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**SECTION L - PART 1  
INSTRUCTIONS, CONDITIONS, AND NOTICES TO OFFERORS**

**L.1.1 LISTING OF PROVISIONS INCORPORATED BY REFERENCE (FAR 52.252-1)  
(FEB 1998)**

**Solicitation Provisions Incorporated by Reference**

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The Offeror is cautioned that the listed provisions may include blocks that must be completed by the Offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the Offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this/these address(es):

FAR: <http://www.arnet.gov/far>

NASA FAR: <http://www.hq.nasa.gov/office/procurement/regs/nfstoc.htm>

JSC PI: [http://officeofprocurement.jsc.nasa.gov/jpiprod/jpi\\_doc.htm](http://officeofprocurement.jsc.nasa.gov/jpiprod/jpi_doc.htm)

(End of provision)

**L.1.1.1 Federal Acquisition Regulation (FAR) (48 CFR Chapter 1) Provisions**

CLAUSE NUMBER	DATE	TITLE
52.204-6	OCT 2003	DATA UNIVERSAL NUMBERING SYSTEM (DUNS) NUMBER
52.211-14	SEP 1990	NOTICE OF PRIORITY RATING FOR DEFENSE USE [Insert DO-C9]
52.215-16	JUN 2003	FACILITIES CAPITAL COST OF MONEY
52.219-24	OCT 2000	SMALL DISADVANTAGED BUSINESS PARTICIPATION PROGRAM - TARGETS
52.222-46	FEB 1993	EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES
52.232-38	MAY 1999	SUBMISSION OF ELECTRONIC FUNDS TRANSFER INFORMATION WITH OFFER
52.237-1	APR 1984	SITE VISIT
52.237-10	OCT 1997	IDENTIFICATION OF UNCOMPENSATED OVERTIME

**L.1.1.2 NASA FAR Supplement (NFS) (48 CFR Chapter 18) Provisions**

<b>CLAUSE NUMBER</b>	<b>DATE</b>	<b>TITLE</b>
1852.219-77	MAY 1999	NASA MENTOR-PROTÉGÉ PROGRAM
1852.223.73	NOV 2004	SAFETY AND HEALTH PLAN
1852.231.71	MAR 1994	DETERMINATION OF COMPENSATION REASONABLENESS
1852.233.70	OCT 2002	PROTESTS TO NASA

**L.1.2 INSTRUCTIONS TO OFFERORS – COMPETITIVE ACQUISITION (FAR 52.215-1) (JAN 2004)**

(a) *Definitions.* As used in this provision-

"Discussions" are negotiations that occur after establishment of the competitive range that may, at the Contracting Officer's discretion, result in the Offeror being allowed to revise its proposal.

"In writing," "writing," or "written" means any worded or numbered expression that can be read, reproduced, and later communicated, and includes electronically transmitted and stored information.

"Proposal modification" is a change made to a proposal before the solicitation's closing date and time, or made in response to an amendment, or made to correct a mistake at any time before award.

"Proposal revision" is a change to a proposal made after the solicitation closing date, at the request of or as allowed by a Contracting Officer as the result of negotiations.

"Time," if stated as a number of days, is calculated using calendar days, unless otherwise specified, and will include Saturdays, Sundays, and legal holidays. However, if the last day falls on a Saturday, Sunday, or legal holiday, then the period shall include the next working day.

(b) *Amendments to solicitations.* If this solicitation is amended, all terms and conditions that are not amended remain unchanged. Offerors shall acknowledge receipt of any amendment to this solicitation by the date and time specified in the amendment(s).

(c) *Submission, modification, revision, and withdrawal of proposals.*

(1) Unless other methods (e.g., electronic commerce or facsimile) are permitted in the solicitation, proposals and modifications to proposals shall be submitted in paper media in sealed envelopes or packages

- (i) addressed to the office specified in the solicitation, and
- (ii) showing the time and date specified for receipt, the solicitation number, and the name and address of the Offeror.

Offerors using commercial carriers should ensure that the proposal is marked on the outermost wrapper with the information in paragraphs (c)(1)(i) and (c)(1)(ii) of this provision.

(2) The first page of the proposal must show-

- (i) The solicitation number;
- (ii) The name, address, and telephone and facsimile numbers of the Offeror (and electronic address if available);
- (iii) A statement specifying the extent of agreement with all terms, conditions, and provisions included in the solicitation and agreement to furnish any or all items upon which prices are offered at the price set opposite each item;
- (iv) Names, titles, and telephone and facsimile numbers (and electronic addresses if available) of persons authorized to negotiate on the Offeror's behalf with the Government in connection with this solicitation; and
- (v) Name, title, and signature of person authorized to sign the proposal. Proposals signed by an agent shall be accompanied by evidence of that agent's authority, unless that evidence has been previously furnished to the issuing office.

(3) *Submission, modification, revision, and withdrawal of proposals.*

- (i) Offerors are responsible for submitting proposals, and any modifications or revisions, so as to reach the Government office designated in the solicitation by the time specified in the solicitation. If no time is specified in the solicitation, the time for receipt is 4:30 p.m., local time, for the designated Government office on the date that proposal or revision is due.
- (ii)
  - (A) Any proposal, modification, or revision received at the Government office designated in the solicitation after the exact time specified for receipt of offers is "late" and will not be considered unless it is received before award is made, the Contracting Officer determines that accepting the late offer would not unduly delay the acquisition; and –

- (1) If it was transmitted through an electronic commerce method authorized by the solicitation, it was received at the initial point

of entry to the Government infrastructure not later than 5:00 p.m. one working day prior to the date specified for receipt of proposals; or

- (2) There is acceptable evidence to establish that it was received at the Government installation designated for receipt of offers and was under the Government's control prior to the time set for receipt of offers; or
- (3) It is the only proposal received.

(B) However, a late modification of an otherwise successful proposal that makes its terms more favorable to the Government, will be considered at any time it is received and may be accepted.

- (iii) Acceptable evidence to establish the time of receipt at the Government installation includes the time/date stamp of that installation on the proposal wrapper, other documentary evidence of receipt maintained by the installation, or oral testimony or statements of Government personnel.
  - (iv) If an emergency or unanticipated event interrupts normal Government processes so that proposals cannot be received at the office designated for receipt of proposals by the exact time specified in the solicitation, and urgent Government requirements preclude amendment of the solicitation, the time specified for receipt of proposals will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal Government processes resume.
  - (v) Proposals may be withdrawn by written notice received at any time before award. Oral proposals in response to oral solicitations may be withdrawn orally. If the solicitation authorizes facsimile proposals, proposals may be withdrawn via facsimile received at any time before award, subject to the conditions specified in the provision at 52.215-5, Facsimile Proposals. Proposals may be withdrawn in person by an Offeror or an authorized representative, if the identity of the person requesting withdrawal is established and the person signs a receipt for the proposal before award.
- (4) Unless otherwise specified in the solicitation, the Offeror may propose to provide any item or combination of items.
  - (5) Offerors shall submit proposals in response to this solicitation in English, unless otherwise permitted by the solicitation, and in U.S. dollars, unless the provision at FAR 52.225-17, Evaluation of Foreign Currency Offers, is included in the solicitation.
  - (6) Offerors may submit modifications to their proposals at any time before the solicitation closing date and time, and may submit modifications in response to an amendment, or to correct a mistake at any time before award.

- (7) Offerors may submit revised proposals only if requested or allowed by the Contracting Officer.
- (8) Proposals may be withdrawn at any time before award. Withdrawals are effective upon receipt of notice by the Contracting Officer.
- (d) *Offer expiration date.* Proposals in response to this solicitation will be valid for the number of days specified on the solicitation cover sheet (unless a different period is proposed by the Offeror).
- (e) *Restriction on disclosure and use of data.* Offerors that include in their proposals data that they do not want disclosed to the public for any purpose, or used by the Government except for evaluation purposes, shall-
  - (1) Mark the title page with the following legend:

This proposal includes data that shall not be disclosed outside the Government and shall not be duplicated, used, or disclosed-in whole or in part-for any purpose other than to evaluate this proposal. If, however, a contract is awarded to this Offeror as a result of-or in connection with-the submission of this data, the Government shall have the right to duplicate, use, or disclose the data to the extent provided in the resulting contract. This restriction does not limit the Government's right to use information contained in this data if it is obtained from another source without restriction. The data subject to this restriction are contained in sheets [*insert numbers or other identification of sheets*]; and
  - (2) Mark each sheet of data it wishes to restrict with the following legend:

Use or disclosure of data contained on this sheet is subject to the restriction on the title page of this proposal.
- (f) *Contract award.*
  - (1) The Government intends to award a contract or contracts resulting from this solicitation to the responsible Offeror(s) whose proposal(s) represents the best value after evaluation in accordance with the factors and subfactors in the solicitation.
  - (2) The Government may reject any or all proposals if such action is in the Government's interest.
  - (3) The Government may waive informalities and minor irregularities in proposals received.
  - (4) The Government intends to evaluate proposals and award a contract without discussions with Offerors (except clarifications as described in FAR 15.306(a)). Therefore, the Offeror's initial proposal should contain the Offeror's best terms from a cost or price and technical standpoint. The Government reserves the right to conduct discussions if the Contracting Officer later determines them to be necessary. If the Contracting Officer determines that the number of proposals that would otherwise be in the

competitive range exceeds the number at which an efficient competition can be conducted, the Contracting Officer may limit the number of proposals in the competitive range to the greatest number that will permit an efficient competition among the most highly rated proposals.

- (5) The Government reserves the right to make an award on any item for a quantity less than the quantity offered, at the unit cost or prices offered, unless the Offeror specifies otherwise in the proposal.
- (6) The Government reserves the right to make multiple awards if, after considering the additional administrative costs, it is in the Government's best interest to do so.
- (7) Exchanges with Offerors after receipt of a proposal do not constitute a rejection or counteroffer by the Government.
- (8) The Government may determine that a proposal is unacceptable if the prices proposed are materially unbalanced between line items or sub-line items. Unbalanced pricing exists when, despite an acceptable total evaluated price, the price of one or more contract line items is significantly overstated or understated as indicated by the application of cost or price analysis techniques. A proposal may be rejected if the Contracting Officer determines that the lack of balance poses an unacceptable risk to the Government.
- (9) If a cost realism analysis is performed, cost realism may be considered by the source selection authority in evaluating performance or schedule risk.
- (10) A written award or acceptance of proposal mailed or otherwise furnished to the successful Offeror within the time specified in the proposal shall result in a binding contract without further action by either party.
- (11) If a post-award debriefing is given to requesting Offerors, the Government shall disclose the following information, if applicable:
  - (i) The agency's evaluation of the significant weak or deficient factors in the debriefed Offeror's offer.
  - (ii) The overall evaluated cost or price and technical rating of the successful and the debriefed Offeror and past performance information on the debriefed Offeror.
  - (iii) The overall ranking of all Offerors, when any ranking was developed by the agency during source selection.
  - (iv) A summary of the rationale for award.
  - (v) For acquisitions of commercial items, the make and model of the item to be delivered by the successful Offeror.

- (vi) Reasonable responses to relevant questions posed by the debriefed Offeror as to whether source-selection procedures set forth in the solicitation, applicable regulations, and other applicable authorities were followed by the agency.

(End of provision)

**L.1.3      REQUIREMENTS FOR COST OR PRICING DATA OR INFORMATION OTHER THAN COST OR PRICING DATA (FAR 52.215-20) (OCT 1997) (ALTERNATE IV) (OCT 1997)**

- (a) Submission of cost or pricing data is not required.
- (b) Provide information described below:

See Section L.2.3.4, Volume IV, Cost Proposal

(End of provision)

**L.1.4      TYPE OF CONTRACT (FAR 52.216-1) (APR 1984)**

The Government contemplates award of a cost plus award fee contract resulting from this solicitation.

(End of provision)

**L.1.5      SERVICE OF PROTEST (FAR 52.233-2) (AUG 1996)**

- (a) Protests, as defined in section 33.101 of the Federal Acquisition Regulation, that are filed directly with an agency, and copies of any protests that are filed with the General Accounting Office (GAO), shall be served on the Contracting Officer (addressed as follows) by obtaining written and dated acknowledgment of receipt from

Craig Burrige, Contracting Officer  
NASA Johnson Space Center  
Mail Code: BJ4  
2101 NASA Parkway  
Houston, TX 77058

- (b) The copy of any protest shall be received in the office designated above within one day of filing a protest with the GAO.

(End of provision)

**L.1.6 PREPROPOSAL/PRE-BID CONFERENCE (NFS 1852.215-77) (DEC 1988)**

(a) A preproposal/pre-bid conference will be held as indicated below:

Date: July 6, 2005  
Time: 9:00 a.m. local time  
Location: NASA Johnson Space Center  
Gilruth Recreation Center  
Houston, Texas  
(For more information, refer to contact in L.1.8)

A maximum of two (2) participants from each company may attend. Please provide the company name and name of the attendees to Cody Corley via e-mail at [smassc@ems.isc.nasa.gov](mailto:smassc@ems.isc.nasa.gov) or via phone at 281-244-5611 by July 1, 2005.

The web site for this solicitation is <http://procurement.isc.nasa.gov/sandma/>

QUESTIONS REGARDING INFORMATION PRESENTED AT THE PREPROPOSAL/PREBID CONFERENCE MUST BE PRESENTED IN WRITING and should be submitted to the point of contact listed in section L.1.8 by July 11, 2005. Oral questions will not be accepted.

(b) Attendance at the preproposal/pre-bid conference is recommended; however, attendance is neither required nor a prerequisite for proposal/bid submission and will not be considered in the evaluation.

(End of provision)

**L.1.7 PROPOSAL PAGE LIMITATIONS (NFS 1852.215-81) (FEB 1998)**

- (a) The following page limitations are established for each portion of the proposal submitted in response to this solicitation.

**Table L-1: Proposal Page Limitations**

Volume	Title	Copies	Page Limit
	Total Volume I and II		300
I	Management Approach and Plans	15	
II	Technical Approach	15	
III	Past Performance	15	No Limit
IV	Cost Proposal	15	No Limit

- (b) A page is defined as one side of a sheet, 8 ½" x 11", with at least one inch margins on all sides, using not smaller than 12 point, Arial (non-compressed) type. Foldouts count as an equivalent number of 8 ½" x 11" pages. The metric standard format most closely approximating the described standard 8 ½" x 11" size may also be used.
- (c) Tables, charts, graphs, plans, figures, diagrams and schematics shall be used whenever practicable to depict organizations, systems, layout, and implementation schedules. These displays shall contain font sizes no smaller than 10 point, be uncomplicated, legible, and appropriate for the subject matter.
- (d) Title pages and tables of contents are excluded from the page counts specified in paragraph (a) of this provision. In addition, the Cost section of your proposal is not page limited. However, this section is to be strictly limited to cost and price information. Information that can be construed as belonging to one of the other sections of the proposal will be so construed and counted against that section's page limitation.
- (e) If final revisions are requested, separate page limitations will be specified in the Government's request for that submission.
- (f) Pages submitted in excess of the limitations specified in this portion will not be evaluated by the Government and will be returned to the Offeror.

(End of provision)

**L.1.8 COMMUNICATIONS REGARDING THIS SOLICITATION (JSC 52.215-105) (DEC 1999)**

Any communications in reference to this solicitation shall cite the solicitation number and be directed to the following Government representative:

Name: Cody Corley  
 Phone: 281-244-5611 (collect calls not accepted)

Address: NASA Johnson Space Center  
Attn: Cody Corley  
Mail Code BJ4  
2101 NASA Parkway  
Houston, TX 77058-3696

E-mail: [smassc@ems.jsc.nasa.gov](mailto:smassc@ems.jsc.nasa.gov)

Information regarding this solicitation may be found online at:

<http://procurement.jsc.nasa.gov/sandma/>

QUESTIONS REGARDING THIS SOLICITATION MUST BE PRESENTED IN WRITING and should be submitted to the above address within 10 days of the RFP issue date in order that answers may be obtained and disseminated in a timely manner, since it is not expected that a proposal submission date can be extended. Oral questions are not desirable due to the possibility of misunderstanding or misinterpretation.

NOTE: Any written communications shall include mail code BJ4 on the envelope to expedite processing.

(End of provision)

**L.1.9      PREAWARD ON-SITE EQUAL OPPORTUNITY COMPLIANCE EVALUATION  
(FAR 52.222-24) (FEB 1999)**

If a contract in the amount of \$10 million or more will result from this solicitation, the prospective Contractor and its known first-tier subcontractors with anticipated subcontracts of \$10 million or more shall be subject to a preaward compliance evaluation by the Office of Federal Contract Compliance Programs (OFCCP), unless, within the preceding 24 months, OFCCP has conducted an evaluation and found the prospective Contractor and subcontractors to be in compliance with Executive Order 11246.

(End of provision)

**L.1.10      SUBMISSION OF PROPOSALS**

Due to the heightened security measures in force at the Johnson Space Center (JSC), and to ensure timely proposal submission, the following procedures shall be followed.

- (a) Offerors shall deliver proposals to Building 269 at the JSC, 2101 NASA Parkway, Houston, TX 77058-3696 no later 3:00 PM local time on the designated due date, **See Table L-3**. Each Offeror is encouraged to notify the Contracting Officer one day in advance of the proposal submission.

- (b) The following instructions for submission of proposals are designed to ensure proposal data is adequately protected against potential improper disclosure while concurrently ensuring the physical security of JSC. The delivery process may require an hour or more for packages to be screened through security and subsequently transported and delivered by the Offeror at the designated building while being accompanied by an employee of the U.S. Government (civil service point of contact). After 2:30 p.m. local time, incoming packages cannot be screened until the following business day. Any attempt by an Offeror to deliver the proposal on a weekend or on a Federal holiday shall be coordinated through the Contracting Officer at least 48 hours prior to the planned delivery date. While the Offeror may use a commercial provider for delivery services, the Offeror shall ensure that its proposal is delivered in a manner that fully complies with the requirements of this solicitation provision and any other proposal delivery instructions in this RFP. Failure to comply could delay the proposal delivery or allow it to be handled by unauthorized or non-Government personnel. Proposals must be hand delivered to comply with security requirements and to ensure that your proposal data is not compromised. Offerors are advised that proposals sent by commercial carrier or through the U.S. Postal Service are subject to being opened and inspected by non-Government personnel. As used herein, the term "non-Government personnel" refers to all personnel not employed directly by the U.S. Government, and includes employees of Government contractors.
- (c) To expedite delivery, each box containing proposal information shall be clearly marked with the following information:

**Proposal Data – SEB Sensitive – DO NOT OPEN**  
**Submitted by [Offeror's Identity] in response to [Insert RFP Number]**  
**Box \_\_\_\_ of \_\_\_\_**  
**Civil Service Points of Contact: Craig Burrige (281-244-5610)**  
**Cody Corley (281-244-5611)**

- (d) To deliver a proposal to JSC, Offerors shall do so by first entering JSC at Gate 4. Offerors are advised that entry through any other gate could result in excessive delays or searches of vehicle contents by non-Government personnel. Anyone delivering a proposal, including persons having authorized access to JSC, may be subjected to searches or delays when attempting to enter through a gate other than Gate 4.

Gate 4 may be reached by traveling east on Bay Area Boulevard from Interstate Highway I-45. Turn right off of Bay Area Boulevard at Space Center Boulevard and enter the Johnson Space Center at the first entrance on the right. Upon entering the site, Offerors will encounter a security guard posted at Gate 4. Offerors shall advise the guard posted at Gate 4 that they are delivering a proposal and should receive instructions to proceed to a security checkpoint (Post 12). Gate 4 opens at 6:00 a.m. local time, however proposals should not be delivered prior to 8:00 a.m.

Since all incoming freight is screened, to avoid delays Offerors are encouraged to limit vehicle contents to the proposal being delivered.

(End of provision)

**L.1.11 ACCOUNTING FOR LEASE COSTS (JSC 52.231-91) (DEC 1999)**

This solicitation covers a period of potentially five years, including the basic contract and all options to extend period of performance. In providing for offsite facilities, it is possible that the contractor may lease space and that any resulting lease agreement may be for the entire life of the contract. In this regard, Offerors should be aware that Financial Accounting Standards (FAS) apply to Government contracts through their incorporation into the Federal Acquisition Regulation (see FAR 31.205-36). Of particular interest in this context is the Statement of Financial Accounting Standards (SFAS) No. 13, "Accounting for Leases". The amount of lease costs that will be allowable under the contract will depend, in part, on whether the lease is considered to be "operating" (wherein lease costs would be allowable if otherwise allocable and reasonable) or "capital" (in which case, allowable lease costs would be limited to what the cost would have been if the contractor had acquired the facility and depreciated it).

Whether a lease is properly characterized as an operating lease or a capital lease depends upon criteria established by SFAS-13, which states, in pertinent part, that a lease is a capital lease if (1) the lease transfers ownership of the property to the lessee; (2) the lease contains a bargain purchase option; (3) the lease term is equal to 75 percent or more of the estimated economic life of the leased property; or (4) the present value of minimum lease payments equals 90 percent or more of the fair market value of the leased property. It should be noted that SFAS-13 provides that the determination as to whether a lease is operating or capital is to be made at the inception of the lease. An analysis is also required at the time an option is exercised if it is considered a "new agreement" in accordance with the provisions of SFAS-13.

Under SFAS-13 criteria 3 and 4 above, the issue as to whether a lease is capital or operating may depend not only upon the apparent lease term expressed in the lease, but also upon whether termination of the lease before the expiration of the term is "reasonably possible" or a "remote contingency". SFAS-5 (applicable to SFAS-13) defines "reasonably possible" as "the chance of the future event or events occurring is more than remote but less than likely." The definition of "remote contingency" is "the chance of the future event or events occurring is slight."

The Offeror shall submit copies of any proposed lease, along with a statement of whether it considers the lease to be capital or operating, for purposes of reimbursement under the contract. The Offeror should also include an analysis detailing the cost impact of treating the lease as an operating lease and the cost impact of treating the lease as a capital lease. The Offeror shall also, whether it considers the lease to be operating or capital, submit the rationale therefore, with sufficient substantiation to enable the Government to conclude that the Offeror's categorization and proposed cost of the lease is correct. The Offeror should explain where these costs are included in the cost proposal elements.

(End of Provision)

**L.1.12 USE OF GOVERNMENT-FURNISHED PROPERTY (JSC 52.245-90) (DEC 1986)**

NASA policy regarding providing Government-furnished property is reflected in FAR Part 45. With certain exceptions, it is Government policy that contractors will furnish all property required for the performance of Government contracts. However, there are circumstances where it may be essential to contractor performance or otherwise advantageous to NASA to provide Government property to the contractor. If Government-furnished property is proposed for the performance of the effort, the Offeror shall identify and justify such property, including the needed time period of its use.

If the Offeror proposed to use Government production or research property on a no-charge, noninterference basis in performance of this contract, the Offeror will furnish with their proposal an authorization from the contracting officer having cognizance of such property. The Government will evaluate the inclusion of any proposed Government property and make cost proposal adjustments, where necessary, to eliminate the competitive advantage that might accrue to the contractor from the use of Government property.

(End of provision)

[END OF SECTION]

**SECTION L - PART 2  
INSTRUCTIONS FOR PROPOSAL PREPARATION AND DELIVERY**

NOTE TO OFFERORS: For a better and more complete understanding of this part of Section L, you should also refer to Section M. The instructions in this part of Section L are directly related to the evaluation factors set forth in Section M.

**L.2.1 INTRODUCTION**

Proposals shall be submitted in the following four volumes within the established page limitations as detailed in the provision at L.1.7 entitled "PROPOSAL PAGE LIMITATIONS (NASA 1852.215-81) (FEB 1998)."

**Table L-2: Overview of Proposal Volumes and Page Limitations**

Volume No.	Title	Page Limit
	Total Volume I and II	300
Volume I	Management Approach and Plans (L.2.3.1)	
	Overall Management Approach (L.2.3.1 (a))	
	Management Plan (DRD 01)	
	Staffing/Retention Approach and Key Personnel (L.2.3.1 (b))	*
	Quality Management System (L.2.3.1 (c))	
	Quality Manual (DRD 06)	
	Work Breakdown Structure (DRD 04) (L.2.3.1 (d))	
	Phase-in Plan (DRD 23) (L.2.3.1 (f))	
	Safety and Health Plan (DRD 09) (L.2.3.1 (e))	No Limit
	Total Compensation Plan (FAR 52.222-46) (L.2.3.1 (g))	No Limit
	Small Business Subcontracting Plan (FAR 52.219-9) (L.2.3.1 (h))	No Limit
Volume II	Technical Approach (L.2.3.2)	
	Technical Exercises (L.2.3.2.7)	**
Volume III	Past Performance (L.2.3.3)	No Limit
Volume IV	Cost Proposal (L.2.3.4)	No Limit

\* The key personnel resumes are exempt from the page limit and can be included as an attachment

\*\* Guideline is 20 pages, which is part of the 300 total page limit for Volume I and II.

The four volumes identified above shall be separately bound in appropriately sized 3-ring binders that permit the volume to lie flat when open. Staples shall not be used. A cover sheet shall be included on each binder, clearly marked with date of offer, volume number, title, copy number, RFP identification and the Offeror's name. The same identifying data shall be placed on the spine of each binder. Information shall not be incorporated by reference. A table of contents shall be provided with each volume for ready reference to sections, tables, and figures. All pages in each volume shall be numbered sequentially with Arabic numerals for contents subject to page limitations. Title pages, table of contents, cross-reference matrices, glossaries, acronym lists, page tabs, and section dividers that do not contain information that can be construed as proposal information will not be counted as part of the page limitations. Any introduction or narrative such as an executive summary will be included in the page count. Offerors shall tab each subsection within each volume for ease of reference.

**Table L-3: Proposal Submission Dates**

<b>Volume</b>	<b>Proposal Section</b>	<b>Proposal Due In Response to RFP</b>
I	Management Approach and Plans	<b><u>September 28, 2005</u></b>
II	Technical Approach	<b><u>September 28, 2005</u></b>
III	Past Performance Past Performance Questionnaire	<b><u>September 14, 2005</u></b>
IV	Cost Proposal	<b><u>September 28, 2005</u></b>

It is NASA's intent, by providing the instructions set forth below, to solicit information that will demonstrate the Offeror's competence to successfully complete the requirements specified in the SOW, to determine its capability to successfully accomplish that effort defined in the SOW, and to permit a competitive evaluation of its proposal.

Generally, the proposal should:

- (a) Demonstrate an understanding of the overall and specific requirements of the proposed contract.
- (b) Convey the company's capabilities for transforming understanding into accomplishment;
- (c) Present in detail, the plans and methods for so doing;
- (d) Present, as requested below, the costs/prices associated with so doing.

Your proposal shall be specific, detailed, and comprehensive enough to clearly and fully demonstrate your understanding of the requirements and the inherent risks associated with the objectives of this procurement. It is inadequate to simply state that you understand and will comply with the specifications, or to paraphrase the specifications such as: “standard procedures will be employed to...” or “well-known techniques will be used for...” The proposal shall explain comprehensively how you propose to comply with the SOW, as well as, the techniques and procedures you propose to implement.

In the event that other organizations are proposed as being involved in conducting this work, their relationships during the effort shall be explained and their proposed contributions to the work shall be identified and integrated into each part of the proposal, as appropriate.

Applicable technical documents can be accessed in the electronic technical library available for this procurement, which can be accessed at the following address:

<http://procurement.jsc.nasa.gov/sandma/>

You will need to request a user name and password for the ability to access the electronic technical library. Point of contact for this request is:

Name: Cody Corley  
 Phone: 281-244-5611 (collect calls not accepted)  
 E-mail: smassc@ems.jsc.nasa.gov

**L.2.2 GENERAL**

**L.2.2.1 Copies of Proposals**

Two electronic copies on compact disks shall be provided with 15 hardcopies (paper) of the proposals by the due dates listed in Section L.1.7, Proposal Page Limitations.

In addition to the copies provided for NASA review, Offerors shall provide 1 copy of Volume IV Cost/Price, to the DCAA per instructions in Section L.2.3.4.5 “Requirement for Concurrent Cost Proposal Delivery to DCAA,” by the due date included in that section.

**L.2.2.2 Period Covered by Procurement**

This solicitation covers a 3-year base period and two 1-year option periods for a total potential period of performance of 5 years. For contracting purposes, this total period is as follows:

**Table L-4: Period of Performance**

Anticipated Dates	Duration	Contractual Coverage
-------------------	----------	----------------------

02/14/06 –03/31/06	45 Days	Phase-In
04/01/06 –03/31/09	3 Years	Base Period
04/01/09 –03/31/10	1 Year	Option 1
04/01/10 –03/31/11	1 Year	Option 2

Offerors shall submit cost proposals for each year in the base period and for each year of the option periods. More information on preparation of the cost proposals is contained later in Section L under instructions related to the Cost/Price Proposal, Volume IV. Cost proposals shall include proposed phase-in period costs as a separate item.

The option periods identified above will be exercised only if the requirements of FAR 17.207(c) have first been met. The Government is not obligated to exercise any option if it determines for any reason that doing so is not in its best interest.

### L.2.2.3 Government-Provided Property and Services

Services and property to be furnished by the Government for use on the proposed contract are as set forth in Section G, JSC Alternate I to NASA Clause 1852.245-77, LIST OF INSTALLATION PROVIDED PROPERTY AND SERVICES and NASA 1852.245-76, LIST OF GOVERNMENT-FURNISHED PROPERTY.

### L.2.2.4 Facilities for Baseline Operational Readiness

The current plan for the S&MA contractor is to use existing facilities on-site at JSC for personnel who will directly support the accomplishment of the SOW. Installation Provided Facilities listed in Table L-5 are operated and maintained by the supported organizations in which S&MA has a presence. These facilities include office and laboratory spaces. User Operated Facilities listed in Table L-6 are laboratory and office spaces that are operated and maintained by S&MA. The successful Offeror shall operate and maintain these laboratories and office spaces.

Facilities to be provided to the successful Offeror include approximately 62,000 square feet of office and laboratory space at JSC and 1100 square feet at White Sands Test Facility in the following buildings:

**Table L-5 Installation Provided Facilities**

Building	Name	Approx. Sq. Ft.
----------	------	-----------------

1	Project Management Building	212
7A	Crew Systems Labs	1,275
9B, N, E	Systems Integration Labs	91
10	Manufacturing Facility	1,267
14	Antenna and tracking Development Lab	227
15 N, S	Experiments and Systems Labs	2,532
16 A	Avionics Systems Labs	1,648
17	Engineering and Applications Development Lab	15,474
29	Long Duration Evaluation Facility	331
32	Space Environment Simulation Lab	161
33	Space Environment Effects Lab	270
36	Bioengineering and Test Support Facility	683
37	Life Sciences Lab	188
44	Communications and Tracking Development Lab	218
45	Project Engineering Offices and Technical Library	19,493
46	Central Computer Facility	7,835
49	Vibration and Acoustics Test Facility	272
222	Atmospheric Reentry Materials and Structures Evaluation Facility	417
225	Administration Support Facility Annex	626
226, N	Administration Support Facility Annex	5,773
241	Human Research Facility	218
350	Energy Systems Support Lab	611
421	General Supply Warehouse	1,577
920	Sonny Carter Training Facility	458
101	White Sands Test Facility	900
113	White Sands Test Facility	100
200	White Sands Test Facility	100
OSB	Kennedy Space Center	300

**Table L-6 User Operated Facilities**

Laboratory	Location	Organization
Precision Measurement Lab	Building 10	S&MA Directorate
Receiving Inspection & Testing Facility	Building 15	S&MA Directorate

Property provided, active databases, and active websites are listed in Section J.

### L.2.3 PROPOSAL CONTENT

Offerors are requested to provide information responsive to the items set forth below. This information is considered essential for the Government to conduct a fair and uniform evaluation of proposals in accordance with the evaluation factors and subfactors provided in Section M. The items listed are not, however, all-inclusive, and Offerors should therefore include in their proposals any further

discussion that they believe to be necessary or useful in demonstrating their ability to understand and perform the work under the contemplated contract.

### **L.2.3.1 Volume I, Management Approach and Plans (Mission Suitability Subfactor 1)**

This volume includes the Offeror's management approach and the associated plans per DRDs and Contract clauses required in Table L-2. The Offeror shall provide a detailed description for each item outlined below and how each associated plan proposed in Section L.2.3.1, will fulfill the requirements of this contract. Narrative and DRD information shall be integrated in such a way that information is complementary with a minimum amount of duplication.

#### **(a) Overall Management Approach**

In addition to the Management Plan, provided in accordance with the requirements of DRD 01, the following is required:

- (1) Describe how both the Completion Form and Level of Effort activities will be managed and coordinated. Include a discussion of how you will separate and maintain proper accountability relating to charging tasks to the Completion Form as opposed to charging tasks to the Level of Effort portion of the contract.
- (2) Describe any innovations and efficiencies to be implemented and gained through the proposed approach to Program, Performance and Risk Management. Provide adequate rationale to substantiate proposed innovations.
- (3) Identify areas where earned value could be utilized under this contract and describe how you would quantify technical progress and assure data integrity.

#### **(b) Staffing/Retention Approach and Key Personnel**

In addition to the Management Plan, provided in accordance with the requirements of DRD 01, the following is required:

- (1) Attracting and Retaining Personnel\*
  - (i) Discuss your proposed approach for attracting high caliber personnel capable of meeting SOW requirements at a high level of excellence.
  - (ii) Describe how you will promote retention of highly skilled and talented people to achieve the requirements of the SOW. Include any incentives, policies, and procedures that you will use that are not already covered by the Total Compensation Package requirements.
  - (iii) Describe your proposed approach to maintain an experienced technical and engineering workforce with demonstrated skills in safety, reliability,

and quality disciplines while adapting to significant workload fluctuations during periods of increasing or decreasing requirements.

- (iv) Describe your proposed training program for new hires and how, once on the job, employee training and any required certification will be accomplished.

\* Note: Information relating to the wages, salaries, and fringe benefits of employees shall be included in Section L.2.3.1 (i) Total Compensation Plan.

(2) Key Personnel

- (i) Identify each person proposed as a key person and explain why that person is essential to your proposed approach to accomplishing work under the S&MA contract.
- (ii) Complete an Attachment L-1 resume for each person proposed as a key person.
- (iii) Provide and explain the minimum qualification standards (e.g. training, certifications, type and length of experience) that will be used to replace key personnel, if required, during the term of the contract for each key position.
- (iv) Describe the proposed process for ensuring the Offeror will maintain key personnel minimum qualification standards.

(c) Quality Management System

In addition to the Quality Manual, provided in accordance with the requirements of DRD 06, the following is required:

Discuss integration of the proposed management approach with the Offeror's quality management system (QMS) and describe how you will follow the JSC Quality Management System.

(d) Work Breakdown Structure (WBS)

Offerors shall provide a proposed WBS in accordance with DRD 04, Work Breakdown Structure. When describing the WBS, Offerors shall identify any proposed additional levels and provide rationale that fully explains how the additional levels will be utilized to enhance control and visibility. The Offeror shall describe how the identified elements map to the contract SOW.

(e) Safety and Health Plan (**Mission Suitability – Subfactor 3**)

A Safety and Health plan, prepared in accordance with the requirements of DRD 09, shall be submitted with your proposal.

(f) Phase-in

A Contract Phase-in Plan, prepared in accordance with the requirements of DRD 23, shall be submitted with your proposal.

(g) Total Compensation Plan

Total compensation plans are required in accordance with FAR 52.222-46 EVALUATION OF COMPENSATION FOR PROFESSIONAL EMPLOYEES. Total compensation plans should identify and discuss wages, salaries, and fringe benefits for professional employees and non-exempt service employees for both the prime and all major subcontractors (over \$1 million in total value per year). It should address the requirements of the Service Contract Act and commit to the compliance of all wage determinations.

- (1) Provide a discussion of your company's plans for recruiting, hiring and retaining qualified personnel.
- (2) Provide your company's salary range for each labor classification identified. Describe planned escalations for exempt and non-exempt employees.
- (3) Discuss your company's fringe benefit policies and practices regarding health insurance coverage, the types of health insurance benefits offered, the company share of premium costs, what co-pays are required, the effective date of coverage, and anticipated escalation of insurance costs. Describe your policy on assuming health insurance coverage for incumbent employees.
- (4) Discuss your company's retirement/savings plans, including what types of plans are offered, how much the company provides toward the plan and information on vesting of company contributions.
- (5) Describe your company's paid time off policies including vacation, sick leave, holidays and your payment policies regarding severance pay, overtime pay, holiday pay and any other premium pay anticipated. If uncompensated overtime is proposed, discuss the effects of uncompensated overtime on the total compensation plan, and provide a discussion as to whether the uncompensated overtime is voluntary or involuntary.
- (6) Describe your policy on the hiring of incumbents, including recognition of seniority, protection of current wages/salaries and fringe benefit coverage.
- (7) Describe incentives to motivate and reward performance and to encourage the retention of personnel. Describe your overall management approach to attracting and retaining high caliber personnel capable of meeting statement of work requirements at a high level of excellence.
- (8) Provide a discussion of prior experience with this proposed total compensation plan, including such information as the length of time you (or other elements of the company) have used the plan and the turnover

experienced with this compensation plan compared to the National Average.

Your total compensation plan must correspond with the data provided on Total Compensation Templates (a), (b), (c), (d), and (e) contained in Volume IV, Cost Proposal.

(h) Small Business Subcontracting Plan

The Offeror shall provide a Small Business Subcontracting Plan in accordance with FAR 52.219-9. This applies ONLY to large businesses. Any detailed plans proposed to meet or exceed SDB goals, shall be proposed as an attachment to the small business subcontracting plan.

- (1)\* The Contracting Officer's assessment of appropriate subcontracting goals for the basic period of performance (3 years and subsequent option years) of this acquisition, expressed as a percentage of total contract value (including fee), is as follows:

**Table L-7: Small Business Goals**

Total Small Business (SB) Goal	25.0%
Small Disadvantaged Business (SDB)	10.0%
Women Owned Small Business (WOSB)	5.0%
HUBZone Business	2.0%
Veteran Owned Small Business (VOSB)	1.0%
Service Disabled Veteran Owned Small Business	1.0%
Historically Black College or University/Minority Institutions	1.0%

Offerors are encouraged to propose goals that are equivalent to or greater than those recommended by the Contracting Officer as stated above.

- (2)\*\* The Offeror will identify specific SDBs that will perform work on the contract if known, the extent of commitment to use SDBs, and the types and amount of work to be performed by SDBs. The Offeror will show how they would actively engage small businesses in the development of technical products including its plans to develop Mentor-Protégé relationships with emerging engineering, scientific and technology oriented small businesses. In addition, the Offeror will identify and discuss its past performance in complying with contract specific subcontracting goals for SDB participation.
- (3)\*\* The Offeror will make an assessment of small business subcontracting opportunities to attain or exceed the SDB subcontracting goal list for this contract.
- (4)\*\* The Offeror will provide targets for the contract period of performance. These targets will be expressed in dollars and percentages of total contract value in each joint venture partner and team member, and a total target for SDB participation will be specified. If the Offeror is an SDB that has waived the SDB price evaluation adjustment in accordance with FAR 52.219-23, it will provide with its offer a target for the work that it intends to perform in the authorized groups as the prime contractor. Target will be incorporated into

and become part of any resulting contract. The Offeror will describe its approach and methods for ensuring SDB participation.

**\* Evaluated under Mission Suitability Subfactor 1**

**\*\* Evaluated under Mission Suitability Subfactor 4**

### **L.2.3.2 Volume II, Technical Approach (Mission Suitability Subfactor 2)**

Offerors shall submit information in their proposals in response to the items set forth below. In addition to responding to these items, Offerors should include in their proposals any additional information that demonstrates their understanding of the work and their ability to perform it.

#### **L.2.3.2.1 Overall Technical Approach**

In this section:

- (a) Discuss your overall technical approach to the Statement of Work requirements for technical activities that apply contract-wide.
- (b) Identify innovative methods you would employ with associated rationale. Efficiencies that go across the entire contract or multiple areas of the SOW should be addressed in this section. For example, a management information system that will affect how lower level SOW areas may be managed.
- (c) Identify technical SOW functional areas you believe are most important and explain why.
- (d) Discuss your approach for assuring technical integration of those functional areas within the S&MA Support Services Contract.

#### **L.2.3.2.2 Specific Technical Understanding and Associated Resources Format**

In the Specific Technical Understanding and Resources Requirements Table (Table L-8), SOW paragraphs are designated in the level of detail column with an "A", "B", "C" or "D" or a combination of "A", "B", "C" and "D". These designations identify the information Offerors are required to provide and correspond to paragraphs "A", "B", "C" and "D" in the sections following Table L-8 below.

Paragraphs designated with "A", "B", and "C" require a narrative demonstrating the Offerors technical understanding and approach, the basis of estimate and efficiencies and cost savings respectively. These will be discussed in detail in the instructions following Table L-8. Paragraphs designated with a "D" represent a roll-up of resources. All lower level SOW paragraphs without a "D" shall be addressed at the next higher SOW level indicated with a "D". Sections 3.0, 4.0, 5.0, 6.0, 7.0, 8.0, 9.0 and 10.0 will represent roll-up of resources of lower level SOW paragraphs within those sections (Ex. The roll-up for section 3.0 will contain the lower level paragraphs 3.1 – 3.7).

For LOE, if a letter is shown in parenthesis, for example, (B, C), these are only required if the Offeror chooses to adjust the skill mix in a manner that differs from the LOE detailed IGE. If the Offeror proposal matches the LOE IGE in that section only the un-bracketed letter is required.

NOTE: Non-Labor resources shall be included in Volume IV, Cost Proposal.

**Table L-8: Specific Technical Understanding and Resources Requirements**

Level of Detail	SOW #	Performance Requirement	LOE	CF
	1.0	INTRODUCTION		
	2.0	GENERAL		
	2.1	Work Authorization		
	2.2	Data Requirements		
D	3.0	CONTRACTOR MANAGEMENT RESPONSIBILITIES		
A, B, C	3.1	Program Management		X
A, B, C	3.2	Cost and Schedule		X
D	3.3	JSC Program S&MA Panels		X
A, B, C	3.3.1	Technical		X
A, B, C	3.3.2	Administrative		X
A, B, C	3.4	Quality Management System		X
A, B, C	3.5	Property Management		X
A, B, C	3.6	Safety and Environmental Health		X
A, B, C	3.7	Information Technology (IT)		X
A, B, C, D	4.0	S&MA PERSONNEL QUALIFICATION PROGRAM		X
D	5.0	PROGRAM SUPPORT		
(D)	5.1	Concepts and Requirements Phase	X	
A (B)	5.1.1	Safety, Reliability and Maintainability Goals and Requirements	X	
A (B)	5.1.2	Quality Assurance Goals and Requirements	X	
A (B)	5.1.3	Requirements Reviews	X	
A (B)	5.1.4	Trade Studies	X	
A (B)	5.1.5	Feasibility Assessments	X	
A (B)	5.1.6	Technical Assessments	X	
(D)	5.2	Design and Development Phase	X	
A (B)	5.2.1	Program Design and Milestone Reviews	X	
A (B)	5.2.2	Integrated Teams	X	
A (B)	5.2.3	Requirements and Design Changes	X	
A (B)	5.2.4	Safety	X	
A (B)	5.2.5	Reliability and Maintainability	X	
A (B)	5.2.6	Quality Assurance	X	
(D)	5.3	Manufacturing, Test, Acceptance, Delivery Phase	X	
A (B)	5.3.1	Quality Assurance	X	
A (B)	5.3.2	Non-Conformance Reports (NCRs) and Waivers	X	
A (B)	5.3.3	Software Verification and Validation	X	
A (B)	5.3.4	Certification	X	
A (B)	5.3.5	Test Support	X	
A (B)	5.3.6	Inspection Requirements	X	

Level of Detail	SOW #	Performance Requirement	LOE	CF
A (B)	5.3.7	Manufacturing and Fabrication Plans and Processes	X	
A (B)	5.3.8	Surveillance and Audits	X	
A (B)	5.3.9	Procurement Quality and Assurance (PQA)	X	
(D)	5.4	Operations and Maintenance Phase	X	
A (B)	5.4.1	Mission Planning	X	
A (B)	5.4.2	Mission Support	X	
D	6.0	JOHNSON SPACE CENTER (JSC) PROJECTS SUPPORT		
A, (B, D)	6.1	Software Assurance	X	
(D)	6.2	Concept and Requirements	X	
A (B)	6.2.1	Feasibility Assessments	X	
A (B)	6.2.2	Procurement Quality and Assurance (PQA)	X	
A (B)	6.2.3	S&MA Requirements	X	
(D)	6.3	Design and Development	X	
A (B)	6.3.1	Projects	X	
A (B)	6.3.2	Payloads	X	
(D)	6.4	Manufacturing, Test, Acceptance, Delivery	X	
A (B)	6.4.1	Readiness Reviews	X	
A (B)	6.4.2	Manufacturing and Test Assurance	X	
A (B)	6.4.3	Non-Conformance	X	
A (B)	6.4.4	Documentation Tracking and Retention	X	
A (B)	6.4.5	Acceptance	X	
(D)	6.5	Operations	X	
A (B)	6.5.1	Certification	X	
A (B)	6.5.2	Shipment of Flight Equipment	X	
A (B)	6.5.3	Prelaunch Assessments	X	
A (B)	6.5.4	Flight Planning and Real-Time Support	X	
A, (B, D)	6.6	Sustaining Engineering and Maintenance	X	
D	7.0	INDEPENDENT ASSESSMENT AND INTEGRATED SUPPLIER ASSURANCE MANAGEMENT		
A (B)	7.1	Independent Assessment	X	
A (B)	7.2	Integrated Supplier Assurance Management Program	X	
A (B)	7.3	Software Continuous Process Improvement	X	
D	8.0	ADVANCED PROGRAMS, ASSURANCE METHODOLOGIES, AND SPECIAL PROCESSES		
(D)	8.1	Advanced Programs and Projects	X	
A (B)	8.1.1	Risk Analysis	X	
A (B)	8.1.2	Requirements Development	X	
A (B)	8.1.3	Vehicle S&MA Engineering	X	
A (B)	8.1.4	Procurement Quality Assurance (PQA)	X	
(D)	8.2	Assurance Methodologies and Technologies	X	
A (B)	8.2.1	Assurance Methodologies	X	
A (B)	8.2.2	Assurance Technologies	X	
A, (B, D)	8.3	Special Processes	X	
A, (B, D)	8.4	Electrical, Electronic, and Electromechanical (EEE) Parts	X	
A, (B, D)	8.5	National Aeronautics and Space Administration (NASA) Advisories and Government-Industry Data Exchange Program	X	

Level of Detail	SOW #	Performance Requirement	LOE	CF
		(GIDEP) / Acute Launch Emergency Reliability Tip (ALERT) System		
D	9.0	INSITUTIONAL SAFETY AND QUALITY		
A (B)	9.1	Pressure Systems	X	
A (B)	9.2	White Sands Test Facility (WSTF)	X	
D	10.0	RECEIVING INSPECTION TEST FACILITY (RITF)		
A, B, C	10.1	Mechanical and Electrical Testing and Analysis		X
A, B, C	10.2	Training		X
A, B, C	10.3	Quality		X
A, B, C	10.4	Laboratory Equipment and Facilities		X
A, B, C	10.5	Maintenance		X
A, B, C	10.6	Shipping and Receiving		X
A, B, C	10.7	Laboratory Information Management System		X

LOE: Level of Effort

CF: Completion Form

The SOW structure and breakout levels listed in the Specific Technical Understanding and Resources Requirements Table are not intended to influence the Offeror’s proposed technical or management approach, but rather to indicate at what level the Source Evaluation Board will conduct its evaluation of labor resources. These are the levels at which the Offerors are required to address the specific labor resources and associated supporting rationale.

A. Technical Understanding/Approach

Provide a narrative to address the following:

**Technical Understanding of Requirements:**

- (i) Describe your approach for performing the tasks required by the SOW.
- (ii) Provide sufficient discussion to fully demonstrate your understanding of the technical requirements including the processes and plans for coordinating and interfacing with other contractors. It is inadequate to simply state that the Offeror understands and will comply with the requirements, or to paraphrase the requirements such as: “standard procedures will be employed to...” and “well-known techniques will be used for...”
- (iii) Comprehensively explain how you propose to comply with the applicable requirements, as well as the techniques and procedures you propose to implement.

**IT Tools and Approach:** Describe the IT tools (software applications, databases, systems, analytical tools) proposed to effectively and efficiently perform contract requirements.

Provide detail on any innovative methods you would employ, and provide adequate rationale for any proposed innovations.

**Technical Risk Assessment:**

- (i) Describe the processes you will use to accurately identify, monitor, and control schedule risks and technical risks.
- (ii) Identify any specific risks relative to performance of work under the SOW and any plans to mitigate or accept each risk.

**B. Basis of Estimate (BOE) and Assumptions**

Provide a narrative to address the following:

**For LOE:**

If the offeror's technical and management approach is to propose a change in the LOE Table of hours (skill mix), the offeror must provide narrative rationale for the change. Any change should be reflective of the offeror's specific technical and management approach. Ensure that the number of LOE hours provided matches the total number of hours in the LOE IGE.

**For CF:**

- (i) Explain the BOE for the FTEs/Hours by providing supporting rationale for all resources proposed. Labor resources are to be proposed for a full 12-month period of performance. For example, if a person is only needed full time for 6 months to do a task over a 12-month period, then this would be proposed at 0.5 FTE. If a person is required full time, for 12 months, to do a task over a 12-month period, then this would be proposed at 1 FTE. Repeating for clarity, an FTE is a full time equivalent defined as the proposed productive hours needed to comprise one average full time employee. This may be one employee or several part time employees. Productive hours are defined as the total available hours for productive work in a year, excluding overtime, less paid time off.
- (ii) Include a discussion regarding how the proposed resources were estimated. Also, include a discussion associated with any assumptions made regarding the scope of work that led to the proposed resources such as: "we assume that a verification plan for the XYZ deliverables already exist and all we are responsible for is the maintenance of the plan." The Offeror's proposed resources will be evaluated for cost realism.
- (iii) Include sufficient narrative discussion to demonstrate to the Government the proposed resources are realistic based on your technical and management approach.

C. Efficiencies or Cost Savings

**For LOE:** An efficiency narrative is not required since, only changes to skill mix are allowed for LOE. The total number of hours shall match the total number of hours in LOE IGE found in Table L-12. Provide any changes, if applicable, to skill mix in the BOE answer.

**For CF:**

(i) Description of Efficiencies or Cost Savings:

Explain any proposed resource efficiencies or cost savings applicable to the subject SOW section, in sufficient detail to allow for a comprehensive analysis.

Efficiencies must be realistic and supported with adequate rationale. Efficiencies that go across the entire contract or multiple areas of the SOW should be addressed in this section. For example, a management information system that will affect how lower level SOW areas may be managed.

If efficiencies and cost savings are proposed, all cost savings and benefits from the efficiencies must be included in the Offeror's cost proposal. Offerors may propose efficiencies which require Government investment or approval however; these may be rejected by the Government on a case by case basis. If efficiencies, or cost savings are being proposed, ensure sufficient supporting information to perform a technical analysis is provided to include all of the following:

(ii) Total Cost of Implementation:

- A. Identify implementation cost specifics such as vendor quotes, bills of materials, hours and skills necessary to implement any proposed efficiency.
- B. Identify and estimate the cost of any Government investment outside the scope of this contract. For example, you are proposing saving one FTE dependent on the Government installing a new doorway connecting two rooms to allow one person to monitor two work stations at once. In this case the Offeror shall identify and estimate the cost of the new doorway as part of the total cost of implementing the efficiency.

(iii) Resource Savings:

- A. State the types and quantities of resources to be saved. For example: "This efficiency will result in the elimination of one Supervisor FTE starting with contract year two for the duration of the contract."

- B. Provide a rough order of magnitude (ROM) dollar estimate of the saving to the Government.

(iv) Implementation Schedule:

- A. Provide a schedule for the implementation of any proposed efficiencies.
- B. Address possible operational impacts such as shutdowns for installation of new equipment or software.
- C. Identify the start date of sustaining cost and maintenance including periodic events during the contract's period of performance such as overhauls or upgrades.

(v) Sustaining Cost (Maintenance and Disposal):

- A. Provide a ROM supported by particulars such as vendor quotes, bills of materials, estimated hours and skills required to sustain and maintain the efficiency.
- B. Also address the disposition of all equipment, software and other property associated with the proposed efficiencies at the end of the proposed contract's period of performance.

D. Table of Resources

The Resources Table (Table L-9 shall agree with the narrative discussion in paragraphs A, B and C above. The tables will reconcile to the cost volume. The roll-up summary tables shall reconcile with the details and will reconcile with the cost proposal as indicated in the cost proposal instructions for a pricing model.

**Table L-9 Resources**

NASA (JSC) RFP Labor Category SOW: _____	CY1	CY2	CY3	CY4	CY5
Standard Labor Categories (SLC)					
TOTAL FTE/Hours PRIME AND ALL SUBS					

CY = Contract Year

**L.2.3.2.3 Specific Technical Understanding Examples**

Offerors are advised that labor resource data in the Technical Approach volume must reconcile with the data used in the cost proposal for pricing purposes.

Also, the discussion addressing technical understanding and resources should be consistent with the proposed overall technical and management approach. Inconsistency between these two areas may result in negative mission suitability findings and cost realism adjustments (probable cost).

Included below in Table L-10 is a list of Standard Labor Categories to use for proposal purposes as well as Table L-8 that delineates the SOW level for which detailed data is required. The format and specific instructions, including an example of what is to be included for each specified SOW level is addressed below.

As mentioned previously, Offerors may include additional labor categories that cannot be easily or logically mapped to those provided in Table L-10.

**Completion Form Technical Proposal Example**

The following is an example of the format for the Specific Technical Understanding and Associated Resources for CF sections:

SOW X.X      SOW Subsection Example

A. Technical Understanding /Approach

**Technical Understanding of Requirements:** We plan to develop, maintain and implement a management plan in the following manner... Integrated financial review products will be provided in the following manner...

**IT Tools:** We have identified the following tools...These tools are currently operating on the following contracts...

**Risk:** The following risks have been identified for this area...We plan to monitor the risk by performing...The risk will be controlled by performing the following:...The proposed mitigation procedures are...

B. Basis of Estimate (BOE) & Assumptions

The approach is based upon a grass roots estimate of the required effort for planning, coordinating, reviewing, maintaining and implementing planning methodology. The amount of resources proposed in the table above were developed based on a review of the DRD requirements of this area and...The proposed skills were based on...The skill XYZ was substituted for a XXX because our XXX possesses the skills,...certification to do XX and will be performing the following function...(Include job description).

C. Efficiencies or Cost Savings

We proposed a variation on the skill mix based on...(Be very specific with historical experience to support this reduction.) Efficiencies will be derived through a reduction of resources made possible by the...

**D. Table of Resources**

NASA (JSC) RFP Labor Category SOW: X.X	CY1
Standard Labor Categories (SLC)	
Program Manager	1
Manager	1
Supervisor	2
Engineer 1	1
Analyst 1	1
Secretarial/Clerical	2
Business Specialist 1	1
Business Specialist 2	1
Other	
XYZ	1
<b>TOTAL FTE PRIME AND ALL SUBS</b>	<b>11</b>

**Level of Effort Technical Proposal Example**

The following is an example of the format for the Specific Technical Understanding and Associated Resources for LOE sections:

SOW X.X      SOW Subsection Example

A. Technical Understanding /Approach

**Technical Understanding of Requirements:** We plan to develop, maintain and implement a management plan in the following manner... Integrated financial review products will be provided in the following manner...

**IT Tools:** We have identified the following tools...These tools are currently operating on the following contracts...

**Risk:** The following risks have been identified for this area...We plan to monitor the risk by performing...The risk will be controlled by performing the following:...The proposed mitigation procedures are...

B. Basis of Estimate (BOE) & Assumptions (ONLY IF SKILL MIX CHANGES)

Due to our cross training program we are able to utilize six skill X's to do...This is in place of the IGE's six skill Y's. This is a more effective means of completing the task because of...(provide a narrative that demonstrates that the revised skills will be able to accomplish the requirement. If possible, provide evidence of other projects where your approach has been successful.)

**D. Table of Resources** ( ONLY IF SKILL MIX CHANGES )

NASA (JSC) RFP Labor Category SOW: X.X	CY1
Standard Labor Categories (SLC)	
Program Manager	1,000
Manager	1,000
Supervisor	2,000
Engineer 1	1,000
Analyst 1	1,000
Secretarial/Clerical	2,000
Business Specialist 1	1,000
Business Specialist 2	1,000
Other	
XYZ	1,000
TOTAL Hours PRIME AND ALL SUBS	11,000

- (a) Hard copies of the three (3) Summary Templates are to be included in both Volume II and Volume IV. These templates shall be printed and are not included in the page count limitation for Volume II. In addition, electronic versions of these templates shall be submitted in Microsoft Excel format. These electronic versions are to be included in your workbook 4 of your Electronic Pricing Model (EPM). The EPM requirements are further defined in the cost instructions below.
- (b) The Technical Resources Summary Template (TRST) is required to summarize all proposed labor resources. There is one TRST included for the Completion Form tasks and one for the LOE tasks. These will be labeled; TRST-CF and TRST-LOE. The TRST is an automated template which serves five functions:
- (1) In the column entitled "Resources Basis" Offerors are required to fill in their assumed staffing level prior to implementation of any changes, improvements, efficiencies or innovations that result from the application of the Offeror's technical and management approach. The Offeror shall provide rationale, detailed narrative, and validation of their resource basis.
  - (2) In the columns entitled "Proposed FTEs" Offerors shall include all proposed labor resources. These resources shall be an accumulation of all the resources justified in the Offeror's Basis of Estimate (BOE) paragraph in accordance with the instructions below.
  - (3) The template includes a column which will automatically calculate deltas between the proposed Resources Basis for contract year one, and the year to year proposed deltas over the period of performance. These deltas must be fully justified in accordance with the instructions for the Efficiencies or Cost Savings (CS) paragraph above. The reference column provided must be used by the Offerors to refer the NASA evaluators to the CS paragraph which provides the analysis of the efficiency resulting in the resource delta. The NASA evaluators will compare all CS paragraphs to proposed resources for equivalence and to ensure all parts of your proposal reconcile.
  - (4) The TRST functions as a link between the Technical Volume and the Cost Volume, therefore, also include a copy of this template in the Cost Volume.
  - (5) The automated graphs that follow the template are intended to provide NASA evaluators a graphical view of your proposed resources. They are fully automated and only require your validation to ensure accuracy.
- (c) The Efficiency Template (ET) is required to summarize all proposed Efficiencies or Cost Savings. Efficiency Template (ET) - This template requires the Offeror to identify all efficiencies in the first column by efficiency number. The ET should reflect all efficiencies or cost savings in the CF section of the SOW.
- (1) The subsequent columns require the associated savings to resources and costs, including the total cost of implementing and sustaining/maintaining

each specific efficiency. The “FTE Savings per Year” column requires the Offeror to input the net decrease in the FTE amount as a result of each efficiency per year.

- (2) The “Total ROM (\$)” column requires the Offeror to provide the rough order of magnitude of the total cost savings associated with each identified efficiency for the entire contract period.
  - (3) The “Total Cost of Implementation” column requires the Offeror to input the total dollar impact necessary to implement each identified efficiency for the entire contract period. The “Implementation Period” should represent the time period it takes to completely implement each efficiency.
  - (4) The “Total Cost of Sustaining/Maintenance” column requires the Offeror to input the total dollar impact necessary to sustain/maintain each identified efficiency for the entire contract period.
  - (5) The “Start Date Sustaining/Maintenance” should show the date when the sustaining/maintenance period is expected to begin.
  - (6) The “Net Savings (\$)” column requires the Offeror to input the net cost savings associated with each identified efficiency for the entire contract period.
  - (7) Include sufficient rationale in narrative form in the “Rationale” column to explain each identified efficiency. It should address any changes to skill mix in sufficient detail to allow for an adequate evaluation. This template is to be completed by the prime Offeror only.
- (d) Technical Resources Template (TRT) is required to summarize and sort by SOW task all proposed labor resources. There is one TRT included for the Completion Form tasks and one for the LOE tasks. These will be labeled; TRT-CF and TRT-LOE. This template requires Labor Resources identification by SLC. The format is automated and only requires you to include source data (FTE-Full Time Equivalents) in the areas shaded in yellow.
- (1) A column titled “Incumbent Retention%” is included for you to display the percent of the incumbent workforce you intend to retain by SLC.
  - (2) Resources should be allocated to their appropriate SOW areas as best as possible. For example, Supervisors should be located in the specific SOW area (4.0, 5.0, etc) that they will supervise exclusively. However, for those labor categories, such as Program Manager that go across the entire contract and not exclusive of a particular SOW, you should allocate them to SOW 3.0 – Contractor Management Responsibilities.

#### **L.2.3.2.5 Standard Labor Categories (SLC)**

A set of proposed Standard Labor Categories (SLC) applicable to this contract are provided to facilitate a consistent evaluation among Offerors. Table L-10

addresses the recommended qualifications and experience levels of the SLC that are to be used for proposal purposes. SLCs are intended to broadly group proposed labor into a manageable number of categories. These guidelines may not address all the possible specific skills, or requirements that any one occupation or profession may require. It is the Offeror's responsibility to understand the complexities of the work required to successfully meet the S&MA requirements. When describing the proposed labor necessary to accomplish the SOW, the SLCs provided in Table L-10 shall be used in the basis of estimates and Table of Resources (Table L-9 described in the previous paragraphs. Offerors may include other additional labor categories that cannot be easily or logically mapped to those provided in Table L-10. Job descriptions similar to the ones listed in Table L-10 shall be provided for the additional categories.

**Table L-10: Standard Labor Categories (SLCs) for this Effort**

Labor Class	Education (or Equivalent training or experience)	Experience (Minimum Years)	Job Description Guidelines
Management			
Program Manager	BS	15	Serves as the Contractor's primary contract manager, and shall be the contractor's authorized interface with the Government Contracting Officer (CO), the Contracting Officer's Technical Representative (COTR), government management personnel and customer agency representatives. Responsible for formulating and enforcing work standards, assigning contractor schedules, reviewing work discrepancies, supervising contractor personnel and communicating policies, purposes, and goals of the organization to subordinates. Shall be responsible for the overall contract performance.
Manager	BS	10	Experience in progressively challenging management positions, including successfully managing people.
Supervisor	BS	5	Experience in supervising or directing other personnel.
Technical			
Engineer 1	BS	0	Degree in engineering, performs professional engineering work.
Engineer 2	BS	3	Degree in engineering with professional experience performing professional work in design, development, test.
Engineer 3	BS	5	Degree in engineering with professional experience performing professional work in design, development, test. May require specialized experience, demonstrated proficiency, or professional certification in one or more of the Safety, Reliability, or

			Quality functional disciplines.
Engineer 4	MS	8	Degree in engineering, advanced degree in engineering or science with specialized professional experience performing professional work in design, development, test. May require specialized experience, demonstrated proficiency, or professional certification in one or more of the Safety, Reliability, or Quality functional disciplines.
Technician 1	High School	2	Technical training or equivalent experience in an aerospace related field such as avionics, electronics, mechanical. Performs work under direct supervision.
Technician 2	High School	5	Technical degree, certificate or license with experience in quality inspection of aerospace systems, i.e. avionics electronics, mechanical.
Technician 3	AA	8	Technical degree, certificate or license with experience in quality inspection of aerospace systems, i.e. avionics, electronics, mechanical, and professional experience in quality systems, audits, assessments, surveillance.
Technician 4	BA/BS	10	Degree in related technical field and relevant professional experience in flight/aerospace hardware and support systems audits, assessments, and inspections. Directs the work of others.
Analyst 1	BS	0	BS degree in job related area or related field.
Analyst 2	BS	2	BS degree in job related area or related field with at least 2 years experience.
Analyst 3	MS	5	Advanced degree in related field with professional experience in analysis techniques.
Information Technology 1	AA	0	Degree or IT certified professional or job related experience.
Information Technology 2	BS	0	Degree in computer science or related field.
Information Technology 3	BS	3	Degree in computer science or related field with job-related experience.
Training Specialist 1	High School	2	Experience in assessing training requirements, tracking and statusing employee training requirements.
Training Specialist 2	BA/BS	5	Education background with experience in assessing existing training, developing training needs, and establishing large, diverse, technical training programs.
Business			
Administration 1	High School	0	Provides professional work of a non-

			technical nature.
Administration 2	AA	0	Degree or experience in the areas of technical writing or administrative support.
Secretarial/ Clerical	High School	0	Provides office support services.
Business Specialist 1	AA	0	Degree or professional experience in budget, finance, accounting.
Business Specialist 2	BA/BS	5	Degree in business, accounting, finance.

**Examples of Mapping Skills into SLCs**

The skills below are provided only as examples of how certain labor categories proposed by the Offeror may fit into the SLCs identified by the Government.

**Engineer**

Mechanical, electrical, aerospace, chemical, system

Technician

Tool/model maker, Installation technician, Manufacturing inspector

Analyst

Analytical engineering, System analysis, Stress/thermal analysis

Information Technology

Programmer, LAN Administrator, Web Master

Training Specialist

Instructor, Training Specialist

Administration

Office Administration Specialist, Administrative Assistant, Human Resources Specialist

Secretarial/Clerical

Secretary, Clerk, Data input, Document custodian

Business

Procurement Specialist, Budget Analyst, Financial Analyst, Contract Specialist, Accountant

**L.2.3.2.6 Labor Independent Government Estimate**

A Labor IGE has been developed and is included in Table L-11, Completion Form Annual IGE, and Table L-12, Level of Effort Annual IGE for CY1. The IGE is the Government’s estimate of the labor resources (skill mix and full time equivalents) required to perform this effort, without incorporation of any one Offeror’s specific management or technical approach and is not intended to influence your proposed estimates of hours applied to skills. With respect to the LOE portions, the total number of hours is fixed, however the IGE detail skill mix can be adjusted to reflect the offeror’s technical and management approach.

The IGE is not to be considered a Government “plug number” for CF. With respect to LOE, the IGE reflects the total number of hours the government intends to buy and therefore is fixed at **1,999,314 (for the 3 year base period)** hours, yet the detail skills included in the IGE are not to be considered “plug numbers.” Once the contract is awarded, fee will not be adjusted if the IGE is used for estimating and

actual cost incurred after award differs (unless significant changes occur to the skill mix that are driven by the requirement).

The IGE FTE estimates include all labor required to perform the entire SOW with the exception of traditional G&A type personnel such as: sales, human resources, finance, legal, procurement, and executives.

**For CF:** The IGE is intended to assist you in determining the magnitude of possible labor required. Offerors shall develop their own estimates that support their unique proposed management and technical approaches and shall provide supporting rationale in narrative form for CF.

**For LOE:** The Offeror has discretion only to change the skill mix used, yet your proposal must match the total hours provided in Table L-12.

**Table L-11 Completion Form Annual IGE (each contract year estimated with this annual number of FTEs)**

Standard Labor Categories	TOTAL (FTEs/ Contract Year)	3.0 Contractor Management	4.0 Personnel Qualification Program	10.0 RITF
<b>Management</b>				
Program Manager	1.50	1.50	-	-
Manager	4.00	4.00	-	-
Supervisor	5.75	4.50	0.25	1.00
<b>Technical</b>				
Engineer 1	11.25	11.25	-	-
Engineer 2	14.50	13.25	-	1.25
Engineer 3	14.50	13.25	-	1.25
Engineer 4	0.00	-	-	-
Technician 1	2.00	-	-	2.00
Technician 2	3.25	-	-	3.25
Technician 3	3.50	0.25	-	3.25
Technician 4	1.00	-	-	1.00
Analyst 1	0.00	-	-	-
Analyst 2	0.00	-	-	-
Analyst 3	0.00	-	-	-
Information Technology 1	1.00	1.00	-	-
Information Technology 2	2.00	2.00	-	-
Information Technology 3	2.00	2.00	-	-
Training Specialist 1	2.00	-	2.00	-
Training Specialist 2	1.00	-	1.00	-
<b>Business</b>				
Administration 1	3.25	2.25	1.00	-
Administration 2	8.75	8.75	-	-
Secretarial/Clerical	5.00	3.50	-	1.50
Business Specialist 1	1.50	1.00	-	0.50
Business Specialist 2	2.50	2.50	-	-
<b>GRAND TOTAL FTE</b>	<b>90.25</b>	<b>71.00</b>	<b>4.25</b>	<b>15.00</b>

**Table L-12 Level of Effort Annual IGE for CY1 (This was assumed to remain level for the 5 years) Due to the size of the Table, it is spread over 7 pages in order to show the lowest levels of detail.**

Standard Labor Categories	5.0 Program Support	5.1 Concepts and Rqmts Phase	5.1.1 Safety, Rel, & Maintainability Goals & Rqmts	5.1.2 Quality Assurance Goals and Requirements	5.1.3 Requirements Reviews	5.1.4 Trade Studies	5.1.5 Feasibility Assessments	5.1.6 Technical Assessments	5.2 Design and Development Phase	5.2.1 Program Design Milestone Reviews	5.2.2 Integrated Teams	5.2.3 Requirements and Design Changes	5.2.4 Safety	5.2.5 Reliability and Maintainability	5.2.6 QA
<b>Management</b>															
Program Manager	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Manager	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Supervisor	13,020	1,116	-	-	-	-	-	-	5,394	-	-	-	-	-	-
<b>Technical</b>															
Engineer 1	18,600	1,860	-	-	-	-	-	1,860	13,020	1,860	3,720	-	3,720	3,720	-
Engineer 2	121,830	3,720	-	-	3,720	-	-	-	48,360	3,720	5,580	11,160	7,440	16,740	3,720
Engineer 3	152,520	22,785	5,580	4,185	4,650	3,720	2,790	1,860	48,360	6,045	1,395	13,020	14,880	6,975	6,045
Engineer 4	18,135	5,580	-	-	-	-	-	5,580	6,743	-	5,580	-	1,163	-	-
Technician 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technician 2	1,860	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Technician 3	6,510	-	-	-	-	-	-	-	930	-	-	-	-	-	930
Technician 4	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Analyst 1	2,790	1,860	-	-	-	-	-	1,860	930	-	-	-	-	930	-
Analyst 2	19,995	15,810	3,720	-	-	3,720	930	7,440	4,185	-	-	-	-	4,185	-
Analyst 3	3,720	1,860	-	-	-	-	-	1,860	1,860	-	-	-	-	1,860	-
Information Technology 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 3	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Training Specialist 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Training Specialist 2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Business</b>															
Administration 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Administration 2	6,975	-	-	-	-	-	-	-	930	-	-	930	-	-	-
Business Specialist 1	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Business Specialist 2	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>365,955</b>	<b>54,591</b>	<b>9,300</b>	<b>4,185</b>	<b>8,370</b>	<b>7,440</b>	<b>3,720</b>	<b>20,460</b>	<b>130,712</b>	<b>11,625</b>	<b>16,275</b>	<b>25,110</b>	<b>27,203</b>	<b>34,410</b>	<b>10,695</b>
Secretarial/Clerical	8,370	1,116	-	-	-	-	-	-	2,790	-	-	-	-	-	-

Standard Labor Categories	5.3 Manufacturing, Test, Acceptance, Delivery Phase	5.3.1 Quality Assurance	5.3.2 NCR's and Waivers	5.3.3 S/W Verification and Validation	5.3.4 Certification	5.3.5 Test Support	5.3.6 Inspection Requirements	5.3.7 Manufacturing and Fabrication Plans & Processes	5.3.8 Surveillance and Audits	5.3.9 PQA	5.4 Operations and Maintenance Phase	5.4.1 Mission Planning	5.4.2 Mission Support
<b>Management</b>													
Program Manager	-	-	-	-	-	-	-	-	-	-	-	-	-
Manager	-	-	-	-	-	-	-	-	-	-	-	-	-
Supervisor	2,790	-	-	-	-	-	-	-	-	-	3,720	-	-
<b>Technical</b>													
Engineer 1	-	-	-	-	-	-	-	-	-	-	3,720	3,720	-
Engineer 2	40,920	1,860	5,580	7,440	3,720	5,580	-	-	13,950	2,790	28,830	16,740	12,090
Engineer 3	42,315	-	14,415	5,580	3,720	5,580	5,580	3,720	1,395	2,325	39,060	20,460	18,600
Engineer 4	1,163	-	1,163	-	-	-	-	-	-	-	4,650	2,325	2,325
Technician 1	-	-	-	-	-	-	-	-	-	-	-	-	-
Technician 2	1,860	1,860	-	-	-	-	-	-	-	-	-	-	-
Technician 3	5,580	-	-	-	-	-	-	-	5,580	-	-	-	-
Technician 4	-	-	-	-	-	-	-	-	-	-	-	-	-
Analyst 1	-	-	-	-	-	-	-	-	-	-	-	-	-
Analyst 2	-	-	-	-	-	-	-	-	-	-	-	-	-
Analyst 3	-	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 1	-	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 2	-	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 3	-	-	-	-	-	-	-	-	-	-	-	-	-
Training Specialist 1	-	-	-	-	-	-	-	-	-	-	-	-	-
Training Specialist 2	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>Business</b>													
Administration 1	-	-	-	-	-	-	-	-	-	-	-	-	-
Administration 2	2,790	-	-	-	-	-	-	-	2,790	-	3,255	930	2,325
Business Specialist 1	-	-	-	-	-	-	-	-	-	-	-	-	-
Business Specialist 2	-	-	-	-	-	-	-	-	-	-	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>97,418</b>	<b>3,720</b>	<b>21,158</b>	<b>13,020</b>	<b>7,440</b>	<b>11,160</b>	<b>5,580</b>	<b>3,720</b>	<b>23,715</b>	<b>5,115</b>	<b>83,235</b>	<b>44,175</b>	<b>35,340</b>
Secretarial/Clerical	1,674	-	-	-	-	-	-	-	-	-	2,790	-	-

Standard Labor Categories	6.0 JSC Projects Support	6.1 Software Assurance	6.2 Concept and Requirements	6.2.1 Feasibility Assessments	6.2.2 PQA	6.2.3 S&MA Requirements	6.3 Design and Development	6.3.1 Projects	6.3.2 Payloads	6.4 Manufacturing, Test, Acceptance, Delivery	6.4.1 Readiness Reviews	6.4.2 Manufacturing and Test Assurance
<b>Management</b>												
Program Manager	-	-	-	-	-	-	-	-	-	-	-	-
Manager	-	-	-	-	-	-	-	-	-	-	-	-
Supervisor	8,370	930	744	-	-	-	744	-	-	3,720	-	-
<b>Technical</b>												
Engineer 1	29,295	1,860	3,720	1,860	-	1,860	11,160	6,510	4,650	6,510	-	4,650
Engineer 2	47,430	3,720	6,510	2,790	-	3,720	16,740	9,300	7,440	12,090	1,860	2,790
Engineer 3	44,640	-	10,230	-	1,860	8,370	11,625	7,440	4,185	11,160	2,790	5,580
Engineer 4	6,045	-	1,395	-	-	1,395	1,860	1,395	465	1,395	-	1,395
Technician 1	9,300	-	-	-	-	-	-	-	-	9,300	-	5,580
Technician 2	18,600	-	3,720	-	3,720	-	-	-	-	13,020	-	11,160
Technician 3	33,480	-	3,720	-	3,720	-	1,860	1,860	-	22,320	3,720	11,160
Technician 4	1,860	-	-	-	-	-	-	-	-	1,860	-	1,860
Analyst 1	-	-	-	-	-	-	-	-	-	-	-	-
Analyst 2	-	-	-	-	-	-	-	-	-	-	-	-
Analyst 3	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 1	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 2	-	-	-	-	-	-	-	-	-	-	-	-
Information Technology 3	-	-	-	-	-	-	-	-	-	-	-	-
Training Specialist 1	-	-	-	-	-	-	-	-	-	-	-	-
Training Specialist 2	-	-	-	-	-	-	-	-	-	-	-	-
<b>Business</b>												
Administration 1	9,300	-	-	-	-	-	-	-	-	9,300	-	1,860
Administration 2	4,650	-	1,860	-	1,860	-	-	-	-	2,790	-	-
Business Specialist 1	-	-	-	-	-	-	-	-	-	-	-	-
Business Specialist 2	-	-	-	-	-	-	-	-	-	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>212,970</b>	<b>6,510</b>	<b>31,899</b>	<b>4,650</b>	<b>11,160</b>	<b>15,345</b>	<b>43,989</b>	<b>26,505</b>	<b>16,740</b>	<b>93,465</b>	<b>8,370</b>	<b>46,035</b>
Secretarial/Clerical	4,650	-	372	-	-	-	372	-	-	1,860	-	-

Standard Labor Categories	6.4.3 Non-Conformances	6.4.4 Documentation Tracking and Retention	6.4.5 Acceptance	6.5 Operations	6.5.1 Certification	6.5.2 Shipment of Flight Equipment	6.5.3 Prelaunch Assessments	6.5.4 Flight Planning and Real-Time Flight Support	6.6 Sustaining Engineering and Maintenance
<b>Management</b>									
Program Manager	-	-	-	-	-	-	-	-	-
Manager	-	-	-	-	-	-	-	-	-
Supervisor	-	-	-	1,860	-	-	-	-	372
<b>Technical</b>									
Engineer 1	1,860	-	-	4,185	930	1,395	930	930	1,860
Engineer 2	3,720	-	3,720	6,510	1,395	1,395	2,790	930	1,860
Engineer 3	-	-	2,790	8,835	2,790	-	3,720	2,325	2,790
Engineer 4	-	-	-	1,395	1,395	-	-	-	-
Technician 1	3,720	-	-	-	-	-	-	-	-
Technician 2	930	-	930	1,860	-	1,860	-	-	-
Technician 3	3,720	-	3,720	5,580	-	5,580	-	-	-
Technician 4	-	-	-	-	-	-	-	-	-
Analyst 1	-	-	-	-	-	-	-	-	-
Analyst 2	-	-	-	-	-	-	-	-	-
Analyst 3	-	-	-	-	-	-	-	-	-
Information Technology 1	-	-	-	-	-	-	-	-	-
Information Technology 2	-	-	-	-	-	-	-	-	-
Information Technology 3	-	-	-	-	-	-	-	-	-
Training Specialist 1	-	-	-	-	-	-	-	-	-
Training Specialist 2	-	-	-	-	-	-	-	-	-
<b>Business</b>									
Administration 1	-	7,440	-	-	-	-	-	-	-
Administration 2	1,860	930	-	-	-	-	-	-	-
Business Specialist 1	-	-	-	-	-	-	-	-	-
Business Specialist 2	-	-	-	-	-	-	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>15,810</b>	<b>8,370</b>	<b>11,160</b>	<b>30,225</b>	<b>6,510</b>	<b>10,230</b>	<b>7,440</b>	<b>4,185</b>	<b>6,882</b>
Secretarial/Clerical	-	-	-	1,860	-	-	-	-	186

Standard Labor Categories	7.0 IA and Assurance Activities	7.1 IA	7.2 ISAMP	7.3 SWATT	8.0 Advanced Programs, Assurance and Processes	8.1 Advanced Programs & Projects	8.1.1 Risk Analyses	8.1.2 Requirements Development	8.1.3 Vehicle S&MA Engineering	8.1.4 PQA
<b>Management</b>										
Program Manager	-	-	-	-	-	-	-	-	-	-
Manager	-	-	-	-	-	-	-	-	-	-
Supervisor	1,395	930	465	-	1,860	372	-	-	-	-
<b>Technical</b>										
Engineer 1	-	-	-	-	-	-	-	-	-	-
Engineer 2	-	-	-	-	1,860	-	-	-	-	-
Engineer 3	1,860	-	-	1,860	13,950	5,580	-	1,860	1,860	1,860
Engineer 4	2,790	2,790	-	-	13,950	-	-	-	-	-
Technician 1	-	-	-	-	-	-	-	-	-	-
Technician 2	-	-	-	-	-	-	-	-	-	-
Technician 3	930	-	930	-	-	-	-	-	-	-
Technician 4	-	-	-	-	5,580	-	-	-	-	-
Analyst 1	-	-	-	-	-	-	-	-	-	-
Analyst 2	-	-	-	-	4,650	3,720	3,720	-	-	-
Analyst 3	5,580	5,580	-	-	1,860	1,860	-	1,860	-	-
Information Technology 1	-	-	-	-	1,860	-	-	-	-	-
Information Technology 2	-	-	-	-	-	-	-	-	-	-
Information Technology 3	-	-	-	-	-	-	-	-	-	-
Training Specialist 1	-	-	-	-	-	-	-	-	-	-
Training Specialist 2	-	-	-	-	-	-	-	-	-	-
<b>Business</b>										
Administration 1	-	-	-	-	-	-	-	-	-	-
Administration 2	2,790	930	1,860	-	1,860	-	-	-	-	-
Business Specialist 1	-	-	-	-	-	-	-	-	-	-
Business Specialist 2	-	-	-	-	-	-	-	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>15,345</b>	<b>10,230</b>	<b>3,255</b>	<b>1,860</b>	<b>47,430</b>	<b>11,532</b>	<b>3,720</b>	<b>3,720</b>	<b>1,860</b>	<b>1,860</b>
Secretarial/Clerical	1,395	-	930	465	1,860	-	-	-	-	-

Standard Labor Categories	8.2 Assurance Methodologies & Tech	8.2.1 Assurance Methodologies	8.2.2 Assurance Technologies	8.3 Special Processes	8.4 EEE Parts	8.5 GIDEP/ALERTS
<b>Management</b>						
Program Manager	-	-	-	-	-	-
Manager	-	-	-	-	-	-
Supervisor	372	-	-	372	372	372
<b>Technical</b>						
Engineer 1	-	-	-	-	-	-
Engineer 2	-	-	-	1,860	-	-
Engineer 3	7,440	1,860	5,580	-	-	930
Engineer 4	1,860	930	930	6,510	5,580	-
Technician 1	-	-	-	-	-	-
Technician 2	-	-	-	-	-	-
Technician 3	-	-	-	-	-	-
Technician 4	-	-	-	5,580	-	-
Analyst 1	-	-	-	-	-	-
Analyst 2	930	930	-	-	-	-
Analyst 3	-	-	-	-	-	-
Information Technology 1	-	-	-	1,860	-	-
Information Technology 2	-	-	-	-	-	-
Information Technology 3	-	-	-	-	-	-
Training Specialist 1	-	-	-	-	-	-
Training Specialist 2	-	-	-	-	-	-
<b>Business</b>						
Administration 1	-	-	-	-	-	-
Administration 2	-	-	-	-	-	1,860
Business Specialist 1	-	-	-	-	-	-
Business Specialist 2	-	-	-	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>10,602</b>	<b>3,720</b>	<b>6,510</b>	<b>16,182</b>	<b>5,952</b>	<b>3,162</b>
Secretarial/Clerical	-	-	-	-	-	-

Standard Labor Categories	9.0 Institutional Safety and Quality	9.1 Pressure Systems	9.2 WSTF
<b>Management</b>			
Program Manager	-	-	-
Manager	-	-	-
Supervisor	1,488	558	930
<b>Technical</b>			
Engineer 1	-	-	-
Engineer 2	5,580	1,860	3,720
Engineer 3	930	-	930
Engineer 4	-	-	-
Technician 1	-	-	-
Technician 2	4,650	-	4,650
Technician 3	8,370	5,580	2,790
Technician 4	-	-	-
Analyst 1	-	-	-
Analyst 2	-	-	-
Analyst 3	-	-	-
Information Technology 1	-	-	-
Information Technology 2	-	-	-
Information Technology 3	-	-	-
Training Specialist 1	-	-	-
Training Specialist 2	-	-	-
<b>Business</b>			
Administration 1	-	-	-
Administration 2	3,720	1,860	1,860
Business Specialist 1	-	-	-
Business Specialist 2	-	-	-
<b>GRAND TOTAL HOURS</b>	<b>24,738</b>	<b>9,858</b>	<b>14,880</b>
Secretarial/Clerical	-	-	-

### **L.2.3.2.7 Technical Exercises**

The Offeror shall demonstrate an ability to effectively perform the SOW requirements by responding to the following scenarios. Responses shall include discussion of the technical, management, and administrative skills to perform the required work and S&MA disciplines that should be applied. Responses shall include rationale for skills, approaches, and activities proposed and provide adequate detail to demonstrate the Offeror's understanding of the requirements.

#### **Technical Exercise 1**

Background: NASA plans to develop an element of the avionics system in a new manned space vehicle. The function accomplished by this new element is such that if the function is lost, the probability of loss of crew, vehicle and mission is unacceptably high. The vehicle is expected to be operational for 10 years with a 50 mission requirement.

The avionic element to be developed is a new design and development project. It might be realized with a mixture of NASA-unique designs integrated with some commercial off the shelf (COTS) items.

The avionic element will have mechanical/structural, power, command and data interfaces with the flight vehicle. The majority of this hardware is electronic in nature and will contain both embedded software and internal digital processing that requires flight software loads for each mission.

- (1) What are the S&MA goals/products for each phase in the life cycle of this avionic element?
- (2) To the next lower level, what are generic descriptions/titles for the major processes, standards and tasks necessary to accomplish the S&MA goals/products for each of the phases?

#### **Technical Exercise 2**

Background: The Station robotic arm has been in use on the International Space Station for 3 years. The hardware was the Canadian Government's contribution to the ISS. There is a scheduled Shuttle arrival and planned use of the Station robotic arm in the next 3 months. NASA also has a similar robotic arm on the Shuttle.

Problem: Canada just reported to NASA that during recent testing of a next generation arm that they built, a problem was discovered. NASA has retained the test reports for the arms in use on Station and Shuttle.

- (1) How do you assess the risk?
- (2) How do you present your assessment?

#### **Technical Exercise 3**

Background: The Shuttle Program is conducting a design review for a new Orbiter Vehicle electrical subsystem.

Task: You are reviewing the documentation for the review and are required to perform an assessment of the reliability of the system and providing recommendations on acceptability of the proposed design or recommendations for changes to the design to improve reliability.

- (1) What information do you need for your assessment?
- (2) What elements will you analyze?
- (3) How will you present your findings?

**L.2.3.3 Volume III, Past Performance****L.2.3.3.1 General Performance**

The Government will contact organizations for which an Offeror and major subcontractors have previously performed work that is relative to this requirement in order to obtain performance appraisals. In accordance with FAR 15.305(a)(2)(iv), an Offeror without a record of relevant past performance, or for whom information on past performance is not available, may not be evaluated favorably or unfavorably in past performance.

The information requested below is required of the Offeror and major subcontractors (over \$1 million in total value per year) for the past performance evaluation, however, Offerors may submit additional information at their discretion if they consider such information necessary to establish a record of relevant performance. Refer to FAR 15.305(a)(2)(iii).

- (a) A list of all relevant active or ended contracts, in the last three years, by name, contract number, brief description, type, and total original, and present or final contract value. References with government contracts are preferred, but not required.
- (b) Customer's name, address and telephone number of both the lead contractual and technical personnel. (Please verify that the telephone numbers provided are current and correct.)
- (c) Date of contract, place(s) of performance and delivery dates or periods of performance.
- (d) Relationship of this work to the work that will be performed under this contract; i.e., how is it specifically comparable. There should be discernable links between this discussion and the Statement of Work to be performed.
- (e) Magnitude of work directly accomplished by the company on the relevant contract in relation to the total effort.
- (f) Method of acquisition: competitive or noncompetitive
- (g) Nature of award: initial or follow-on
- (h) Any major technical problems and how they were overcome. List any major deviations or waivers to technical requirements that were granted by the customer.
- (i) Whether delivery was on time and, if not, why; adherence to program schedules; incentive performance (e.g. schedule and technical) history, if applicable.
- (j) Average number of personnel on the contract per year and percent turnover of personnel per year.

- (k) List any government contracts terminated (partial or complete) within the past three years and basis for terminations (convenience or default). Include the contract number, name, address, and telephone number of the terminating officer. Include contracts that were “descoped” by the customer because of performance or cost problems.

Complete Section L Attachment L-2, Past Performance Questionnaire, to identify up to five contracts (completed and ongoing) over \$1 million in total value that the Offeror or major subcontractor has had within the past three years that best shows your ability to perform the requirements of the contemplated contract.

The Offeror shall instruct each of its references to return the questionnaire directly to the Contracting Officer in a sealed envelope, by fax, or e-mail as identified below:

S&MA SEB  
BJ4/Craig Burridge  
NASA Johnson Space Center  
2101 NASA Parkway  
Houston, TX 77058  
Ph. 281.244.5610  
Fax. 281.483.8529  
[smassc@ems.jsc.nasa.gov](mailto:smassc@ems.jsc.nasa.gov)

The Offeror shall include in its written proposal, a list of those to whom the questionnaire was sent including name of individual; current and verified phone number; organization; and contract number. The questionnaire shall be returned to the Contracting Officer no later than the time and date indicated in Table L-3, for submission of the Past Performance proposal. It is the Offeror's responsibility to ensure that its references deliver the questionnaires to NASA by the required time and date.

#### **L.2.3.3.2 Safety and Environmental Performance**

Offerors are to provide a statement of their past safety performance on contracts identified above. A statement shall be made regarding any OSHA citations of your company's operations during the past 5 years. For those contracts cited above, records of your company's OSHA recordable injuries and illnesses shall be included. The records typically include, for each worksite, as a minimum, 1 copy of each year's OSHA logs for these past 5 years as required by Title 29 of the Code of Federal Regulations, Section 1904 including the number of employees at the worksite, hours worked, and the calculated OSHA Days Away Case Rate and Total Recordable Incident Rate; and the North American Industrial Classification (NAICS) Code utilized. If you propose a joint venture or prime-subcontract relationship, the same information shall be provided for each company proposed. If an Offeror's annual or 3-year Days Away Case rate is higher than 50% of the Bureau of Labor Statistics Industry Averages, an Offeror shall provide explanations and plans to keep their rates at or below the averages. If an Offeror includes team members that are not required to maintain OSHA logs, documentation shall be

provided that includes their NAICS code, employee hours worked, list and types of cases (OSHA classifications preferred), days away from work, restricted duty or job transfer, and total medical treatment cases. All information shall be tabulated by year.

Offerors and major subcontractors shall provide a statement of their past environmental performance. A statement shall be made regarding any environmental related citation of your company's operations in the past 5 years. Citations may have come from, but not be limited to, Federal, State, and local environmental agencies.

In addition to the above, the workers' compensation experience modifier, including the state formula utilized for the computation, shall be included, along with the loss ratio for the past 5 years (where the loss ratio is defined as the ratio of losses to premium). All figures used for computation shall be shown. Information on the liability and lawsuit history related to safety and health performance shall also be provided. Data shall be provided in the form of a certification letter from the appropriate insurance carrier. A list of all safety and health insurance carriers that have underwritten the Offeror's and major subcontractor's workers compensation program or equivalent for the last 5 years, or as long as the Offeror and major subcontractors has been in business, shall be provided. The list of insurance carriers shall include a point of contact and phone number to aid proposal evaluators in verifying the Offeror's and major subcontractor's statements of its past safety and health performance. The Offeror shall authorize the listed insurance carriers to respond to questions asked by the Government.

In the event the company is self-insured, a copy of their loss runs (or equivalent information) plus labor hours for all facilities included in their past performance data will be satisfactory in lieu of workers' compensation experience modifier data. OSHA logs will still be required. This information shall be certified with the signature of a responsible company official. If a company proposes a joint venture or prime-subcontractor relationship, the same information shall be included for the offeror and all major subcontractors.

#### **L.2.3.3.3 Quality System Experience**

Each Offeror and major subcontractor shall provide copies of the Quality Management System (QMS) certifications it has received elsewhere in the past 3 years. A statement shall be made regarding any changes of registrars, loss of registration status or of being placed on notice or losing registration status in the past 3 years.

#### **L.2.3.3.4 Export Control Experience**

Offerors and major subcontractors are to provide a summary of their past export control experience. Offerors shall identify activities, processes, and issues used to address export control for work comparable to the SOW requirements. Offerors shall identify all export control violations occurring during the past 3 years.

**L.2.3.3.5 Small Business Subcontracting**

The Offeror and major subcontractors shall provide verifiable evidence showing the Offeror's and major subcontractors past performance in complying with contract specific small business subcontracting goals. Offerors and major subcontractors should specifically address subcontracting goals for small disadvantaged business (SDB) concerns, monetary targets for SDB participation, and notifications submitted under FAR 19.1202-4(b).

**L.2.3.4 Volume IV, Cost Proposal**

**L.2.3.4.1 Instructions for Preparation of the Cost Proposal**

Certified cost and pricing data is not required; however, other than cost and pricing data is required. To ensure that the Government is able to perform a fair assessment of the proposed cost, each Offeror is required to submit a cost proposal that is suitable for evaluation. A cost volume that is suitable for evaluation shall:

- (a) Account for all resources necessary to complete requirements of this contract.
- (b) Be traceable to the technical/management proposal(s).
- (c) Explain in detail all pricing and estimating techniques.
- (d) Disclose the basis of all projections, rates, ratios, percentages, and factors in sufficient detail to facilitate the SEB’s understanding and ability to mathematically verify these estimating tools.
- (e) Comply with applicable Federal Acquisition Regulation (FAR), NASA FAR Supplement (NFS), and governing statutory requirements.
- (f) Include a narrative portion that explains all judgmental elements of cost projections and fee policies including any proposed cost ceilings and team fee sharing arrangements.
- (g) Include fully completed cost and total compensations templates.

Your cost proposal shall be submitted in one volume labeled Volume IV Cost/Price Proposal.

**L.2.3.4.2 Non-Labor Resources (NLR) IGE**

The Completion form and LOE non-labor independent government estimate (IGE) for materials and travel are:

**Table L-13 Completion form Non-Labor IGE (1=\$1000)**

	CY1	CY2	CY3	CY4	CY5
EQUIPMENT & MAINTENANCE	\$185	\$190	\$196	\$201	\$207
TRAINING	\$25	\$26	\$26	\$27	\$28
TOTAL	\$210	\$216	\$222	\$228	\$235

**Table L-14 LOE Non-Labor IGE (1=\$1000)**

	CY1	CY2	CY3	CY4	CY5
TRAVEL	\$900	\$925	\$951	\$978	\$1,005
TOTAL	\$900	\$925	\$951	\$978	\$1,005

These “Equipment and Maintenance” estimates include raw materials, purchased parts, supplies, equipment, and equipment maintenance.

These “Training” estimates include training materials costs and class instructor fees.

These “Travel” estimates include airfare, meals/per diem, and hotel cost.

It is important that Offerors understand that the non-labor resources IGE does not include the application of any indirect expenses such as material handling or general and administrative expenses, nor does it include fee.

These IGEs represent the government’s estimate for accomplishing the requirement without incorporation of any one Offeror’s specific management and technical approach. It is intended to assist you in determining the magnitude of the non-labor resources (NLR) requirement. This is not to be considered a government “plug number”. Offeror’s will note that fee will not be adjusted due to differences between the non-labor estimates and actual non-labor expenses post contract award. Offerors’ shall consider the above in developing their proposed fee arrangement. Use of the IGE for non-labor resources above is elective. Offerors are free to incorporate the IGE into their Cost/Price Volume or to propose non-labor resource costs as deemed appropriate to accomplish the SOW. Note that the material IGE does NOT include offsite facilities or IT equipment (Networks LANs, PCs, printers, or Faxes). Consequently, Offerors are required to at least provide the following documentation in support of their offsite facilities and IT cost estimate. Additionally, if the Offeror elects NOT to utilize the IGE amounts provided for materials and travel, the following documentation is also required for these estimates:

#### **L.2.3.4.3 Documentation Necessary for Non-Labor Resources Other Than IGE Amounts**

Offerors shall provide adequate supporting rationale for the quantity of non-labor resources proposed (e.g., square foot requirements for facilities or number of workstations). Explain all the non-labor resources identified that will be indirectly charged to the contract through an indirect rate based on your disclosed accounting practices and contract requirements.

The Offeror shall propose cost elements in a manner that is consistent with its disclosed and approved estimating and accounting practices. For example, certain non-labor resources (for example facilities) are frequently treated as an indirect expense and included in overhead or G&A. In situations like this, Offerors shall provide a complete description and rationale for all non-labor resources along with a statement communicating how these costs are to be charged in accordance with the Offerors approved estimating and accounting practices.

#### **L.2.3.4.4 Labor IGE**

To assist Offerors in understanding the size of this effort the Government’s FTE estimates for Completion Form and LOE are provided in Table L-11 and Table L-12 respectively. These estimates represent the government’s approximation of the staffing levels needed for accomplishing the requirement without incorporating any

one Offeror's specific management and technical approach. The Offeror is not required to propose this staffing level except for LOE. In LOE, Offerors must bid the total LOE hours included in the Table but may alter the skill mix to better suit the proposed technical and management approaches. The Offeror shall support all proposed staffing necessary to accomplish the requirements based on the individual Offeror's technical and management approach.

#### **L.2.3.4.5 Requirement for Concurrent Cost Proposal Delivery to DCAA**

A copy of the prime and all major subcontractor's cost proposals (both electronic and hardcopy) are to be delivered to each respective cognizant Defense Contract Audit Agency (DCAA) field audit office concurrent with delivery to the Johnson Space Center. If you do not know your cognizant DCAA field audit office, the information is readily available on the world-wide-web at [www.dcaa.mil](http://www.dcaa.mil). Once the web site is accessed, click on the "Audit Office Locator" link. Enter your company's 5 digit Zip Code in the area provided and click on the adjacent "search" button. (It is important that you enter the 5 digit Zip Code for your company location where auditable books and records supporting amounts in your proposal physically reside.) Once the search is completed, the cognizant field audit office physical and E-Mail addresses and Voice and FAX telephone numbers will be displayed.

#### **L.2.3.4.6 EXCEL Pricing Model (EPM) FILE:**

**Format:** In order to achieve standardization, the Excel Pricing Model includes four (4) workbooks/files. The following three (3) of the workbooks/files must be automated to the greatest extent possible:

- (1) Completion form workbook
- (2) LOE workbook
- (3) Resources workbook

The fourth workbook entitled "other workbook" shall include the following templates: Summary Pricing Template, Overhead Template, G&A Template, Minor Subcontractor Pricing Template and the Total Compensation Templates. Automating or linking the templates in the fourth workbook with the first three workbooks/files is not required.

The goal of the EPM automated workbooks is to provide a comprehensive working model of your proposed cost volume in an automated format. The pricing model will be designed to facilitate changes to source data such as direct labor hours and/or rates, overhead and G&A rates etc. and be sophisticated enough to compute the total impact of various changes to both cost and price. For example; the model must be able to compute the cost and price impact of:

- (1) Increasing (or decreasing) the number of Engineer I full time equivalent staff (FTE)

(2) Increasing (or decreasing) the overhead rate(s).

**Formulas:** All formulas used in the workbooks must be clearly visible in the individual cells and verifiable. Whereas linking among the spreadsheets or workbooks may be necessary; the use of external links (source data not provided to NASA) of any kind is prohibited. The workbooks must contain no macros or hidden cells.

**Locks:** The EPM and all its associated workbooks shall not be locked/protected or secured by passwords.

#### L.2.3.4.7 CD Cost Proposal Organization

The Government intends to use a personal computer with Microsoft Excel to aid in the evaluation of the cost proposal. In addition to the hardcopy requirements of the preceding section, each prime and major subcontractor is required to submit their EPM and any other electronic cost data, including formulas, on CD only.

Each CD provided is to have an external label indicating:

- (1) The name of the Offeror,
- (2) The RFP number, and
- (3) The files/workbooks or range of files/workbooks contained on the CD.

Labeling the CD case alone does not fulfill this requirement. The CD itself must be labeled. The use of a permanent marker to label the CDs by hand is acceptable.

As addressed above the CD structure includes 4 workbooks:

- (1) One fully automated workbook including all templates for Completion Form
- (2) One fully automated workbook including all templates for LOE
- (3) One fully automated workbook including the three (3) resources templates.
- (4) One non-fully automated workbook including all (other) templates such as overhead, TCP, and G&A.

When multiple versions of the same template are required, then submit the multiple templates inside one worksheet stacked vertically. For example the Rates Dev Template – Contractor Specific (RDT-CS) is required for each year of the contract, therefore 5 vertically stacked templates will be submitted under a tab titled LOE under workbook LOE-Company Name.xls

All electronic file/workbook names included in your proposal shall begin with the appropriate workbook acronym, hyphen, followed by the first three letters of your company name. For example: Assume your company name is ABC Company and you have completed the Completion form workbook; the file/workbook name would

be Completion form-ABC.xls. Offerors shall use the Template acronyms below in naming individual worksheets/tabs within an Excel file/workbook:

**Workbook Descriptions:**

**Resources Workbook** - three (3) resource templates TRST, TRT and ET.

**Completion Form Workbook** - All required Completion form Templates

**LOE Workbook** – All required Level of Effort contract type Templates

**Other Workbook** – All other required Templates such as overhead, G&A etc.

**Template Acronyms:**

**CAOT** - Cognizant Audit Office Template

**ET** – Efficiency Template

**GAT** - General & Administrative Expense Template

**LPT** - Labor Pricing Template

**MST** - Minor Subcontractor Pricing Template

**OHT** - Overhead Template

**OPT** – Overtime Pricing Template

**PBT** - Prime Burdens Template

**PCST** - Prime Cost Summary Template

**PIT** – Phase-In Template

**RDT(CS)** - Rates Development Template – Contractor Specific

**RDT(T)** - Rates Development Template – Team

**SCST** - Major Subcontractor Cost Summary Template

**SCT** – Summary Cost Template

**SPT** – Summary Pricing Template

**SUBT** – Subcontractor Template

**TC(a)** – Compensation Template (a) Salaries & Wages – Non-Exempt

**TC(b)** – Compensation Template (b) Salaries & Wages –Exempt

**TC(c)** – Compensation Template (c) Fringe Benefit Analysis Package

**TC(d)** – Compensation Template (d) Personnel and Fringe Benefits Policies

**TC(e)** – Compensation Template (e): Incumbency Assumptions

**TOPT** – Task Order Pricing Template

**TRST** - Technical Resources Summary Template

**TRT** – Technical Resources Template

The cost proposal templates are designed to provide NASA with information necessary to perform a cost realism analysis. The specific templates required can be found in Attachments L-3.

**L.2.3.4.8 Cost Proposal Template Instructions for Completion Form**

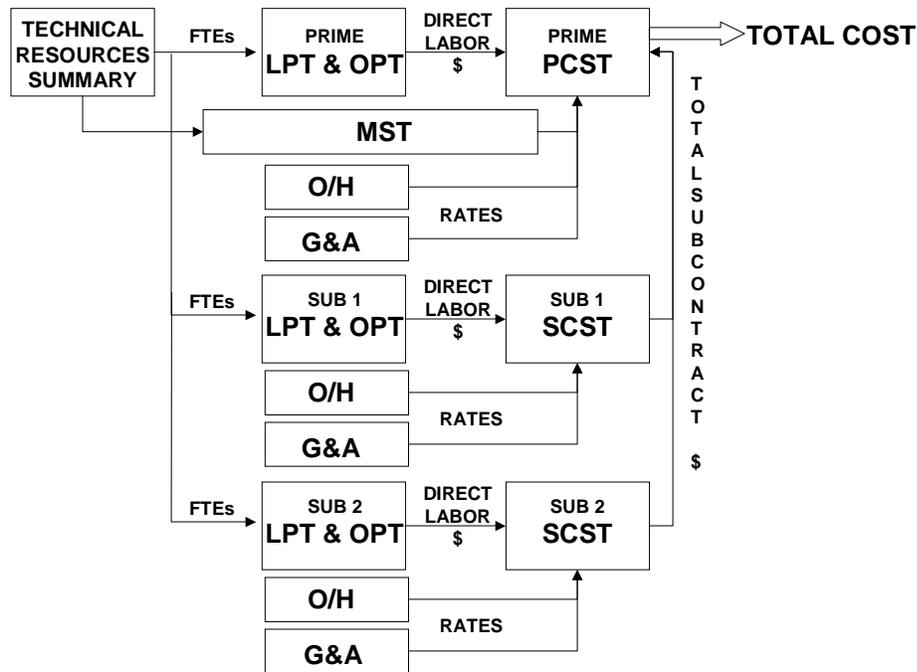
The Offeror's proposed labor resources (FTEs) for the Completion form portion of the work for the prime's entire team (Prime, Major & Minor Subs) shall be accounted for and described in Volume I from a technical and management point of view. Subsequently, in Volume IV the Offeror's proposed Completion form FTEs for the entire team (Prime, Major & Minor Subs) must be summarized in the TRST. The FTEs are converted to productive hours and priced out using the Labor Pricing Template (LPT) and the Overtime Pricing Template (OPT).

Provide any Forward Pricing Rate Agreements (FPRA) used to price this proposal or provide completed Overhead and G&A templates that include estimated expenses and base for the period of performance used to develop the overhead and G&A rates to price this proposal.

Each major subcontractor must prepare a Major Subcontractor Cost Summary Template (SCST). The prime Offeror combines prime's entire team costs on the Prime's Cost Summary Template (PCST).

The following flowchart illustrates in a simplified manner how the different templates relate to one another to create a complete representation of proposed Completion form cost.

**COMPLETION FORM PRICING FLOWCHART**



**Completion form Technical Resources Summary Template:**

This template shall be completed by the prime Offeror as a means to summarize the total FTEs for all 5 years of the Completion form period of performance. The Offeror shall include the prime, major subcontractor, and minor subcontractor FTEs on this template.

**Labor Pricing Template (LPT):**

A separate template is required from the prime and all proposed major subcontractors. This template serves to identify all compensated (straight time) productive hours and costs. This template shall support and reconcile to the direct labor hours and costs shown on the Cost Summary Templates (PCST or SCST).

A narrative basis of estimate is required to accompany this template. This narrative at a minimum shall address methods used to estimate direct labor rates and incumbent retention. There are three steps to completing this template:

- (1) Enter your Straight-time hours by labor category from the table above on the straight hours portion of the template.
- (2) Enter the corresponding direct labor rates for each labor category on the straight rates portion of the template.
- (3) Multiply Straight-time hours by the corresponding direct labor rates to compute the straight time cost by labor category on the straight time cost portion of the template.

If you require the use of multiple productive conversion factors for different labor categories, add rows to this template to facilitate this approach.

#### **Overtime Pricing Template (OPT):**

A separate template is required of the prime and all proposed major subcontractors. This template is required for all compensated overtime hours. [Note; any uncompensated overtime must be addressed in accordance with FAR Clause 52.237-10] The steps for completing this template are similar to the steps for completing the LPT. A supporting narrative shall include the rationale for calculations used to develop the overtime rates. For example, "...the non-exempt personnel were calculated using a rate equal to 150% of the proposed straight-time rate multiplied by 3% of exempt employee SLC hours, while the exempt personnel were calculated using a rate equal to XXX%." Indicate in the appropriate column whether the specific labor category is considered an exempt or non-exempt. The overtime hours included here will reconcile to the overtime hours included on the SCST or PCST.

#### **Major Subcontractor Cost Summary Template (SCST):**

A separate template is required of each major subcontractor. This template serves as a summary of the proposed labor hours, cost, and fee by contract period. A reference column has been provided on the templates for the Offeror to use to identify the supporting data for each cost element. The detailed data shall be clearly displayed so that the Government may understand the cost development and computations.

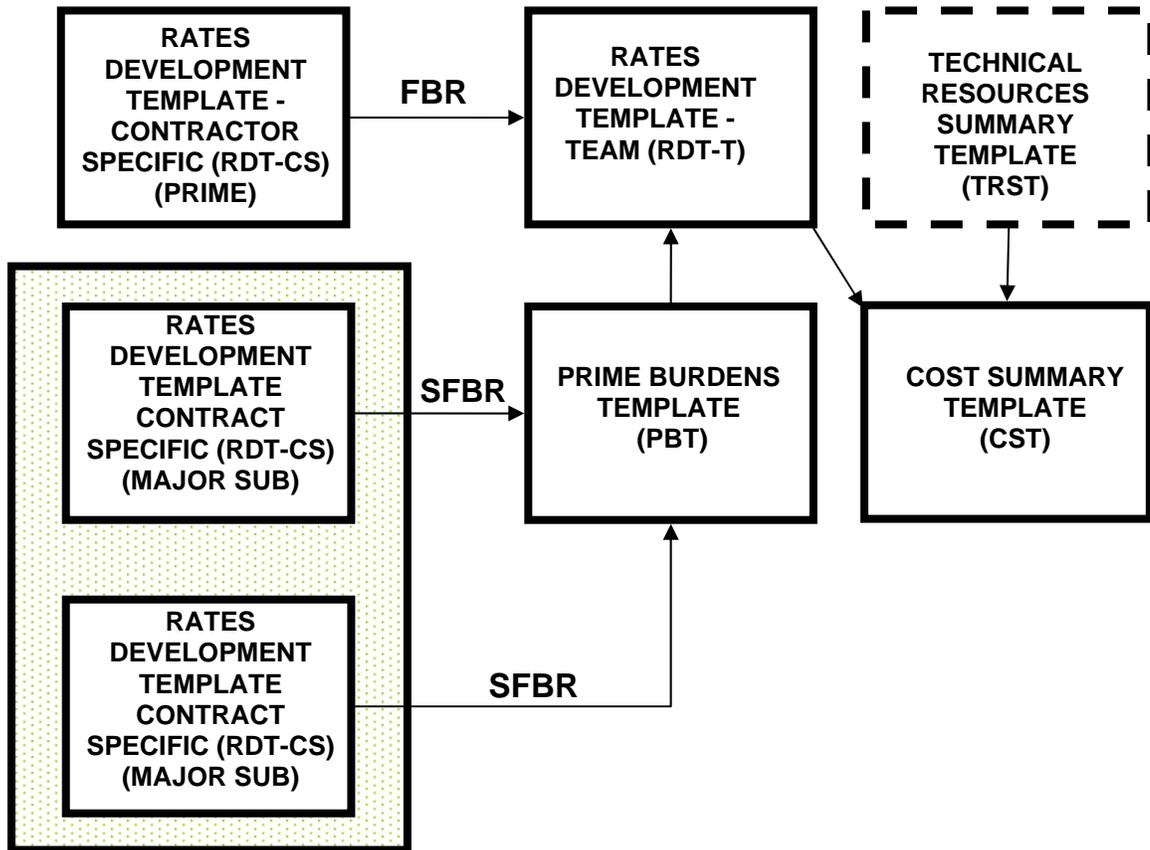
#### **Prime Cost Summary Template (PCST):**

This template serves as a summary of the proposed labor hours, cost, and fee by contract period and is required of the prime only. A reference column has been provided on the templates for the Offeror to use to identify the supporting data for each cost element. The detailed data shall be clearly displayed so that the Government may understand the cost development and computations. The total costs from any major subcontractors shall be input from the respective SCSTs on the Major Subcontractor rows.

**L.2.3.4.9 Cost Proposal Instructions for LOE**

The following flowchart illustrates in a simplified manner how the different templates relate to one another to create a complete representation of proposed Level-of-Effort cost.

**LEVEL OF EFFORT PRICING FLOWCHART**



\*FBR – Fully Burdened Rates  
 \*\*SFBR – Subcontractor Fully Burdened Rates

**Rates Development Template – Contractor Specific (RDT (CS))**

A separate RDT (CS) is required for each contract year of the effort from the prime and each major subcontractor. This template is provided so that each Offeror may show how they arrived at their individually proposed fully burdened rates (less prime fee).

First, this template calculates a weighted average direct labor cost for each Standard Labor Category (SLC) while simultaneously mapping the Offeror’s job categories into the SLCs. The column entitled “usage” provides the comparative weighting for each of the Offeror’s labor categories. The usage percentage will total 100% for each SLC.

Next, indirect costs (and fee for subcontractors only) are added to the direct labor cost to compute the fully burdened rate. This template includes some typical indirect cost categories (overhead, G&A, facilities capital cost of money, etc.); however, it may be modified to accommodate your accounting system. You may add rows or columns to facilitate this. However, do not remove any SLCs in your submitted templates.

### **Prime Burdens Template (PBT)**

This template is required for each Contract Year from the prime contractor. It is provided so that the prime may add their applicable burdens (subcontractor handling, G&A, etc.) to the Subcontractor Fully Burdened Rates (SFBR). These rates are the subcontractor rates that were developed in the “Rates Development Template – Contractor Specific.”

### **Rates Development Template – Team (RDT (T))**

This template is required from the prime only and is intended to show how the Offeror arrived at its' proposed fully burdened contract rates. This template has a column entitled “usage” where the planned usage percentage for each team member (prime and all subcontractors) is included. This template may have blanks since it is possible for the prime or any one subcontractor to be proposing on only certain labor categories.

At the bottom of this template is space for are additional cost line items that would be applied as burden rates to non-labor costs. In accordance with the Offeror's accounting system these cost items may include items such as material handling, and G&A.

### **Summary Cost Template (SCT)**

This template is for pricing the annual LOE hours proposed and is required of the prime contractor only. The hours included for CY1 will match the hours proposed in the CY1 of the TRST. The hours included for each of the following contract years (CY 2 through 5) shall be identical to those hours developed in the TRST for the respective year.

The template is divided into 3 sections. The first section addresses productive hours. The Offeror shall determine the mix of labor categories and the labor hours required to perform the work.

The second section addresses the contract rates that were determined in the RDT (T).

The third section addresses the labor cost developed by multiplying the productive hours by the contract rates. This will be the fully burdened labor cost per labor category

The bottom of the template addresses the fully burdened labor cost, prime fee (subcontractor fee shall be included in fully burdened labor rates unless a fee sharing arrangement is being proposed), and the total cost and fee.

#### L.2.3.4.10 Other Templates Instructions

**Summary Pricing Template (SPT):** The summary pricing template is required of the prime only. A completed SPT will summarize the total dollar value of the offer. This value must reconcile to any statement of the total proposed value of the offer contained in the proposal or contained in any attached cover letter.

**Minor Subcontractor Template (MST):** The minor subcontractor template is required of the prime only. This template is intended to provide the SEB a concise assessment of the substance of minor sub-contracts. Minor-subcontracts are subcontracts with an estimated annual value below \$1M. Two examples showing how this template is to be completed are included on this template.

**Overhead Template (OHT):** The prime Offeror and all major subcontractor(s) must provide their Forward Pricing Rate Agreement (FPRA) used to price indirect cost for this proposal or this template. This template shall provide insight into the composition of the burden pool for the proposed overhead rates. A separate template for each of the proposed burden pools is to be completed. In addition, provide overhead cost history for the prior three years and for the term of the contract. The basis for projections of overhead shall also be provided and an explanation in support of any significant changes in either expenses or base of application that exist from one year to the next. In the event the Offeror's fiscal year and anticipated contract year do not coincide, the Offeror shall complete the rate reconciliation showing how the fiscal year overhead rates result in the proposed overhead rates for each contract year. The Government does not require or mandate that you propose indirect rate ceilings. However, if proposed, the template includes an area for overhead ceilings.

A few cost elements are included on the template that represents the type of cost detail the Government requires visibility into. If these cost elements are not applicable to any proposed indirect cost pool, leave blank.

**G&A Template (GAT):** The prime contractor and all major subcontractor(s) must provide their Forward Pricing Rate Agreement (FPRA) used to price G&A cost for this proposal or this template. This template shall provide insight into the composition of the burden pool for the proposed General and Administrative (G&A) rate. Identify the estimated G&A expense and explain the method for its calculation. Provide G&A cost history including the actual expense pool and application base amounts for the prior three years. The basis for projections of G&A shall also be provided and an explanation in support of any significant changes in either expenses or base of application that exist from one year to the next. In the event the Offeror's fiscal year and anticipated contract year do not coincide, the Offeror shall complete the rate reconciliation showing how the fiscal year G&A rate results in the proposed G&A rate for each contract year. The Government does not require or mandate that you propose indirect rate ceilings. However, if proposed, the template includes an area for G&A ceilings.

A few cost elements are included on the template which represent the type of cost detail the Government requires visibility into. If these cost elements are not applicable to your proposed G&A cost pool, leave blank.

**Cognizant Audit Office Template (CAOT):** This template is required for each prime contractor, teaming partner, joint venture partner, and major subcontractor that meets the major subcontractor threshold (\$1 Million per year). This template is to be delivered with the Past Performance Volume. This template is designed to capture relevant information concerning (1) the specific location (address or addresses for prime and major subcontractors) where auditable cost information physically resides that supports amounts proposed; (2) the person or persons (name, address, phone number, e-mail address etc) who can be contacted by DCAA to provide cost realism audit information for the prime contractor, (3) the person or persons (name, address, phone number, e-mail address etc) who can be contacted by DCAA to provide cost realism audit information for your company or partners (in a teaming, joint venture or partnership situation) and major subcontractor(s); and (4) the name and address of the cognizant DCAA field audit office to which electronic and hardcopy proposals were sent.

**Subcontractor Template (SUBT) -** This template serves as a summary of all subcontract cost. It is to be provided by the prime offeror only. This template must reconcile with the Small Business Subcontracting Plan, Volume IV.

**Phase-In Template (PIT) –** Phase-In will be proposed as fixed price. The phase-in template is required of the prime only and is designed to show the total cost (include all subcontractor phase-in costs and profit). This template must be supported by a narrative basis of estimate (BOE). Include all skills and hours on this template and add rows if needed to account for all labor required. Use the SLCs for skill mix if appropriate or include your labor mix on the template with a brief job description in the narrative. The BOE should include a discussion of labor skill mix and significant non-labor resources (materials/supplies, equipment, other, etc.) necessary for accomplishment of phase-in requirements. The phase-in template is to include ALL phase-in costs necessary for full contract implementation.

The following supplemental cost data, where appropriate, shall be submitted with the cost volume:

**(1) Financial Accounting Standard (FAS) 13 Analysis:**

The Offeror shall perform a FAS 13 analysis, as required by FAR 31.205-36 and FAR 31.205-11, in determining the classification of a lease as operating or capital. This applies to facilities and capital equipment.

**(2) Cost of Money for Facilities Capital:**

The Offeror may choose to include the cost of money for facilities capital as authorized by Cost Accounting Standard (CAS) 414 and FAR 31.205-10 in the proposal. However, it is NASA policy to offset CAS 414 costs dollar for dollar from fee/profit as per NASA FAR Supplement 1815.404-471-5.

In the event the Offeror does not propose cost of money for facilities capital, FAR clause 52.215-17, "Waiver of Facilities Capital Cost of Money" will be included in the contract.

**(3) Fee:**

Provide a description of your proposed fee structure. If a fee sharing pool arrangement is proposed, include a discussion of the arrangement and the distribution of fee earned. Include a discussion of how the proposed fee was derived and why it is reasonable for the type of effort.

If one fee/profit rate is proposed for multiple contract types provide an explanation of the proposed fee/profit strategy. Show the offset for cost of facilities capital cost of money, if proposed, from the proposed fee pool and NTE fee rate.

Subcontractor fee may be proposed as cost to the prime in which case the subcontractors' fully burdened rates (SFBR) would include fee. If a team fee arrangement is proposed, the SFBR would not include fee and all fee would be included in prime fee.

When proposing award fee, Offerors are also encouraged to develop the proposed amount after considering how their performance will be evaluated and scored in accordance with the Award Fee Evaluation Plan.

**L.2.3.4.11 Total Compensation Templates Instructions**

**The following compensation templates are required in order for the Government to perform an evaluation of your labor relations. These templates will reconcile with the cost templates described above, wherever applicable.**

**(1) Compensation Template (a): SALARIES AND WAGES NON-EXEMPT - CONTRACT YEAR 1: TC(a)**

The Offeror shall submit a completed Compensation Template (a) for non-exempt personnel for contract year 1. This template is required of the Offeror proposed as prime and all proposed major subcontractors. In the "LABOR CATEGORY - Offeror's" column, list all proposed labor classifications (included in the cost proposal), by titles from the Offeror's estimating system. Each of the Offeror's Labor Categories shall be mapped to the Government Standard Labor Category. The DOL WD category shall be mapped to the LABOR CATEGORY - Offeror's. The "Incumbent Actual Labor Rate" column is only applicable to incumbent contractors or sub-contractors. Incumbent contractors or sub-contractors are to include the actual average current direct labor rate for each SLC. The "FTE" Column shall include all proposed FTEs per SLC. Depending on whether the category is DOL or CBA covered, include the wage rate in the appropriate column. The "Contract Year 1 Actual Proposed Labor Rate" is the Offeror's actual proposed composite labor rate (Completion form & LOE) starting in Contract Year 1. The "escalation rates for year 2-5" column shall

include your annual escalation percentage. A source column has been provided on the template for the Offeror to use to identify the supporting data for each labor category, which shall include the source data for non-exempt personnel. An example is included on the template for illustration purposes only.

**(2) Compensation Template (b): SALARIES AND WAGES EXEMPT - CONTRACT YEAR 1: TC(b)**

The Offeror shall submit a completed Compensation Template (b) for exempt personnel for contract years 1. This template is required of the Offeror proposed as prime and all proposed major subcontractors. In the "LABOR CATEGORY - Offeror's" column, list all labor classifications included in the proposal, by titles from the Offeror's estimating system. Each of the Offeror's Labor Categories shall be mapped to the Government Standard Labor Category. The "Incumbent Actual Labor Rate" column is only applicable to incumbent contractors or sub-contractors. Incumbent contractors or sub-contractors are to include the actual average current direct labor rate for each SLC. The "FTE" Column shall include all proposed FTEs per SLC. The "Contract Year 1 Actual Proposed Labor Rate" is the Offeror's actual proposed composite labor rate (Completion form & LOE) starting in Contract Year 1. The "escalation rates for year 2-7" column shall include your annual escalation percentage. The "Actual Proposed Annual Salary" is the salary of the proposed labor category. A source column has been provided on the template for the Offeror to use to identify the supporting data for each labor category, which shall include the source data (Actual or Wage Survey) for exempt personnel. An example is included on the template for illustration purposes only.

**(3) Compensation Template (c): FRINGE BENEFITS ANALYSIS OF COMPENSATION PACKAGE - Contract Year 1: TC(c)**

A separate Template (c) shall be completed for Exempt, Non-Exempt Nonunion, and Non-Exempt Union direct labor. This template is required of the Offeror proposed as prime and all proposed major subcontractors. It should be noted that the minimum hourly fringe benefits rate cannot be less than the DOL specified minimum rate listed in the RFP under Section J for non-exempt employees. The column entitled, "Cost of Fringe Benefit" shall include the cost, not rate, associated with the fringes specified (i.e. life insurance, disability insurance, etc.) that are proposed on this contract for each of the related personnel type (exempt, non-exempt union/non-union). The next column entitled, "Percent of Direct Labor Cost" shall include the percentage of each of the related specified fringe costs as a percent of direct labor cost. The third column shall include hourly rates based on the average cost per labor hour proposed per specified fringe.

**(4) Compensation Template (d): PERSONNEL AND FRINGE BENEFITS POLICIES - Contract Year 1: TC(d)**

This template is required of the Offeror proposed as prime and all proposed major subcontractors. This template provides visibility, by employee category,

into personnel policies and fringe benefits, which shall be in effect at the time of contract award. Although only brief explanations are desired, sufficient information is required to allow an evaluation and estimate of all potential costs, which will arise upon award of the contract. Comments are required pertaining to all items listed below under the proper column, whether or not the policy is written. The established practice of the Offeror and applicability to this proposal shall be provided. If any item below is not applicable, so state. Items pertinent to the Offeror, which are not identified must be included if cost recovery is anticipated.

**(5) Compensation Template TC(e): Incumbency Assumptions- Contract Year 1:TC (e)**

This template is required of the Offeror proposed as prime and all proposed subcontractors (major and minor). This template provides visibility into any incumbency assumptions proposed by each Offeror pertaining to incumbency labor rates and incumbency seniority rights for fringe benefit purposes. Offerors shall select only one option in each category.

In the area entitled, "Labor Rates", the Offeror shall pick one of the three options: 1) Proposing to pay current incumbent labor rates, 2) Proposing to not pay current incumbent labor rates or, 3) Other. The Government understands that non-incumbent Offerors may be only able to estimate what the current incumbents are making; however, it simply wants to understand your intentions regarding pay for these employees if retained. The Offeror will provide a narrative explanation supporting or explaining the reason for selecting any of the options, particularly if option, "Other" is selected. Explain how your proposed salary structure will allow you to capture the proposed percentage of the qualified incumbent workforce.

In the area entitled, "Seniority Rights", the Offeror shall pick one of the three options: 1) Proposing to maintain seniority rights for fringe purposes, 2) Proposing to not maintain seniority rights for fringe purposes or, 3) Other. The SEB understands that non-incumbent Offerors may be only able to estimate the current incumbent's seniority levels; however, the SEB simply wants to understand your intentions regarding seniority for these employees if retained. The Offeror shall provide a narrative explanation supporting or explaining the reason for selecting any of the options, particularly if option, "Other" is selected. Explain how not maintaining seniority rights for fringe benefit purposes will allow you to capture and maintain the proposed percentage of the incumbent workforce.

**ATTACHMENT L-1 KEY PERSONNEL RESUME**

Complete one form for each proposed Key Person. The resume shall not exceed two pages.

1. Name
2. Education
  - a. Degrees, dates, majors, schools
  - b. Other education or training and dates
  - c. Licenses, certifications, or professional designations (locations)
3. Proposed assignment: title and organizational element
4. Current position and beginning date
5. Current significant responsibilities or projects
6. Previous positions (last five years)
  - a. Firm and period of employment
  - b. Significant experience
  - c. Specific projects
  - d. Immediate supervisor's name, address, telephone number and employer. (Indicate if current supervisor may be contacted)
7. Professional activities and achievements
  - a. Awards
  - b. Significant publications
  - c. Professional societies
  - d. Significant achievements
8. Unique qualifications. Summarize any relevant unique experience, education, or personal characteristics that may not be evident from the above information.
9. Evidence of commitment to the program.

**ATTACHMENT L-2 – PAST PERFORMANCE QUESTIONNAIRE**

**Complete one set of letters and forms for each Past Performance reference. Additional space or blank sheets may be added to answer any question.**

<b>Transmittal Letter to Accompany Present/Past Performance Questionnaire</b>
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FROM:

SUBJECT: Present/Past Performance Questionnaire for Contract(s):

We are currently responding to NASA Johnson Space Center's (JSC's) Request for Proposal (RFP). This RFP requires offerors to identify customers and solicit their response regarding our performance.

We are providing present and past performance data to NASA JSC relating to our performance on contract \_\_\_\_\_ (contract name/number). The RFP instructs that we provide our customers with the attached questionnaire and requests that you provide requested data and submit it by \_\_\_\_\_ directly to:

S&MA SEB  
Attn: BJ4/Craig Burrige  
NASA Johnson Space Center  
2101 NASA Parkway  
Houston, TX 77058  
[smassc@ems.jsc.nasa.gov](mailto:smassc@ems.jsc.nasa.gov)

You are also encouraged to fax the hardcopy questionnaire(s). The JSC source selection facility fax number is 281-483-8529.

The information contained in the completed Past Performance Questionnaire is considered sensitive and cannot be released to us, the offeror. If you have any questions about the acquisition or the attached questionnaire, your questions must be directed back to the JSC point of contact identified above. Thank you for your timely assistance.

Sincerely,

*(Company Official)*

**ATTACHMENT L-2 – PAST PERFORMANCE QUESTIONNAIRE**  
**Offeror Identification**

Please provide the following information:

1. Contractor Information

Company:

Division:

Mailing Address:

2. Contract Number:

3. Contract Type:

4. Product/Service Description:

5. Contract Award Date:

6. Period of Performance (basic and any options):

7. During this contract period of performance, this firm was the:

- Prime Contractor
- Significant Subcontractor
- Team Member
- Other (please describe): \_\_\_\_\_

What percentage of the Total Contract Value for this contract did the firm perform and what is the Total Contract Value?

Percentage of work performed by contractor \_\_\_\_\_

Total contract value \_\_\_\_\_

8. Does a corporate or ownership relationship exist between the contractor being evaluated and your organization?

- No
- Yes – If yes, please describe the relationship: \_\_\_\_\_

9. Unusual contract features or conditions:

**ATTACHMENT L-2 – PAST PERFORMANCE QUESTIONNAIRE**  
**Past Performance Evaluation**

Based on your knowledge of the contract identified above, please provide your assessment of how well the contractor performed on each of the following questions. It is very important to keep in mind that only performance in the ***past 3 years*** is relevant.

Please rate the contractor as described below in the following technical, schedule, cost, and general areas. Please give a short narrative as to why you chose the adjective you did, especially for those answers that are other than “satisfactory.”

**Exceptional** – Exceeds the established performance requirements to an exceptional degree. Performance is exemplary and accomplished in a timely, efficient, and economical manner. Very minor (if any) deficiencies have no adverse affect on overall performance. Examples include substantial cost underruns due to contractor diligence and cost savings initiatives, technical end products that exceed original Government specifications in critical performance areas, deliverables usually ahead of contract schedule, etc.

**Satisfactory** – Meets the established performance requirements. Performance is effective and most requirements are met in a timely, efficient, and economical manner. Reportable deficiencies have little identifiable effect on overall performance. Examples include no cost overruns caused by the contractor, technical end products that meet all Government specifications, deliverables delivered on time, schedule, etc.

**Unsatisfactory** – Fails to meet the established performance requirements. Remedial action required in one or more area. Reportable deficiencies in one or more area adversely affect overall performance. Examples include substantial cost overruns caused by the contractor, technical end products fail to meet Government specifications in critical areas, deliverables usually delivered behind contract schedules, etc.

**Not Applicable** – Contractor not required to provide the service or product indicated.

**ATTACHMENT L-2 – PAST PERFORMANCE QUESTIONNAIRE**  
**Past Performance Evaluation**

**TECHNICAL PERFORMANCE**

1. Overall performance in planning and controlling the program:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

2. Overall quality of technical services and support:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

3. Compliance with technical requirements and performance standards relevant to Safety and Mission Assurance.

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

4. Insight in understanding customer requirements and priorities:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

5. Initiative in identifying and resolving unforeseen technical and schedule problems (causes, impacts, and resolutions):

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

6. Identification, surveillance, and management of major/critical subcontractors:

- Exceptional
- Satisfactory

- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

7. Contractor's ability to correct performance deficiencies:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

8. Ability to use metrics and other tools to accurately measure and track program:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

9. Record in demonstrating a thorough understanding of the nature of the work required and the disciplines required to accomplish them:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

10. Record in identifying and mitigating risks:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

11. Other particular strong/weak points of contractor's technical performance.

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**SCHEDULE PERFORMANCE**

1. Ability to provide a qualified workforce to fulfill schedule requirements:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

2. Content, accuracy, and timeliness of technical reports:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

3. Adherence to task schedules:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

4. Timeliness and accuracy of cost and business reports:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

5. Record in completing technical tasks/milestones, deliverables within established schedules:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

**CONTRACT MANAGEMENT AND COST PERFORMANCE**

1. Contract Value:

	Initial Value	Current/Final Value
Estimated Cost	\$ _____	\$ _____
Fee/Profit	\$ _____	\$ _____
Total Value	\$ _____	\$ _____

Briefly describe any change(s) from original contract value:

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2. Adherence to estimated costs and contract cost targets:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

3. Was there a cost overrun/under-run?

- No
- Yes – If yes, what was the magnitude? Please explain:

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4. Does the contract have ceilings rates?

- No
- Yes – If yes, what are the rates?

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Has the contractor exceeded the rates?

- No
- Yes – If yes, please explain:

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5. Ability to effectively plan efforts, provide realistic cost and schedule estimates, etc:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

6. Ability to forecast and control costs:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

7. Ability to submit accurately and timely financial reports and credible forecasts of future resource requirements:

- Exceptional
- Satisfactory

- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

8. Business Management performance (discuss degree of monitoring/guidance required in contract administration):

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

9. Contract change order management (discuss contractor commitment to negotiate and implement contract changes in a timely manner):

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

10. Rate the contractor's record in effectively selecting and managing subcontractors:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

11. If an award/incentive fee type contract, percent of available fee earned? \_\_\_\_\_%

12. Has the contract been partially or completely terminated for default or convenience?

- No
- Yes – If yes, please explain the reason for termination (i.e., inability to meet cost or delivery schedules, performance, etc:

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13. Rate the contractor's history of reasonable and cooperative behavior and commitment to customer satisfaction?

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

14. Rate the contractor’s record in reacting quickly and adjusting staffing levels and make-up to meet changing requirements:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

15. Performance in managing problems and implementing corrective actions:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

16. Record in managing multiple and diverse projects/tasks from planning through execution phases:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

17. Record in managing complex projects at multiple, geographically dispersed sites:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

18. Record in adhering to or ability to meet goals for Small Business Subcontracting Goals:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

**GENERAL**

1. Approximately how many people were/are employed under this contract? \_\_\_\_\_

2. Rate the contractor’s record in identifying key positions, filling these positions with individuals with required skills, and providing back-ups:

- Exceptional
- Satisfactory

- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

3. What has been the key personnel turnover rate for this contract? \_\_\_\_\_

4. Rate the contractor's record in recruiting, maintaining, and managing a workforce with the required skill mix:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

5. Did any accidents or industrial illnesses resulting in lost time occur under this contract?

- No
- Yes – If yes, please provide details:



6. Rate the contractor's compliance with export control requirements:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

7. Rate the contractor's record in complying with safety, health, and environmental procedures/requirements:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

8. Record in establishing and maintaining an effective quality assurance program and meeting quality improvement requirements:

- Exceptional
- Satisfactory
- Unsatisfactory
- Not Applicable

Comments: \_\_\_\_\_

9. Would you select this contractor again?  No  Yes

Comments:

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10. In what areas below do you feel the contractor is strong?

- Program/Project Management
- Risk Identification and Mitigation
- Attracting and Retaining Qualified Personnel
- Communication
- Technical Performance
- Technical Innovation
- Small Business Utilization
- Safety and Environmental Performance
- Cost Performance
- Response to Change

11. In what areas below do you feel the contractor is weak?

- Program/Project Management
- Risk Identification and Mitigation
- Attracting and Retaining Qualified Personnel
- Communication
- Technical Performance
- Technical Innovation
- Small Business Utilization
- Safety and Environmental Performance
- Cost Performance
- Response to Change

**RESPONDENT INFORMATION**

1. Name of evaluator: \_\_\_\_\_

2. Position title: \_\_\_\_\_

3. Agency/Company

Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Telephone Number: \_\_\_\_\_

Facsimile Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

4. Your role in the program/contract:

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5. Length of involvement in this program/contract: \_\_\_\_\_

6. Date questionnaire completed: \_\_\_\_\_