in Microsoft Word, Excel, PowerPoint, or Adobe Acrobat. NIH uses Microsoft Office 2016.

Understanding the Requirements (20 Points)

Quote demonstrates a complete understanding of the requirements and indicates a clear awareness of the SOW objectives. Quote demonstrates that the Contractor knows the subject well enough to anticipate and avoid problems, and to react appropriately when problems arise.

Contractor shall submit two samples of previous projects comparable in design and/or content to the OHR Data Bootcamp.

Key Personnel and Personnel Management (30 Points)

Proposed key personnel will be evaluated for experience, education, training, resumes and availability in accordance with the specific guidelines set forth in the Statement of Work. Contractors are to provide a staffing plan that demonstrates their understanding of the labor requirements that describes their approach for managing the work specified in the Statement of Work for this requirement. **Resumes of key personnel** reflect not only academic qualifications, but also length and variety of experience in similar tasks and clearly demonstrate relevant training as well as competency and experience in the skills

required in the Statement of Work. If subcontractors are proposed, information is provided to support the qualifications of the subcontractors.

Information is provided as to which key personnel will be used on this project. Documentation is provided on the decision-making authority of the project director as related to other elements of the organization. The percentage of time each staff member will contribute to the program is adequately identified. The extent to which outside consultants or specialists will be used is documented and evidence of their availability is provided.

The contractor shall identify by name, one or more instructors to deliver the facilitated content of the bootcamp training sessions. Please specify which instructors will facilitate specific course titles and support the learning labs.

In addition to instructors, the Contractor shall identify by name, personnel proposed for managing, designing, and integrating the program, as well as coordinating with the OHR Program Manager/COR. Resumes should include the following:

- Employee name
- Brief description of proposed duties/responsibilities/areas of expertise
- Education (degrees and certificates)
- Recent experience specific to their proposed role including experience with federal clients
- ¹Whether they are currently employed by the vendor, planning to join the organization (date must be given), or are a subcontractor.

Technical Approach (30 Points)

Quote describes the proposed approach to comply with each of the requirements specified in the Statement of Work. The quote is consistent with the stated goals and objectives. The proposed approach of ensuring the achievement of timely and acceptable performance is well documented and sound. Milestone and/or phasing charts illustrate a logical sequence of proposed events.

Contractor shall included proposed courses that fulfill the requirements of this SOW, including:

- Course titles
- Descriptions
- Duration (sessions should begin no earlier than 9 AM EST and end no later than 4 PM EST)
- Agendas
- Sample courseware per training topic
- Specific technical requirements (e.g. MS Excel)

Contractor shall provide a Quality Assurance Plan to demonstrate how performance will be measured.

Past Experience (20 Points)

Vendors will be evaluated on the vendor's experience in providing current and similar services.

*Vendors are to provide three (3) experiences for similar services. The past experience must include at least the below information:

- Contract/Order Number
- Period of Performance
- Contract/Order Amount-Including Options
- Contract/Order Type (T&M, FFP, etc)
- Customer and CO Name, Phone Number, email address
- General Contract/Order Description and how it fits with the requirement of the solicitation.

***If a vendor is in a teaming arrangement with another company, a total of five (3) references is also required, of which at least three (2) shall be provided by the prime contractor and one (1) from the subcontractor.**

Total Possible Points = 100

Price Evaluation

The Government will separately evaluate prices for items listed in the Pricing Schedule section of the RFQ. Price analysis of the quote will be conducted to determine the reasonableness of the contractor's price. The Contractor's pricing shall be based on their GSA Labor category rates, utilizing any and all discounts. The vendor shall provide pricing based on the line items provided in the solicitation as well as provide backup information on how pricing was calculated (labor, estimated hours, etc).

Past Performance Factor

Vendors' past performance information references will be checked for the vendor most likely to receive the award.

The Government will review the Contractor's past experience, especially with federal employees and scientific populations, based on information obtained from references provided by the vendor, other relevant past experience information obtained from other sources known to the Government, and any information supplied by the Contractor concerning problems encountered on the identified contracts and corrective action taken.