

U.S. DEPARTMENT OF THE INTERIOR



# Ordering Guide

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## Design/Build and Construction IDIQ - MATOC

**U.S. Fish & Wildlife Service**  
**Division of Contracting and Facilities Management**  
**4401 North Fairfax Drive, MS 7118-43**  
**Arlington, VA 22203**



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# Introduction

This guide contains the information needed to properly use the Design/Build & Construction Indefinite Delivery, Indefinite Quantity (IDIQ) – Multiple Award Task Order Contract (MATOC) to award a Task Order responsive to the customer’s requirements. It contains general information, instructions on placing Task Orders, roles and responsibilities of key points of contact, how to prepare a proper requirements package for ordering and direction in initiating and managing Task Orders. This document is applicable to all U.S. Department of the Interior (DOI) bureaus and individuals with delegated authority to award and administer Task Orders against this contract.

## Section I: General Information

### Scope of the MATOC

The objective of the MATOC is to provide comprehensive, technical design/build and construction services. Firm Fixed Price and Time and Materials Task Orders may be issued in accordance with this IDIQ for the following services in support of: investigations, analyses, studies, design/build, construction administration and management, National Environmental Policy Act (NEPA), archeological and historical compliance and actual construction. Design services regulated by the Brooks Act are not included within the scope of the MATOC. Work may be performed in all 50 states, the District of Columbia and territories of the United States (including Guam, Puerto Rico and the Virgin Islands). Use of this IDIQ is not mandatory, but is highly suggested to reduce procurement costs and streamline the acquisition process.

### Period of Performance

The IDIQ was awarded with a one-year base period on December 9, 2009, with four (4) one-year option periods, for a potential aggregate total performance period of five years.

**Table 1-A**

Year	Start Date	End Date
Base Year	December 9, 2009	December 8, 2010
<i>Option Year 1</i>	December 9, 2010	December 8, 2011
<i>Option Year 2</i>	December 9, 2011	December 8, 2012
<i>Option Year 3</i>	December 9, 2012	December 8, 2013
<i>Option Year 4</i>	December 9, 2013	December 8, 2014

Task orders may not have a period of performance that extends more than 365 calendar days beyond the final day of the last, previously exercised option year.

### Purchase Limitations

The minimum guaranteed amount under this IDIQ contract for each vendor is \$10,000.00 (ten-thousand) per year. Prior to the initiation of a Task Order, program offices are required to verify the remaining purchasing capacity.

#### Minimum Order

When the Government requires supplies or services covered by this contract in an amount of less than \$3,000.00 (three-thousand), the Government is not obligated to

purchase, nor is the Contractor obligated to furnish, those supplies or services under the contract.

Maximum Order

The total combined funding for all Task Orders issued within the base year, and for each subsequent, exercised option year thereafter, may not exceed \$400,000,000.00 (four-hundred million). Combined Task Orders for the base year shall not exceed \$100,000,000.00 (one-hundred million). Combined Task Orders for each exercised option year shall not exceed \$75,000,000.00 (seventy-five million). Upon reaching the total combined funding limit of four-hundred million, the IDIQ will expire and be terminated.

**Table 1-B**

Year	Minimum	Maximum
Base Year	\$10,000.00	\$100,000,000.00
Option Year 1	\$10,000.00	\$75,000,000.00
Option Year 2	\$10,000.00	\$75,000,000.00
Option Year 3	\$10,000.00	\$75,000,000.00
Option Year 4	\$10,000.00	\$75,000,000.00
TOTAL	Up to \$50,000.00	Up to \$400,000,000.00

## Section II: Issuing Task Orders

Authority

Any warranted Contracting Officer (CO) belonging to DOI, its bureaus or any of its offices may order against this contract within their delegated warrant authority, provided the IDIQ does not exceed any of the aforementioned limitations. All COs seeking to place orders against this contract consent to the terms and conditions set forth in the IDIQ. A certified Contracting Officer Technical Representative (COTR) must be identified for each Task Order. Once a Task Order is administered under this contract, a signed copy of the Task Order must be submitted to the MATOC Contracting Officer (MCO) or Deputy MATOC Contracting Officer (DMCO):

**Table 2-A**

James McCaffery, MCO	Joffrey Benford, DMCO
<i>Bureau Procurement Chief</i> 703-358-2176 <a href="mailto:james_mccaffery@fws.gov">james_mccaffery@fws.gov</a>	<i>Supervisory Contracting Officer</i> 703-358-2668 <a href="mailto:joffrey_benford@fws.gov">joffrey_benford@fws.gov</a>

Using the FWS Headquarters' Contracting Office

For Task Orders awarded by FWS on behalf of another Bureau, funding must be provided through an interagency agreement form that includes a statement of work, an independent government estimate based on prices established in the IDIQ, a financial division point of contact and a technical point of contact. FWS will send the statement of work to the vendor for a quote, and then issue the Task Order if found fair and reasonable. There is a 3% cost recovery amount for Task Orders awarded by the FWS Headquarters' Contracting Office on behalf of another Bureau. Task Orders awarded by another Bureau using each entity's own Contracting Office submit \$500 or .25% of the award amount (whichever is greater) to the FWS Headquarters Contracting Office. Task Orders awarded by the FWS Headquarters' Contracting

Office on behalf of another internal, FWS regional Contracting Office will be accepted on a case-by-case basis; there is no cost recovery amount.

**Table 2-B**

Requiring Program Office	Contracting Office	Cost Recovery Amount
Non-FWS Bureau	FWS Headquarters	3%
Non-FWS Bureau	Non-FWS Bureau	\$500 or .25% of award amount, whichever is greater
FWS Regional Office	FWS Headquarters	0%, case-by-case basis

### Vendor Points of Contact

Task Orders will normally be competed among all MATOC vendors within the relevant geographic area, but the Government reserves the right to unilaterally issue a Task Order under exigent circumstances. Evaluation criteria will be established and provided per the requirements of each individual Task Order. The Government also reserves the right to compete a Task Order among all six MATOC vendors without regard to geographic area if the CO concludes it is in the Government's best interest to obtain more than three design/build approaches for particularly complex projects. Generally, all construction-only tasks will be competed based on price only. In contrast, design/build tasks will factor in both technical approach and price.

**Table 2-C**

- WESTERN UNITED STATES -	- EASTERN UNITED STATES -
<b>C3, LLC</b> 5990 Greenwood Plaza Blvd, Suite 205 Greenwood Village, CO 80111 <b>Reference Contract #: 98210AD001</b> Phone: 303-741-0404 Fax: 303-741-0505 Email: <a href="mailto:bids@c3-designbuild.com">bids@c3-designbuild.com</a> Primary POC: Artis Brazee	<b>Perini Management Services, Inc.</b> 73 Mt. Wayte Ave Framingham, MA 01701 <b>Reference Contract #: 98210AD002</b> Phone: 508-628-2442 Fax: 508-628-2357 Email: <a href="mailto:usfws@perini.com">usfws@perini.com</a> Primary POC: John Gerstenlauer
<b>CH2M Hill</b> 9191 South Jamaica Street Englewood, CO 80112 <b>Reference Contract #: 98210AD003</b> Phone: 720-286-5151 Fax: 720-286-9378 Email: <a href="mailto:cliff.bjorgum@ch2m.com">cliff.bjorgum@ch2m.com</a> Primary POC: Cliff Bjorgum	<b>MACTEC Engineering and Consulting, Inc.</b> 3200 Town Point Drive NW, Suite 100 Kennesaw, GA 30144 <b>Reference Contract #: 98210AD004</b> Phone: 770-590-4623 Fax: 781-246-5060 Email: <a href="mailto:mactecdoi@mactec.com">mactecdoi@mactec.com</a> Primary POC: Randy Knott
<b>URS Group, Inc.</b> 8181 East Tufts Ave Denver, CO 80237 <b>Reference Contract #: 98210AD005</b> Phone: 303-740-3867 Fax: 303-694-3946 Email: <a href="mailto:gregg_batchelder_adams@urscorp.com">gregg_batchelder_adams@urscorp.com</a> Primary POC: Gregg Batchelder Adams	<b>BlueScope Construction, Inc.</b> 1540 Genessee Street Kansas City, MO 64102 <b>Reference Contract: 98210AD006</b> Phone: 816-245-6886 Fax: 816-245-6099 Email: <a href="mailto:fwsmatoc@bluescopeconstruction.com">fwsmatoc@bluescopeconstruction.com</a> Primary POC: Brian Aldrich

Payment and Performance bonds and Proof of Insurance will be required for each Task Order awarded unless it only includes consulting services. Ensure all bonds are properly executed and include a Power of Attorney by the surety with original signatures. Bonds certified by the

Small Business Administration must include Form 990. Bonds are due no later than 10 calendar days after Task Order award. Notice to Proceed will not be issued until the required bonds are received, reviewed and approved by the Task Order CO.

## Section III: Roles and Responsibilities

### IDIQ COs

The MCO and DMCO have the overall responsibility for managing and administering the IDIQ, as well as the following:

- Serving as general informational points of contact for IDIQ users
- Providing administrative procedures guidance for placing orders
- Monitoring base year and option year periods of performance

### Task Order COs

The Task Order COs are responsible for the following:

- Serving as the local contracting focal points for coordination and award of Task Orders
- Ensuring Task Order requirements are within the IDIQ scope, rates and terms
- Making certain Task Order request packages are properly prepared and provide all required information
- Coordinating Task Order requests with the MCO and DMCO, or designated points of contact as required, in order to monitor and track purchasing limits
- Providing copies to the MCO or DMCO of all Task Orders awarded against this contract
- Preparing vendor performance assessment reports as required

### COTRs

COs shall delegate authority to a COTR. COs should consider the nomination submitted by the program office that identifies a Federal Government employee who is technically qualified and trained to become (or already is) a COTR. Responsibilities typically encompass the following:

- Accomplishing day-to-day surveillance of vendor performance
- Informing the CO of any potential performance problems
- Preparing and submitting to the CO a written evaluation of the vendor's performance upon completion of a Task Order as necessary
- Reviewing invoices in comparison to actual performance accomplished

### MATOC Vendors

The vendors under this contract are responsible for the following:

- Submitting monthly Task Order summary reports to the respective COTR and CO that includes the status of all Task Orders completed and/or those currently in progress
- Guaranteeing performance and deliverables meet the requirements set forth in the IDIQ and each consequent Task Order
- Performing work and providing the services in accordance with the terms and conditions enclosed in the IDIQ
- Submitting proposals in accordance with requests from program offices

## Conflicts of Interest

FWS has incorporated three measures to help prevent conflicts of interest under the MATOC:

1. Separate Task Orders are required for on-site inspectors when such services are required. These orders may not be awarded to any vendor if it (or its subcontractor) is working on the project to be inspected.
2. No Task Order may be awarded to a vendor if it (or its subcontractor) participated in developing specifications for the project that is the subject of the Task Order.
3. No construction Task Order may be awarded to a vendor if it (or its subcontractor) prepared the designs that will be used in the construction project.

## Section IV: The Requirements and Ordering Process

### Task Order SOW

The statement of work (SOW) identifies and describes the customer's needs as accurately and thoroughly as possible, and addresses those needs with statements describing the required services, generally in terms of output. The SOW should not impose requirements that are not specifically required to ensure successful satisfaction of the Task Order requirements. Requirements should be stated in clear, concise, easily understood and measurable terms. Detailed procedures should not be included that dictate *how* the work is to be accomplished; rather, the requirements should allow the vendor the latitude to work in a manner suited for innovation and creativity. At a minimum, the SOW should be organized in accordance with FAR 8.405-2(b), to include:

- Description of the work to be performed
- Location of work
- Period of performance
- Deliverable schedule (if applicable)
- Applicable performance standards
- Any special requirements (e.g. security clearances, travel, special knowledge, NEPA or other applicable environmental laws etc.)

### Task Order IGE and Documentation

The Independent Government Estimate (IGE) is often prepared without a fully defined scope of work and is developed primarily for funding and budgeting purposes, as well as determining an estimated cost magnitude for the project. It also is not intended to be a comprehensive line item estimate, but should account for major cost elements and systems associated with each Task Order, such as:

- Anticipated square footage and building type
- Anticipated site development including existing and proposed facilities
- Anticipated mechanical and electrical needs (i.e. will the structure be heated and/or cooled?)
- Anticipated structural systems
- Anticipated utility needs (i.e. will the site require leach field or well?)
- Anticipated utility systems

When applicable, the Task Order request shall also include all available as-builts, floor plans, design drawings, photographs, record data and other pertinent documentation for the vendor's use in executing a design/build or purely construction project. It is ultimately the vendor's responsibility to verify actual "as-built" conditions and to request any as-built drawings (if available) that would be applicable to the project.

## Ordering Process

The Task Order CO may solicit responses to requirements from vendors in written form. A formal purchase request should be prepared and issued for each project requirement. The request and supporting documentation should clearly define the scope of the project. Vendors are required to have estimating, drafting and design capabilities either in-house or through sub-contract.

### 1. Purchase Request

This should be prepared by the program office and submitted to the ordering CO. It must include a SOW in accordance with FAR 8.405-2(b), an IGE, any available pictorial documentation such as as-built drawings, points of contact and any other supplemental documentation critical to the requirement.

### 2. Solicitation

Upon approval and receipt of the purchase request, the CO may then solicit to the vendor for a quotation. The solicitation package should include a cover letter with all applicable deadlines, points of contact (including the anticipated COTR), the SOW, evaluation criteria outlining the factors on how a proposal is to be assessed and any other applicable documents submitted with the purchase request.

### 3. Proposing a Response

After receipt of a solicitation from the CO, the vendor shall either submit a proposal or written notification of a decline to bid. As appropriate, the CO may elect to schedule a pre-award and pre-construction site visit, and/or a pre-proposal meeting. The vendor is responsible for submitting its proposal within the time prescribed in the cover letter. Upon reaching the cutoff time specified in the cover letter, the Government may begin conducting its review by the source selection evaluation board comprised of technical and contracting representatives.

### 4. Evaluation

The Government will review each timely proposal and comment as necessary. Evaluation criteria outlined in the solicitation must include, at a minimum, price/cost and past performance. For construction projects greater than or equal to \$1,500,000.00 (one million, five-hundred thousand), the CO must also include as an evaluation factor the vendor's commitment to utilizing local small business concerns in performance of the resulting contract. DOI's goal is to spend 60% of the contract value in a local area. For the purposes of this contract, a local area small business is defined as a business residing or primarily doing business within the project state, or within a 60 mile radius from the project site. The relative importance of this factor in relation to other factors is at the CO's discretion. For more information on evaluation criteria, reference FAR 15.304. Moreover, the Government reserves the right to award Task Orders without discussions. Once analysis is complete, a vendor's proposal may be accepted or rejected.

## Section V: Administration and Attachments

### Task Order Administration

The MCO and DMCO are accountable for IDIQ administration and management. Under no circumstances shall any understanding, agreement, modification or any other action in deviation from the terms and conditions of the IDIQ be effective or binding upon the Government. All such actions must be initiated and executed by the MCO. The MCO and DMCO are available to answer questions concerning planning and developing Task Orders, review and approval procedures, and can provide overall guidance, oversight and general information regarding this contract. All administration associated with individual Task Orders will be performed by the CO issuing the Task Order. Additionally, all official Task Order files will be maintained at each ordering office.

### Monthly Summary Reports

The vendor shall provide monthly summary reports to the MCO and DMCO. Reports shall address the status of all submitted Task Orders and all currently being worked on. The report for each month is due no later than the close of business, the 7<sup>th</sup> day of the following month. Information shall consist of:

1. A listing of ALL Task Orders submitted and issued during the month, to include:
  - Ordering office/CO
  - Task Order number and date issued
  - Bureau name
  - Facility/Location of work
  - Brief description of Task Order work (in the event that the Task Order spans multiple areas, select the task area that represents the preponderance of work)
  - Total amount ordered and obligated under each Task Order, including any modifications
  - Period of Performance for each Task Order
  - Scheduled percent complete and actual percentage completed
  - Concerns, problems encountered and how addressed
  - Future actions required by Government
2. Cumulative amount of total dollars ordered and obligated to date on all Task Orders
3. Cumulative amount of dollars ordered and obligated by Bureau
4. A listing of all Task Orders estimated and proposals submitted for, but not awarded

### Subcontracting Plan and Reports

The vendor shall maintain a current list of all subcontracts under each Task Order and provide it to the MCO and DMCO on a semi-annual basis, as well as upon request. The report shall include the name of the subcontractor, the service to be performed, the period of performance and the total subcontract amount. Furthermore, the report shall identify which subcontractors are local area small businesses along with what percentage of the total Task Order amount was awarded to these businesses. Reference FAR clause 52.219-09: Small Business Subcontracting Plan in the IDIQ for extra direction.

## Performance Assessment Reports

In accordance with FAR 42.1502(b), "Agencies shall prepare an evaluation of contractor performance for each contract that exceeds the simplified acquisition threshold."

### For the IDIQ

As required, vendor performance will be monitored and entered into the Contractor Performance Assessment Reporting System (CPARS). On each order meeting the simplified acquisition threshold (currently \$150,000.00), a vendor performance report will be generated in CPARS format and combined with all other orders into one CPARS report. This one CPARS report will record vendor performance at the contract level covering all orders under the IDIQ.

### For Task Orders

Therefore, at the completion of each Task Order that exceeds \$150,000.00 the issuing CO shall complete a vendor performance report in the CPARS format and forward it to the MCO and DMCO. Completed reports will be kept in the IDIQ file. The preparation and completion of these reports is the responsibility of the ordering CO, but should include input from the assigned COTR. All reports shall be submitted within 15 days from contract close-out.

## Changes in Vendor Personnel

The vendor may not add personnel to an awarded Task Order without prior authorization to do so. The vendor shall advise the ordering CO of personnel removals as they occur. The vendor may also replace personnel as necessary to meet unique requirements. Requests to modify personnel composition may be submitted to the ordering CO at any time.

## Vendor Feedback

Upon written request by the vendor, a debriefing may be given to an unsuccessful offer. During the debriefing, feedback should discuss what was required and expected of the vendor and if those expectations were met. Debriefings may be conducted orally, in writing or by any other method deemed appropriate by the ordering CO. In accordance with FAR 15.505(e), applicable feedback material that may be covered includes:

- The agency's evaluation of significant elements in the offeror's proposal
- A summary of the rationale for eliminating the offeror from the competition
- Reasonable responses to relevant questions about whether source selection procedures contained in the solicitation, applicable regulations and other applicable authorities were followed in the process of eliminating the offeror from the competition

## Attachments

For invoicing instructions and the standard DOI interagency form, refer to the following document attachments:

- Attachment A: Construction Invoice Handling Procedures
- Attachment B: DOI Interagency Agreement Form