AWARD TERM PLAN

FOR

Millennia Lite

APPROVED:

_____

Contract Term Official

_____

Date

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AWARD TERM PLAN

1.0 INTRODUCTION

a. This is the basis for outlining the plan for the Millennia Lite contract evaluation of the prime contractor's performance and for presenting an assessment of that performance to the Contract Term Official (CTO). The evaluation period for the award of term points will begin at contract award. An adjustment to the award term will not result in a contract ordering period of less than 3 years or greater than 10 years from initial award of the contract. The specific criteria and procedures used to assess the contractor's performance and to determine the amount of award term points earned are described herein.

b. For Contractors awarded more than one functional area, each functional area will be evaluated and scored separately. Points earned in one functional area cannot be used to earn an award term extension in another functional area.

c. An award term extension will be provided to the contractor by the Procuring Contracting Officer through a unilateral contract modification.

2.0 ORGANIZATION

The award term organization consists of: the Contract Term Official (CTO); an Award Term Review Board (ATRB) which consists of a chairperson, and other members to be designated at contract award. Other participants and advisors may be added at a later date, as deemed necessary. Attachment A will be completed at contract award.

3.0 RESPONSIBILITIES

a. **Contract Term Official**. The CTO will approve the award term plan and any changes. The CTO will review the recommendation(s) of the ATRB, consider all pertinent data. The CTO appoints the ATRB Chairperson.

b. **Award Term Review Board Chairperson.** The ATRB Chairperson chairs the meetings of the ATRB, and briefs the CTO on recommended earned term points and the contractor's overall performance and recommends award term plan changes to the CTO.

c. **Award Term Review Board**. As described further herein, ATRB members evaluate contractor's performance, consider all information from pertinent sources, and arrive at an earned award term points recommendation to be presented to the Chairperson. The ATRB will recommend changes to this plan and review contractor proposed changes.

d. **Procuring Contracting Officer.** The Procuring Contracting Officer will issue the modification after the CTO has authorized the award extension based on the accumulation of sufficient award term points.

e. **Performance Evaluation**. Performance monitoring by the ATRB will result in scoring the areas of evaluation described in Attachment D.

4.0 AWARD TERM PROCESS

a. Available Award Term Points. The earned award term points will be based on the contractor's performance during each evaluation period. The available points for each evaluation period are shown in Attachment B. An accumulation of 85 points is required for a one year term extension.

b. Evaluation Criteria. The evaluation criteria are listed in Attachment D. If the Procuring Contracting Officer does not provide specific notice in writing to the contractor of changes to the evaluation criteria prior to the start of an evaluation period, the same criteria from the preceding period will be used in the next evaluation period. Any changes to evaluation criteria will be made by revising Attachment D and notifying the contractor. Special criteria may be established (and points awarded) to meet designated contract or program objectives.

Attachment E will be used by the ATRB to rate the Task Order Performance. The Contractor Performance Evaluation form will be sent electronically by the contractor to all client representatives at the completion of each task order or at the end of each 12 month performance period, whichever comes first. The contractor will instruct the client representative to submit the Contractor Performance Evaluation form electronically to their ITM through the IT Solutions Shop.

c. Interim Evaluation Process. The ATRB will perform an interim evaluation of all contractors performance, from the effective date of award through the end of 12 months, and every 12 months thereafter. For the interim evaluation process, all available information outlined in the Evaluation Criteria (Attachment D) will be used. Ratings will not be assigned. The interim evaluation process is not used for earning award term points, but to brief contractors on their demonstrated strengths and weaknesses prior to their rating. The contractors may be provided the estimated award points the contractor could expect to earn at the end of the current rating period if they make no change to their performance. The determination is based upon the information provided from contract reports, Contractor Performance Evaluation Forms, and input from the Customer Service Centers to the ATRB, the ATRB Chairperson determines the interim evaluation results and notifies the contractor of any identified strengths and weaknesses. At this time, the ATRB may also recommend any changes to the award term plan for approval by the CTO.

d. End-of-Period Evaluations. The ATRB will perform an evaluation of all contractors performance to assign point scores from the effective date of award through the end of 18 months, and, every 12 months thereafter. Every contractor will be provided

an opportunity to present their self-assessment. Contractors are encouraged to submit written self assessments and will be accepted up to 30 days after the end of the evaluation period. Upon receipt of year end evaluation information and the contractor's self assessment, the ATRB forwards a recommendation of the final assessment report to the ATRB Chairperson. The ATRB Chairperson then will prepare a final evaluation report and recommendation of earned award term points. The ATRB Chairperson briefs the evaluation report and recommendation to the CTO within 105 calendar days after the end of the evaluation period. The CTO determines the overall grade and earned award term points for the evaluation period within 15 calendar days after the ATRB Chairperson's briefing. A letter from the CTO will inform the contractor of the earned award term points and the total cumulative points. Upon the accumulation of sufficient award term points, the PCO issues a modification within 45 calendar days after the decision is made by the CTO, authorizing award extension reflecting the earned award term amount. If the accumulation is insufficient to award an additional award term, the contract period of performance will expire at the end of the current term. The points are set and no additional points may be earned.

e. Contractor's Self-Assessment. The contractor's self-evaluation is submitted to the PCO within thirty days after the end of the evaluation period. This written assessment of the contractor's performance throughout the evaluation period may also contain any information that may be reasonably expected to assist the ATRB in evaluating the contractor's performance. The contractor's self-assessment should be reasonably concise. If awarded more than one functional area, a separate self-assessment should be submitted for each functional area.

5.0 AWARD TERM PLAN CHANGE PROCEDURE

Changes to the Award Term Plan may be made in writing by either party. Upon mutual agreement of the parties, any changes will subsequently be incorporated into the Plan.

ATTACHMENT A

AWARD TERM ORGANIZATION

TO BE COMPLETED AT AWARD

Members

Contract Term Official:

Award Term Review Board Members:

_____(Chairperson)
_____
_____
_____

ATTACHMENT B

AWARD TERM POINTS AVAILABLE FOR ALLOCATION BY EVALUATION PERIODS

The award term points earned by the contractor will be determined at the completion of evaluation periods shown below. The award term points shown corresponding to each period is the maximum available award term amount that can be earned during that particular period.

Evaluation Period	From	To	Available Award Term
First	Award	End of Month Eighteen	100 award points
Second through final	At Month Nineteen and every 12 months thereafter	End of Month Thirty every 12 months thereafter	100 award points

NOTE: The award term arrangement shall not be used to extend the total contract period beyond a maximum of 10 years from effective date of contract award.

85 award term points = 1 year term extension

ATTACHMENT C

AWARD CONVERSION TABLE

RATING	AWARD POINTS
Unsatisfactory	**0 to 69**
Satisfactory	**70 to 89**
Excellent	**90 to 100**

ATTACHMENT D EVALUATION CRITERIA

AREA	UNSATISFACTORY	SATISFACTORY	EXCELLENT	TRACK
Contract Administration (20 pts)				
(a) Contracting reporting requirements in Section G.4	Fails to meet required due date for reports <100%	Meets required due date 100%, w/accurate & current information	Meets required due date 100%, accurate, detailed & current information	Reports, ITSS
(b) Invoicing requirements	100% on time, with >5% rejection rate	100% on time, w/≤5% rejection rate	100% on time, 0 rejection rate	Reports, ITMs, ITOMs, ITSS,
(c) GSA Contract Access Fee	100% by due date	100% on time w/full payment	<100% on time or partial payment	Report
Task Order Performance (30 pts)				
(a) Quality of Products and/or Services	Score of 0-1 on Customer Survey (Attachment E)	Score of 2 on Customer Survey (Attachment E)	Score of 3 on Customer Survey (Attachment E)	Survey/ITMs
(b) Cost Controls	Score of 0-1 on Customer Survey (Attachment E)	Score of 2 on Customer Survey (Attachment E)	Score of 3 on Customer Survey (Attachment E)	Survey/ITMs
(c) Timeliness of Performance	Score of 0-1 on Customer Survey (Attachment E)	Score of 2 on Customer Survey (Attachment E)	Score of 3 on Customer Survey (Attachment E)	Survey/ITMs
(d) Business Relations & Customer Satisfaction	Score of 0-1 on Customer Survey (Attachment E)	Score of 2 on Customer Survey (Attachment E)	Score of 3 on Customer Survey (Attachment E)	Survey/ITMs
(e) Close Out	<100% w/in 60 days of task completion	100% w/in 60 days of task completion	100% w/in 30 days of task completion	ITMs,ITSS Reports

ATTACHMENT D
EVALUATION CRITERIA

AREA	UNSATISFACTORY	SATISFACTORY	EXCELLENT	TRACK
Program Objectives (30 pts)				
(a) Partnering w/FTS to promote Millennia Lite	Fails to attend/support trade shows, joint marketing efforts	Participates in Trade shows through booths; presentations at conferences/meetings	Satisfactory performance and active, innovative and creative promotion of Millennia Lite program	Reports, Bulletin Board, Input from CSCs, SDCs, RSC
(b) Marketing	Fails to meet objectives and goals in Marketing plan	Meets goals and objectives of marketing plan	Exceeds goals and objectives of marketing plan	Reports, Input from CSCs, SDCs, RSC
Subcontracting (20 pts)				
(a) Subcontracting Plan Compliance	Untimely submission and/or fails to meet subcontracting goals	Timely submission and meets subcontracting goals	Timely submission and exceeds subcontracting goals	294/295
(b) Subcontractor Participation	Ineffective use of teaming partners, not sharing meaningful work, routine, non-complex assignments	Effective use of teaming partners in providing total solutions; sharing work with progressively complex work	Creative and innovative use of team partners in providing total solutions; sharing of complex work	Self Assessment, Random Sampling on ITSS proposals

CONTRACTOR PERFORMANCE EVALUATION

Offeror's Name_____

Delivery Order/Contractor No. _____ **Project No. _____**

Prime Contractor _____ **Functional Area_____**

Subcontractor(s) _____

Dates of Performance: Starting Date _____ **Ending Date _____**

This Reporting Period _____ **Total Est. $ Amount_____**

Rating: 0. Unsatisfactory; 1. Marginal Satisfactory; 2. Satisfactory; 3. Exceeds Expectations; N/A. Not Applicable

Please provide your opinion by rating the following:

Quality of Product/Service

1. Effectiveness in identifying user requirements	0.___ 1.___ 2.___ 3.___ N/A. ___
2. Effectiveness in accomplishing performance metrics	0.___ 1.___ 2.___ 3.___ N/A. ___
3. Identified risk factors and alternatives for alleviating risk	0.___ 1.___ 2.___ 3.___ N/A. ___
4. Effective logistics support (hardware, software, personnel)	0.___ 1.___ 2.___ 3.___ N/A. ___
5. Quality & completeness of deliverables and documentation	0.___ 1.___ 2.___ 3.___ N/A. ___
6. Technical qualifications of contractor personnel	0.___ 1.___ 2.___ 3.___ N/A. ___
7. Technical qualifications of subcontractor personnel	0.___ 1.___ 2.___ 3.___ N/A. ___

Cost Control

8. Accurately estimated and controlled costs to complete work	0.___ 1.___ 2.___ 3.___ N/A. ___
9. Timely, current, accurate & complete invoices	0.___ 1.___ 2.___ 3.___ N/A. ___

Timeliness of Performance

10. Adherence to delivery schedule (major tasks, milestones)	0.___ 1.___ 2.___ 3.___ N/A. ___
11. Provided timely technical assistance, on-site & off-site	0.___ 1.___ 2.___ 3.___ N/A. ___
12. Timely, current & complete reporting, tracking & documentation	0.___ 1.___ 2.___ 3.___ N/A. ___

Business Relations & Customer Satisfaction

13. Effectively managed, coordinated & integrated subcontractors	0.___ 1.___ 2.___ 3.___ N/A. ___
14. Effectively communicated with Government management & staff	0.___ 1.___ 2.___ 3.___ N/A. ___
15. Contractor personnel (professional, cooperative & flexible)	0.___ 1.___ 2.___ 3.___ N/A. ___
16. Subcontractor personnel (professional, cooperative & flexible)	0.___ 1.___ 2.___ 3.___ N/A. ___
17. Overall Satisfaction with Prime Contractor	0.___ 1.___ 2.___ 3.___ N/A. ___
18. Overall Satisfaction with Subcontractor(s)	0.___ 1.___ 2.___ 3.___ N/A. ___

Comments: (Please use additional page if necessary)

_____

_____

_____

In your opinion, should GSA use this contractor again on future delivery orders? Yes_____ No _____

Rater's Name:_____Date:_____Organization:_____

Title: _____

Phone Number:_____Fax Number:_____Email Address:_____

CONTRACTOR PERFORMANCE EVALUATION

Exceeds Expectations:
The contractor has demonstrated an exceptional performance level in any of the below categories that justifies adding a point to the score. This rating will be used only in those circumstances when contractor performance clearly exceeds the performance levels described as "Excellent."

Excellent There are no quality problems.	There are no cost issues.	There are no delays.	Responses to inquiries, technical, service, and administrative issues are effective and responsive.
Satisfactory Nonconformances do not impact achievement of contract requirements.	Cost issues do not impact achievement of contract requirements.	Delays do not impact achievement of contract requirements.	Response to inquiries, technical, service, and administrative issues is usually effective and responsive.
Marginal Nonconformances require minor Agency resources to ensure achievement of contract requirements.	Cost issues require minor Agency resources to ensure achievement of contract requirements.	Delays require minor Agency resources to ensure achievement of contract requirements.	Response to inquiries, technical, service, and administrative issues is somewhat effective and responsive.
Unsatisfactory Nonconformances are compromising the achievement of contract requirements.	Cost issues are compromising performance of contract requirements.	Delays are compromising the achievement of contract requirements.	Response to inquiries, technical, service, and administrative issues is not effective and responsive.