



National Regionalized A/E Design Services IDIQ Contracts

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Objectives

- Understand the purpose and limitations of the National A/E Design Contracts
- Identify stakeholder roles and responsibilities
- Explain the process of placing a task order
- Provide guidance on administering task orders

Understanding the Contract

*"The universe never did make sense,
I suspect it was built on government contract."*

- Robert A. Heinlein

Understanding the National A/E Design IDIQ Contract

The National A/E Design IDIQ contracts will assist NRCS program offices and engineering to obtain services to complete mission essential tasks.



Understanding the National A/E Design IDIQ Contracts

- Under the terms of the National A/E Design IDIQ Contracts the following A/E services/functions are available:
 - Construction Management/Quality Assurance Services
 - Dam Assessments
 - Project Design
 - Design Review
 - Geotechnical Investigations and Analysis
 - Planning of Conservation Measures
 - Architectural and Structural Engineering
 - Technical Document Development Tasks
 - Miscellaneous Professional A&E Design and Related Services
- This not an all inclusive listing; however, is representative of the types of services that may be secured.

Understanding the National A/E Design IDIQ contract

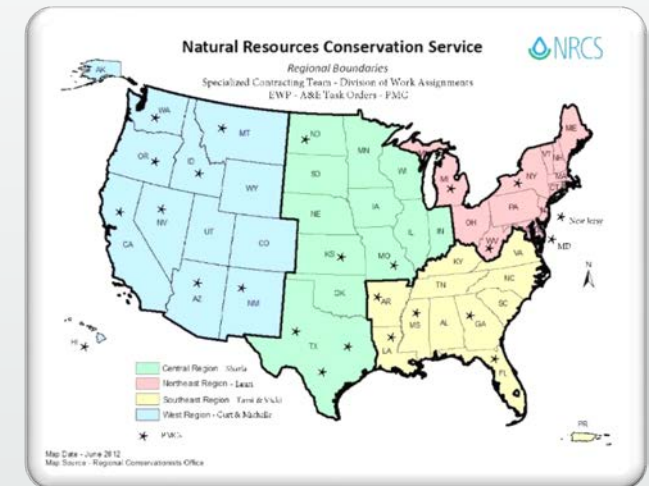
- Under the terms of the National A/E Design IDIQ contract customers may **NOT**:
Obtain easement boundary surveys for any of the easement programs administered by the agency. A separate contract tool is being established to complete these types of services.



Awards by Region

Region 1: Northeast

- DDK Engineering Joint Venture
- Aterra-Schnabel Joint Venture
- RJH Consultants, Inc.
- Pare Corporation
- North Wind Resource Partnership

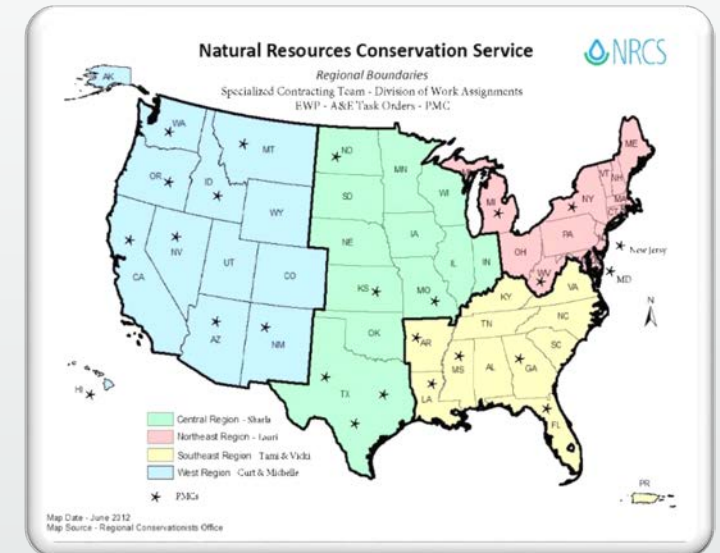


(Maine, New Hampshire, Massachusetts, Maryland, Washington DC, Rhode Island, Connecticut, Vermont, New York, Pennsylvania, West Virginia, Ohio, Michigan, New Jersey and Delaware)

Awards by Region

Region 2: Southeast

- Aterra-Schnabel Joint Venture
- ECM + M&E Joint Venture
- Kenall-Freese and Nichols Joint Venture
- K.S. Ware & Associates, LLC



(Kentucky, Virginia, North Carolina, South Carolina, Georgia, Florida, Tennessee, Alabama, Mississippi, Louisiana, Arkansas (Including the National Water Management Center) and Puerto Rico

Awards by Region

Region 3: Central

- Ad Astra Collaborative
- Conservation Works Joint Venture
- M&E Consultants, Inc.
- RJH Consultants, Inc.
- Ackerman-Estvold

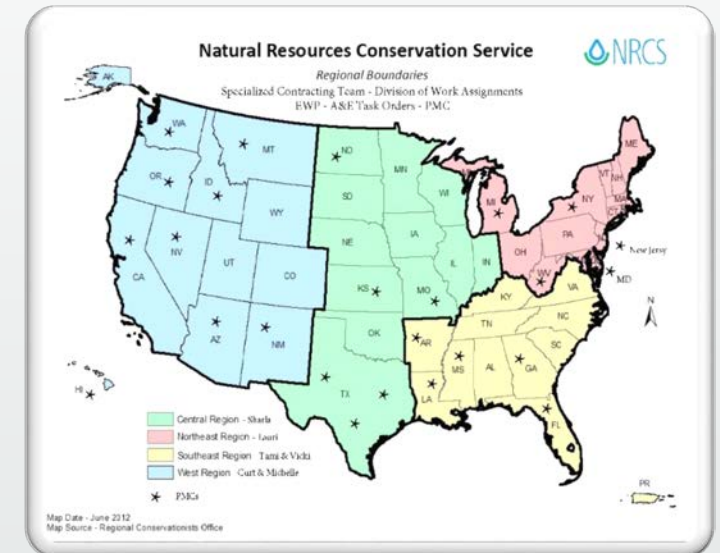


(North Dakota, South Dakota, Nebraska, Kansas, Oklahoma, Texas (including the National Design, Construction and Soil Mechanics Center), Minnesota, Iowa, Missouri, Wisconsin, Illinois and Indiana)

Awards by Region

Region 4: West

- RJH Consultants, Inc.
- Great West Engineering
- DJ&A, Inc.
- Short Elliott Hendrickson-Himalayan Joint Venture
- Genterra Consultants
- Jones & DeMille



(Washington, Alaska, Oregon, California, Hawaii, Nevada, Idaho, Montana, Wyoming, Utah, Colorado, Arizona, New Mexico, Guam)

Dollar Limitations of National IDIQ Design Services Contracts

- All National IDIQ Design Services contracts are limited to \$2M per contract year (\$10M over 5 year term)
- Capacity by region is as follows:
 1. Region 1 - \$50M
 2. Region 2 - \$40M
 3. Region 3 - \$50M
 4. Region 4 - \$60M

*Contracts are available for use by all USDA agencies.

Roles and Responsibilities

*"Great things in business are never done by one person.
They're done by a team of people."*

- Steve Jobs

IDIQ Contracting Officer (IDIQ/CO)

- Responsible for the overall administration of the National A/E Design Services contract
- Informational POC for the firms, task order Contracting Officer (TO/CO) and customers
- Provides guidance to the TO/CO and customers for placing orders
- Monitors base year and option year periods of performance
- Monitors compliance with contract terms and conditions
- Exercises option periods as necessary



**IDIQ
Contracting
Officer
(IDIQ/CO)**

Task Order
Contracting
Officer

Technical
Evaluation
Board (TEB)

Contracting
Officer
Representative
(COR)

NRCS Customer

Firm

Task Order Contracting Officer (TO/CO)

- Appointed by the Specialized Team Leader or Geographic Team Leader and serves as the primary POC for the action.
- Ensures request for proposal packages are properly prepared.
- Assist Technical Evaluation Board (TEB) with stream lined evaluation process and conduct cost negotiations.
- Awards task orders while ensuring requirements are within IDIQ terms, and serves as final approver for payments in IPP.
- Monitors the task order to ensure compliance with contract terms and conditions.
- Processes Task Order modifications as necessary

IDIQ
Contracting
Officer
(IDIQ/CO)

**Task Order
Contracting
Officer (TO/CO)**

Technical
Evaluation
Board (TEB)

Contracting
Officer's
Representative
(COR)

NRCS Customer

Firm

Technical Evaluation Board (TEB)

- Comprised of as many members as the states deem appropriate.
- Development of TEB report after completion of evaluation of firms and provide recommendation of most highly qualified.
- Assist CO with conducting the cost negotiation.
- Support any post-source selection activities, such as debriefings and post-award reviews/meetings as may be required.

IDIQ
Contracting
Officer
(IDIQ/CO)

Task Order
Contracting
Officer (TO/CO)

**Technical
Evaluation
Board (TEB)**

Contracting
Officer's
Representative
(COR)

NRCS Customer

Firm

Contracting Officer's Representative (COR)

- Must be FAITAS COR certified and have current IPP access
- Responsible for the development of the Scope of Services, independent government estimate (IGE) and quality assurance surveillance plan (QASP)
- Serves as primary POC for CO and contractor relative to technical requirements of the Task Order and approval of invoice in the Invoice Payment Platform (IPP)
- Responsible for completing contractor evaluations in CPARS

IDIQ
Contracting
Officer
(IDIQ/CO)

Task Order
Contracting
Officer (TO/CO)

Technical
Evaluation Board
(TEB)

**Contracting
Officer's
Representative
(COR)**

NRCS Customer

Firm

NRCS Customer

- Reviews the Task Order Placement Instructions.
- Recommends a COR and TEB members and completes pre-planning steps
- Obtains funds approval via AD-700
- Submits a complete procurement package attached to an IAS requisition

IDIQ
Contracting
Officer
(IDIQ/CO)

Task Order
Contracting
Officer (TO/CO)

Technical
Evaluation
Board (TEB)

Contracting
Officer
Representative
(COR)

NRCS Customer

Firm

Firm

- Guarantees performance and deliverables meet IDIQ and TO requirements
- Submits proposals in accordance with contract terms and conditions
- Completes all Quality Control procedures to ensure quality deliverables are provided
- Submits monthly progress reports and invoices to the respective COR and TO/CO.

IDIQ
Contracting
Officer
(IDIQ/CO)

Task Order
Contracting
Officer (TO/CO)

Technical
Evaluation
Board (TEB)

Contracting
Officer
Representative
(COR)

NRCS Customer

Firm

Placing an Order

*"If there is something I like, I buy it and then find somewhere for it.
I buy first then I think."*

- Christian Louboutin

Steps to placing a National IDIQ Design Services Task Order



Planning Steps

- The customer identifies a COR to compile a requisition package
 - The COR must be FAC-COR certified in FAITAS and have IPP access
- The COR shall:
 - Work with stakeholders to define the requirement
 - Obtain guidance from the Specialized Services Team or Geographic Team Lead for respective region
 - Develop the Scope of Services and the IGCE
 - Obtain funds approval (AD-700)
 - Submit a complete requisition package to the IAS requisitioner

Planning Assistance

- For complex requirements the COR may arrange a discussion with the Specialized Services Team Lead or the Geographic Team Leader for their region
- The Specialized Services Team Lead or the Geographic Team Lead may assign a contracting officer (CO) to the acquisition in advance of receiving a requisition to serve as an advisor during the pre-planning process
- If assigned, the CO should **only serve as an advisor** in the pre-planning stages

Defining the requirement

- Properly defining the requirement provides the foundation for the following key documents
 - Scope of Services (SOS)
 - Independent Government Cost Estimate (IGCE)
- Should answer the following questions:
 - What results are required?
 - What are the required tasks?
 - What are the performance standards?
 - How will you determine if standards are being met?

Considering Options

- What is an Option?
 - A method of obtaining firm commitments from the contractor to perform additional work
 - Can be for additional quantities, or for extended periods of performance
 - Are not binding, until exercised (they're optional)
- When may options be authorized?
 - When there is a need for continuity of operations; and
 - If there is an anticipated need for a similar service beyond what was originally required
- Before exercising an option, the CO shall make a written determination for the contract file that:
 - Exercise is in accordance with the terms of the option, the requirements of FAR 17.207 and FAR Part 6 – Competition Requirements.

Estimating Contract Cost

- Independent Government Cost Estimate (IGCE)
 - Prepared by the COR
 - Primarily used for funding and budgeting purposes and for determining the contractor's price is fair and reasonable
 - Not intended to be a comprehensive line item estimate
 - Should account for major cost elements associated with the task order
- A [Sample IGE](#) and instructions can be found on the CSB [Customer Guide](#) SharePoint Site

How To Prepare the Estimate (IGCE)

- Review the associated rate tables of each firm for the region wherein the work is to be performed. These are to be used as a guideline only.
- Determine the tasks that will be required to be performed by the firm.
- Estimate the number of hours needed by each labor classification to complete the required task.
- Determine if travel/other direct expenses will be required and estimate costs utilizing the JTR.
- Determine what equipment will be necessary to perform the requirement and calculate estimated costs for the type and size of equipment needed.
- Determine if any lab testing or drilling will be required. If so, determine the appropriate test, etc. that may be needed.
- Determine if any surveying functions will be necessary (i.e. design, etc.)
- Determine if any specialized services will be required (i.e. geotechnical, modeling, etc.)

How to Prepare the Scope of Services (SOS)

- In the near future, example Scopes of Services will be placed on the Share Point Site
- A firm is not required to provide services which are not specified in the IDIQ or task order SOS.
- Describes the work as desired outcome rather than “how” the work is to be performed
- If changes are required after award you must work with the TO/CO to effectuate a contract modification

The Purchase Request

- Submitted to the Specialized Team Lead or Geographic Team Lead through the IAS requisition process
- The IAS requisition must include the following attachments:
 1. A Scope of Services
 2. IGCE
 3. AD-700
 4. Supplemental documentation critical to the requirement – i.e. permits, Project Agreement.

Planning

Purchase
Request

RFP

The Request for Proposal

- The TO/CO ensures the purchase request is within the IDIQ scope and terms.
- TO/CO's shall utilize the Streamlined Procedures outlined in the IDIQ contracts as authorized under FAR 16.505(b)(1)(ii). **THIS IS MANDATORY – NO DEVIATION FROM STATED CRITERIA WILL BE ALLOWED.**
- Under the streamlined procedures, the TO/CO prepares a Request for Proposal (RFP) to be sent to all the firms within the Region
 - Cover Letter – firms must respond to the following evaluation criteria:
 - a. Technical Understanding of the Requirement
 - b. Knowledge and Experience in the geographic location where the work will be performed.
 - c. Past Performance
 - Applicable deadlines
 - Points of contact (including the anticipated COR)
 - SOS and any other applicable documents – project site maps, previous survey information, etc.
 - SF-330's will not be submitted as part of this process – information limited only to (a, b, and c above).



Planning

Purchase
Request

RFP

Award

NATIONAL REGIONALIZED A/E DESIGN IDIQ CONTRACTS

Evaluation and Award

- The TO/CO and TEB will complete the evaluation process utilizing the following evaluation factors and methodology:
 1. Technical Understanding of the Requirement, Deliverables, and Delivery Schedule – TEB will evaluate the firm's understanding of the services to be performed and to ensure the methodology successfully meets with the requirements of the task order.
 2. Knowledge of the Geographic Location – TEB will evaluate the firms past performance with respect to projects similar in scope and size to the work described within each task order requirement in the geographic area.
 3. Past Performance – The TEB will evaluate the firms past performance to determine the firm's quality, timeliness and cost control on previous work.

THE PROCESS IS MANDATORY AND NO DEVIATIONS WILL BE ALLOWED. An evaluation ranking sheet has been developed and is available for use by all states. It is located on the Share point Site.



Planning

Purchase
Request

RFP

Award

NATIONAL REGIONALIZED A/E DESIGN IDIQ CONTRACTS

Evaluation and Award

- Once the determination of the most highly qualified firm is provided to the TO/CO, The TO/CO will notify the firm to provide their cost/price information relative to the requirement. **Firms may not offer hourly rates in excess of those established in the base IDIQ contract.**
- Firms will provide their proposed labor mix, number of hours proposed for each labor category as well as any associated equipment, testing or travel associated costs.
- The TO/CO and the TEB will evaluate the firms cost/price proposal to determine cost/price reasonableness. Negotiations relative to cost/price will be conducted in accordance with FAR Part 15.
- Once costs/price are finalized a task order will be issued to the firm.



Planning

Purchase
Request

RFP

Award

NATIONAL REGIONALIZED A/E DESIGN IDIQ CONTRACTS

Evaluation and Award

- In the event, a fair and reasonable price can not be accomplished, the TO/CO may communicate with the next best suited firm , based on the original analysis, to proceed with cost/price negotiations. Once the TO/CO begins process of negotiations with the next best suited firm, no further communications with the previous firm will be entertained until after the task order has been awarded.
- Each TO/CO shall ensure compliance with FAR 52.219-14 Limitations on Subcontracting. Each price proposal will be reviewed and tracked to ensure that at least 51% of the performance of the work is completed by the prime or a combination of the prime and that of it's similarly situated subcontractor(s). Reports must be provided to the CO for tracking and administration purposes.
- Each TO/CO shall ensure compliance with the statutory 6% design fee limitation imposed by the Brooks Act (6%) (10 U.S.C. 4540, 7212 and 9540). Reports must be provided to the CO for tracking and administration purposes. (A spreadsheet has been provided on the share point site for use in tracking these costs).

Administering the Contract

"Trust, but verify"

Ancient Proverb

Commencement of Task Order Work

- Work shall commence under each Task Order as specified by the task order requirements.
- Work shall not commence until an official Notice to Proceed has been issued by the cognizant Contracting Officer.
- Firm's Monthly Progress Report
 - Responsibility of the firm and submitted monthly with invoices

Invoicing and Payment

- Invoices must be submitted through the Invoice Payment Platform System (IPP)
- COR and TO/CO are responsible for validating contractor invoice documentation for accuracy and compliance with contract terms and conditions
- Each invoice must contain an attachment including a line-item breakdown of the total amount billed
- Approved travel costs must be broken down by the individual traveler and documentation supporting the costs must be attached and clearly indicate the traveler's identity
- Any remaining non-travel associated costs must be broken down by task denoting a percentage of work completed.

Contract Closeout Responsibilities

- The COR shall assist the TO/CO by:
 - Assisting the contracting officer in the settlement of any outstanding claims or change orders
 - Ensuring that all technical requirements of the task order has been met and the task order has been satisfactorily completed
 - Assuring that a final release of claims as required by FAR 52.232-10, Payments Under Fixed Price Architect-Engineer Contracts, is submitted with the firm's final invoice. A final invoice submitted without a release of claims shall not be processed for payment.
 - Certifying that all deliverable items, including the final report, were delivered and accepted, and that all services were performed and accepted
 - Reviewing and approving the final invoice for payment
 - Assisting with the final CPARS evaluation

Task Order Evaluation Ranking Spreadsheet

- Three areas of evaluation for each task order:
 - Technical Understanding of the Requirement, Deliverables and Delivery Schedule (60 %)
 - Qualitative description of proposed methodology and technical approach
 - Proposed deliverables and delivery schedule
 - Personnel and subcontractors proposed
 - Knowledge of the Geographic Location (22%)
 - Projects submitted of similar size and scope
 - Are sample projects directly related to the work to required by the task order?
 - Past Performance (18%)
 - Quality
 - Timeliness
 - Cost Control
- Evaluation ranking spreadsheet template developed for each region

Some Strategies for use of IDIQ Contracts

- The prime contractor is responsible to perform at least 50% of the work for every task order. Thus, make sure to develop task orders where the prime contractor can perform at least 50% of the work.
- Each task order takes substantial resources to administer. Where appropriate, group similar projects into a single task order.
- Consider task orders for the development of standard designs or standard plans. Work with other states to pool resources in such efforts.
- Share lessons learned with others – especially within regions. For example, share scope of work templates for task orders.

Feedback Needed

- Immediate need for IDIQ contracts
- Total FY18 need for IDIQ contracts
- Anticipated FY19 need for IDIQ contracts
- Further training needs for use of IDIQ contracts

Questions?

Appendix

- Task Order Placement Instructions: https://ems-team.usda.gov/sites/NRCS_MGMTacquisitionsdiv/procurement/customer/National%20Contracts/Forms/AllItems.aspx?RootFolder=/sites/NRCS_MGMTacquisitionsdiv/procurement/customer/National%20Contracts/IDIQ_Design%20and%20Construction%20Management%20%28Multi%20Award%29/Instructions%2c%20POC%20Info%2c%20and%20Miscellaneous%20Docs&FolderCTID=0x012000613AFEAA21C8FB4E9DC43448A79703C7&View=%7bDBE7C50C-1A58-4860-93E3-63872A02D7E5%7d
- Evaluation Ranking Worksheet - https://ems-team.usda.gov/sites/NRCS_MGMTacquisitionsdiv/procurement/customer/National%20Contracts/Forms/AllItems.aspx?RootFolder=%2Fsites%2FNRCS%5FMGMTacquisitionsdiv%2Fprocurement%2Fcustomer%2FNational%20Contracts%2FIDIQ%5FDesign%20and%20Construction%20Management%20%28Multi%20Award%29%2FInstructions%2C%20POC%20Info%2C%20and%20Miscellaneous%20Docs%2FTask%20Order%20Ordering%20Instructions&FolderCTID=0x012000613AFEAA21C8FB4E9DC43448A79703C7&View=%7BDBE7C50C%2D1A58%2D4860%2D93E3%2D63872A02D7E5%7D
- Request for Technical Proposals – https://ems-team.usda.gov/sites/NRCS_MGMTacquisitionsdiv/procurement/customer/National%20Contracts/Forms/AllItems.aspx?RootFolder=%2Fsites%2FNRCS%5FMGMTacquisitionsdiv%2Fprocurement%2Fcustomer%2FNational%20Contracts%2FIDIQ%5FDesign%20and%20Construction%20Management%20%28Multi%20Award%29%2FInstructions%2C%20POC%20Info%2C%20and%20Miscellaneous%20Docs%2FTask%20Order%20Ordering%20Instructions&FolderCTID=0x012000613AFEAA21C8FB4E9DC43448A79703C7&View=%7BDBE7C50C%2D1A58%2D4860%2D93E3%2D63872A02D7E5%7D
- IDIQ Contracts by Region: https://ems-team.usda.gov/sites/NRCS_MGMTacquisitionsdiv/procurement/customer/National%20Contracts/Forms/AllItems.aspx?RootFolder=/sites/NRCS_MGMTacquisitionsdiv/procurement/customer/National%20Contracts/IDIQ_Design%20and%20Construction%20Management%20%28Multi%20Award%29/Instructions%2c%20POC%20Info%2c%20and%20Miscellaneous%20Docs&FolderCTID=0x012000613AFEAA21C8FB4E9DC43448A79703C7&View=%7bDBE7C50C-1A58-4860-93E3-63872A02D7E5%7d