Office of Logistics and Acquisition Operations

PICS II
Standard Operating Procedures

NIH National Institutes of Health

Last Updated: November 2, 2020

FOREWARD

The National Institutes of Health (NIH) Public Information and Communication Services II (PICS II) vehicle is intended to assist the NIH, the Department of Health and Human Services (HHS), HHS Operating Divisions (OPDIVS), and on a case by case basis, other Federal agencies to achieve and maintain high quality performance in the areas of media, communication, and information dissemination and technology. The PICS II vehicle is structured as 10 Indefinite Delivery / Indefinite Quantity (IDIQ) contracts awarded to small business entities. Task orders are to be issued under the 10 contracts to acquire services as desired.

The Standard Operating Procedures (SOP) herein contain guidelines for utilizing the NIH PICS II contract vehicle, covering the roles and responsibilities of all involved parties, including contractor personnel.

The task orders will be awarded under the Federal Acquisition Streamlining Act (FASA) which requires that the prime contractors be given a Fair-Opportunity-to-be-Considered (FOC) for task order awards.

Please refer to the PICS II Website (http://PICS.olao.od.nih.gov) and/or contact the PICS II Program Support Team (PICSII@mail.nih.gov) if you have any questions, need additional information, and/or require official documentation and administration related to task order establishment.

PICS II Support Team
PICSII@mail.nih.gov

ACRONYMS

The following is a list of acronyms used throughout this document.

Abbreviation	Full Name
CO:	Contracting Officer
COR:	Contracting Officer's Representative
FAR:	Federal Acquisitions Regulation (http://www.acquisition.gov/far)
FASA:	Federal Acquisition Streamlining Act
FP:	Fixed Price
IC:	Institutes and Centers
ID/IQ:	Indefinite Delivery/Indefinite Quantity
IGCE:	Independent Government Cost Estimate
NIH:	National Institutes of Health
OLAO:	Office of Logistics and Acquisition Operations
PICS II:	Public Information & Communication Services II
SOW:	Statement of Work
SRD:	Selection Recommendation Document
T&M:	Time & Materials
TO:	Task Order
TORP:	Task Order Request Package

NIH National Institutes of Health

TABLE OF CONTENTS

4

1 GENERAL INFORMATION

The Public Information and Communication Services II (PICS II) Contract is an acquisition vehicle available to the National Institutes of Health (NIH), the Department of Health and Human Services (HHS), HHS Operating Divisions (OPDIVS), and on a case by case basis, other Federal agencies to purchase communication goods and services, namely when this expertise does not exist in-house. This multiple award contract with ten (10) small business contractors will be used by NIH to procure media, communications, and information dissemination and technology on a task order basis. In technical terms, PICS II is an Indefinite Delivery/Indefinite Quantity (IDIQ) contract, which allows customers to order services after requirements arise. Additional information including the scope, labor categories, and services related to PICS II can be found in the following sections.

The contract period of performance will consist of a base year performance period and four one-year option periods.

1.1 Non-Personal Services and Inherently Government Functions

Pursuant to FAR 37.1, no personal services shall be performed under this contract. All work requirements shall flow only from the Contracting Officer's Representative (COR) to the contractor's Project Manager. No contractor employee will be directly supervised by the Government. All individual employee assignments, and daily work direction, shall be given by the applicable employee supervisor. If the contractor believes any Government action or communication has been given that would create a personal services relationship between the Government and any contractor employee, the contractor shall promptly notify the Contracting Officer of this communication or action.

Pursuant to FAR 7.5, the contractor shall not perform any inherently governmental actions under this contract. No contractor employee shall hold him or herself out to be a Government employee, agent, or representative. No contractor employee shall state orally or in writing at any time that he or she is acting on behalf of the Government. In all communications with third parties in connection with this contract, contractor employees shall identify themselves as contractor employees and specify the name of the company for which they work. In all communications with other Government contractors in connection with this contract, the contractor employee shall state that they have no authority to in any way change the contract and that if the other contractor believes this communication to be a direction to change their contract, they should notify the Contracting Officer for that contract and not carry out the direction until a clarification has been issued by the Contracting Officer.

The contractor shall insure that all of its employees working on this contract are informed of this information. Nothing in this section shall limit the Government's rights in any way under the other provisions of the contract, including those related to the Government's right to inspect and accept the services to be performed under this contract. The substance of this section shall be included in all subcontracts at any tier.

1.2 Labor Categories

The contractor shall maintain a management structure with overall task order control and authority for the performance of the work. At a minimum, the contractor's management structure shall be responsible for the following throughout the life of each task order:

a) Deploying a technically proficient and professionally capable staff.

b) Keeping personnel turnover to a minimum and ensuring individuals are motivated to achieve excellent performance.

c) Ensuring problems are minimized and unavoidable problems are resolved with minimal disruption to the activities performed under the task order.

d) Obtaining continuous feedback on performance from appropriate Government personnel and disseminating feedback to contractor personnel on all areas of task order performance.

e) Continually monitoring the quality of all products and services provided for purposes of identifying and implementing performance improvements.

f) Ensuring that all resources necessary to perform the task order are identified with clearly defined roles and deployed on schedule.

Support under this contract will include the labor categories detailed in Appendix 1.

1.3   Contract and Task Order Management

Contract and task order management is a mandatory element for all task orders placed under the PICS II contract vehicle. The objective of contract and task order management is to provide the program management, project control, and contract administration support needed to manage a high volume, multiple contract task order process.

The application of processes that support task order management are encouraged to ensure that cost, schedule, and quality requirements of each order are tracked, communicated to the government, and ultimately attained.

1.4   Principal Task Areas

The following tasks cover the total scope of services available under the PICS II contract:

Communications and Outreach
- Communications Research (Task Area 1)
- News Media Operations Support (Task Area 2a)
- Media and Crisis Communication Training (Task Area 2b)
- Audience Outreach and Promotion (Task Area 3a)
- Outreach to Target Populations/Health Disparities Programs (Task Area 3b)
- Foreign Language, Translation, and Interpretation (Task Area 6)
- Information Referrals ("Clearinghouses") (Task Area 7)

Materials Development and Distribution
- Materials Development (Task Area 4)
- Inventories / Warehouse / Distribution Services (Task Area 11)

Graphic Design, Web, and Database
- Graphic Design (Task Area 5)
- IT Requirements (Task Area 10a)
- Web Design, Development, and Management (Task Area 10b)
- Preservation, Cataloging, and Storage of Web-based and Other Digital Content (Task Area 10c)
- Website Usability Testing (Task Area 10d)
- Database Design, Development, and Management (Task Area 1oe)
- Information Tracking and Referral (Task Area 10f)
- Security (Task Area 10g)

Exhibit and Conference
- Exhibit Development, Design, Production, Storage, and Transport (Task Area 8)
- Meeting, Conference, and Event Support (Task Area 9)

For additional information regarding the type of work included under each task area, please refer to the <u>Statement of Work</u>.

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1.5   Task Orders

All requirements will be fulfilled under task orders. The task order will provide detail of the specific services that will be required. Task orders may be Fixed-Price, Time and Materials, or Labor Hour type contracts.

Though Fixed Price type task orders are preferred, Time and Materials and Labor Hour are permitted but require a signed Determinations and Findings (D&F) report. If the task order is in excess of 3 years, the D&F must be signed by the NIH Head of Contracting Activity. Time and Materials should only be used if Fixed-Price is not suitable.

1.6   PICS Resources

There are PICS II resources available to help work with this vehicle, including an informational Web site located at http://PICS.olao.od.nih.gov and a PICS II Program Support Team that can be reached at PICSII@mail.nih.gov.

1.7   Classified Material

A Task Order Request Package (TORP) will contain only unclassified material, regardless of the level of classification of the work to be performed under the task order.

The customer is responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure. It is the contractors' responsibility to ensure that all proprietary information is appropriately marked.

1.8   PICS Usage Assessments

This contract is designed for use by NIH, HHS OPDIV's and STAFDIV's, and on a case by case basis other federal agencies with agreement from the OLAO Associate Director. For external customers (outside of NIH) to use the PICS II Contracts, there will be an assessment collected via an Interagency Agreement (IAA) between the requesting agency and the NIH. The assessment, which will be a percentage of the estimated dollar amount of award, will be determined by whether the order is unassisted or assisted.

An unassisted order is one where the requesting agency uses its own contracting shop/contracting officer (this includes HHS/PSC). The assessment for an unassisted order is .5%.

An assisted order would be a task order administrated by this office, meaning NIH/OLAO would serve as the contracting shop/contracting officer. For assisted orders, there will be an additional 2% assessed making the total assessment for an assisted order 2.5% (.5% to use the vehicle + 2% for NIH/OLAO serving as the contracting shop/contracting officer).

Our office requests the Memorandum of Understanding (MOU) and Interagency Agreement (IAA) forms 7600 A and B in order to begin the task order process. Please provide the MOU and IAA to the PICS II Support Team when you submit the Task Order Request Package (TORP). Your TORP will be released to the contractors once a complete package (including the MOU and draft 7600 A and B forms) is received.

The IAA will need to be fully executed, with all documents signed and CAN numbers received, prior to the award of the task order.

## 1.9   Supporting Documentation Submission

The preferred method of correspondence to the PICS II Contracting Officer is electronic via e-mail (PICSII@mail.nih.gov). Microsoft Word (.doc or .docx) is the preferred format for all text documents. All spreadsheets should be submitted in Microsoft Excel (.xls or .xlsx) format. PDFs are also acceptable.

2 ROLES AND RESPONSIBILITIES

The primary roles supporting the PICS II contracts and task orders on behalf of the NIH are:

- PICS II Program Support Team

    o PICS II Contracting Officer (CO)

    o PICS II Contracting Officer's Representative (COR)

- Customer

    o Task Order CO (located in the requesting IC's office of Acquisition)
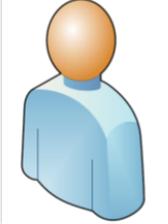
    o Task Order COR

Each will play a significant role in the maintenance of the PICS II contract as well as the initiation, tracking, and close-out of each task order. Responsibilities are outlined in the following sections and again later in the task order procedures.
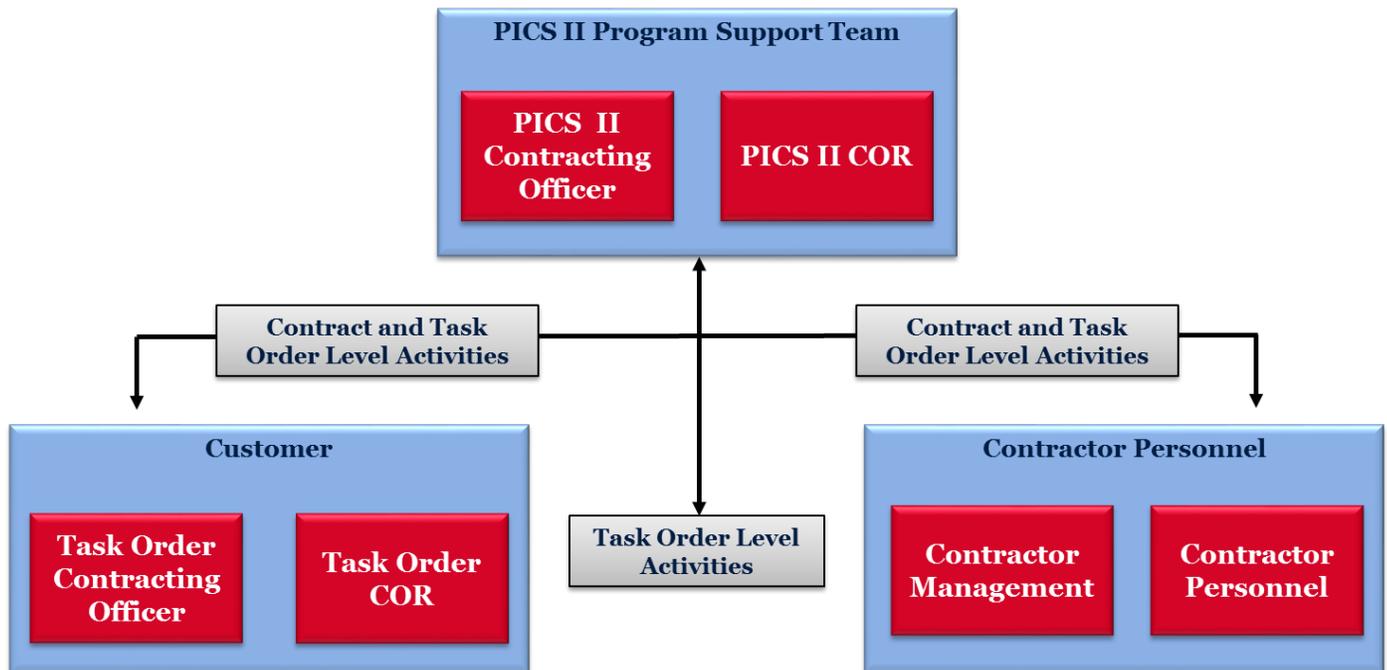
2.1 PICS II Program Support Team

The Office of Logistics and Acquisition Operations (OLAO) has established the PICS II Program Support Team to provide contract-level **management and oversight for the PICS II contract vehicle**. The PICS II COR within OLAO has been designated to oversee and manage the contract with support from the PICS II CO. While individual task orders will include guidelines specific to the performance of the requirements of that TO, the overall contractual relationship between NIH and contractors is maintained by the PICS II Program Support Team.

2.1.1   PICS II Contracting Officer

> ## PICS II Contracting Officer
>
> **Role:** OLAO representatives who can negotiate changes to the Statement of Work (SOW), delivery schedule, and Period of Performance for the PICS II contract vehicle. Act as the Point of Contact (POC) for contractual issues.
>
> **Primary Responsibilities:**
> - Review and approve TORPs submitted by customers
> - Release approved TORPs to vendors
> - Coordinate and liaison between vendors and customers
> - Announce task orders awards

PICS II Contracting Officer

The PICS II Contracting Officer has the authority to act as an agent of the Government under the PICS II contracts. Only the PICS II Contracting Officer has authority to:

(1)   direct or negotiate any changes in the Statement of Work or specifications of the **PICS II vehicle**;

(2)   modify or extend the period of performance;

(3)   change the delivery schedule;

(4)   otherwise change any terms and conditions of the contracts;

(5)   concur with any exceptions to the Fair Opportunity Process; and

(6)   perform contract administration duties such as exercising option years and contract close-out functions.

Other responsibilities of the PICS II Contracting Officer include:

(1)   receiving TORP packages from PICS II customers;

(2)   reviewing TORPs and releasing TORPs to all contractors;

(3)   reviewing Q&A and releasing Q&A to all contractors;

(4)   concurring on Selection Recommendation Documents (SRDs);

(5)   announcing task order awards; and

(6)   acting as the primary point of contact for contractual issues related to the PICS II contracts.

2.1.2   PICS II Contracting Officer's Representative (COR)

PICS II COR

Role: Support the PICS II Contracting Officer by monitoring the technical progress of the vendors and assisting in the resolution of technical problems.

Primary Responsibilities:
- Log and maintain task order records
- Track and guide contract performance over the life of the PICS II contract vehicle

The PICS II COR will act as the PICS II Contracting Officer's Representative for the purpose of the PICS II contract vehicle. The PICS II COR is responsible for:

(1)   monitoring the contractors' technical progress, including the surveillance and assessment of performance;

(2)   recommending changes in requirements to the PICS II Contracting Officer;

(3)   interpreting the Statement of Work and any other technical performance requirements;

(4)   performing technical evaluations as required;

(5)   performing technical inspections and acceptance required by this contract; and

(6)   assisting in the resolution of technical problems encountered during performance.
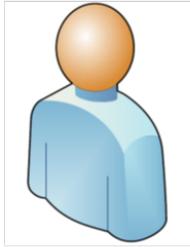
Additional duties include:

(1)   logging and maintaining records of all task orders; and

(2)   tracking and guiding contract performance over the life of the PICS II vehicle.

2.2   Customer

Task orders will be used to define and obtain services under the PICS II vehicle and each task order is expected to have differing requirements based on the unique needs of the customer. The roles listed below describe NIH personnel who will be responsible for the **procurement and oversight of task orders**. People in these roles are considered to be "customers" of the PICS II vehicle.

2.2.1   Task Order Contracting Officer (CO)

The Task Order Contracting Officer (CO) will be the representative of an NIH Acquisition Office and will have the authority to act as an agent of the Government under a particular task order.

Task Order Contracting Officer

Role: The Task Order CO will have the authority to act as an agent of the Government under a particular task order and have the right to negotiate changes to the Statement of Work. The Task Order CO will support the Task Order COR through the task order process.

Task Order Contracting Officer

Primary Responsibilities:
- Submit TORP to PICS II CO and COR
- Assist in the task order proposal evaluation
- Monitor and assess task order performance
- Responsible for all pre-award, award, administration, and close-out activities

The Task Order Contracting Officer has authority to:

(1) direct or negotiate any changes in the Statement of Work or specifications of a **task order**;

(2) modify or extend the period of performance of the task order; as long as the completion of the task order period of performance is within 12 months after the base contract expires;

(3) change the delivery schedule;

(4) otherwise change any terms and conditions of a particular task order; and

(5) create and gain approvals for the exceptions to the Fair Opportunity Process.

Additional responsibilities of the Task Order Contracting Officer include:

(1) submitting the TORP to the PICS II Contracting Officer;

(2) executing the determination and findings (D&F) per FAR 16.602 for each task order placed on a time and materials (T&M) or labor hour (LH) basis (note: additional approval is required for contracts expected to extend beyond three years);

(3) collaborating with the Task Order COR in the evaluation of proposals;

(4) signing the Selection Recommendation Document (SRD);

(5) creating and awarding a task order;

(6) processing modifications to the task order;

(7) monitoring and assessing the contractor's task order performance;

(8) signing acceptance of the final deliverables and/or statement that the work has been completed in accordance with the task order statement of work; and

(9) performing close-out tasks.

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2.2.2 *Task Order Contracting Officer's Representative (COR)*

The Task Order COR must be FAC-COR certified and is responsible for all technical aspects of the task order. The Task Order COR will typically be the individual requiring the services offered under the PICS II vehicle, but may be a designee within the IC requiring the service. The Task Order COR will develop the requirement represent the Government as the main interface between NIH and the contractor during the delivery of services.

Task Order COR

Role: The individual requiring PICS II contract services and represents the Government as the main interface between NIH and the contractor during the delivery of services.

Primary Responsibilities:
- Develop TORP
- Monitor the contractor's task order progress
- Interface with contractor management staff
- Complete contractor performance evaluation

The Task Order COR is responsible for:

(1) monitoring the contractor's technical progress on a **task order**;

(2) collaborating with Task Order Contracting Officer in the evaluation of proposals;

(3) completing formal contractor performance evaluations as required by the PICS Program Support Team

(4) interpreting the Statement of Work (SOW) and any other technical performance requirements of a task order;

(5) performing technical inspections and acceptance required by a task order;

(6) performing technical inspections and acceptance required by a task order; and

(7) assisting in the resolution of technical problems encountered during performance.

Additional duties of the Task Order COR include:

(1) working with the Task Order Contracting Officer to draft the Task Order Request Package (TORP);

(2) providing direction to the contractor's management staff to facilitate task order performance; and

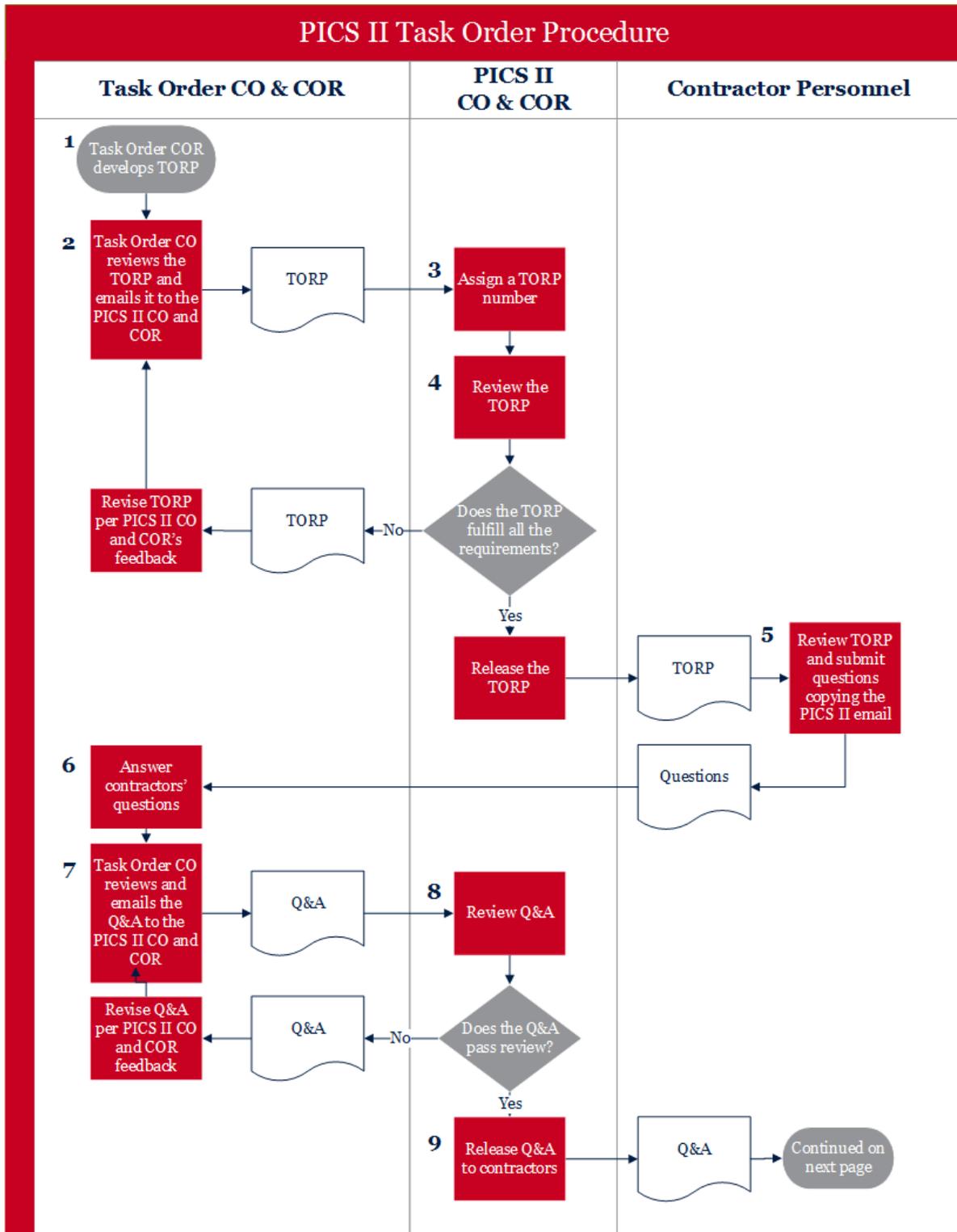(3) monitoring performance over the life of the task order.

3   TASK ORDER PROCEDURES

Task orders are issued to procure services under the PICS II contract vehicle. This section describes the details of the task order creation, solicitation, administration, and management.
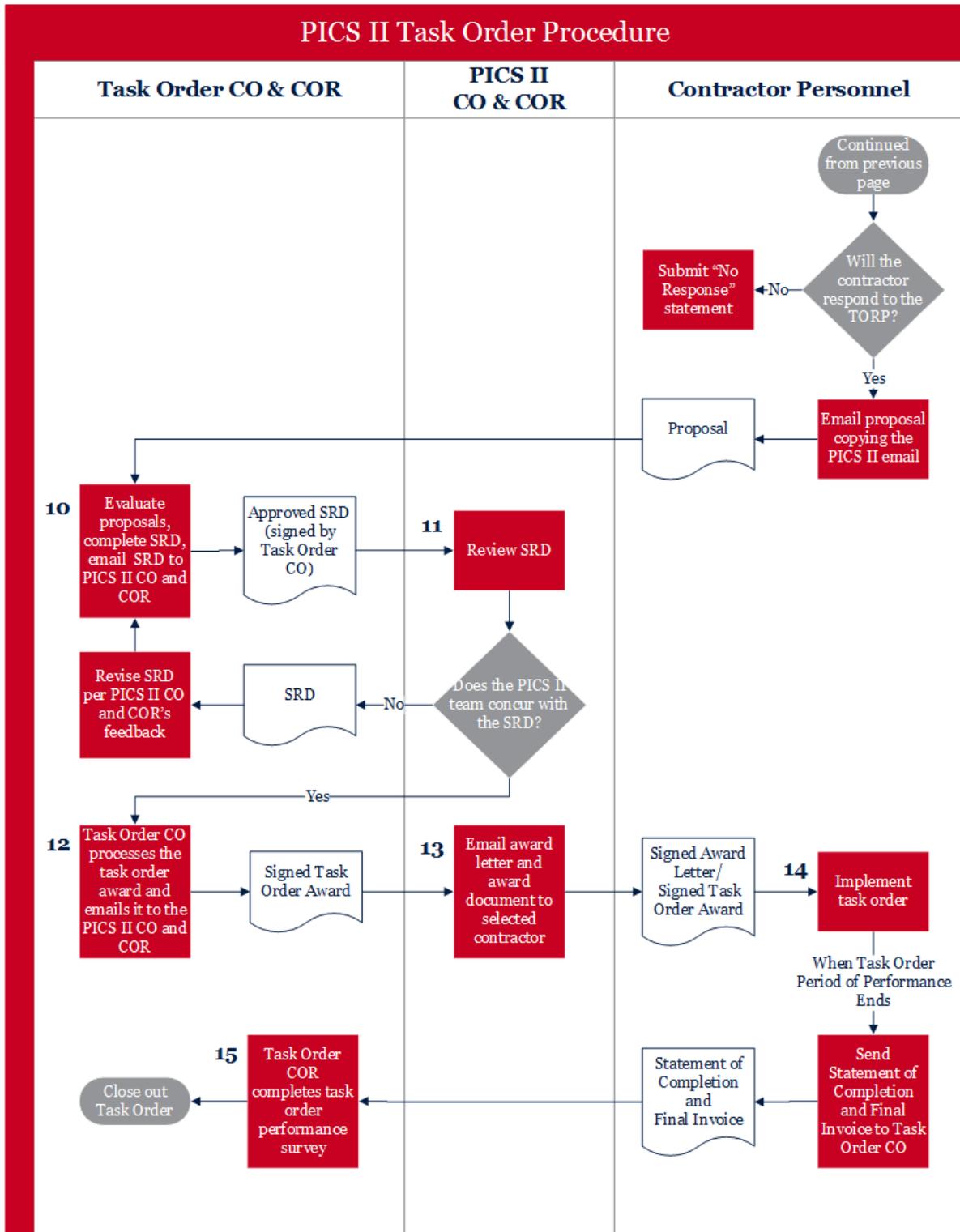
Please refer to the PICS II Website at http://pics.olao.od.nih.gov/ and/or contact the PICS II Program Support Team (PICSII@mail.nih.gov) for additional information.

In accordance with Federal Acquisition Streamlining Act (FASA) and Federal Acquisition Regulation (FAR), Part 16.505(b), each contractor will be provided a fair opportunity to be considered for each order in excess of $3000 unless one of the conditions stated in FAR 16.505(b)(2) applies.

The figure below charts the Task Order Process Flow from initiation of the requirement through task order close-out, mapping each step to the party primarily responsible for completing the required activities. A more detailed description of the activities occurring at each step is provided in subsequent sections of these procedures.

PICS II Task Order Procedure

Task Order CO & COR	PICS II CO & COR	Contractor Personnel

1 Task Order COR develops TORP

2 Task Order CO reviews the TORP and emails it to the PICS II CO and COR

TORP

3 Assign a TORP number

4 Review the TORP

Does the TORP fulfill all the requirements?

—No→ TORP → Revise TORP per PICS II CO and COR's feedback

Yes

Release the TORP

TORP

5 Review TORP and submit questions copying the PICS II email

6 Answer contractors' questions ← Questions

7 Task Order CO reviews and emails the Q&A to the PICS II CO and COR

Q&A

8 Review Q&A

Does the Q&A pass review?

—No→ Q&A → Revise Q&A per PICS II CO and COR feedback

Yes

9 Release Q&A to contractors

Q&A

Continued on next page

14

PICS II Task Order Procedure

Presolicitation

3.1 Step 1 - Task Order Contracting Officer's Representative (COR) develops TORP

When an NIH IC determines a need exists for communication services, a Task Order COR and Task Order Contracting Officer (CO) will first be identified. The Task Order COR may or may not be the requestor for services, but must be Federal Acquisition Certification (FAC)-COR certified. Similarly the Task Order CO must be FAC-C certified. Before creating a Task Order Request Package, the Task Order COR and CO should review the PICS II Contract. The Task Order COR will create a TORP using the TORP form.

All Task Order CORs must coordinate the internal administrative review and management of their respective task orders as defined within these procedures with their Task Order CO.

A completed **TORP** will include the following:

1. Completed TORP Form

2. Statement of Work (SOW)

3. Independent Government Cost Estimate (IGCE) (not released to contractors)

4. Funding Memo (not released to contractors) for task orders where the total value (base plus option years) is less than $250,000

5. Acquisition Plan for task orders where the total value is greater than $250,000

6. Any required conference/meeting approval request forms and waivers with approvals (not released to contractors)

7. Determination and Findings (if applicable) (not released to contractors)

The Task Order COR will submit the TORP to the Task Order CO for review.

3.2 Step 2 - Task Order CO reviews TORP

The Task Order CO will review the TORP to make sure it is complete, per the list in Step 1 and submit a complete TORP to the PICS II CO and COR for review using the PICS II Program Support Team e-mail (PICSII@mail.nih.gov). Only the Task Order CO can email the TORP to the PICS II email.

3.3 Step 3 - PICS II CO receives the TORP and assigns a TORP number

The PICS II CO will assign the TORP an official number prior to review. The TORP number will serve as the task order tracking number.

When submitting or sending any documents or e-mails, the Task Order CO shall reference the TORP number (e.g., subject line for e-mails, headers for documents).

16

Solicitation and Award

3.4   Step 4 - PICS II CO and COR review and release the TORP

The PICS II CO and COR will review the TORP for completion and scope. Any issues with the TORP will be resolved with the Task Order CO and COR. TORPs requiring revisions will be returned by the PICS II CO and COR via email. After review and approval, the PICS II CO will release the TORP to all contractors via e-mail and copy the Task Order COR and Task Order CO.

The TORP <u>does not</u> commit NIH to pay any costs incurred in the submission of any proposal, nor does it commit NIH to award a task order for such services. NIH intends for each TORP to be negotiated into a resulting task order; however, there is no guarantee that a task order will be issued in every case.

3.5   Step 5 - Contractors review TORP and submit questions if necessary

Upon receipt of the TORP, all contractors will have the opportunity to review the requirement and submit questions requiring clarification. Contractors shall submit all questions to the Task Order CO and COR copying the PICS II email address PICSII@mail.nih.gov by the date and time indicated in the TORP.

3.6   Step 6 - Task Order CO works with the Task Order COR to prepare responses to questions

The Task Order CO will work with the Task Order COR to sufficiently respond to any questions submitted by the contractors. Technical related questions will be answered by the Task Order COR; contractual questions will be answered by the Task Order CO. In accordance with fair competition guidelines, all questions and answers must be released to all contractors collectively.

3.7   Step 7 - Task Order CO sends questions and answers to the PICS II CO and COR

All questions and answers will be compiled by the Task Order CO and sent to the PICS II CO and COR via the PICS II e-mail address (PICSII@mail.nih.gov).

3.8   Step 8 – PICS II CO and COR review and release Q&A

The PICS II CO will review and upon approval release questions and answers simultaneously to all contractors from the PICS II email address PICSII@mail.nih.gov copying the Task Order CO and COR.

3.9   Step 9 - Contractors respond to the TORP

Each contractor will have the opportunity to review the requirement, any provided questions and answers, and determine whether or not to submit a proposal. The contractors shall submit either a proposal or a "No Response" statement to the Task Order CO and COR copying the PICS II email PICSII@mail.nih.gov.

3.9.1   Proposals

Proposals shall be submitted electronically via e-mail to the Task Order CO and COR, copying the PICS II e-mail address (PICSII@mail.nih.gov). Oral proposals will not be accepted. Proposals will consist of two parts: a technical proposal and a business proposal. The contractors shall prepare a proposal with as much detail as requested by the TORP. Please note that these proposals may be quite brief unless additional information is required. If price/cost is the only evaluation factor listed, award will be made to the lowest price.

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**Technical Proposals** shall sufficiently respond to all elements of the TORP.

Business Proposals shall include an estimated ceiling (not to exceed) amount specifying labor and other related fees and expenses. The hourly rates for the proposed task order labor categories may not exceed, but may be less than, the rates established in the associated PICS II vehicle. All proposed rates are subject to review by the PICS II Contracting Officer for compliance with the contract.

The contractors will ensure that all proprietary information is appropriately marked within the proposals.

3.9.2 "No Response" Statements

A "No Response" statement shall be submitted if a contractor is unable or otherwise cannot perform a requirement. This shall be submitted electronically via e-mail to the Task Order CO and COR copying the PICS II e-mail address.

All **"No Response" statements** shall include a brief statement as to why the contractor has elected to forego the opportunity.
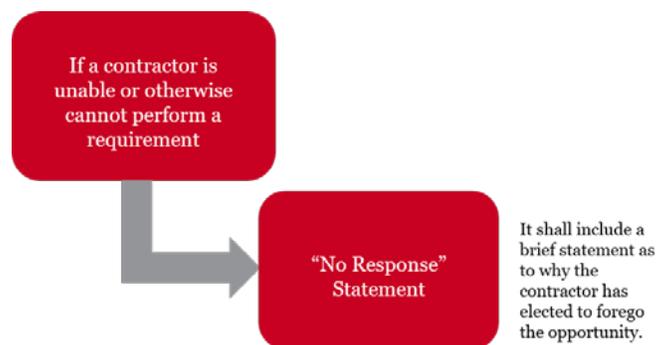
# 3.10 Step 10 - Task Order CO and COR evaluate proposals; submit SRD

The Task Order CO and Task Order COR will evaluate the contractors' technical and business proposals. It is the responsibility of the Task Order CO and Task Order COR to ensure that contractors are treated equitably and fairly during this evaluation process.

The Task Order CO and Task Order COR are responsible for ensuring that proprietary information contained in the contractors' proposals is protected from unauthorized disclosure.

After completion of the evaluation, an Awardee is selected. The Task Order COR will complete a Selection Recommendation Document (SRD) documenting the review process and detailing the reason that award to the recommended contractor is in the best interest of the Federal government in accordance with FAR 16.505(b). An SRD template may be found on the Resources page of the PICS II Website (http://PICS.olao.od.nih.gov). Please note all proposals submitted must be fully evaluated in justification and selection of the Awardee.

The SRD must include the following:

1. the selection criteria/methodology for evaluating submitted proposals as originally defined in the TORP package

2. a list of the contractors that responded to the TORP

3. rationale for the recommendation of the task order Awardee, including a summary of evaluation results, any negotiations conducted, price analysis, and award analysis.
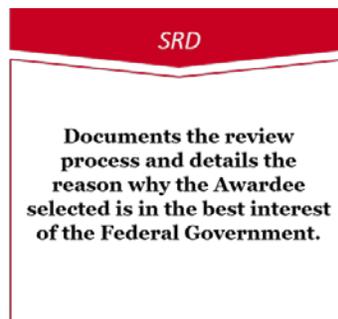
The Task Order CO will sign the SRD and email it to the PICS II CO (via the PICS II e-mail PICSII@mail.nih.gov) for review and concurrence. **The Task Order CO cannot process the award until concurrence is received.**

3.11 Step 11 – PICS II CO reviews and concurs on the SRD

After reviewing and concurring with the SRD, the PICS II CO will notify the Task Order CO via e-mail to begin processing the task order award. This step must be completed before any award can be processed.

3.12 Step 12 - Task Order CO processes the task order award

Per NIH acquisition rules, no task order released under this vehicle can be awarded as a standalone contract or purchase order.

The **task order** will contain:

*   contract number (for the PICS II contractor selected),

*   task order number,

*   order date,

*   point of contact for billing purposes,

*   statement of work (SOW),

*   appropriation/funding citation,

*   amount of funds obligated,

*   billing and delivery addresses, and

*   period of performance.

The Task Order CO will process the award (e.g. OF-347). A copy of the signed award document and DCIS report must be provided to the PICS II email (PICSII@mail.nih.gov)

The Task Order CO and Task Order COR should establish and maintain a task order file containing, at a minimum, all pre-award documentation/proposals/approvals, awarded task order, task order administration documents and correspondence, modifications and supporting documentation, invoices, performance evaluations, closeout documents, and any other documents/correspondence relative to each individual task order.

3.13 Step 13 - PICS II CO releases the award letter

The PICS II CO and COR will announce the task order award by emailing the contract award along with an award letter to the winning contractor. The Task Order CO and COR will be copied on this email.

Upon release of the award letter to the winning contractor, the Task Order CO will email unsuccessful offeror letters within 3 days of contract award to those contractors that submitted a proposal but did not win the task order and copy PICSII@mail.nih.gov.

According to the FAR, Task Order COs must provide a debriefing for all task orders exceeding $5.5M to offerors that request one within 3 days of being notified. For task orders less than $5.5M, providing a debriefing will be at the discretion of the Task Order CO.

Once the unsuccessful offeror letters have been released, the PICS II Support Team will email an award notice to all PICS II contractors informing them of the task order award.

Note: All internal debrief requests for any task order will be coordinated by the Task Order CO and Contractor. A summary of the debriefing proceedings are to be forwarded to the PICS II CO within 3 days of the meeting for filing/audit purposes.

Administration

3.14 Step 14 - Contractor implements the task order

The contractor must contact the Task Order COR to start the work.

The contractor will submit all task order invoices to the billing address indicated in Article G.4 (Invoice Submission) of their PICS II contract. All invoices shall include both current and cumulative billing and clearly cite the funds remaining. The Task Order CO and COR are responsible for reviewing/approving these invoices and ensuring that appropriate receiving is entered.

3.15 Step 15 - Task order close-out

After the Task Order has expired, the Task Order COR will, in conjunction with the Task Order CO, assess the quality of services received by completing a performance survey (available on the PICS II Website at http://PICS.olao.od.nih.gov), and ensure that all task order requirements were met.

The contractor shall submit the final invoice to the Task Order COR including a statement indicating that all work has been completed and all costs have been accounted for and billed. The contractor shall forward a copy of the final invoice to the PICS II CO via email (PICSII@mail.nih.gov) when the task order has been completed.

3.16 Task Order Award Timelines

Task order award timelines are largely dependent on the specific requirement. The timeline for the PICS II Program Support Team to review and release the TORP to contractors (Task Order Steps 3-4 from above) is targeted to be approximately five (5) business days. Task orders with special requirements or complex requirements may take longer. This processing time begins once a complete, acceptable TORP is received by the PICS II Contracting Officer.

Incomplete or unacceptable TORPs will require additional time for the PICS II Contracting Officer to advise the Task Order CO on minimum acceptable requirements.

Task Order COR in consultation with the Task Order CO will establish a TORP response time that will afford contractors a reasonable opportunity to respond to the requirement. When establishing the TORP response time, Task Order COR and Task Order CO shall consider the circumstances of the individual acquisition and account for factors such as the complexity, availability, and value of the requirement.

4   CONTRACT AND TASK ORDER MANAGEMENT

As outlined in Section 2 of this document, the Office of Logistics and Acquisition Operations (OLAO) will provide contract-level management and oversight for the PICS II contracts through the PICS II Program Support Team. The Task Order Contracting Officer (CO) and Task Order Contracting Officer's Representative (COR) will perform day-to-day management and oversight for each task order.

4.1   Contract Management

The PICS II Contracting Officer (CO) will perform contract administration duties while the PICS II Contracting Officer's Representative (COR) will track and guide contract performance over the life of the contract. The PICS II Program Support Team employs several methods and tools to assist this effort, in close concert with performance monitoring and evaluation efforts.

4.1.1   Contract Files

The PICS II Program Support Team maintains a central file for each of the contracts. The file contains the contract and all documentation; all contract modifications, correspondence, and performance evaluation reports, as well as copies of task orders, task order documentation, and task order modifications. The Task Order Contracting Officer maintains the official task order file and associated documentation.

4.1.2   Training

The PICS II Program Support Team will prepare and conduct training presentations to assist PICS II customers and contractors in understanding and using the PICS II contracts. Training sessions will also be held with the contractors to improve their understanding of the task order process. Training all parties involved will facilitate adherence to the task order procedures. In addition, materials such as this SOP document, FAQs, templates, and other supporting documents are available on the PICS II Program Support Team's Web site at http://PICS.olao.od.nih.gov/. Please complete the Training Request Form on the "Resources" page of the PICS II Website.

4.2   Task Order Management

The Task Order CO and Task Order COR will be responsible for the task order activities involving initiating, awarding, administering, and closing out task orders. They will track and guide task order performance over the life of the task order. The PICS II Program Support Team will assist all customers in their task order activities as well as log and maintain records of all task orders.

4.2.1   Initiation and Close-out of Task Orders

Task order initiation and close-out activities will be the responsibility of the Task Order CO and Task Order COR. These materials may be reviewed by the PICS II COR.

4.3   Day-to-Day Oversight and Management

The Task Order CO and Task Order COR provide "frontline" day-to-day monitoring of the task order during the task order period of performance. Since this is a non-personal services contract, the Task Order CO and Task Order COR shall ensure that direct management of contractor personnel remains the responsibility of the contractor's management staff.

The Task Order CO and Task Order COR are responsible for monitoring and assessing the contractor's task order performance, including the responsiveness of the contractor management staff.

Contract level issues that arise during task order performance should be referred to the PICS II Program Support Team for resolution (e.g., need for contract modifications, contract disputes, contract terminations).

4.3.1   Acceptance of Services

The Task Order CO and Task Order COR are responsible for inspection and acceptance of task order services provided. If services are rejected, this must be documented in writing to the contractor, with recitation of the requirement and factual statements of how the contractor failed to meet these requirements.

4.4 Task Order Modifications

Task order modifications are generally made to correct oversights or changes in conditions from the original task order. The following procedures will apply to task order modifications:

4.4.1   No-Cost Modifications

After obtaining approval by the PICS II CO, no-cost modifications will be processed directly by the Task Order CO with input from the Task Order COR.

Copies of any task order modification executed are required to be sent to the PICS II CO and COR via the PICS II Program Support Team e-mail (PICSII@mail.nih.gov).

4.4.2   Addition of Funds

After obtaining approval by the PICS II CO, modifications to add funds to a task order will be processed directly by the Task Order CO with funding documentation provided by the Task Order COR.

Copies of any task order modification executed must be sent to the PICS II CO and COR via the PICS II Program Support Team e-mail (PICSII@mail.nih.gov).

4.4.3   Additional Work / Additional Time

If the customer's modification requirement alters the scope, adds an additional period of performance, or provides for major changes such as additional work, a task order modification is not appropriate. Instead, a new TORP must be initiated.

5   Appendix 1: PICS II Labor Categories

Labor Category	Functional Responsibility	Education/Experience
Program Manager	✓ Responsible for planning, developing, implementing and evaluating overall program policies and directing subordinate managers/staff ✓ Directs and manages the operation of several programs/projects ✓ Administration, management, and monitoring responsibilities include, but may not be limited to: establishment of goals, objectives, performance requirements, standards, and accountability; administration of program costs and budget; management and operation of programs; project execution; and contract compliance and deliverable schedules for projects including media, marketing, graphics, website design, video production and other communication activities, outreach, market research, and analysis	▭ MA or equivalent professional degree in an associated field ▭ A minimum of 10 years of related experience ▭ Equivalent combination of experience and training that provides the required knowledge, skills, and abilities may be substituted
Deputy Program Manager	✓ Serves as the project manager for large, complex task order (or a group of task orders) ✓ Able to assist the Program Manager in working with the Government's CO, the contract-level Contracting Officer's Representative (COR), the task order-level COR(s), government management personnel and customer agency representatives ✓ Under the guidance of the Program Manager, responsible for the overall management of the specific task order(s) and ensuring that the technical solutions and schedules in the task order are implemented in a timely manner	▭ BA/BS degree in business or other related discipline ▭ A minimum of 12 years of experience of which at least 7 years must be specialized in project development from inception to deployment and demonstrated capability in managing multi-task contracts and/or subcontracts of various types and complexity
Project Manager	✓ Provides management of project activities, personnel and administrative functions related to specific tasks and ensures that technical solutions and schedules are implemented in a timely manner ✓ Directs and manages staff assignments and monitors product quality and ensures project milestones meet deliverable schedules, and reports on project status to the program manager	▭ BA/BS in communications, journalism, or other related training

24

Meeting Planning	✓ Supervises on-site logistical support activities including room set-up, audio-visual requirements, manages logistical activities associated with planning and implementing meetings, conferences, trade show exhibits, and other events ✓ Maintains close contact with the client project officer throughout event planning and implementation ✓ Negotiates site contracts for meetings ✓ Develops status and end-of-event reports for clients ✓ Develops and maintains participant databases using meeting planning software ✓ Verifies and reconciles host hotel and other vendor invoices	📖 BA/BS or high school diploma with strong administrative skills 📖 3 years of relevant experience
Jr. Meeting Planner	✓ Provides guidance to team members, assigns exhibitor space, oversees booth set up, orders booth furniture and required audio-visual equipment ✓ Collects participant and exhibitor registration fees when applicable	📖 BA/BS or high school diploma with strong administrative skills 📖 1 year of relevant experience
Web Designer	✓ Directs and manages the design, development, and management of client web sites	📖 High School diploma or equivalent certification 📖 Advanced experience in web design, website development, web production management, web-based scripting language, and design standards and file types 📖 Must have working knowledge of Section 508 standards as well as experience with design-related graphics and relevant applications such as Adobe
Web Developer	✓ Builds web pages using a variety of graphics software applications and web-based scripting language(s) ✓ Manages and performs website editorial activities ✓ Analyses complex technical problems ✓ Develops and renders solutions ✓ Develops site content ✓ Aids in all web projects involving desktop publishing and website design and development	📖 Certification in web applications 📖 Must have experience in website development 📖 Must have experience web page design, web-based scripting language(s), and web graphics files and standards
IT Specialist	✓ Provides administrative support for activities pertaining to software applications utilizing commercial database management systems Includes:	📖 Must have relevant experience and training that provides the required

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	user administration, data gathering, data retrieval, and manipulations ✓ Reviews computer systems in terms of machine capabilities and man-machine interface ✓ Prepares reports and studies concerning hardware ✓ Prepares functional requirements and specifications	knowledge, skills, and abilities
Scientific Writer	✓ This interdisciplinary position involves analyzing scientific data and translating the information into writing that can easily be understood by readers ✓ Responsible for composing a variety of documents about physical, medical, chemical, or biological sciences ✓ Write for a variety of media, including periodicals, books, websites and newspapers ✓ Readers of these publications can be experts or laypeople ✓ Responsible for conveying information to a wide audience successfully	▢ BA/BS in a scientific field ▢ 3 years of relevant experience
Sr. Writer	✓ Formulates and writes copies for projects including fact sheets, project summaries, monthly progress reports, informational packets, press releases, publications and web content ✓ Provides technical writing, editing and proofreading support for materials such as reports, news releases, fact sheets web content, and scripts ✓ Collaborates with subject matter experts, researchers, and graphic artists to produce documents	▢ BA in Journalism, Communication, English, or related field ▢ 5 years of experience
Jr. Writer	✓ Provides technical writing support for project deliverables ✓ Conducts research, identifies subject matter experts, and conducts interviews ✓ Gathers data and collates and organizes facts for inclusion in written products ✓ Develops drafts and submits them for review ✓ Proofreads copy written by project team members and client ✓ Plans web and print products	▢ BA in Journalism, Communication, English, or related field ▢ 3 years of technical/ editing experience
Editor	✓ Provides technical writing, editing, and proofreading support for materials such as reports, news releases, fact sheets, web content, and scripts	▢ BA in Journalism, Communication, English, or related field ▢ 5 years of technical/ editing experience

26

Subject Matter Expert (SME)	✓ SMEs are persons widely considered to be experts in a subject, topic or field and may have a diploma, certification, or equivalent experience in their areas of expertise ✓ Performs a variety of work to evaluate and apply new methodologies for problem-resolution while ensuring that systems are in compliance with organizational requirements ✓ Analyzes agency needs to determine functional requirements, performs functional allocation to identify required tasks and their interrelationships ✓ Develops recommendations for organizational process changes to include new solutions and new technologies	📖 Advanced degree or equivalent training and certification in a relevant field or related discipline 📖 5 years of relevant, senior-level experience
Executive Admin Asst.	✓ Performs a variety of administrative functions for executives and project team members ✓ Familiar with a variety of field concepts, practices, and procedures ✓ Generates reports, handles multiple projects, and prepares and monitors invoices and expense reports ✓ May direct and lead the work of others ✓ A wide degree of creativity and latitude is expected	📖 BA/BS in a related discipline 📖 5 years' of related experience or an equivalent combination of education and training that provides the required knowledge, skills, and abilities
Clerk	✓ Under supervision performs coding and filing of documents, familiarity with basic office procedures, operates office equipment, e.g., multi-line/voice systems, office machines, and minimal computer programs ✓ Clerical duties often vary in type and sequence depending on task ✓ Customer service skills should be emphasized ✓ Duties include generic clerical skills such as greeting and directing visitors, fielding phone calls, scheduling meetings, responding to callers, taking minutes, composing memos, transcribing, developing presentations, generating reports, and monitoring invoices and expense reports	📖 High School diploma 📖 2 years of strong administrative support or related field experience
Production Assistant	✓ Provides document production support by operating computer equipment to compile, type, revise, combine, edit, revise, print, label, organize, and store documents	📖 BA/BS degree or High School diploma 📖 3 years of strong administrative support or related field experience

27

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Graphic Artist/ Designer	✓ Develops and designs layouts across all mediums (print and electronic) that have a clear focus, theme, and message for intended audiences	📖 BA/BFA in design (e.g., graphics, marketing, or other discipline) 📖 A minimum of 5 years of experience in graphics or advertising
Translators and Interpreters	✓ Provides language translation and interpretation services at the level of a native speaker or as certified to be able to interpret and translate at the level of a native speaker	📖 BA/BS degree in an associated discipline or 2 years of relevant experience and accredited by the American Translators Association or other similar and pertinent accrediting and certification institution (e.g., health interpreters' organizations)
Warehouse Manager	✓ Provides asset management system to monitor and track customer's office furniture and equipment inventory ✓ Provides a physical inventory of furniture and furnishings, bar-coding services, including: developing bar code standards, bar-c0ding individual office items, and develops a bar code data base ✓ Flow chart current processes and develops recommendations to improve processes ✓ Manager the process for the proper disposition of Federal Government property in accordance with applicable rules and regulations, as required ✓ Organizational skills and customer service shall be emphasized	📖 BA/BS or High School diploma with strong administrative skills 📖 4 years of relevant experience
Warehouse/ Skilled Labor (Gen)	✓ Performs general labor tasks including loading, unloading, lifting, and moving materials ✓ Experience operating heavy machinery in warehouse, i.e. forklifts	📖 High School diploma or its equivalent 📖 3 years of experience in the field or related area
Unskilled Labor (Gen)	✓ Performs general labor tasks	📖 High School diploma or its equivalent 📖 1 year of experience in the field or related area
Courier	✓ Provides services related to pick up and delivery of boxes, packages, and mail	📖 High School diploma or its equivalent 📖 2 years of experience in the field or related area
System Engineer	✓ Provides highly technical expertise in the use of complex applications ✓ Evaluates and recommends available products to support validated user requirements ✓ Defines file organization, indexing methods, and security procedures for specific user applications	📖 Must have relevant experience and training that provides the required knowledge, skills, and abilities

28

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	✓ Provides direct support to consultants and other senior personnel	
Senior Analyst	✓ Leads design of project solutions and manages project ✓ Provides primary point of contact with client and is the senior technical advisor ✓ Provides strategic guidance in area of formulating requirements, analyzing project proposals, recommending optimum approaches and developing system design ✓ Formulates specifications for developers to use in producing product deliverables	🕮 BA/BS 🕮 A minimum of 7 years of experience with 4 years supervisory responsibility
Strategic Planner	✓ Provides direction and guidance for program, task or event operations ✓ Works closely with customer to develop and implement plan ✓ Works with logistics coordinators and team members to develop and execute work plans	🕮 BA/BS and/or 8 years of experience developing agenda for professional conferences and meetings 🕮 Experience in developing and implementing marketing plans and building exhibits
Professional Trainer	✓ Trains personnel by conducting formal classroom courses, workshops and seminars ✓ Prepares instructor materials Develops and revises courses and prepares appropriate training catalogs ✓ Prepares student materials (training aids, presentations, course outlines, workbooks, handouts, completion certificates, and course critique forms)	🕮 BA/BS or specialty accreditation or equivalent certification 🕮 3 years of senior-level experience in the field or related area
Call Center Staff	✓ Serves as lead points-of-contact at contracted help desk and carries out help desk activities and responsibilities, including preparation, execution, and record-keeping related to timely response of phone, written, and in-person inquiries ✓ Conduct information dissemination activities ✓ Serve as points-of-contact for troubleshooting computer equipment	🕮 Must have relevant experience and training that provides the required knowledge, skills, and abilities
Call Center Manager	✓ Provides daily supervision and direction of help desk (inquiry response) responsibilities and activities ✓ Oversees help desk and directs contractor programs related to agency information dissemination ✓ Provides first-point-of-contact troubleshooting computer equipment ✓ Maintains documentation of help desk activities ✓ Prepares reports and participates in planning meetings	🕮 Must have relevant experience and training that provides the required knowledge, skills, and abilities

29

Exhibit Designer	✓ Responsible for lead design, oversight, production, delivery, and installation of exhibits and their accompanying materials ✓ Design responsibilities include but are not limited to conceptualizing, designing, revising, and producing exhibits and their accompanying materials; updating and repairing existing materials; and overseeing transport, installation, and storage of property to and from designated site(s) ✓ Provides and/or makes recommendations for design, installation, and maintenance of exhibits and exhibit property for future use ✓ Makes all necessary arrangements for exhibits in venues (tradeshows, Government sites, non-Federal, exhibit venues, et al.)	📖 BA/BS in a relevant discipline 📖 A minimum of 2 years of related experience or equivalent combination of education and training that provides the required knowledge, skills, and abilities
Exhibit Production Staff	✓ Under supervision of the exhibit designer, prepares facilities for receipt and installation of materials associated with exhibit set-up ✓ Interacts with facility personnel in coordinating booth assignments, and serves as a liaison for transport, lighting, set-up, security, and storage or exhibit materials	📖 BA/BS in an associated discipline 📖 A minimum of 6 months of related experience or equivalent combination of education and training that provides the required knowledge, skills, and abilities

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