



Statement of Work (SOW)

PART I - THE SCHEDULE

DESCRIPTION/SPECIFICATION/STATEMENT OF WORK

C INTRODUCTION

The National Institutes of Health (NIH), Office of Logistics and Acquisitions Management, through this procurement, intends to award multiple Indefinite Delivery, Indefinite Quantity (IDIQ) contracts for acquiring a wide range of administrative, meeting, conference, and travel support services. The nature of the product required is a support services contract for domestic and international travel, meetings and conference management services and administrative support for the National Institutes of Health (NIH) and other Federal agencies. The focus is to provide all the necessary services, qualified personnel, facilities and funding, not otherwise provided by the Government as needed to perform the Statement of Work (SOW) below. Through this procurement, the NIHCATS II will provide multiple, non-mandatory Task/Delivery Order contracts with improved response time and at equitable and reasonable prices to our customers. The Conference Administrative and Travel Services contracting program is a flexible means for NIH and other government agencies to obtain conference, administrative and travel and associated support. The geographic scope of this requirement includes the Continental United States and abroad.

C.1 Scope

This contract is intended to cover a broad range of administrative, travel, meeting and conference support. In addition, this contract will provide a wide range of documentation support, website design and development. Successful offerors must have the ability to operate and provide for remote locations of personnel to 100 nations worldwide, and at times up to 20+ countries to include the African nations of Botswana, Cote d'Ivoire, Ethiopia, Kenya, Rwanda, South Africa, Tanzania, Uganda and Zambia; the Caribbean nations of Guyana and Haiti; and Vietnam, India, Cambodia and other nations abroad. This remote location can range from a performance period of one (1) month to about one (1) year or longer.

The contract type is expected to be an Indefinite Delivery/Indefinite Quantity (IDIQ) task order contract containing one or more Time and Materials (T&M) type task orders. These contracts will be used primarily by the entire NIH, but may also be used by other portions of DHHS and other Federal agencies.

The SOW contained herein is intended to outline the general requirements required of vendors under NIHCATS II. Specific details of task assignments, deliverables, documentation, applicable government /department standards, etc., will be provided within each individual task order. Below are the task areas for this contract and

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examples of the types of tasks that may be obtained under this SOW provided that tasks are within the identified task areas.

NOTE: One meeting may be comprised of one or more of the following six task areas. The task areas for the proposed acquisition are described below:

C.1.1 Contract and Task Order Management

Contract and task order management is a mandatory element for all task orders placed under the NIHCATS II Contract. The objective of contract and task order management is to provide the program management, project control and contract administration necessary to manage a high volume, multiple contract type task order process for a large, diversified team so that the cost, schedule and quality requirements of each order are tracked, communicated to the government, and ultimately attained. The application of expertise on processes and metrics that support task order management are encouraged to achieve the following objectives.

These objectives are used to provide quicker access, improved accuracy, and enhanced accessibility for contracts/clients, real-time monitoring of status/deliverables, tracking the quality of support service and gauging overall customer satisfaction.

- a) Travel Support
- b) Meeting and Conference Support
- c) Documentation Support
- d) Administrative Support
- e) Website Design, Development, and Maintenance Support

C.2. Task Areas

C.2.1 Travel Support (Task Area 1)

The objective of the travel support task is to arrange and provide for travel (domestic and international) for program participants, escort services; translation and preparation of program documents; lodging accommodations; varied assistance at workshops and conferences; and subsistence allowances for participants. The ability to operate and provide for remote locations of personnel to 100 nations worldwide, and at times up to 20+ countries to include the African nations of Botswana, Cote d'Ivoire, Ethiopia, Kenya, and Haiti; and Viet Nam, India and other nations abroad. A non-exhaustive list of examples of the type of work to be performed under this task area is:

- a) Travel Arrangements.
- b) Develop detailed travel itineraries.
- c) Guidance and assistance to U.S. foreign travelers in obtaining passports and/or visas.
- d) Complex domestic and international travel arrangements, utilizing a variety of transportation modes, as dictated by the needs of specific programs and cost effectiveness, from the traveler's residence or home

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institution to the specified destination. In most cases, the contractor shall provide prepaid tickets in advance of travel.

Purchase economy class (or business or first class if specified by the Project Officer) air fare or other tickets for domestic or international travel. The purchase of other than economy fares is restricted unless authorized by the IC Director or higher level authority and to provide a written justification to ensure compliance with Federal Regulations. **CONTRACTORS MUST COMPLY WITH U.S. FLAG CARRIER REGULATIONS AND REQUIREMENTS!**

- e) Foreign Flag and Premium class (14 hours or medical approved excuse).
- f) Purchase and arrange ground transportation as required. (Taxi cabs, shuttle service, limousine service and rental car) as requested.
- g) Arrange hotel or other lodging accommodations, in the United States and in foreign countries. All accommodations should be of moderate to above-average cost. In those instances when the visitor is to remain in the United States for an extended period of time, the contractor shall recommend and/or obtain suitable lodging in the form of a furnished house, apartment, university housing, etc. The contractor shall consider convenience of location in terms of commuting, safety, and cost effectiveness. In most instances, contractor shall pay lodging costs directly to hotel or lesser in advance or as identified by the project officer with the contractor. Late arrivals must be guaranteed.
- h) Pay appropriate subsistence allowance in advance as specified by the bilateral agreement or by the Project Officer. **THE CONTRACTOR SHALL BE RESPONSIBLE FOR ANY REPORTING TO THE IRS FOR PAYMENTS TO TRAVELERS. THIS REPORTING MAY BE REQUIRED AND/OR MODIFIED BY THE IRS CODE AND INTERNATIONAL TREATIES AND AGREEMENTS.**
- i) Make direct contact with the host and/or traveler to ensure that all arrangements are mutually understood concerning arrival times, accommodations, addresses, official functions, financial arrangements, special events, and any other special information that impacts on the visit. All such arrangements must be approved and confirmed by the Project Officer.
- j) Provide the U. S. traveler or visitor, host, and Project officer with a typed day-to-day itinerary listing accommodations with addresses and telephone numbers; dates and times of appointments with addresses and telephone numbers; field representative (escort) names and telephone numbers; emails and program coordinator's name and home and office telephone numbers; email and ground transportation arrangements; air travel schedules indicating flight times, airlines, and airports; information regarding invitations, conferences participants orientation plans, special

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functions, general travel tips, and emergency points of contact information for all participants and attendees.

- k) Provide reimbursement upon receipt of expense statement for:
- Charges for storing baggage and equipment not required during portions of traveler's trip in baggage rooms or terminal lockers.
 - Charges for telegrams, cablegrams, and local and long-distance telephone calls concerning official business only.
 - Passport and visa fees, costs of passport and visa photographs, fees for affidavits, charges for required inoculations, etc.
 - Fees for entry into foreign countries, port taxes, etc., and all other allowable travel costs and expenses incurred as authorized by Federal Government Travel Regulations and Policies and Procedures.
 - Written instructions for expense statements shall be prepared by the contractor and shall be provided to the traveler and the Task Order Project Officer.
- l) Highly skilled interpreters who provide simultaneous foreign language interpretation at scientific meetings and conferences are sometimes accompanied to the NIH or other government agencies. However, due to the complexity and high level security for other government agencies, special provisions are made through an agreement with the contractor and the government through an agreement with other government agencies. When an interpreter has been assigned to a delegation, the interpreter also acts as an escort during the entire duration at all times and will require travel arrangements, per diem, and lodging at the same level and rate as the foreign visitors. Remote location maybe required at short notice. The contractor shall be responsible for making these arrangements.
- m) Provide limousine or other ground transportation (taxi, bus, rental car, etc.) as required. The contractor must be able to provide rapid response to changes in programs and unanticipated events. Response time may be less than one hour's notice for a transportation need.
- n) Escort services. When requested by the Task Order Project Officer, a field representative (escort) shall meet a foreign visitor upon arrival in San Francisco, Los Angeles, Chicago, New York City, Washington, D. C., or other ports of entry. Services provided by this escort shall include, but not be limited to, the following:
- Assist with customs, immigration concerns, and luggage.
 - Assist with connecting flight, if the visitor is not staying in the city of entry.
 - Accompany the visitor to the hotel, assist with check-in procedures and alert hotel staff regarding any special accommodations; assist in check cashing procedures and all financial matters, and explain

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- all subsistence procedures.
- Review itinerary with the visitor and determine if there are any concerns or problems that requires immediate attention at a short notice. Notify Task Order Project Officer and resolve problems as deemed necessary and in an expeditious manner or specified time frame.
 - Provide orientation of surroundings, including personal care requirements, area restaurants and public transportation. Provide orientation regarding American culture, i.e., customs, colloquialisms, and trends.
 - Be available at all times during a visitors' stay to accompany him/her to meetings, conferences, and appointments and to provide for all necessary changes in itinerary and other changes as visit progresses.
 - Assist with check-out procedures prior to departure and verify that all incidentals are paid and cleared for and that the bill is handled in accordance with the hotel reservations and rules. Confirm return air reservations with airlines and traveler.
 - Provide services of foreign-speaking escort and accommodations when directed by the Task Order Project Officer or his designee.

C.2.2 Meeting and Conference Support (Task Area 2)

The contractor shall provide logistical support for conferences, meetings, seminars, and workshops held in the United States and in foreign countries. The contractor shall also provide support for the writing and production of reports/documents; and the distribution of conference materials. A non-exhaustive list of examples of the type of work to be performed under this task area is:

- a) The ability to analyze and endorse conference center agreements.
- b) Hotel contracts.
- c) Secure other contractor as needed with approval.
- d) Design and develop meeting website, graphics, etc.
- e) Design registration and abstract submission forms.
- f) Facilitation of online abstract review process.
- g) Provide on-site coordination and logistical and technical support.
- h) Prepare post conference summary.
- i) Weekly status reports (progress, budget, etc.)
- j) Provide technical and logistical meeting support for presentations and registration on-site.
- k) The contractor will perform a site search in an effort to secure adequate and appropriate housing for conference participants.
- l) Provide meeting rooms, audio visual equipment, supplies, and services incidental to the conduct of conferences.
- m) Invitation and registration, fees and pre-conference distributions, with the

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- ability to handle online registrations allowing participants worldwide access to online registration to make meeting arrangements.
- n) Establish message centers.
 - o) Evaluation and Statistical Analysis Support – Contractors may be requested to provide an array of technical services in support of government research and educational issues.
 - p) Provide personnel with the ability to facilitate in planning and implementing throughout the decision making and conference implementation process.
 - q) Provide personnel with knowledge of the Federal Government's travel rules and regulations.
 - r) Record and transcribe proceedings.
 - s) Provide and operate audiovisual equipment.
 - t) Provide simultaneous foreign language interpreters as requested with an immediate response time.
 - u) Immediate response time for translation shall be required for this task area.
 - v) Coordination and implementation of third party participation.
 - w) Collection management if third party payment*.
 - x) Liaison support with venue*.

Note: The contractor shall pay all upfront charges (e.g., the contractor will be responsible for funding the reservation of conference space, and/or hotel accommodations after the required approvals have been obtained.)

This task area prohibits and restricts the use of any meals for Federal Government employees (See effective Efficient Spending Policy <http://oamp.od.nih.gov/ContractToolBox/SpendingPolicy.asp>)

For the asterisked (*) item of this Task Area, collection of third party payments can only be performed in accordance with the Task Order IC/Agency current policies, procedures and authority. All IC/Agency approvals must be obtained prior to the collection of third party payments.

The Task Order COR is responsible for obtaining a financial report between the contractor and recipient for all upfront charges. This report is to be provided to the Task Order Contracting Officer within **thirty** (30) days of each transaction. The report will be reviewed and filed in the task order file for audit and review purposes. The financial report must include documentation that was forwarded to the IC, higher level officials or Agency Director for approval for the upfront charges. This documentation must be divided into four parts, 1) Issue, 2) Discussion, 3) Recommendation, and 4) Decision. The individual agency's task orders will have to provide additional information on responsibility for payment. The report must include

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the recipient's name, date received, funding distribution copy, invoice date and number and the amount of the task order.

The contractor is required to pay for all appropriate services in a timely manner in accordance with the Task Order Request issued.

Definitions:

HHS “local travel area” - When a temporary duty site is outside of the “official duty station” area (see below), but within the vicinity surrounding it; and the site is a minimum driving distance of less than 50 miles, by the most direct route, from the employee’s office/permanent duty station, the site is considered to be a part of the “local travel area”.

“Official duty station” – The corporate limits of the city or town in which the employee’s office/permanent duty station is situated.

(See NIH Manual Issuance 1500-06-01 - Per Diem Allowances in the Local Travel Area)

C.2.3 Documentation Support (Task Area 3)

The contractor shall provide documentation services in support of meetings, conferences, seminars, and workshops held in the United States and in foreign countries. A non-exhaustive list of examples of the type of work to be performed under this task area is:

- a) Prepare materials for distribution prior to the conference, which may include briefing materials, spreadsheets, power point, preliminary agenda, travel and hotel data, and instructions concerning financial arrangements.
- b) Prepare materials for distribution at the conference, which may include the final agenda, list of participants.
- c) Prepare materials for distribution at the conference, which may include the final agenda, list of participants, notices of special functions, name badges, reference materials, program booklets negotiated contracts (hotels, interpreter transportation, etc.)
- d) Assist with preparation of program documentation. Program documentation ranges from simple agendas, negotiation documents, and progress reports, summary reports of meetings to bilingual briefing books containing proceedings of working meetings and background biographical data on program.
- e) Participants. The contractor shall be expected to provide such services as typing, collating, editing, reproduction, and delivery and mailings.
- f) Assist with preparation of abstract papers and/or publication of proceedings.

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- g) Arrange for translation of documents, negotiate contracts for translators, English and foreign languages as well as verification of accuracy and equivalency in translation. Translators may be obtained through a subcontract arrangement subject to acceptance by the Task Order Project Officer (or through NIH arrangements with the Department of State).

C.2.4 Administrative Support (Task Area 4)

The objective of the administrative support task is to provide services in direct support of conferences or scientific meetings to support the scientific program staff and other government agencies in accomplishing a variety of research and administrative responsibilities. This contract will not be used for temporary services or any other administrative associated support services. All services are to be in direct support of conferences or scientific meetings to support the scientific program staff in accomplishing a variety of research and administrative responsibilities. A non-exhaustive list of examples of the type of work to be performed under this task area is:

- a) General administrative tasks as identified in the statement of work and in compliance with the contract and not for ongoing temporary services or acting as an office assistant.
- b) Administrative support for conferences
- c) Administrative support for workshops
- d) Administrative support for symposiums
- e) Administrative support for focus groups
- f) Administrative support for meetings
- g) Editing and publishing newsletters, brochures, and pamphlets
- h) Graphics for newsletters, invitations, brochures, pamphlets for research, meetings, conferences, etc.
- i) Assisting with the distribution of letters, documents, or other materials by electronic mail (e-mail), FAX, postal service, or courier service.

C.2.5 Website Design, Development, and Maintenance Support/Internet Support (Task Area 5)

The Contractor shall provide Internet and Intranet support. The contractor will provide initial design, development, management, and conduct usability testing to evaluate effectiveness and ease of use. This task area shall only be used in support of a conference, meeting, focus groups, scientific research, studies, etc. This task area will be used to support IT conference, medical, research or related services only for the NIH and other federal agencies. A non-exhaustive list of examples of the type of work to be performed under this task area is:

- a) Design, develop, and maintain websites on the Internet, as required.
- b) Present a professional image that uses state-of-the-art features of web technology
- c) Newsletters, brochures, manuscripts, publications and pamphlets.
- d) Use existing graphics produced by the NIH and other Federal agencies

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- whenever possible.
- e) Meet with the Task Order Project Officer and other appropriate staff of NIH and other Federal agencies within one week of the effective date of each task order award to discuss the design process.
 - f) Work with the Task Order Project Officer and other Federal agencies to determine any IT security violations, the site content, site concept, target audience, site goals and ideas for conference and meeting presentations.
 - g) Text and graphic design/conversion for conference and meeting support only.
 - h) Use documents provided by NIH and other Federal agencies or write or edit new documents for inclusion on the sites. All new documents shall be edited and proofread by the editorial staff to ensure the highest quality control.
 - i) Create new art, integrated into sites using HTML (hypertext markup language), record and digitalize audio, and program and integrate databases for the design.
 - j) Convert images, audio, or video as requested for services that require databases. Work with the Web Site Manager/Task Order Project Officer of NIH and other Federal agencies to design databases. (The Contractor shall be able to use current technology that is supported by the most commonly used browsers such as creating databases, JAVA and CGI scripts, and templates or cascading style sheets to create or redesign web pages. The Contractor shall keep up-to-date and apply new technologies such as PNG (Portable Network Graphics), dynamic HTML and XML (Extensible Markup Language) to the websites of NIH and other Federal agencies when these features are available to all browsers.
 - k) The Contractor shall provide technical support for site maintenance and tracking. This shall include validation of HTML and links; testing site on the most frequently used browsers and various platforms; publicity of site through search engines and metatags; and tracking of site usage and accessibility with daily user statistics and online surveys.

NOTE: ALL OF THE ABOVE SERVICES SHALL BE USED ONLY IN DIRECT SUPPORT OF CONFERENCE AND MEETINGS SERVICES ONLY (SEE TASK AREA 2)

C.4 – Notes

1. This contract will require frequent close communication and interaction between the Contractor and the Project Officer. To insure that required services, face-to-face meetings, and daily document transfer are possible on a practical and cost-effective basis, it will be necessary that the Contractor's main or satellite office be located in close proximity to the NIH, or other federal government agency and that the Offeror submit plans

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to demonstrate how the necessary interactions can be successfully accomplished at a distance.

2. Individual task orders may require a specified level of close and continuous communication. Task orders may require a specific Project Manager for the period of performance who will serve as the principal point of contact with the Government and who shall be the individual held responsible for production and oversight of all reports and plans, for the direct supervision and coordination of project staff and consultants, for issuing work assignments, for monitoring the progress of this contract and provision of deliverables, and for maintaining cost control.
3. Offerors shall address plans to insure that no confidential or proprietary information recorded via notes, tapes or transcript during the conduct of a closed meeting or closed meeting session will be kept in files open to the public nor shall be accessible to anyone but those contracted employees directly engaged in the project. Plans shall include the disposition of finalized hardcopy and/or computer discs containing finalized summaries, minutes, reports, etc. For some specific meetings where such information is disclosed, the subsequent Contractor may be required to sign a secrecy or confidentiality agreement. Any such form will be identical to that which is concurrently signed by the Government.
4. The Contractor must follow the NIH Publication Standards for print materials. Materials produced by the Contractor shall not exceed the limitations imposed by the "Government Printing and Binding Regulations" published by the Joint Committee on Printing, Congress of the United States. The limitation is 5,000 reproductions of any page; documents consisting of multiple pages may not exceed an aggregate of 25,000 production units. In cases where quantities do exceed this limitation, the NIH will provide the Contractor with the required materials for distribution.
5. All contractors must be registered in the CCR.
6. Section F. "Deliverables will be specified with each task order".