SOCIAL SECURITY ADMINISTRATION (SSA)

REQUEST FOR QUOTATION
EVALUATION OF OCCUPATIONAL INFORMATION SERVICES

SSA-RFQ-08-1549

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REQUEST FOR QUOTATION

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SECTION A

SF1449 SOLICITATION FOR COMMERCIAL ITEMS

See attached .pdf file (2 pages)

SF1449

The offeror is requested to complete the attached SF1449.

SECTION B

June 25, 2008

Dear Prospective Offerors:

The Social Security Administration (SSA) anticipates issuing a Task Order for evaluation services of occupational information under GSA's MOBIS schedule 874-1. We are therefore soliciting a quotation from your firm to perform this effort under your GSA Contract. If you are interested, please provide us with a quotation that includes the following:

A. Technical Proposal (no more than 25 pages excluding resumes and articles)

The technical proposal shall demonstrate the offeror's understanding of the requirements. At a minimum, the written technical proposal shall include sufficient detail inclusive of the following:

(1) The solicitation number;

(2) The name, address, and telephone number of the offeror;

(3) Acknowledgment of any Solicitation Amendments;

(4) A statement specifying the extent to which the offeror complies with all terms, conditions, and provisions included in the solicitation. If the offeror is unable to or elects not to comply with one or more of the terms, conditions and provisions in the solicitation, the offeror must furnish an explanation. Offerors that fail to furnish required information or reject the terms and conditions of the solicitation may be excluded from consideration;

(5) Address all pass/fail criteria shown in Section E and address all issues raised in the Statement of Work including:

I. Evaluation Methods - offerors will describe the methods by which they propose to evaluate occupational information, including the following:

a) A description, in the offeror's own words, of SSA's occupational information requirements;

b) A description, in the offeror's own words, of job analysis techniques and definitions as they are reflected in the DOL's DOT, SCO and RHAJ, and a description of how the Offeror's methodology will evaluate the extent to which these job analysis techniques were or are employed by the Occupational Information Contractor (OIC) in developing the occupational information;

c) A detailed description of the methodology, including processes, procedures, staffing and sampling techniques, that the offeror will use to perform cross-validation studies of the occupational information (see Statement of Work, task 2.3.C.5.);

d) A detailed description of the methods, processes, procedures and staffing that offeror will employ to perform the evaluations described in Statement of Work, task 2.3; and

e) A detailed description of the methods, processes, procedures and staffing that offeror will employ to write the reports described in Statement of Work, task 2.4.

II. Recommended Expertise and Staffing - Offerors must recommend the appropriate expertise and staffing needed to conduct the contracted work.

a) Offerors shall describe the general staffing plans for the contracted work; Identify the Principal Investigator (PI) and, if a different individual, the Project Manager (PM); Identify other professional staff or subcontractors who will perform the contracted work;

b) Offerors must specify the exact staffing arrangements being proposed, including position descriptions and duties, lines of authority, general labor categories, and percentage of time committed to the project for each staff member or subcontractor involved in the contracted work;

c) Offerors must submit resumes or curriculum vitae for the PI, the PM (if applicable) and for all professional staff or subcontractors. Each resume or curriculum vita must indicate educational background, recent experience, and specific or technical accomplishments. Each resume or curriculum vita must also indicate experience, if applicable, in performing onsite direct-observation job analyses;

d) Offerors shall provide information regarding up to 4 articles or books authored by the PI and related to the contracted work, including titles, publication information (if applicable), or location of the articles (if unpublished). Offerors must attach copies of referenced unpublished articles to the technical proposal. Offerors may attach copies of published articles to the technical proposal;

e) For all proposed personnel who are not currently employed by or under contract to the offeror (i.e., being recruited specifically for this contracted work), a letter of commitment or other evidence of availability is required. A resume does not meet this requirement.

III. Project Management- This factor will be evaluated by considering the extent to which the offeror's project management plans will contribute to the effective management of the project to ensure that the goals and requirements of the contracted work are met. This should include, but is not limited to:

- A description of the skill categories to be utilized (this description should match up to the labor category description included in your price proposal);
- A description of which portions of the effort will be subcontracted, if any;
- A description of the number of hours required to accomplish the work effort; and
- A complete staffing chart indicating who will be performing what task, number of hours, etc. (this chart should cite the name of the individual whenever possible and the GSA schedule labor category of which they are being proposed). *Do not include labor hour pricing in the technical proposal, as such pricing will be included as part of your price quotation.*

IV. Past Performance - offerors must list the following information regarding past performance:

a. Offerors must cite all projects or contracts involving evaluations conducted within the last 3 years. Offerors must cite all projects or contracts involving evaluations of occupational information conducted within the last 5 years;

b. For each project or contract, offerors must cite briefly (a few sentences) the main requirement(s) and the extent to which the requirement(s) was met;

c. For each project or contract involving an evaluation of occupational information, offerors must briefly describe the occupational information, the purpose of the evaluation, the evaluation methodology employed, and the results of the evaluation;

d. For each project or contract, offerors must indicate whether the project or contract was completed on time and within budget;

e. For each project or contract, offerors must identify the period of performance, level of effort, and actual dollar value for each year of the project or contract; and

f) For each project or contract, offerors must cite the name of a reference for the customer/contractee/employer and current contact information for the reference, including a telephone number. Offerors shall be responsible for ensuring that the reference information is current and accurate.

In addition, Past Performance surveys are included in this solicitation as Attachment C which may be completed by referred organizations and returned by the response date of the solicitation along with offers. Offerors are encouraged, but not required, to include completed surveys along with their offers.

(6) Offerors shall disclose any current or past business or personal relationships with private-sector entities that produce occupational information as described in this solicitation. Offerors must also disclose if it is a producer of occupational information and, if so, describe the occupational information in detail. In each instance, offerors shall list the following information for these disclosures:

A. Offerors must list the product(s) and the name(s), address(es) and contact information of the entity(s) involved. Offerors shall be responsible for ensuring that the contact information is current and accurate;

B. Offerors must briefly describe the type of business or personal relationship(s) involved; and

C. Offerors must indicate whether this relationship continues, or when and how it ended.

(7) The Offeror shall indicate a willingness to sign a non-disclosure agreement regarding the evaluation of the occupational information and methodology.

(8) Offerors are requested to use size 12 font for all forms of delivery submission.

B. <u>Price Quotation</u>

The offeror is required to submit a price quotation separate from its technical proposal. The price quotation shall be fixed price except for travel. Any travel required in accordance with the statement of work shall be proposed as a total not-to-exceed amount and will be reimbursed based on actual cost in accordance with Federal Travel Regulations. *Note: The travel to be reimbursed is defined as "other than local travel -travel outside of the Baltimore-Washington area*.

The price quotation shall identify all elements as follows:

- **Labor** (firm-fixed-price) - Labor categories, descriptions, number of labor hours for each category and labor rates, segregated by task;
- **Other Direct Costs** (firm-fixed-price) - if any, identify all ODC elements and applicable overhead rates. Any ODC element >$25,000 must be included under your GSA Schedule contract;
- **Travel (other than local)** (cost-reimbursable) - if any, NOT TO EXCEED AMOUNT, identify all elements (i.e., per diem, lodging, airfare, etc.) and applicable overhead rates (profit/fee excluded).
- **Price discounts or reductions to be offered -** SSA seeks price reductions from your GSA pricing schedule whenever possible and/or in accordance with FAR 8.405-4.

The offeror must provide a copy of its applicable GSA schedule contract and price list for the period of performance of this requirement. If applicable, the offeror should include this same information for any proposed schedule subcontractor.

Note that security clearances will be required for all personnel involved in the resulting task order award, and that SSA will forward the appropriate forms to the successful contractor immediately following award for processing. Contractors should be prepared to accelerate the return of the required forms within 7 days of award. The Government cannot permit contractor personnel to perform under the contract until the pre-screening process is complete.

The government anticipates one (1) award as a result of this solicitation, with a performance period of 9 months from date of award. Award will be made to the offeror who represents the "best value" to the government in accordance with the Evaluation Criteria listed in SECTION E.

An expeditious award is desired; therefore, award may be based upon initial offers received without discussions.

Questions concerning this solicitation must be submitted in writing to the email address listed below **no later than noon, July 2, 2008.**

Your offer must be received by **1:00 PM EST, July 9, 2008** and marked with the solicitation number, SSA-RFQ-09-1549. Three hard copies of your offer shall be delivered to the address shown in field 15 of the SF1449 form stating "attention to Daniel Walker". Additionally, your offer shall be submitted electronically to **daniel.walker@ssa.gov.**

Sincerely,
/s/
Daniel Walker
Contracting Officer
Division of Programs Contracts
Office of Acquisition and Grants

SECTION C

**Evaluation of Occupational Information
Which Updates the Dictionary of Occupational Titles
for Use in SSA's Disability Evaluation Process**

STATEMENT OF WORK

1. PURPOSE

The purpose of this contract is to obtain the services of an Independent Evaluator (IE), who will evaluate the occupational information and methodology employed by a specific, unrelated private-sector entity(ies) to produce occupational information that updates the 1991 *Dictionary of Occupational Titles Revised 4th Edition* (DOT), published by the Department of Labor (DOL). Through a separate solicitation SSA will identify and obtain for evaluation purposes occupational information from one or more private-sector entity(ies). The occupational information SSA identifies through a separate solicitation must be an existing, updated DOT-based database which SSA may be able use in SSA's disability programs. Before SSA can use this private-sector occupational information, SSA must know if the information and the methodology employed to produce it meet SSA's requirements for use in SSA's disability evaluation process. With the assistance of the evaluation(s) to be performed for this contract, SSA will determine if the private-sector occupational information and the methodology employed to produce it meet these requirements.

2. BACKGROUND

A. SSA's Use of Occupational Information

SSA requires occupational information about work performed throughout the nation to assess whether claimants' impairments prevent them from doing not only their past work, but also any other work in the U.S. economy. In its regulations, SSA takes administrative notice of reliable job information available from various governmental and other publications. Currently, SSA uses the DOT and its companion volume, *Selected Characteristics of Occupations Defined in the Revised Dictionary of Occupational Titles* (SCO), published by the DOL, as primary sources of information about jobs, job requirements, and the existence of work in the national economy. In addition, SSA's regulatory guidelines are based on DOT constructs and definitions. For example, SSA defines sedentary, light and medium strength work in the same way they are defined in the DOT and SCO. However, the DOL has not formally updated the DOT since 1991 and has no plans to do so. Instead, the DOL has developed a new system, the Occupational Information Network (O*NET), for use in the public workforce investment system and for purposes of career exploration, educational planning, and career decision-making. SSA has determined that it cannot use O*NET occupational information in its disability determination process.

SSA is considering ways in which these issues can be resolved on a long-term basis. In the interim, SSA is seeking, through a separate solicitation, to obtain occupational information on trial basis that the IE will assist SSA in evaluating under this contract to determine if the occupational information and the methodology employed to produce the information meet the criteria cited in this contract.

For a general description of SSA's disability evaluation process, see SSA's regulations at 20 Code of Federal Regulations (CFR) 404.1520 and 416.920.

For SSA disability guidelines and a description of the manner in which occupational information is used in SSA's disability evaluation process, see SSA's regulations at 20 CFR 404.1560 to 404.1569a and 416.960 to 416.969a, and 20 CFR Part 404, Subpart P, Appendix 2.

B. Required Reference Material

The following DOL materials contain background, definitions, information, and data that are pertinent to the work under this contract:

Dictionary of Occupational Titles Revised 4th Edition, Vol. I and Vol. II (DOL, 1991), including occupational titles, definitions, tasks, codes, worker traits (includes information published in the *Selected Characteristics of Occupations Defined in the Revised Dictionary of Occupational Titles* (DOL, 1993), and associated cross-walks to other classification systems. See National Crosswalk Service Center (Center for Career and Occupational Resources Iowa Department of Education, Grimes State Office Building, Des Moines, Iowa 50319, see www.xwalkcenter.org)

The Revised Handbook for Analyzing Jobs (1991).

3. SCOPE OF WORK

A. Overview

Through this contract, SSA is evaluating existing, updated DOT-based occupational information developed by a private-sector entity(ies). The Independent Evaluator (IE) will evaluate occupational information and the methodology employed to produce it. SSA will identify and select, through a separate solicitation, one or more Occupational Information Contractor(s) (OIC(s)) who have an existing DOT-based occupational database that updates DOT information for possible use in SSA's disability programs in the interim while SSA pursues longer-term alternatives. The IE will conduct an evaluation as required and described in this contract of the occupational information and methodology used to produce it for each entity that SSA selects for evaluation through a separate solicitation.

Prior to the start of any evaluation activity (see tasks 2.1 through 2.3) required by this contract, the IE contractor and all involved IE contractor staff, including subcontractors, will be required to sign a non-disclosure agreement regarding any of the OIC's occupational information, methodologies, source materials and documentation, and technical proposal materials and documentation examined or evaluated by the IE for tasks required by this contract.

The IE will have access to the OIC, its staff and its documents, including onsite visits to OIC's place of business, during the evaluation.

The IE will issue a report(s) to the SSA Contract Officer Technical Representative (COTR) on its findings for each evaluation conducted. The IE will be required to sign a non-disclosure agreement regarding the IE's evaluation of the Occupational Information Offeror(s)'s and OIC's occupational information and methodology. Any disclosure of these reports or the information contained in these reports shall be at the sole discretion and responsibility of SSA.

The relationship between the OIC(s) and the IE, while not adversarial, is also not collaborative. The relationship between the OIC(s) and the IE shall be an "arm's length" relationship as that is required to maintain the objectivity of the IE. At no time during the performance of this contract shall the OIC(s) and the IE, or their respective staffs or subcontractors, discuss the IE's opinions or findings regarding the OIC's occupational information or methodology.

While the IE may use OIC or other computer software to do any data searches necessary as part of the evaluation described in this contract, the IE will not perform an evaluation of the computer software.

The IE shall evaluate occupational information and the methodology employed to produce that information, which is described in the OIC's technical proposal(s) which SSA will share with the IE after SSA has selected OIC(s). The IE's evaluation of OIC's documentation, including OIC's technical proposal(s), will be only for the purposes of this contract and not for OIC selection(s) to participate in this evaluation.

4. DETAILED TECHNICAL REQUIREMENTS (Tasks)

This section states the requirements of this contract. SSA anticipates that these evaluations will be completed within 9 months.

1.0 Post Award Activity

Task 1.1 Post Award Meeting

Key IE project personnel shall meet with the SSA COTR and other SSA staff for Post Award meeting within two (2) weeks following the contract award date. For the purpose of estimating costs, offeror(s) should assume that this meeting will take place for no more than two (2) full days. The purpose of this meeting will be to:

- Clarify the goals of the project;
- Clarify the roles of the SSA COTR and the IE;
- Discuss the details of implementing the IE's proposed plans; and
- Clarify any final revisions to IE's methodology or proposed plans.

IE deliverables for task 1.1

Within two (2) weeks following the contract award date, key IE project personnel shall meet with the SSA COTR and other SSA staff.

2.0 Evaluation Activity

The IE shall conduct the evaluation according to the requirements described in the tasks below. During the evaluation(s) conducted under this contract, the IE shall have access to the OIC(s), its staff and its documents, including onsite visits to OIC's place of business.

Task 2.1 Meetings

For the purpose of developing cost estimates, Offeror(s) should assume that all meetings, except those held solely between the IE and the OIC(s), shall be held at SSA headquarters in Baltimore, Maryland. However, SSA and the IE may negotiate alternative locations of meetings conducted under this contract, except those held solely between the IE and the OIC(s). Meetings between the IE and the OIC(s) will be held at the OIC's place of business unless the parties negotiate an alternative location. The following meetings will be conducted under this task:

A. Orientation Meeting with SSA COTR and OIC

> Key IE project personnel shall meet with the SSA COTR, other SSA staff, and the OIC (IE and SSA COTR and SSA staff will meet with each OIC separately throughout one (1) business week if SSA selects more than one OIC) for an Orientation meeting. For the purpose of estimating costs, offeror(s) should assume that this meeting will take place in Baltimore, Maryland at SSA headquarters for no more than five (5) business days. The purpose of this meeting will be to accomplish the following:

- Clarify the goals of the project;
- Clarify the roles of the SSA COTR, the IE, and the OIC; and
- Discuss the details and logistics of performing the evaluation.

B. Other Meetings

The IE shall meet with the SSA COTR and other SSA staff as needed. The purpose of the meetings will be to discuss questions and concerns, and to review task completion and progress toward task deadlines. These meetings will be in addition to the required Orientation meeting described in task 2.1.A. above. For the purpose of estimating costs, offeror(s) should assume that the meetings will be held for one day, unless otherwise agreed upon by the SSA COTR.

The IE shall meet with the OIC(s) as needed. The purpose of the meetings will be to exchange information regarding OIC's occupational information and methodology, and to address any questions or concerns that either the IE or the OIC(s) has regarding the evaluation. During these meetings, the OIC(s) and IE will not discuss IE's opinions or findings. These meetings will be in addition to the required Orientation meeting described in task 2.1.A. above.

IE deliverables for task 2.1

Within four (4) weeks following the contract award date, key IE project personnel shall meet with the SSA COTR, other SSA staff, and the OIC (IE and SSA COTR and SSA staff will meet with each OIC separately throughout one business week if SSA selects more than one OIC) for an Orientation meeting.

The IE shall provide the OIC(s) with notice of onsite visits at least two (2) weeks in advance of an anticipated meeting.

At least one (1) week prior to any meetings between the OIC(s) and the IE, the IE shall notify the SSA COTR in writing regarding time, place and agenda for the meeting.

Task 2.2 Telephone and Electronic Mail Contact

The IE and the SSA COTR shall be available to each other by telephone and email on an as-needed basis to discuss activities, progress on task completion, and any questions or concerns that either the SSA COTR or the IE has regarding the contract tasks.

The OIC(s) and the IE shall be available to each other by telephone and email on an as-needed basis to exchange information regarding OIC's occupational information and methodology, and to address any questions or concerns that either the IE or the OIC has regarding the evaluation. During these contacts, the OIC(s) and IE will not discuss IE's opinions or findings.

IE deliverables for task 2.2

IE project personnel shall reply to telephone calls and messages from SSA COTR or OIC(s) within one (1) business day.

At the time of correspondence between the OIC(s) and IE, the IE shall send copies of any such correspondence, including electronic correspondence, to the SSA COTR.

Task 2.3 Evaluations

SSA may select more than one (1) OIC through a separate solicitation whose occupational information and methods are to be evaluated under this contract.

A. Occupational Information Requirements

The IE shall evaluate OIC's occupational information and methodology based on the following standards:

1. The updated DOT-based occupational information must currently exist and be available to SSA and, in turn, to the IE throughout the evaluation described in this contract.

2. The occupational information must utilize the same constructs, definitions, descriptors and rating systems (e.g., worker traits and values from 1993 SCO), and associated cross-walks (e.g., Guide to Occupational Exploration) as those found in the DOT (1991) and the RHAJ (1991) published by the DOL.

3. The occupational information must include the complete set of descriptors (e.g., worker traits and values, skill levels, strength ratings) as found in the DOL's DOT and the RHAJ.

4. The occupational information must not be derived, in whole or in part, from any occupational classification systems other than the DOL's DOT (including SCO) and the RHAJ. (This does not refer to any classification systems that enumerate occupations in the economy, such as the Occupational Employment Statistics).

5. The occupational information must contain descriptions of work (e.g., occupational definitions and ratings for worker traits) found throughout the nation that are more recent than the 1991 version of the DOT, including the 1993 version of the SCO, published by the DOL. That is, the occupational information must reflect "new" and "updated" DOT-based occupations.

6. Occupations must be described as they are generally performed throughout the nation rather than at individual work sites or in local areas.

7. Occupations must reflect all work found throughout the nation, including work found in only one or more regions of the country. For example, the occupation "Able Seaman" may not be found in the economy of a number of U.S. states; however, it is found in the U.S. economy.

8. Occupations must be discrete. That is, occupations must not overlap or be subsets of other occupations without being clearly designated as such.

9. Occupational classification must reflect approximately the same level and manner of occupational aggregation as that reflected in the DOL's DOT.

10. The occupational information must include cross-walks to other government occupational classification or information systems (e.g., the Occupational Employment Statistics, the Standard Occupational Classification, etc.).

11. The OIC's occupational information and the methodology employed to produce it must be valid, reliable, accurate, verifiable, reproducible, and defensible for use in SSA's disability evaluation process in terms of SSA's current disability evaluation guidelines and use of the DOT.

12. The OIC must be engaged in a continuing effort to update the occupational information. This updating process must be planned in regularly recurring cycles (e.g., periodic updates no more frequently than every six months and no less frequently than annually) so that each cycle contains static occupational information that SSA can maintain as a legacy system.

13. For the evaluation as described in this contract, the OIC must supply the occupational information to SSA and the IE in an industry-standard format such as Microsoft Access.

14. For the evaluation as described in this contract, the OIC must provide file format specifications and data definitions for the occupational information and its periodic updates. As the OIC's occupational information must utilize the same labels, definitions and ratings as those prescribed for the DOL's DOT (including the SCO) in the RHAJ, the file format specifications and data definitions must be similar to that which is issued by DOL for the DOT and which is available through the National Crosswalk Service Center (Center for Career and Occupational Resources Iowa Department of Education, Grimes State Office Building, Des Moines, Iowa 50319, see www.xwalkcenter.org).

B. Evaluation Factors

The purpose of the IE's evaluation is to determine the extent to which OIC's occupational information and methodology meets the requirements shown above. The IE shall consider, among other factors:

1. All the possible sources of data and their reliability. This includes evaluating the occupational information that is derived from another source and occupational information which the OIC develops independently. It includes evaluating the process(es) employed and examining the methods by which the OIC collects the information, updates the DOT occupations, adds new occupations, and designates other DOT occupations as obsolete;

2. The extent to which the OIC's job analysis techniques adhere to the DOL's DOT (including SCO) and RHAJ methods and definitions;

3. The manner in which analyses of positions or jobs are aggregated into a new or revised occupation;

4. The extent to which the updates to the occupational information reflect the actual occupations they are intended to represent;

5. The manner in which new or emerging occupations have been identified, and whether these occupations have been included in the occupational information;

6. The basis for updating and the manner in which existing occupations requiring update have been identified, and whether these occupations have been updated;

7. The basis for obsoleting occupations, the manner in which obsolete occupations have been identified, and whether these occupations have been deleted from or delineated within the occupational information. The IE shall consider, for example, what empirical evidence the OIC gathered to determine an occupation is obsolete and whether the OIC considered the issue of regional variations when declaring an occupation obsolete; and

8. The manner in which the occupational information has been tested to show that it is valid, reliable, accurate, verifiable, reproducible, and defensible for use in SSA's disability evaluation process in terms of current SSA disability guidelines and the use of the DOT.

C. Evaluation Materials, Contacts, and Activities

The IE shall base the evaluation of OIC's occupational information and methodology on the following materials, contacts, and activities:

1. Access to the OIC, its staff and its documents, including onsite visits to OIC's place of business;

2. The OIC's technical proposal(s);

3. Documentation, to be submitted with the technical proposal, of the OIC's work processes, including detailed information on the procedures that were employed to identify occupations, collect information, and validate the occupational information. This documentation is to include all supporting documentation, evidence and working papers used by the OIC(s) to develop the occupational information for a total of twelve occupations, including:

- Four (4) new or emerging occupations which do not currently exist in the DOL's DOT and which have been added to the OIC's occupational information;
- Four (4) occupations currently existing in the DOL's DOT that contain revised ratings in the OIC's occupational information; and
- Four (4) occupations currently existing in the DOL's DOT, which have been found by the OIC(s) to no longer exist and which are not found in the OIC's occupational information;

4. The OIC's occupational information.

5. Independent onsite job analyses to be performed by the IE. To the greatest extent practicable, the IE shall identify a sample of occupations (other than those cited in task 2.3.C.3 above) which have been added to or revised in the OIC's occupational information. This sample of occupations shall include diverse industries and strength and skill requirements. The IE shall independently perform onsite job analyses meeting the requirements of the RHAJ to derive independent job information for the sample occupations. The IE will then compare the independent job analyses for the sample of occupations to Occupational Information Offeror(s)'s rating(s) for the corresponding occupations.

6. Examination of OIC's occupational information. As part of the IE evaluation of the extent to which the OIC's occupational information meets the criteria stated in task 2.3.A 2 and 2.3.A.3 above, the IE shall examine the OIC's occupational information and determine the type and number of OIC occupational information that reflect information needed for use in SSA's current disability evaluation process, such as the following:

   - Type and number of OIC occupational information that reflect "updated" DOT-based occupations.
   - Type and number of OIC occupational information that reflect "obsolete" DOT-based occupations.
   - Type and number of OIC occupational information that reflect "new" DOT-based occupations.
   - Type and number of OIC occupational information that reflect "unskilled" (Specific Vocational Preparation (SVP) 1-2), "semi-skilled" (SVP 3-4), and "skilled" (SVP 5 and up) DOT-based occupations compared to a similar search of DOL DOT occupational information.
   - Type and number of OIC occupational information that reflect sedentary, light, medium, heavy and very heavy DOT-based occupations compared to a similar search of DOL DOT occupational information.
   - Type and number of OIC occupational information that reflect "unskilled" sedentary DOT-based occupations compared to a similar search of DOL DOT occupational information.

- Type and number of OIC occupational information that reflect a variety of profiles of ratings for various worker traits (e.g., occupations requiring frequent lifting, occupations requiring occasional reaching, etc.) compared to a similar search of DOL DOT occupational information.

NOTE: The OIC's software is not a factor for evaluation under this contract; therefore, the IE will not consider the OIC's software in its evaluation. However, the OIC's Occupational Information must be provided to SSA in an Industry Standard format as described in 2.3.A or the OIC's Occupational Information may be deemed as not compatible with SSA's computer software. Therefore, the IE will evaluate whether the OIC's Occupational Information will meet this criterion.

IE deliverables for task 2.3

IE shall complete evaluation activities for task 2.3 within 6 months of the Post Award meeting described in task 1.1. Completion of evaluation activities shall be reflected in IE's monthly status report as described in task 2.4.

Task 2.4 Reports

The IE shall be responsible for completion of monthly status reports and the evaluation report(s).

The IE shall be required to sign a non-disclosure agreement regarding the IE's evaluation(s) of OIC's occupational information and methods to produce it under this contract, including any working papers and documentation, and draft and final evaluation report(s) the IE, IE project staff, and subcontractors develop for the evaluation described in this contract. Any disclosure of the IE evaluation report(s) developed and submitted to SSA under this contract or the information contained in these evaluation reports shall be at the sole discretion and responsibility of SSA.

A. Monthly Status Reports:

The IE shall submit to the SSA COTR reports that briefly summarize the status of the preceding month's activities and anticipated future activities. The IE shall submit the reports electronically to the SSA COTR. At a minimum, these reports shall include the following:

- Activities completed during the preceding month, including the extent to which tasks have been completed;
- Any concerns or problems the IE has encountered or has observed and how these have been or will be addressed;
- Any concerns or problems the IE anticipates and how they will be resolved;
- A calendar of activities planned for the current month, including evaluations, reports and meetings; and

- A calendar of activities planned through completion of task 2.0, “Evaluation Activity,” (tasks 2.1 through 2.4),” including evaluations, reports and meetings.

B. Monthly Expenditure Reports:

The IE shall provide a paper version of a spreadsheet with the vouchers submitted to SSA for payment for that month (see Attachment B for a sample). The spreadsheet shall include the following items:

- Expenditures for personnel by task (hours and cost) for post award and evaluation activities with OIC and/or SSA;
- Line item expenditures by task for post award and evaluation activities with OIC and/or SSA;
- A sum of all expenditures for that month; and
- A sum of all expenditures to date.

C. Evaluation Report(s):

The IE shall submit to the SSA COTR, for approval, report(s) detailing the IE’s findings regarding OIC’s occupational information and methodology. At a minimum, the report(s) must respond to all standards for occupational information listed in task 2.3.A; to all considerations and materials and source documentation for IE’s evaluation listed in tasks 2.3.B and C; and to all other issues posed in this Statement of Work. The report(s) shall describe IE’s own methodology in conducting this evaluation and in performing onsite occupational analyses (see task 2.3.C.), and the qualifications of the individuals involved in conducting each portion of the evaluation and onsite occupational analyses.

IE deliverables for task 2.4

The IE shall submit monthly status reports and monthly expenditure reports for each Independent Evaluation of each OIC to the SSA COTR in the first week of each month in which outstanding work under this contract remains to be completed.

The IE shall submit evaluation report(s) of each OIC’s occupational information and the methods used to produce it to the SSA COTR, for approval, within four (4) weeks of completion of evaluation activities (see task 2.3). Within two (2) week of receipt of comments from SSA COTR, the IE shall submit revised reports, with an explanation of how comments were resolved, to the SSA COTR for approval.

4. SCHEDULE OF DELIVERABLES

General Requirements for Deliverables

The following schedule summarizes the deliverables or activities required by this contract, to whom the deliverables should be submitted and the delivery due dates.

Schedule of Deliverables		
Task(s) Involved	**Deliverable/Activity**	**Delivery Due Date**
1.0 Post Award Activity		
1.1 Post Award Meeting	1) Meet with SSA COTR and staff. SSA shall provide 1 week's notice of meeting.	1) Within two (2) weeks after the effective date of the contract.
2.0 Evaluation Activity		
2.1 Meetings	1) Orientation Meeting: Meet with SSA COTR and OIC(s) 2) Other Meetings: a. Provide notice of need for onsite visit(s) to OIC(s). b. Meet with OIC(s) as needed.	1) Within four (4) weeks after the effective date (AED) of the contract. 2.a.) At least two (2) weeks in advance. Submit notice of meeting, with time, place and agenda, to SSA COTR at least one (1) week in advance of meeting.
2.2 Telephone and Electronic Mail Contact	1) Reply to telephone calls and messages from SSA COTR and OIC(s) 2) Send copies of correspondence between IE and OIC(s) to SSA COTR	1) Within one (1) business day. 2) At time of correspondence
2.3 Evaluations	1) Complete evaluation activities	1) Within six (6) months of Post Award meeting (see task 1.1).

2.4 Reports	1) Monthly status report 2) Monthly expenditure report 3) Evaluation report(s), to SSA COTR for approval 4) Revised evaluation report(s), to SSA COTR for approval.	1) First week of each month with outstanding work under this contract. 2) First week of each month with outstanding work under this contract. 3) Within four (4) weeks of completion of evaluation activities. 4) Within two (2) weeks of receipt of SSA COTR comments.

SECTION D

ADDITIONAL CLAUSES

1. 52.252-2 CLAUSES INCORPORATED BY REFERENCE. (FEB 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address(es): www.arnet.gov.

52.204-7 Central Contractor Registration (July 2006)

2. DESIGNATION OF GOVERNMENT CONTRACT SPECIALIST

[**to be filled in at time of award**], Contract Specialist, Division of Programs Contracts, has been assigned to administer the contractual aspects of this contract. However, changes in the Scope of Work, contract price, quantity, quality or delivery schedule shall be made only by the Contracting Officer by a properly executed modification. All correspondence that in any way concerns the terms or conditions of this contract shall be submitted directly to the Contract Specialist at the following address: [**to be filled in at time of award**]

3. DESIGNATION OF GOVERNMENT CONTRACTING OFFICERS TECHNICAL REPRESENTATIVE (COTR)

(a) The individual(s) named below is hereby designated as the Government Contracting Officer's Technical Representative (COTR). If an alternate COTR is also listed below, that person will serve in the project officer's stead when the COTR is unavailable. The COTR is responsible for the technical administration of this contract, [in accordance with the provisions of the clause included herein entitled, "Technical Direction."]

NAME	ADDRESS
COTR	[**to be filled in at time of award**]
Alternate (as applicable)	[**to be filled in at time of award**]

(b) The COTR, or his/her authorized representative, shall be responsible for coordinating with the contractor the technical aspects of the contract. The COTR is not authorized to make any changes, which affect the contract amount, terms or conditions. The contracting officer is the only person with the authority to act as agent of the Government under this contract. 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 any costs incurred during the performance of this contract; or (5) otherwise change any terms and conditions of this contract.

4. TECHNICAL DIRECTION

Performance of the work under this contract shall be subject to the technical direction of the Contracting Officer's Technical Representative (COTR). The term "technical direction" is defined to include, without limitation, the following:

(a) Directions to the contractor which redirect the contract effort, shift work emphasis between work areas or tasks, require the pursuit of certain lines of inquiry, fill in details or otherwise serve to accomplish contractual statements of work.

(b) Provision of information to the contractor which assists in the interpretation of specifications or technical portions of the work description.

(c) Review and, where required by contract, approval of specifications or technical information to be delivered by the contractor to the Government under the contract.

Technical direction must be within the general scope of work stated in the contract. The COTR does not have the authority to, and may not, issue any technical direction which: (1) constitutes the assignment of any additional work outside the general scope of the contract; (2) constitutes a change as defined in the contract clause entitled, "Changes;" (3) in any manner causes an increase or decrease in the total estimated contract cost, fixed fee or time required for the contract performance or (4) changes any of the expressed terms, conditions or specifications of the contract.

All technical directions shall be issued in writing by the COTR or shall be confirmed by him/her in writing within 5 working days after issuance.

The contractor shall proceed promptly with the performance of technical directions duly issued by the project officer in the manner prescribed by this article and within his/her authority under the provisions of this article.

If, in the opinion of the contractor, any instruction or direction issued by the COTR is within one of the categories as defined in (1) through (4) above, the contractor shall not proceed, but shall notify the contracting officer, in writing, within 5 working days after receipt of any such instruction or direction and shall request the contracting officer to modify the contract accordingly. Upon receiving such notification from the contractor, the contracting officer shall issue an appropriate contract modification or advise the contractor, in writing, that, in his/her opinion, the technical direction is within the scope of this article and does not constitute a change under the "Changes" clause of the contract. The contractor shall thereupon proceed immediately with the direction given. A failure of the parties to agree upon the nature of the instruction or direction, or upon the contract action to be taken with respect thereto, shall be subject to the provisions of the contract clause entitled, "Disputes."

5. PROJECT DIRECTOR AND KEY PERSONNEL

The performance of the work required by this contract shall be conducted under the direction of [**to be named by offeror in its proposal, will be filled in at time of award**]. The Government reserves the right to disapprove any successor to this individual.

The key personnel under this contract shall be:

[**to be named by offeror in its proposal, will be filled in at time of award**]

6. SUBSTITUTION OF KEY PERSONNEL

(a) The offeror agrees to assign to the contract those persons whose resumes were submitted with the proposal who are necessary to fill the requirements of the contract. No substitutions shall be made except in accordance with this clause.

(b) The offeror agrees that during the first ninety (90) days of the contract performance period no personnel substitutions will be permitted unless an individual's sudden illness, death, or termination of employment necessitates such substitutions. In any of these events, the contractor shall promptly notify the contracting officer and provide the information required by Paragraph (c) below. After the initial ninety (90) day period, all proposed substitutions must be submitted, in writing, at least fifteen (15) days, (thirty (30) days if security clearance is to be obtained), in advance of the proposed substitutions to the contracting officer, and provide the information required by Paragraph (c) below.

(c) All requests for substitution must provide a detailed explanation of the circumstance necessitating the proposed substitution, a complete resume for the proposed substitute and any other information requested by the contracting officer needed by him to approve or disapprove the proposed substitution. All proposed substitutes must have qualifications that are equal to or higher than the qualifications of the person to be replaced. The contracting officer or his authorized representative will evaluate such requests and promptly notify the contractor of his approval or disapproval thereof.

(d) The contractor further agrees to include the substance of this clause in any subcontract, which may be awarded under this contract.

7. CONTRACTOR CONTRACT ADMINISTRATION

The contractor's representative responsible for handling contract administration is:

Name: [**to be named by offeror in its proposal, will be filled in at time of award**]
Title:
Address:
Telephone Number:
E-mail:

8. INVOICE SUBMISSION AND PAYMENT RELATED INFORMATION

You may submit your invoice, electronically via email, by regular mail, or by hand carrying it to the Office of Finance at the addresses below. Your invoice must include all of the elements of a proper invoice as defined in the invoice or payment clause used in this award as well as any other information required below or in the contract.

SENDING THE INVOICE ELECTRONICALLY:

Submit your invoice either as an attachment to an email message, or within the message itself, to: OFPO.OF.DAP.INVOICES@ssa.gov.

FOR INVOICES NOT SUBMITTED ELECTRONICALLY:

Submit an original and three (3) copies of the invoice to:

If sent by mail:

Social Security Administration
Office of Finance
Post Office Box 47
Baltimore, Maryland 21235-0047

If Hand Carried:

Social Security Administration
Office of Finance
Customer Service Help Desk
2-B-4 East Low Rise Building
6401 Security Boulevard
Baltimore, Maryland 21235-0047

The telephone number of the customer service help desk is (410) 965-0607.

Taxpayer Identification Number (TIN) and Dun&Bradstreet Number (DUNS):

In order to assist the government in making timely payments, please include your TIN, your DUNS#, and the Order Number on each invoice.

Submission of Electronic Funds Transfer (EFT) Information and Remittance Information:

The Government shall make payment to the Contractor using the EFT information contained in the Central Contractor Registration (CCR) database. In the event that the EFT information changes, the Contractor shall be responsible for providing the updated information to the CCR database.

Remittance information associated with EFT payments is now available via the Payment Advice Internet Delivery (PAID) System on the Department of Treasury's Internet site at http://fms.treas.gov/paid/index.asp. This site provides an explanation of the system, how it works, security and access information, a user demonstration, and registration information. There is no charge to use the PAID system.

You may also direct payment inquiries to SSA's Office of Finance by using its Financial Interactive Voice Response System (FIVR). FIVR is an automated self-service telephone system available 24 hours a day that allows direct electronic access to administrative payment information using the telephone keypad. You can access FIVR by calling (410) 965-0607. The services available through FIVR will be available through a Telecommunications Device for the Deaf (TDD) Line at 410-597-1395. Customer Service Representatives will be available to answer vendor payment inquiries Monday - Friday, between 8 a.m. and 4:30 p.m. Eastern Time.

You may also address any payment inquiries to SSA's Office of Finance by sending an email to payment.inquiries@ssa.gov, or visiting its internet site at http://www.ssa.gov/vendor/contact.htm. You can also access the PAID system through a link on this site.

9. SECURITY REQUIREMENTS CLAUSE

Purpose: To provide procedures for obtaining suitability determinations for contractor personnel who will be performing under the contract.

Definition: "*Performing under the contract*" is defined as either working on-site at an SSA facility (including visiting the SSA site for any reason) or having access to agency programmatic or sensitive information.

Suitability factors: Suitability considerations include:

- Delinquency or misconduct in prior employment.
- Criminal, dishonest, infamous, or notoriously disgraceful conduct.

- The nature and seriousness of the conduct.
- When the conduct occurred.
- The applicant’s or employee's age at the time of the conduct.
- The circumstances surrounding the conduct.
- Intentional false statement, deception, or fraud on application forms.
- Habitual use of intoxicating beverages to excess.
- Abuse of narcotics, drugs, or other controlled substances.
- Reasonable doubt as to the loyalty of the individual to the Government of the United States.
- The kind of position for which the person is applying or in which the person is employed.
- Contributing social and environmental conditions.
- The absence or presence of rehabilitation or efforts towards rehabilitation.

Authorities:

Childcare center security requirements mandated by The Crime Control Act of 1990, Public Law 101-647, subtitle E, as amended by Public Law 102-190.

Personnel security requirements for programmatic and sensitive information are mandated by Executive Orders 10450 and 12968, and Title 5, Code of Federal Regulations (CFR), Parts 731, 732, and 736.

Protective security requirements mandated by the General Services Administration (GSA).

Required Forms:

2 completed forms FD-258, "Fingerprint Charts*," (The contractor will absorb the costs for obtaining fingerprints.)

1 completed SF 85 (Revised September 1995), *Questionnaire for Non-Sensitive Positions* for Contract and Childcare Personnel.

1 completed Optional Form 306, “Declaration for Federal Employment,”

1 completed “Fair Credit Reporting Act (FCRA) authorization form**,” and

For a Non-U.S. citizen, 1 legible photocopy of the work authorization permit and social security card.

* Preprinted with MD900310Z, SOC SEC ADMIN, PROT SEC BR, BALTIMORE, MD on the form.

** The FCRA, as amended on September 30, 1997, requires that the Government notify each applicant, employee, and contractor (in a document consisting solely of the notice) that a consumer report may be used for employment purposes. The applicant, employee, or contractor must authorize this use in writing before the Government obtains the consumer report. The FCRA also requires that, before taking adverse action relative to an employment decision based on a consumer report, the agency provide the consumer with a copy of the report, and a copy of the Federal Trade Commission’s Consumer Rights Notice. To comply with these requirements, SSA requires that the contractor submit each applicant’s or employee’s signed FCRA authorization form along with the other investigative documents.

Obtaining Forms: The contracting officer will include a set of the forms with the signed contract.

The contractor may contact the Protective Security SPO on (410) 965-4548 for additional forms.

Forms Completion: The contractor must make sure that all forms are fully completed. This includes making sure that the Fingerprint charts and Personal History forms are printed legibly or typed in black ink and all signatures are in black ink.

Forms Submission: **The contractor must submit the completed forms for each employee and replacement employee (including each subcontractor employee) who will be performing under the contract to the Protective Security SPO. The Government will not permit contractor personnel to perform under the contract until the pre-screening process is complete. See pre-screening below.**

Cover Letter:

The contractor must provide a ***cover letter*** listing:

The names of employees for whom completed forms are submitted,

The contract number; and

The contractor's contact name and telephone number.

Notes: (1) The pre-screening process may take up to 15 workdays. (2) If contractor personnel will require access to an SSA facility, the contractor should contact the SSA project officer (PO) to obtain a copy of the access procedures. Also note that some facilities require access forms to be completed and approved after pre-screening is completed but before access. The access process may take as many as five workdays at a Headquarters facility. For access to a regional or field facility, contact the PO to determine how much time may be needed.

The Protective Security SPO's address is:

Social Security Administration
Protective Security Suitability Program Officer
Rm 1260 Dunleavy Bldg
6401 Security Boulevard
Baltimore, Maryland 21235

Phone: (410) 965-4548

Note: The PO needs to know <u>for whom and when</u> the completed forms are submitted. To accomplish this, when submitting the forms for processing, the contractor must send an e-mail with this information to the PO.

Waiver:

For contractor employees performing services on-site at an SSA facility up to one day ***and*** where access to programmatic or sensitive information is ***not*** required, the contractor may request that the Protective Security SPO waive submission of the FD-258s and the Credit Authorization form.

If the Protective Security SPO authorizes a waiver, it will apply only to the one day for which the contractor requested it.

If an individual subsequently performs or is expected to perform additional work, the Protective Security SPO will not approve another waiver. The contractor must therefore submit the FD-258s and Credit Authorization form.

Pre-Screening:

The Protective Security SPO will use the information from the completed forms as part of the basis for making a pre-screening determination. The Protective Security SPO will notify the contractor whether a prospective employee may or may ***not*** perform under the contract pending a final suitability determination. Concurrently, the Protective Security SPO will send a copy of the notification to the CO and PO.

Time Frame for Pre-screening

The contractor should anticipate that the Protective Security SPO will issue the notification within 15 workdays after receipt of the properly completed forms.

Final Suitability Determination

The *Protective Security* Suitability Program Officer (SPO) makes the final suitability determination for each contractor employee who ***does not*** require access to programmatic or sensitive systems information.

Note: The *Protective Security* SPO will provide the contractor a final suitability determination in writing, either favorable or unfavorable, approximately 45 days after submittal of the completed forms. At the same time, the SPO will notify the CO and PO.

The *Personnel Security* SPO makes the final suitability determination for each contractor employee who ***does*** require access to programmatic or sensitive systems information.

Note: The *Personnel Security* SPO will provide the contractor a final suitability determination in writing, either favorable or unfavorable, approximately 45 days after submittal of the completed forms. At the same time, the SPO will notify the CO and PO.

The Personnel Security SPO's address is:

Social Security Administration
OPE Security and Suitability Staff
Room 1600 Annex
6401 Security Boulevard
Baltimore, Maryland 21235

Phone: (410) 965-0594

Unsuitable Employees:

If the Government determines that a contractor employee or applicant is unsuitable, the Protective Security SPO or the Personnel Security SPO will advise the contractor in writing that such employee may not continue to perform or begin performing under the contract. Concurrently, the Protective Security SPO or Personnel Security SPO will send a copy of the notification to the CO and PO.

When the contractor receives the notification, the contractor must ***immediately*** remove the employee from performing under the contract. The contractor must confirm, in writing to the cognizant SPO, the date of the employee's removal.

Concurrently, the cognizant SPO will advise the PO and CO that he has notified the contractor that the proposed contractor personnel have been determined unsuitable/unfit to perform on the contract and must be replaced. The letter will also request that a replacement(s) be named and the appropriate security forms completed as quickly as possible in order that contract performance will not be adversely impacted. The SPO's letter will also advise the contractor to contact the CO if there are any contract performance problems related to the removal.

Neither the denial resulting from the pre-screening nor the removal of an individual determined unsuitable gives rise to an equitable adjustment under the contract.

Contractor Notification to Government:

In the event that contractor personnel performing on this contract either leave the company or are removed from the project, or are arrested or charged with a crime during the term of this contract, the contractor shall notify the Protective Security Officer immediately. In the notification, the contractor must provide the contractor personnel name(s), SSN, the type of charge(s), the court date, and, if available, the disposition of the charges(s).

Duration of Suitability Determination:

The Government must clear each contractor employee, other than a guard, for suitability every *five* years. The Government must clear each guard every *two* years.

Government Control:

The Government has full control over granting, denying, or withholding access to SSA facilities and for requiring the contractor to remove personnel from performing under the contract.

Following a successful pre-screening, the Government will usually permit contractor personnel to work on the contract pending a final suitability determination.

Permitting a contractor employee to work does not assure that a favorable final suitability determination will follow. This permission to work or issuance of a favorable final suitability determination does not prevent, preclude, or bar the Government from withdrawing or terminating any such permission or suitability determination.

10. <u>REMOVAL FROM DUTY</u>

The Government* may request that the contractor immediately remove any contractor employee(s) from working on the contract should the Government determine that individuals are unfit to perform on the contract. The contractor must comply with these requests. The Government's determination of unfit may be made from, but not limited to, incidents involving the misconduct or delinquency as set forth below:

a. Violation of the Rules and Regulations Governing Public Buildings and Grounds, 41 Code of Federal Regulations 101-20.3. This includes any local badging requirements.

*The contracting officer (CO), with input from the project officer and cognizant Suitability Program Officer, will make all determinations regarding the removal of any employee(s). In the event of a dispute, the CO will make the final determination.

b. Neglect of duty, including sleeping while on duty, unreasonable delays or failure to carry out assigned tasks, conducting personal affairs during official time, and refusing to cooperate in upholding the integrity of SSA's security program.

c. Falsification or unlawful concealment, removal, mutilation, or destruction of any official documents or records, or concealment of material facts by willful omissions from official documents or records.

d. Disorderly conduct, use of abusive or offensive language, quarreling, intimidation by words or actions, or fighting. Also, participating in disruptive activities, which interfere with the normal and efficient operations of the Government.

e. Theft, vandalism, immoral conduct, or any other criminal actions.

f. Selling, consuming, possession of, or being under the influence of intoxicants, drugs, or substances which produce similar effects.

g. Improper use of official authority or credentials.

h. Unauthorized use of communications equipment or Government property.

i. Misuse of weapon(s) or tools used in the performance of this contract.

j. Unauthorized access to areas not required for the performance of the contract.

k. Unauthorized access to employees' personal property.

l. Violation of security procedures or regulations.

m. Prior determination by SSA or other Federal agency that a contractor's employee was unsuitable.

n. Unauthorized access to, or disclosure of, agency programmatic or sensitive information, or IRS Tax Return information.

o. Unauthorized access to an agency Automated Information System.

p. Unauthorized access of information for personal gain, (including, but not limited to monetary gain) or with malicious intent.

q. Not providing for the confidentiality of and disclosure and protection of information entrusted to them. Contractor personnel are considered the same as Federal employees for the purposes of applying certain provisions of:

- The Privacy Act of 1974,

- The Tax Reform Act of 1976 and the Taxpayer Browsing Protection Act of 1997,
- SSA regulation 1,
- The Computer Fraud and Abuse Act of 1986, and
- Section 1106 of the Social Security Act.

NOTE: The Government will provide, in writing, specific reasons for removal of an employee to the contractor.

11**.** Dissemination of Information

(a) Data and information provided to the contractor, or to any subcontractor, or generated by activities under the proposed contract shall be privileged. The contractor, and any subcontractor, shall be restricted from duplicating, using or disclosing such data or information, in whole or in part, outside the Social Security Administration for any purpose other than the fulfillment of the requirements set forth in this contract. Any questions about "privileged information" shall be referred to the COTR [Contracting Officer's Technical Representative].

(b) In the event that the contractor, or any subcontractor, wishes to duplicate, use or disclose data and information provided to the contractor, or to any subcontractor, or generated by activities under the proposed contract, they are prohibited from doing so without prior written consent of the technical representative (i.e., Project Officer). The Contractor/Subcontractor (hereinafter Requestor) shall submit to the Project Officer a written request for permission to duplicate, use or disclose data and information provided to the contractor, or to any subcontractor, or generated by activities under the proposed contract. The written request shall include: a description of the data and/or information they are seeking to duplicate, use, and/or disclose; the purpose for which they are requesting the data/information; and, when and how the data/information would be released. The Project Officer will review the request as soon as possible and notify the Requestor, in writing, of the decision. Without a written authorization from the Project Officer, the Requestor does not have permission to duplicate, use or disclose data and information provided to the contractor, or to any subcontractor, or generated by activities under the proposed contract.

SECTION E

EVALUATION CRITERIA

Offeror's written technical proposals will be evaluated against the below pass/fail technical evaluation criteria. Offerors that pass each of the three technical evaluation criteria below will be deemed technically acceptable and will be further evaluated under the technical evaluation gradable criteria. Offerors that fail 1 or more of the technical evaluation criteria under the pass/fail criteria shall be deemed technically unacceptable and will no longer be considered for contract award.

I. PASS/FAIL CRITERIA:

1. An Offeror shall be ineligible for participation in this contract if it is:

- A producer of occupational information such as that described in a separate solicitation (SSA-RFQ-08-1516) to provide occupational information to the Social Security Administration for use in its disability evaluation process. Further, an offeror is ineligible if it is a producer of occupational information which meets the definition of occupational information from Attachment A of the solicitation, or
- An offeror with a business or personal relationship (including subcontractors and related third parties) to a producer of such occupational information.

2. Offeror's Prinicipal Investigator must have:

- An advanced degree in Industrial-Organizational Psychology, Psychometrics, Multivariate Statistics, or related disciplines; and
- Experience in performing onsite direct-observation job analyses.

3. The Offeror must indicate a willingness to sign:

- A non-disclosure agreement regarding the evaluation of the occupational information and methodology; and

II. GRADABLE CRITERIA

An offeror shall pass the three Pass/Fail criteria described above in order to be considered for further evaluation. In the event that an offer passes the above Pass/Fail criteria, the offer will be evaluated against the following gradable criteria with each factor weighted in descending order of importance.

1. Evaluation Methods

This evaluation will be an assessment of the extent to which the methods that the offeror proposes meet SSA's requirements. For example, this evaluation will consider:

- The extent to which the offeror's proposal reflects an understanding of SSA's occupational information requirements as cited the Statement of Work tasks 2.3;
- The extent to which the Offeror's proposal reflects an understanding of the Independent Evaluator's requirements as cited in the Statement of Work tasks 2.3;
- The extent to which the Offeror's proposal recommends methodology(ies) that will enable the Offeror to meet the Independent Evaluator's requirements and to conduct an evaluation(s) of the DOT-based occupational information.

2. Recommended Expertise and Staffing

This factor will be evaluated by considering the extent to which the expertise and staffing that the offeror proposes are appropriate for the contract, and the extent to which the proposed expertise and staffing will be assets to the project as a whole. For example, this assessment will consider:

- Articles or books authored by the PI that are related to the contracted work. This assessment will rate the authored work in descending order according to whether the work was peer-reviewed and published, peer-reviewed and awaiting publication, published but not peer-reviewed, or unpublished and not peer-reviewed;

- The extent to which the offeror has specific experience in evaluating occupational information or occupational classification systems. Greater weight will be given to evaluations of national occupational information, particularly DOT-based occupational information, and lesser weight will be given to evaluations of other classification systems or evaluations of occupational information for a local area or a specific employer;

- The extent to which the proposed PI/PM has experience planning and directing projects similar to that contemplated by this solicitation;

- The extent to which the proposed staff has experience in performing onsite direct-observation job analyses; and

- The extent to which proposed expertise and staffing are appropriate for the contract and represent an asset to the project as a whole.

3. Project Management

This factor will be evaluated by considering the extent to which the offeror's project management plans will contribute to the effective management of the project to ensure that the goals and requirements of the contracted work are met.

4. Past Performance

This factor will be evaluated by considering the offeror's past performance in managing and conducting projects of similar scope and complexity or with similar products to that of the SOW. Past performance may be demonstrated by the offeror through past or current contracts (including Federal, State, and local Governments and private) for efforts similar (size, scope, and complexity) to the SOW. Evaluation will be made by reviewing the information submitted by the offeror, information received when contacting references, and information available from other public and private sources. Specifically, this factor will be based on the extent to which the corporate experience reflects customer satisfaction in the areas of:

- Timeliness of deliverables
- Competency and accuracy of work products
- Responsiveness to customer requirements
- Staffing (i.e., assigning/hiring/training qualified personnel and, when necessary, providing timely replacements).

In evaluating past performance, the Government reserves the right to contact references as deemed necessary to enable an adequate evaluation of proposals. Attachment C is provided for offerors to provide references. The Government is not limited to the references listed by the offeror and further reserves the right to contact any relevant references for past performance information using public and private sources. The Government is not required to make more than 2 attempts to contact any given reference.

Whereupon an offeror has no record of relevant (similar in size, scope, and complexity to the SOW) past performance or for whom past performance is not available, the offeror will be evaluated as neutral (neither favorable or unfavorably) on past performance.

5. Price

Although technical factors are of paramount consideration, price is also important to the overall award decision. As such, the evaluation will consider:

- Total labor price;
- ODC's;
- Othen Than Local Travel costs; and
- Overhead and profit/fee (where proposed on ODC's, excluding profit/fee on other than local travel)

III. AWARD DECISION

A contract award shall be considered only for those offers which pass all of the Pass/Fail criteria described in section E.I. The award decision shall be based on a *best value* decision by applying the gradable criteria stated in section E.II. In a best value decision, it may be in the best interest of the Government to consider award to other than the lowest priced offeror or other than the highest technically rated offeror. For this award, the offeror's proposed evaluation methods, expertise and staffing, project management, and past performance are more important than price. The gradable criteria will be evaluated in descending order of importance. The Government reserves the right to make award without discussion.