



Homeland Security

Office of Procurement Operations
U.S. Department of Homeland Security
Washington, DC 20528



Program Management, Administrative, Clerical and Technical Services (PACTS) Ordering Guide

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Foreword

The Program Management, Administrative, Clerical and Technical Services (PACTS) program is a suite of multiple-award indefinite delivery/indefinite quantity (IDIQ) contract vehicles. The *PACTS Ordering Guide* contains information required to use the contract vehicles to obtain program management, administrative, clerical and technical services throughout DHS. It provides the procedures for ordering services under PACTS, and defines the roles and responsibilities of the major parties involved in the ordering process. The contracts are available to DHS Headquarters and its Components, and orders may be placed directly by DHS-warranted Contracting Officers. Components that use other federal agency resources to provide contracting services may delegate procurement authority to allow the use of the PACTS contracts on the Component's behalf.

Questions regarding these guidelines and procedures, or those of a contractual nature, should be directed to the Office of Procurement Operations (OPO), Enterprise Acquisitions Division (EAD-1) / PACTS Program Management Office using the email address below. The EAD will revise these guidelines, as needed, to improve and streamline the process of awarding and managing orders under the PACTS contracts.

This Ordering Guide is intended to provide guidance on general ordering processes for the PACTS contracts. This information is intended to supplement the requirements of the base PACTS contracts, particularly those of clause G.4 Task Order (TO) Procedures. The information provided in this Guide in no way supersedes the provisions of the Federal Acquisition Regulation, the Homeland Security Acquisition Regulation, the Homeland Security Acquisition Manual, or any ordering activity-specific policies and guidance.

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HOW TO USE THIS GUIDE

Our goal was to keep the guide short and simple. Therefore, the PACTS ordering guide only contains the information required to use this vehicle for obtaining Program Management, Administrative, Clerical and/or Technical Services throughout DHS. Chapters 1 – 3 provide general information, roles and responsibilities, and PACTS Ordering Procedures.

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1. General Information

1.1 Background

The major goal of the **Program Management, Administrative, Clerical and Technical Services (PACTS)** acquisition was to create a streamlined portfolio of contract vehicles for various services with accessibility by DHS Headquarters and its Components. In support of Executive Order 13360, PACTS is a 100% Service Disabled Veteran Owned Small Business (SDVOSB) set-aside. The types of services provided under the PACTS program make up a significant portion of requirements currently being acquired through various procurement vehicles across the Department of Homeland Security (DHS).

The strategic goals and objectives for the PACTS acquisition include:

- (1) Providing a comprehensive range of services for use throughout the Department.
- (2) Providing a continuous alignment between business strategy, business processes, and various management services while maintaining an acquisition approach based on flexibility and efficiency.
- (3) Acquiring essential services in an effective, economical, and expedient manner consistent with the DHS mission.
- (4) Supplementing current DHS-wide procurement vehicles.
- (5) Promoting and supporting DHS small business goals and initiatives.
- (6) Providing opportunities for Service-Disabled, Veteran-Owned Small Businesses (SDVOSBs).

To accomplish these objectives the Office of Procurement Operations (OPO), Enterprise Acquisitions Division (EAD), has:

- Established services vehicles through a portfolio of Indefinite Delivery Indefinite Quantity (IDIQ) contracts and effected monetary savings by focusing on procurements from an enterprise-wide perspective, thus leveraging DHS' buying power through economies of scale;
- Enhanced the availability of services from small business;
- Established a portfolio of Component accessible and effective contracting vehicles tailored exclusively for SDVOSBs to provide these services; and
- Streamlined and standardized acquisition processes and procedures.

1.2 Purpose

This document provides the procedures for placing Task Orders (TOs) for services under PACTS, and defines the roles and responsibilities of the major parties involved in the ordering process. TOs against PACTS may be placed by OPO (for use on its own behalf or for use by the Components) or by Component TO Contracting Officers who hold a current DHS warrant. However, overall responsibility for administration of the PACTS contracts rests with the Contract-level Contracting Officer (CO).

The ordering guidelines contained herein are in concert with the best practices guidance of the Office of Federal Procurement Policy (OFPP) and the Office of Management and Budget (OMB), as well as Homeland Security Acquisition Manual (HSAM) policy. Specifically, in promoting PACTS, OPO will focus on the following:

- Making simplified ordering procedures and award documentation templates available to DHS and its Components;
- Managing a reasonable number of PACTS awards with highly skilled, responsible SDVOSB contractors who possess a wide variety of expertise;
- Promoting performance-based work statements;
- Improving the efficiency of the ordering process with the use of PRISM and other electronic ordering systems. These systems encompass requisitioning, soliciting, ordering, contract/order/solicitation management, award and closeout;
- Ensuring availability of acquisition, technical, program and contracting personnel to provide advice and guidance, at no cost to the Component level ordering office; and,
- Scheduling periodic meetings between the PACTS Program Management Office (PMO), PACTS contractors, and DHS Components to discuss administrative matters, future requirements, and needed improvements in the ordering process.

1.3 Scope

The PACTS IDIQ contracts will promote the use of performance based contracting, but will accommodate the issuance of TOs for various types of pricing arrangements (Fixed Price (FP) & FP Incentive, Time and Materials (T&M), and Labor Hour (LH)), . Cost-reimbursable orders of any type are not permitted under PACTS (although other direct costs (ODCs) may be included as part of a FP or T&M/LH TO). Specific program or project requirements will be defined in TOs that will be competed at the Functional Category level. TOs will be competed using the Fair Opportunity provisions of the Federal Acquisition Regulation (FAR), Part 16.505. PACTS IDIQ contracts have a two (2) year base period and three (3) one-year option periods that may be exercised at the sole discretion of DHS/OPO. TOs issued under PACTS must have individually-defined performance periods. PACTS will allow for TO performance at any location in the Continental United States (CONUS) or Outside the Continental United States (OCONUS). To effectively manage this acquisition, the PACTS PMO will be responsible for providing acquisition program support to PACTS. The PACTS PMO will play pivotal roles with transforming the “typical” acquisition environment by focusing on program outcomes and business successes.

The following four (4) comprehensive Functional Categories (FCs) represent the types of non-IT services available under PACTS:

- FC1 – Program Management
- FC2 – Administrative
- FC3 – Clerical
- FC4 – Technical

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Pursuant to FAR requirements, PACTS requires that each prime contractor in the pertinent Functional Category have a “fair opportunity to be considered” for each TO within that Functional Category. Unless one of the exceptions cited at FAR 16.505 applies, the TO CO will announce each requirement to all prime contractors who have received an award for the applicable FC.

Please note that FAR Part 12 clauses shall not be used in the PACTS TO's.

1.4 Authorized Users

DHS PACTS contracts are intended for use by DHS and its Components. The contracts are not Government-Wide Acquisition Contracts and cannot be used by other Federal agencies. DHS Components that use another federal agency to provide contracting services may delegate procurement authority to allow the use of the PACTS contracts on the component's behalf. It is the Component's responsibility to ensure that the delegation precludes non-DHS orders placed on the contracts and that awarded orders are included in the monthly contractor activity reports.

1.5 Contractors

PACTS is a total SDVOSB set-aside. The identification of specific TO requirements and the TO competition process will enable PACTS contractors and PACTS contractor teams to form the most advantageous solutions for satisfying specific requirements. PACTS contractors, by Functional Category, are listed in Appendix A, inclusive of complete addresses, fax and phone numbers, company points of contact (POCs).

2. Roles and Responsibilities

The following describes the roles and responsibilities for matters regarding PACTS contract administration, as well as other administrative information.

2.1 PACTS Program Management Office (PMO)

The PACTS PMO is responsible for the following items:

- Ensuring that customers are aware of their responsibilities and of the scope of the PACTS contract;
- Addressing and satisfying the needs of all participants in the process;
- Maintaining a level of program integrity that prevents or mitigates contractual or programmatic risks;
- Soliciting feedback and providing continuous process improvement;
- Promoting guidance and providing assistance to customers who use PACTS; and,
- Receiving, monitoring and reporting all TO awards and all “fair opportunity” exceptions.

The PACTS PMO is available to work directly with customers and PACTS contractors throughout the TO process, and to provide assistance, support, and overall PACTS contract level contract management/administration. As such, the PACTS PMO is guided by directives from other organizations, and develops, employs and promulgates procedures and templates that support these directives, e.g., DHS Acquisition Directive 102-01, Investment Review Process.

2.2 Requiring Activity

The requiring activity or component is responsible for preparing the TO request package (TORP), to include a purchase request/requisition. It should be noted that the TORP will include internal government documents which shall not be released to the PACTS contractors. The TORP shall contain, at a minimum, the following:

- Complete statement of work (SOW), statement of objectives (SOO), or performance work statement (PWS);
- Independent government cost estimate (IGCE);
- Proposal instructions (including proposal due date);
- Contractor evaluation criteria and evaluation plan; and,
- Name, title, address, phone number and e-mail of requisitioner/requiring activity POC.

Also include the following, as applicable:

- PACTS Streamlined Acquisition Plan;
- Fair opportunity exception
- Other pertinent statute/regulation requirements, including applicable Section 508 requirements or exceptions;
- Necessary approvals (Investment Review Board (IRB), etc., if applicable); and
- Specific security requirements and documentation (e.g., DD 254).

It is the responsibility of the requiring activity to obtain the necessary approvals (e.g., IRB, funds certification, etc. prior to submitting the TORP to the TO CO). Additionally, personal services shall not be ordered under PACTS, and it is the responsibility of the requiring activity to ensure that they are not included in any PACTS TO(s).

2.3 Contracting Officer – PACTS Contract Level

The PACTS Contract Level CO has the overall responsibility for the administration of the PACTS contracts. The Contract Level CO, without right of delegation, is the only individual authorized to take actions on behalf of the Government to amend, modify, or deviate from the base contract terms, conditions, requirements specifications, details and/or delivery schedules. With-in that CO authority is the ability to delegate to an Administrative Contracting Officer (ACO) for the administration, management and oversight of the contracts.

The Contract Level CO is responsible for the overall administration and final closeout of the contracts, and when necessary, shall:

- Provide scope oversight;
- Serve as liaison between the contractor(s) and DHS;
- Assist in expediting orders;
- Ensure compliance with contract requirements;
- Issue the CO's final decision and handle all contract-level contractual disputes under the Contract Disputes Act; and,
- Issue all modifications against the base contract(s).

2.4 Contracting Officer – Task Order Level

Services will be ordered via TOs issued by TO COs within the DHS Headquarters or component's organization in accordance with the ordering procedures set forth in this Guide. Another federal agency that provides contracting services to a DHS Component may place TOs on that Component's behalf. All warranted DHS COs, including its Components, are authorized TO COs. OPO is available to conduct acquisitions on behalf of Components, in particular for those without an in-house procurement capability.

TO CO responsibilities include:

- Ensuring that TOs are within the scope of the contract (i.e., that the Northern American Industry Classification System (NAICS) code for the requirement is the same as the NAICS code(s) for the Functional Category under which the TO is being issued);
- Issuing TO Request for Proposals (TORFPs) and evaluating TO technical and cost/price proposals;
- Overseeing the TO procurement process through award;
- Approving or withholding payment, or authorizing partial payment of invoices;
- Ensuring the administration and final closeout of TOs;
- Forwarding an end of fiscal year notification to the Contract Level CO at PACTS@HQ.DHS.GOV (either by memo, letter, or electronically) stating which TOs awarded in the preceding fiscal year are closed and final disposition complete, including release of claims letters (if applicable);

- Completing contractor performance evaluations, with input from the contracting officer's representatives (CORs)/requiring activity using the Contractor Performance Assessment Reporting System (CPARS) at <http://www.cpars.csd.disa.mil/cparsmain.htm>;
- Requesting and verifying contractor past performance information during the solicitation and evaluation process;
- Adhering to the terms and conditions of the PACTS contracts, FAR, and other applicable laws, regulations and guidelines (including the Service Contract Act and any applicable wage determinations);
- Assisting the PM/COR in selecting the appropriate Functional Category (FC). The appropriate FC is the FC which represents the predominant amount of work as defined in the SOW/SOO/PWS. Only one (1) FC should be identified for the defined requirement. The TO CO has the final authority when determining which FC shall be used for a particular requirement;
- Designating the TO COR after confirming training and certification;
- Providing a copy of the COR designation letter to the COR and contractor; and,
- Forwarding copies of the TORFP, exception for fair opportunity explanation, TO award documentation, and TO modification documentation to the DHS PACTS PMO at PACTS@HQ.DHS.GOV.

2.5 Contracting Officer's Technical Representative – Task Order Level

TO COs should designate CORs for individual TOs, who will be responsible for the day-to-day coordination of that TO. It is the TO CO's responsibility to confirm that the designated individual is a trained, certified COR. A copy of the letter of designation, identifying specific duties and responsibilities will be provided to the contractor.

The TO COR responsibilities may include:

- Representing the TO CO in the administration of technical details within the scope of the TO;
- Ensuring final inspection and acceptance of all TO deliverables and reports, and such other responsibilities as may be specified in the TO, including review of Section 508 compliance testing results; and,
- Completing the contractor performance evaluations using the CPARS at <http://www.cpars.csd.disa.mil/cparsmain.htm>) with respect to each TO.

The COR is not authorized to make any representations or commitments of any kind on behalf of the TO CO or the Government. The COR does not have authority to alter the contractor's obligations or to change the TO specifications, pricing, terms or conditions. If, as a result of technical discussion(s), it is desirable to modify TO requirements or the specification, changes will be issued in writing and signed by the TO CO.

2.6 Task Order Contract Ombudsman

Contractors shall contact the Task/Delivery Order Level Competition Advocate of the appropriate Component to express concern with the issuance or proposed issuance of a task/delivery order on the grounds stated previously. The Task Order/Delivery Order Level Ombudsman's responsibilities are to:

- Address contractor concerns regarding compliance with task/delivery order award procedures;
- Review contractor complaints on task/delivery order contracts;
- Ensure all contractors are afforded a fair opportunity to be considered for each task/delivery order, consistent with FAR 16.505(b); and,
- When requested, maintain strict confidentiality of the contractor requesting assistance.

The Contract Level Ombudsman for PACTS is the DHS Headquarters Competition Advocate, within OPO. The Contract Level Ombudsman is responsible for the final recommendations/decisions for all orders under this contract, when resolution cannot be determined at the Component level.

Contractors should contact the PACTS PMO to appeal TOs issued by non-DHS procurement offices. The PACTS PMO will coordinate the appeals with the Headquarters Competition Advocate for resolution.

2.7 Contractor's Program Manager

The contractor's Program Manager shall act as the central POC with the Government for all program-wide technical matters, and will represent the contractor at all post-award status meetings. The contractor's Program Manager shall be responsible for resolution of all technical issues, program management, and other contract support. This includes providing comprehensive account support for the PACTS contract. The contractor's Program Manager is responsible for overall contract performance and shall not serve in any other capacity under this contract.

3. PACTS Ordering Procedures

3.1 PACTS Ordering Procedures

This section describes the steps required to issue TOs under FAR Part 16.505. TOs may be issued using either a traditional ordering process or a multi-phased ordering process – the TO CO shall determine which is the most appropriate ordering process for the requirement. This section of this guide contains the PACTS contractor list, TO procedures, fair opportunity exception guidance, the TORP checklist. Clause G.4 Task Order (TO) Procedures of each base contract should also be used when issuing TORFPs or TOs. The PACTS PMO does not approve TORFPs, but will provide support by reviewing TORFPs if requested by the TO CO.

For TOs that will be performed OCONUS, each PACTS contract includes an OCONUS multiplier which shall be applied to the **unburdened** hourly labor rate to arrive at the OCONUS hourly labor rate. The hourly labor rates that are listed in Section B of each PACTS contract are the fully burdened hourly labor rates – therefore, the OCONUS multiplier should not be applied to the hourly labor rates listed in Section B.

The PACTS contractors will perform calculations identifying the unburdened labor rates in a clear and concise manner within the TO proposal. TORFPs should be very clear as to what and which portion of the work is to be performed OCONUS.

Please note that FAR Part 12 clauses shall not be used in the PACTS TO's.

3.1.1 Traditional Ordering Process

In utilizing the traditional ordering process, and after the determination of Fair Opportunity Exception or unrestricted competition, the prime contractors within the designated FC shall have the opportunity to submit a full technical and cost/price proposal.

If the TO request is complex and requires extensive technical and cost/price proposals from each contractor, the Government shall allocate the proper resources to evaluate each of the proposals according to the evaluation plan . The following key steps provide guidance for the ordering process, see Figure 1: PACTS Task Order Process:

- **STEP 1: TORP DEVELOPMENT** (Acquisition Planning) - the requiring activity prepares the TORP documents either for the Traditional or Multi-phased Ordering Process and forwards it to the TO CO, refer to Section 2.2.

☐NOTE: The PACTS PMO staff is available to assist ordering activities by reviewing acquisition planning documentation prior to submission to the TO CO.

- **STEP 2: TASK ORDER SOLICITATION PREPARATION** – the TO CO reviews the TORP and prepares a TORFP to be forwarded to the prime contractors within the designated FC. The TORFP should not be referred to as a Request for Quote (RFQ) or Request for Proposal (RFP) by the TO CO.

The request should typically place a limit of no more than fifteen (15) pages on the technical proposal, subject to adjustment at the discretion of the TO CO based on the size, scope and complexity of the TO. The request may also include an oral presentation and due diligence sessions, if it is determined to be beneficial to the evaluation. A complete cost/price proposal must be submitted, with no page restrictions. The amount of time allowed for the traditional response is typically ten (10) days, which may be adjusted by the TO CO based on the scope/complexity of the requirement and the needs of the customer.

- **STEP 2a: FAIR OPPORTUNITY DETERMINATION** – in accordance with the Section 3.5. Fair Opportunity Exceptions, and if a Fair Opportunity Exception applies, the TO CO prepares the solicitation in accordance with the applicable regulations.
- **STEP 3: ISSUANCE OF THE SOLICITATION** – the TO CO issues the solicitation to PACTS contractors in the appropriate FC. The TORFP shall utilize a Standard Form (SF) 18, SF 1449, or Optional Form 347 as the cover sheet. The first sentence of the cover sheet should read: This TORFP is for services under your firm's Functional Category [insert appropriate Functional Category number here] PACTS award for the Department of Homeland Security (DHS), [insert the name of the ordering/requiring activity here].

- ☐NOTE: A copy of the solicitation must be provided to the PACTS PMO via email at PACTS@HQ.DHS.GOV.

- **STEP 4: PROPOSAL EVALUATION** – the TO CO receives and evaluates proposals in accordance with the Evaluation Plan.
 - Technical and cost/price evaluations are conducted by the Government evaluation teams designated according to the written evaluation plan. Negotiations may take place, if needed.
- **STEP 5: TASK ORDER AWARD** – the TO CO awards the TO to the successful offeror (contractor).

- **NOTE:** A copy of award documentation must be provided to the PACTS PMO via email at PACTS@HQ.DHS.GOV.

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- **STEP 6: NOTIFICATION TO UNSUCCESSFUL OFFEROR(S)** – the TO CO issues non-select notifications to the unsuccessful offeror(s). If requested by the offeror, the TO CO should provide explanation for the non-selection in accordance with G.4.8 of the base PACTS contract.

3.1.2 Multi-Phased Ordering Process

While it is anticipated that the traditional ordering process will be used for the majority of requirements under PACTS, a multi-phased approach is available for use when appropriate.

Under the multi-phased approach, the TO CO will issue a proposal request for a PHASE 1 brief technical proposal and price/cost estimate to the appropriate FC contractors. Subsequently, a down-select is conducted inviting only those offeror(s) remaining in the competition to submit a PHASE 2 full technical and price/cost proposal.

The multi-phased process provides three (3) major benefits. First, it allows the Government to focus the TO selection on the most qualified contractors. Second, it saves the Government significant time and expenditures associated with evaluating lengthy proposals from a large number of offerors. Third, it saves less qualified candidates significant time and expenditures in proposal costs. The following key steps provide guidance for the multiphase process:

- **STEP 1: TORP DEVELOPMENT** – Refer to section 3.1.1. Step 1.
- **STEP 2: PHASE 1 - MULTI-PHASE SOLICITATION/RESPONSE** – the TO CO reviews the TORP and prepares a TORFP for a Multi-Phased Technical and Cost/Price Task Order to be forwarded to the prime contractors within the designated FC.

The request may be for a written TO proposal, oral presentation, or both. If the PHASE 1 request includes a written TO proposal, the request would typically place a limit of no more than seven (7) pages for the response, which encompasses the proposed technical and management approach or the past performance/qualifications approach. It also includes past performance information.

○NOTE: Within the seven (7) pages, the offeror(s) should also include a preliminary estimate or Not-To-Exceed (NTE) estimate for cost/price.

The amount of time allowed for the PHASE 1 response is typically five (5) days, which may be adjusted based on the scope/complexity of the requirement and the needs of the requiring activity. The request may also include an oral presentation if it is determined to be beneficial to the evaluation.

Evaluation of the PHASE 1 proposals and estimates are conducted by the Government evaluation team designated in the written evaluation plan.

Based on the evaluation results, the TO CO performs a down-select that identifies the contractors that are most qualified to compete for the TO. Only the most qualified offeror(s) that are identified in the down-select process are invited to submit a PHASE 2 Full Technical and Cost/Price Proposal.

- **STEP 3: PHASE 2 – FULL TECHNICAL AND COST/PRICE PROPOSAL REQUEST** – the TO CO issues the solicitation for PHASE 2 proposals.
- **STEP 4: PHASE 2 – PROPOSAL EVALUATION** – PHASE 2 proposals and estimates are evaluated in accordance with Section 3.1.1., Step 4

- **STEPS 5 and 6: PHASE 2 – TASK ORDER AWARD AND NOTIFICATION TO UNSUCCESSFUL OFFEROR(S)** – Refer to Section 3.1.1, Steps 5 and 6.

3.2 Scope of PACTS Task Orders

Although an individual TO may only be identified under one FC, it may include a small portion of services from another FC. The TO CO, with the advice/assistance of the PACTS PMO (if requested), will determine the appropriate FC for a TO request. This determination will be based on the predominant work to be performed under the TO.

3.3 Fair Opportunity Exceptions

In accordance with FASA and FAR Part 16.505(b) (2), the TO CO will provide all awardees, within the appropriate FC, a fair opportunity to be considered for each order in excess of the micro purchase threshold, unless one of the conditions below applies:

- The agency need for such services is so urgent that providing a fair opportunity would result in unacceptable delays;
- Only one awardee is capable of providing the required services, at the level of quality necessary, because the services required are unique or highly specialized;
- The order must be issued on a sole-source basis, in the interest of economy and efficiency, because it is a logical follow-on to a TO already issued under this contract (provided that all awardees were given a fair opportunity to be considered for the original order) (see Note 1 below)
- For orders exceeding the simplified acquisition threshold, a statute expressly authorizes or requires that the purchase be made from a specified source

Note 1: If the order is a follow-on to a TO that was not issued under PACTS, or is a delivery order for which the PACTS awardees were not given the opportunity to compete, this exception CANNOT be used.

Note 2: Although one of the exceptions to fair opportunity procedures is that it is necessary to place an order with a particular vendor in order to satisfy a minimum guarantee, the minimum guarantees for all PACTS contractors are the responsibility of the PACTS PMO. This exception shall not be used for PACTS TOs.

3.3a Fair Opportunity Exceptions Procedures

The elimination of any PACTS contractor from contract competition requires a written rationale and is developed as a part of the TORP. The rationale must be written in accordance with the fair opportunity rationale. The TO CO, or other designated agency official, in accordance with agency regulations and in compliance with FAR 16.505(b) (2), must sign the exception rationale.

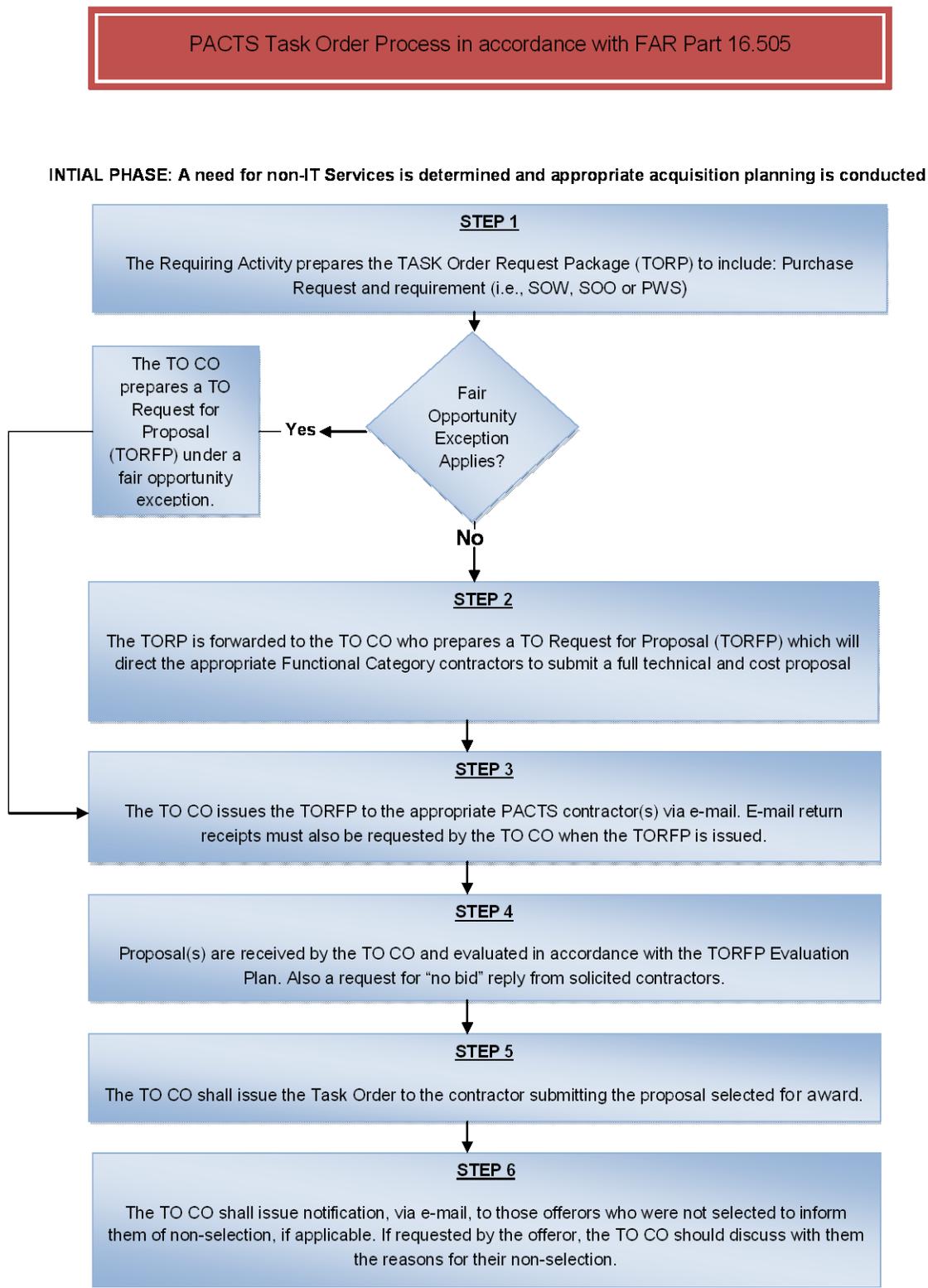
The TO CO should provide a courtesy copy of the exception to the fair opportunity rationale to the PACTS PMO (send to PACTS@HQ.DHS.GOV). If the PACTS PMO has any questions, they will be addressed to the TO CO directly.

3.4 Where to Locate More PACTS Contract Information

Non-DHS personnel may find additional information on PACTS Contracts on the DHS Internet website: <http://www.dhs.gov/xopnbiz/opportunities/>

DHS personnel may find additional information on the PACTS contract on the DHS Intranet – DHS Connect: <http://mgmt-ocpo-sp.dhs.gov/sites/epic/opo/Pages/PACTS.aspx>

Figure 1 - PACTS Task Order Process



<p>STEP 1</p>	<p>The Requiring Activity prepares the Task Order Request Package (TORP) to include: a purchase request and requirement (e.g., Statement of Work (SOW), Statement of Objective (SOO), or Performance Work Statement (PWS)) that includes, at a minimum, identification of specific task(s), place of performance, period of performance, deliverable(s)/delivery schedule, applicable performance standards, incentives, Government- furnished equipment and Information, and any special regulations, including applicable Section 508 requirements or exceptions; an Independent Government Cost Estimate (IGCE); technical evaluation plan and funding document. Also, to be included, if applicable:</p> <ul style="list-style-type: none"> • Statement identifying the basis for using an exception to the fair opportunity process; • Acquisition Plan/Streamline documentation (if required); • Specific security requirements and documentation (e.g., DD254). <p>Upon request of the Requiring Activity (Task Order (TO) Contracting Officer (CO) or Program Office), the PACTS Program Management Office (PMO) will assist with the development and the review of the TORP. The PACTS PMO can offer advice regarding the applicability of the work statement, the appropriate functional area of the work to be performed, whether or not the IGCE supports the SOW/SOO/PWS, adequacy of the evaluation plan/criteria, and appropriateness of the task order type.</p>
<p>STEP 2</p>	<p>The TORP is forwarded to the TO CO who prepares a TO Request for Proposal (TORFP) (either traditional or multiphase) determined appropriate by the TO Contracting Officer, to be issued to all of the PACTS contractors in that Functional Category, unless an exception to the fair opportunity applies.</p>
<p>STEP 3</p>	<p>It is recommended the TO CO issue TORFPs via e-mail, and request that responses be submitted in the same medium. Please include PACTS@HQ.DHS.GOV on all TORFPs issued via e-mail. The TO CO is responsible for verifying that all the PACTS vendors in the Functional Category have received the solicitation. TORFPs can be open for any length of time, PACTS recommends 10 business days for orders less than \$1 million and a minimum of 15 business days for orders \$1 million or more.</p> <p>The TORFP shall include, at a minimum, the following: TORFP identifier number, date of proposal request, identification of DHS Component customer, requirements document (e. g., SOW, SOO, or PWS), task order type (FFP/T&M/Labor Hour), proposal due date, DHS point-of-contact information (Contracting Officer/Specialist), and instructions for submission of a technical and cost/price proposal, and criteria/basis for award. Other information to be included, if applicable: request for special pricing data (related to travel or Other Direct Costs (ODCs), identification of incumbent contractor, and a request for “bid/no bid” replies from solicited contractors.</p>
<p>STEP 4</p>	<p>Responses received shall be evaluated using the evaluation criteria provided in the TORFP and in accordance with the technical evaluation plan. The TO CO will lead in any discussions or negotiations for the Government. After the completion of the evaluation process, the TO CO / TO COR shall prepare award recommendation package, which, shall include at a minimum: whether the solicitation was issued to all PACTS vendors in the Functional Category or an exception to the fair opportunity applied, the selection criteria / methodology used to evaluate the proposals, the results of the evaluation, and the rationale for the award recommendation, including a summary of any negotiations conducted, cost/price analysis and best value analysis.</p>
<p>STEP 5</p>	<p>The TO CO shall issue the task order to the contractor submitting the proposal selected for award. A copy will be sent to the PACTS@HQ.DHS.GOV mailbox.</p>
<p>STEP 6</p>	<p>After the task order is awarded, the TO CO shall issue notification, via email, to those Unsuccessful Offeror(s) to inform them of their non-selection for contract award. If requested by the Offeror(s), the TO CO shall discuss with them the reasons for their non-selection. The TO CO shall only discuss the reason(s) for non-selection. The TO CO shall not discuss other contractors’ proposals, compare contractors’ proposals, or allow a non-selected contractor access to the award decision documentation.</p>

4. Appendice

4.1 Appendix A. PACTS Contractor List

Functional Category	PACTS Contract Awardees	Contract Number	E-mail
FC1	Winbourne and Costas	HSHQDC-09-D-00011	PACTSFC1@winbournecostas.com
FC1	Klett Consulting Group	HSHQDC-09-D-00012	PACTSFC1@kcg-inc.net
FC1	Longview-FedConsulting	HSHQDC-09-D-00013	PACTSFC1@longview-inc.com
FC1	Teracore	HSHQDC-09-D-00014	PACTSFC1@teracore.com
FC1	Savvee Consulting	HSHQDC-09-D-00016	PACTSFC1@savvee.biz
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FC3	TAPE	HSHQDC-09-D-00032	PACTSFC3@tape-llc.com
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