

SOLICITATION, OFFER AND AWARD

THIS CONTRACT IS A WATER ORDER UNDER DPAS (15 CFR 350)

930-0085

1a | 63 PAGES

2. CONTRACT NO. PDC-0085-C-00-1141-00
 3. SOLICITATION NO. OP/W/CO-91-008
 4. TYPE OF SOLICITATION
 SEAL (D) BID (IF B)
 NEGOTIATED (RFPI)
 5. DATE ISSUED
 6. REQUISITION/PURCHASE NO. 1303008/1304002

7. ISSUED BY Agency for International Development
 Central Operations Branch
 Office of Procurement
 Washington, DC 20523-1428
 CODE
 8. ADDRESS OFFER TO (If other than Item 7)
PDFCU805

NOTE: In sealed bid solicitations "offer" and "offeror" mean "bid" and "bidder".

SOLICITATION

9. Sealed offers in original and See L.19(e) copies for furnishing the supplies or services in the Schedule will be received at the place specified in Item 8, or if handcarried, in the depository located in Section L.19 until 3:00 local time August 2, 1991
 (Hour) (Date)

CAUTION - LATE Submissions, Modifications, and Withdrawals. See Section L, Provision No. 52.214-7 or 52.215-10. All offers are subject to all terms and conditions contained in this solicitation.

10. FOR INFORMATION CALL: A. NAME Mr. James A. Jeckell
 B. TELEPHONE NO. (Include area code) (NO COLLECT CALLS) (703) 875-1170

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OFFER (Must be fully completed by offeror)

NOTE: Item 12 does not apply if the solicitation includes the provisions at 52.214-16, Minimum Bid Acceptance Period.

12. In compliance with the above, the undersigned agrees, if this offer is accepted within _____ calendar days (60 calendar days unless a different period is inserted by the offeror) from the date for receipt of offers specified above, to furnish any or all items upon which prices are offered at the price set opposite each item, delivered at the designated point(s), within the time specified in the schedule.

13. DISCOUNT FOR PROMPT PAYMENT (See Section 1, Clause No. 52-232.8)
 10 CALENDAR DAYS %
 20 CALENDAR DAYS %
 30 CALENDAR DAYS %
 CALENDAR DAYS %
 14. ACKNOWLEDGMENT OF AMENDMENTS (The offeror acknowledges receipt of amendments to the SOLICITATION for offerors and related documents numbered and dated)
 AMENDMENT NO. DATE AMENDMENT NO. DATE

15A. NAME AND ADDRESS OF OFFEROR
 CODE FACILITY
 MANAGEMENT SYSTEMS INTERNATIONAL
 600 Water Street, S.W., NBU 7-7
 Washington, D.C. 20024
 16. NAME AND TITLE OF PERSON AUTHORIZED TO SIGN OFFER (Type or print)
Lawrence S. Cooley
President

15B. TELEPHONE NO. (Include area code) (202) 484-7170
 15C. CHECK IF REMITTANCE ADDRESS IS DIFFERENT FROM ABOVE. ENTER SUCH ADDRESS IN SCHEDULE.
 17. SIGNATURE
 18. OFFER DATE
SEP 9 1991

AWARD (To be completed by Government)

19. ACCEPTED AS TO ITEMS NUMBERED Offer submitted 8/2/91 response to OP/W/CO-91-008 and BAPO ltr of 9/30/91
 20. AMOUNT \$4,074,116
 21. ACCOUNTING AND APPROPRIATION See Section G.2

22. AUTHORITY FOR USING OTHER THAN FULL AND OPEN COMPETITION:
 10 U.S.C 2304(c)(1) 41 USC 253(c)(1)
 23. SUBMIT INVOICES TO ADDRESS SHOWN IN (4 copies unless otherwise specified) ITEM See Section G.1

24. ADMINISTERED BY (If other than Item 7) CODE
 25. PAYMENT WILL BE MADE BY CODE See Section G.1

26. NAME OF CONTRACTING OFFICER (Type or print) Edward H. Thomas
 27. UNITED STATES OF AMERICA
 Edward H. Thomas
 (Signature of Contracting Officer)
 28. AWARD DATE 30 September 1991

IMPORTANT - Award will be made on this Form, or on Standard Form 26, or by other authorized official written notice.

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SECTION B
SUPPLIES OR SERVICES AND PRICES/COSTS

B.1 Supplies and Services

The Contractor shall furnish all necessary facilities, material, and personnel and shall perform all services necessary to carry out the scope of work identified in Section C. The purpose of this contract is to provide evaluation and related technical services to A.I.D. and cooperating country agencies for the design, implementation, and institutionalization of program performance information and evaluation systems and activities in support of effective strategic management of bilateral assistance toward the attainment of development results.

B.2 Estimated Cost, Fixed Fee, and Limitation of Funds

(a) FOR THE BASIC CONTRACT PERIOD

Total Estimated Cost	\$ 3,828,549
Fixed Fee	245,567
TOTAL ESTIMATED COST AND FIXED FEE (TECPFF)	\$ 4,074,116

(b) FOR OPTION I

Total Estimated Cost	\$ 3,028,389
Fixed Fee	193,149
TOTAL ESTIMATED COST AND FIXED FEE (TECPFF)	\$ 3,221,538

(c) OBLIGATIONS

Amount Obligated by this document	\$ 531,936
Total Amount Obligated for Contract	\$ 531,936

The Contractor shall not exceed the total amount obligated unless approved in writing by the Contracting Officer as provided in the clauses of this contract entitled Limitation of Funds and Option to Extend the Term of the Contract. It is estimated that the amount currently obligated will be sufficient to fund this contract through ~~TO BE COMPLETED AT THE TIME OF AWARD~~ February 28, 1992. E47

B.3 Budget

(a) The following itemized budget sets forth the fixed fee and estimated for reimbursement of dollar costs for individual line items of cost. Without the prior written approval of the Contracting Officer, the Contractor may not exceed the total.

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estimated cost set forth in the budget hereunder, or the obligated amount, whichever is less (see the clause entitled B.2 Estimated Cost, Fixed Fee, and Limitation of Funds). Without the prior written approval of the Contracting Officer (which must be retained by the Contractor for audit purposes, and a copy of which must be furnished to the A.I.D. COTR by the Contractor), the Contractor may not exceed the estimated dollar cost for any individual line item of cost shown by more than 15% of such line item, except for indirect costs (e.g., overhead, G&A, etc), which are governed Section B.6 entitled Advanced Understanding on Ceiling Indirect Cost Rates and Final Reimbursement for Indirect Costs. The fixed fee may be adjusted pursuant to the clause entitled H.14, Level of Effort.

(b) Itemized Budget

(i) For the period September 30, 1991 to September 29, 1994

The following is representative of the type of line items to be included in the negotiated budget.

<u>Cost Category</u>	<u>Amount *</u>
Direct Labor	\$ 887,110
Fringe Benefits	216,258
Overhead	397,213
Subcontract	1,424,690
Travel/Transportation & Per Diem	361,972
Other Direct Costs	283,750
Subtotal	\$ 3,570,993
G&A	257,556
TOTAL ESTIMATED COST	\$ 3,828,549
FIXED FEE	\$ 245,567
TOTAL ESTIMATED COST AND FIXED FEE (TECPFF)	\$ 4,074,116

* Refer to Attachment A - Budget Summary for budget amounts for each year of the contract period.

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(ii) For the period September 30, 1994 to September 29, 1996
OPTION I

<u>Cost Category</u>	<u>Amount *</u>
Direct Labor	\$ 735,989
Fringe Benefits	182,357
Overhead	330,605
Subcontract	1,152,648
Travel/Transportation & Per Diem	328,318
Other Direct Costs	97,500
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Subtotal	\$ 2,827,417
G&A	200,972
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TOTAL ESTIMATED COST	\$ 3,028,389
FIXED FEE	\$ 193,149
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TOTAL ESTIMATED COST AND FIXED FEE (TECPFF)	\$ 3,221,538

(c) The Contractor also agrees to furnish data which the Contracting Officer may request on costs expended or accrued under this contract in support of the budget information provided herein.

NOTE: The inclusion of a dollar amount for subcontract(s) and/or consultants in the aforementioned budget does not obviate the requirements of the clause of this contract entitled Subcontracts (Cost-Reimbursement and Letter Contracts), or of Section H of this contract for any prior written approvals required thereunder by the A.I.D. official indicated therein.

The inclusion of any costs in the above budget does not obviate the requirements for prior approval by the Contracting Officer of cost items designated as requiring prior approval by the applicable cost principles (see the clause of this contract entitled Allowable Cost and Payment), nor does it constitute a determination of allowability by the Contracting Officer of any kind of cost, unless specifically stated elsewhere in this contract or in a modification hereto.

The foregoing budget is based on the Contractor's proposal, which was accepted by A.I.D. through the award of this contract, and any negotiation thereof. The Contractor's proposal may be used to substantiate negotiated agreements between the parties to this contract, but shall not supersede any terms and conditions of this contract.

* Refer to Attachment A - Budget Summary for budget amounts for each year of the option period.

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B.4 Payment of Fixed Fee

At the time of each payment to the Contractor on account of allowable dollar costs, the Contractor shall be paid a dollar amount which is in the same ratio to the total fixed fee as the related payment being made on account of allowable dollar costs is to the total estimated costs, as amended from time to time; provided however, that whenever in the opinion of the Contracting Officer such payment would result in a percentage of fee in excess of the percentage of work completed, further payment of fee may be suspended until the Contractor has made sufficient progress, in the opinion of the Contracting Officer, to justify further payment of fee up to the agreed ratio; provided further, that after payment of eighty-five percent (85%) of the total fixed fee, the clauses of this contract entitled Allowable Cost and Payment and Fixed Fee will be followed.

B.5 Establishment of Indirect Cost Rates

Pursuant to the provisions of the clause of this contract entitled "Allowable Cost and Payment", a rate or rates shall be established for each of the Contractor's accounting periods which apply to this contract. Pending establishment of revised provisional or final indirect cost rates for each of the Contractor's accounting periods which apply to this contract, provisional payment on account of allowable indirect costs shall be made on the basis of the following negotiated provisional rate(s) applied to the base(s) which are set forth below:

Category _____ Base _____

Refer to Attachment B

The following indicates the applicable rates for the periods:

Category _____ YEAR 199X 199X 199x 199x 199x

Refer to Attachment B

The Contractor's fiscal year for which the rates are applicable is from _____.

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B.6 Advanced Understanding on Ceiling Indirect Cost Rates and Final Reimbursement for Indirect Costs

Notwithstanding any other provision of this contract, for each of the Contractor's accounting periods during the term of this contract, including any subsequent extensions thereto, the parties agree as follows:

- i. The bases for the indirect rates are as set forth in clause B.5 entitled Establishment of Indirect Cost Rates.
- ii. The Contractor will make no change in its established method of classifying or allocating indirect costs without the prior written approval of the Contracting Officer.
- iii. Reimbursement for indirect costs shall be at the final negotiated rates, but not in excess of the following ceiling rates:

<u>Category</u>	<u>Rate</u>
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Refer to Attachment C

The ceiling rates apply to the period of the contract and the exercise of any and all options hereunder, and subsequent modifications, if any.

- iv. The Government shall not be obligated to pay any additional amount on account of indirect costs above the ceiling rates established herein. Final indirect costs exceeding the rates applied to the base shown above shall be absorbed by the Contractor and considered cost sharing. Other U.S. Government agreements shall not absorb these costs
- v. This advanced understanding shall not change any monetary ceiling, cost limitation, or obligation established in the contract.
- vi. In the event final rates are lower than the provisional or ceiling rates established herein, the Government shall pay the lower rate.
- vii. A determination as to the adequacy and acceptability of the Contractor's accounting system has preceded the awarding of this contract. To the extent that the allocation and allowability of costs affects the agreement negotiated in this contract, it is understood and agreed that the Contractor shall make no change in this accounting system without the prior written approval of the Contracting

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Officer. Any agreement to modify or change, in any way, the Contractor's current method of allocating costs in the overhead, G&A, or other burdened center accounts is subject to negotiation.

B.7 Source of Funds

(a) The source of funding for this contract is the cognizant A.I.D. project office, and is hereinafter referred to as "core funding or funds." Such funding is intended for what is hereinafter referred to as the "core activities" portion of the project. However, A.I.D. anticipates that other A.I.D. Washington Bureaus and Offices and overseas Missions will require access to the resources and expertise developed by and under the core activities portion of the project (hereinafter referred to as the "core contract"), through what is hereinafter referred to as a "buy-in" to the project. A buy-in is the acquisition of services or reports and other deliverables from the Contractor which are related and complementary to, and within the scope and in furtherance of, the core activities being implemented under this contract.

(b) However, such buy-ins are not included under this contract. Instead, buy-ins shall be implemented under a companion requirements-type contract, number:

PDC-0085-Q-00-1142-00

B.8 Costs Reimbursable

In accordance with the clauses of this contract entitled Allowable Cost and Payment (FAR 52.216-07) and Documentation for Payment (AIDAR 752.7003), the Contractor shall, except to the extent specified in Section H.16, Logistic Support, be reimbursed in U.S. dollars for reasonable, allowable, allocable, and necessary costs incurred during the performance of this contract, subject to the clauses of this contract entitled Limitation of Cost (FAR 52.232-20) and Limitation of Funds (FAR 52.232-22), and other applicable terms and conditions of this contract. Costs billed under this contract shall not include costs allocable and chargeable to a delivery order issued under the contract identified in B.7 (b) of this contract. Costs shall be submitted on vouchers separate from vouchers submitted for any delivery order issued under the requirements contract.

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SECTION C
WORK STATEMENTC.1. TITLE

Program Performance Information for Strategic Management (PRISM)

C.2. OBJECTIVE

The objective of this contract is to obtain professional evaluation and related technical services for A.I.D. and cooperating country agencies to support the design, implementation and institutionalization of program performance information and evaluation systems and activities that are related to, and directly support, effective strategic management of bilateral assistance toward the attainment of development results.

C.3. BACKGROUND

Management excellence -- "doing fewer things, but doing them very well" -- has become a central theme in A.I.D.'s efforts to achieve development results. To manage strategically, i.e., to orchestrate diverse activities and priorities to achieve a significant development objective, managers need a sound and well-informed basis for assessing how well or poorly programs are performing, and their continuing relevance to the development problems being addressed.

During the mid-1980s, a major new emphasis on "strategic thinking" began to emerge in A.I.D., notably in the Africa Bureau (spearheaded by the emphasis on program impact under the Development Fund for Africa), and to varying degrees in other Regional Bureaus. This development corresponded to, and reinforced, a more general shift in emphasis from discrete projects targeted at alleviating specific problems and needs mainly in rural areas, to more coordinated programs (including projects, non-project assistance, policy reforms and related efforts) aimed at making a difference for overall country development.

Until these changes began to influence Agency programming, Missions had historically developed their assistance portfolios in a much more piecemeal fashion, tending to design and fund a diverse range of project activities aimed at discrete project results. These activities were loosely linked to, categorized under and justified in terms of the larger objectives identified by A.I.D.'s field Missions in 3 to 5 year Country Development Strategy Statements (CDSSs).

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Under the emerging approach, USAID Missions are deliberately reformulating their resources and activities as "tactics" aimed at a limited number of "strategic" objectives that, in turn, represent some significant development achievement in their respective countries (e.g., increased labor-intensive investment by the private sector, decreased infant mortality). While both the earlier and the more recent approaches are valid, there is a growing consensus that the "strategic" planning and management approach is generally more appropriate to the foreseeable development challenges, and to the anticipated levels of U.S. bilateral assistance and Agency staffing.

PPC/CDIE played a supportive role in efforts to adopt a new "strategic" approach. CDIE helped stimulate and elaborate the emerging concept of programming toward strategic objectives; provided technical advice on the selection of appropriate and practical indicators for measuring, monitoring and evaluating impact; supported the design of multi-project management information systems and their data requirements; and disseminated methodologies for evaluating program impacts.

In 1988, CDIE began more closely examining these expanding efforts to develop information systems for monitoring and evaluating program performance under a new strategic approach. It quickly became apparent that many of these efforts were being developed piecemeal; lacked consistency in orientation, methodology and standards; and sometimes seemed to be mainly "paper planning" exercises. In mid-1989, in close collaboration with the Regional Bureaus and other central offices, CDIE began providing more active leadership and coordination by initiating Program Management and Evaluation "Pilots" to develop model program performance information systems (PPIS) in three to four selected Missions in each region. In addition, A.I.D.'s Regional Bureaus introduced similar models to other Missions under their own auspices. By early 1990, 30 Missions had taken the first steps in designing program management information systems that would better enable these Missions to monitor and evaluate their program performance in terms of progress toward strategic objectives. The results of this experience were reviewed, and an initial Agency-wide synthesis was outlined, during an AID/W workshop sponsored by CDIE in February 1991.

These Mission-based PPISs developed since mid-1989 can be characterized as "bottom up" systems; that is, within the parameters of their respective Bureau objectives and policy priorities, Missions began selecting strategic objectives and performance indicators that were appropriately country-specific as distinct from being imposed "top down". Nevertheless, the February, 1991 workshop identified substantial commonalities among the 30 Missions in terms of similar strategic objectives and indicators for measuring program performance.

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The workshop also identified 1) a few cases in which Missions continued simply to assign activities in their assistance portfolios to program "categories" rather than genuinely reorienting them to a few strategic objectives; 2) objectives for which adequate indicators of performance were still elusive, controversial or difficult to operationalize (e.g., indicators of "democratization"); and 3) the need for continuing technical support to Missions to assist them in further refining and implementing their PPIS, and relating or linking them to information systems for monitoring and evaluating performance of specific interventions/activities (e.g., specific projects and non-project assistance).

Consolidating the linkages between information systems for tracking program performance and impacts related to strategic objectives, and information systems for monitoring the progress and results of specific interventions/activities is a fundamental aspect of PPIS design and use. The PPIS concept envisions a continuing iteration between the progress of specific activities and the strategic objectives these activities are designed to influence, and providing managers of specific activities the information that will help them assess if and how their activities are contributing to those objectives. For this reason, PPC/CDIE has continued to support the design of monitoring and evaluation (M&E) systems at the activity level, within a new framework of strategic management. These M&E information systems also provide essential data for use during evaluations.

In October, 1990, the Administrator of A.I.D. announced a new initiative to strengthen the role of evaluation in the Agency, as one element of an improved basis for policy and program decision-making, and for more convincing performance reporting and accountability to the U.S. Congress. An important aspect of this initiative focuses on improving the Agency's program performance monitoring by strengthening field Mission (and other operating unit) program management information systems, and by developing and implementing a new Agency-wide program performance tracking system. In December, 1990, the Administrator further announced an initiative to strengthen strategic management at all levels of Agency operations. The strengthened role of evaluation was designated as a key instrument for carrying out this management initiative.

To respond effectively to these initiatives, CDIE is required to substantially expand, build on and sustain its efforts during the next three years. Accordingly, CDIE expects to undertake the following:

1. A "horizontal" expansion of CDIE technical assistance to Bureaus, Missions, cooperating countries and participating organizations in creating and implementing performance information and evaluation systems to support strategic program management;

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2. A new "vertical" extension of its efforts by establishing a CDIE-managed Agency-wide program performance tracking system, in the form of a database of key performance indicators and related analytical and reporting activities, to serve senior management; and

3. Consolidation and institutionalization of the practice of informed strategic planning and management of assistance programs, through training, workshops, seminars and demonstrations; regular technical advice and support; issuance of guidelines on procedures, methodologies and techniques for monitoring, evaluation and PPIS development; expanding the understanding and practice of performance-oriented participatory formative evaluation of projects and programs to support effective action in the field; and refined procedures for information feedback and utilization in program decision-making.

C.4. SCOPE OF WORK

This project has three components corresponding to three related objectives. The contractor will undertake the tasks and complete the associated reports and deliverables identified under each component as follows:

a. Component 1: Support the Design and Implementation of PPIS in USAID Country Programs

The objective of this component is to install PPIS concepts and operation in all major USAID country programs, by

- o Initial design of PPIS in 20 USAID countries
- o Follow-up installation, implementation and refinement of PPIS in USAID countries that have designed these systems
- o Quality assessments and problem-solving reviews of PPIS in selected Missions in four geographic regions
- o Annual workshops to review and consolidate PPIS experience Agency-wide
- o Guidelines and training materials on PPIS development and evaluation planning to support strategic management
- o Development and implementation of effective procedures for cooperating country participation in Mission-sponsored strategic planning/management and PPIS design/implementation.

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Tasks and Related Reports/Deliverables

(1). First-Phase PPIS Design: The contractor will provide teams of 2-3 specialists each, working in concert with A.I.D. to initiate, design, organize and carry out a process for creating a PPIS in 20 USAID countries (first phase "TDYs"), and will provide a short (not to exceed 30 pages) written report describing the results of each TDY, due within 30 days after completion of the TDY. It is anticipated that the contractor will provide services to 20 Missions during the first two years of the contract. Typically, this task will require 3 weeks in each country and will involve facilitating a process of clarifying strategic objectives and related performance indicators; facilitating discussion of the linkages between strategic objectives and planned outcomes of existing interventions and activities in the country assistance portfolio (e.g., projects, nonproject assistance); initial formulation of plans for collecting and using program performance information; and provision of advice on organization, management and personnel implications of a PPIS. The scope of each PPIS design will include indicators of outcome and effectiveness of specific interventions/activities as well as linkages of these indicators to indicators of broader program performance relative to strategic objectives. Approximately 20 percent of the level of effort involved in the work of these teams will be directed to ensuring that gender and related equity considerations are incorporated into the selection of indicators, associated gender and distributional data requirements are specified, and existing or required data sources are identified. The team member representing a specialization in women in development may also represent a second specialization appropriate for PPIS formulation. The contractor will arrange a team planning meeting in advance of each country visit, in which A.I.D. representatives and/or contractors may participate.

(2). Follow-Up PPIS Implementation: The contractor will provide 2-3 person teams to USAID countries to assist in detailed PPIS development and operationalization (follow-up "TDYs"), and will provide a short (not to exceed 30 pages) written report describing the results of each TDY, due within 30 days of the completed TDY. It is anticipated that the contractor will provide services to 6 Missions in the first and second years, and to 16 in each subsequent year. Typically, this task will require 3 weeks in each country and will involve provision of the teams' technical services for facilitating reaffirmation/adjustment of strategic objectives; detailed elaboration of program performance (progress and impact) indicators; development of more detailed data collection and analysis activities related to strategic objectives, and identification of practical organizational locations for managing these activities; detailed examination of activity-level (e.g., project, non-project assistance) information systems designed for activity-level monitoring and management, and their relationship to

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program performance indicators and reporting; development and testing of management information systems (including automated systems); design of requirements for carrying out data collection and analysis, including mini-surveys and access to existing survey data; and assistance in formatting data for annual reporting to AID/Washington. Approximately 20 percent of the level of effort involved in the work of these teams will be directed to ensuring that gender and related equity considerations are incorporated into the selection of indicators and associated data disaggregation requirements. Beginning in the third year of this contract, the contractor teams will include in their level of effort the provision of two-days of refresher training in PPIS concepts and evaluation methods to field staff. The contractor will arrange a team planning meeting in advance of each country visit, in which A.I.D. representatives and/or contractors may participate.

(3). Regional PPIS Quality Reviews: The contractor will provide 1-2 person teams to support follow-up quality reviews in 3-4 USAID countries each in four geographic regions to be identified by A.I.D., for the purpose of assessing PPIS progress and identifying common problems/contraints in effective PPIS implementation. Typically, this task will require the teams to work for one to one-and-a-half weeks in each Mission consecutively. It is anticipated that one such review will be undertaken during the first year of the contract, and two per year in subsequent years. These teams will assess progress in designing and implementing PPIS, in the collection and analysis of data, and in the use of PPIS-generated information in decisions regarding program directions. A written report is not necessarily required, but the A.I.D. Project Officer may so direct.

(4). Intra-Agency PPIS Status and Results Workshops: Each year during the life of this project, the contractor will design, organize and facilitate a two-day workshop for approximately 35 participants. Typically, these workshops will be held in the 2nd calendar quarter in off-site locations to be arranged by the contractor in the Washington, DC area, for the purpose of reviewing and synthesizing Agency-wide status of PPIS development, implementation and reporting, as well as summarizing the substantive results of Agency-wide program performance reporting relative to Agency-wide strategic objectives. Within 15 days after each workshop, the contractor will submit a status report on the substance of the workshop proceedings.

(5). Systems Development: From time to time and at the direction of the A.I.D. Project Officer, the contractor will provide 2-person teams to provide technical assistance to A.I.D. in special systems development tasks related to evaluation and information applications in strategic management. For example, such teams

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might provide intensive assistance to Missions in systems development for priority strategic objectives or initiatives, such as in the natural resource management, democratic-initiatives, or women-in-development areas. Typically, each team will work for two weeks on such tasks in a field Mission. It is anticipated that four such teams will be required each year, beginning in the first year of the contract.

(6). PPIS Design Manual and Videotape: Following the first workshop, the contractor will draft and submit to the A.I.D. Project Officer proposed written guidelines for the development, design and operationalization of PPIS as a strategic planning/management tool. It is anticipated that these guidelines would not exceed 30 pages in length plus illustrative materials. Approximately 10 percent of the level of effort involved in preparing these guidelines will be directed to ensuring treatment of gender considerations in performance information. Following A.I.D. review and approval of these guidelines, the contractor will prepare a 30-minute videotape for use in training Agency and participating country professional staff in the design and application of PPIS, to be delivered within 180 days after approval of the guidelines. In the fourth year, the contractor will update the guidelines.

b. Component 2: Establish, Maintain and Operationalize an A.I.D. Program Performance Database (AidPROD)

The objective of this component is the creation of and support for an A.I.D. capacity to track comprehensively and to report succinctly, rapidly and usefully information on the performance of A.I.D.-assisted programs, by:

- o Design, test and annually update an A.I.D. database for tracking and summarizing key indicators (both quantitative and qualitative) of the performance and results of A.I.D. assistance programs, based on data and information from improved Agency program performance reporting.
- o Prepare summaries, syntheses and other analyses of A.I.D.-sponsored evaluations and the Database as a basis for reports to senior management on program performance.
- o Install rapid and cost-effective methods for networking the exchange of program performance information/data
- o Develop and apply state-of-the-art techniques for formatting and presenting program performance data to senior managers.

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- o Selectively relate the Database with program performance and country trend indicator data contained in other centrally-managed databases/information or reporting systems.
- o Develop and recommend guidelines and standards for progress and performance reporting by Bureaus and Missions as required to enhance the utility of the Database to senior managers.
- o Demonstrate to USAID cooperating countries the feasibility and utility of program performance information in supporting senior-level policy and program decision-making.

Tasks and Associated Reports/Deliverables

(a). Design and Implementation of Database: Beginning in the first year of this contract, and under the technical direction of the A.I.D. Project Officer, the contractor will manage the design, operation and maintenance requirements for the "A.I.D. Program Performance Database" (AidPROD), to include quantitative indicators as well as qualitative indicators and related documented performance/evaluation information that can be searched through automated means. This Database will be designed to enable A.I.D. to track and summarize information on the performance of assistance programs relative to specific development objectives. It is anticipated that this Database will be built initially on Mission-developed PPIS reporting of quantitative indicators of program-level performance as well as selected evaluation and audit reports, and will subsequently phase in additional quantitative and qualitative information on intervention/activity-level performance, possibly including A.I.D. completion reports on project/non-project activities. Successful implementation of this task will require the contractor to become thoroughly familiar with the contents of USAID country PPISs; up to 6 centrally-managed A.I.D. databases and knowledge-bases (e.g., DIS, ESDS, Child Survival, micro-enterprise, trade and investment, women in development); and the contents of up to 100 reports (e.g., evaluations, audits, project completion reports) to be specified by the Project Officer and which the contractor will review, summarize and synthesize for inclusion in AidPROD. The contractor will assist A.I.D. in securing annual Mission reports on program performance from PPIS, reports/data from up to 6 other Agency databases and knowledge-bases, and project completion reports, together with appropriate documentation, for the purpose of developing and maintaining AidPROD.

(b). Development of Automated Data Exchange: In the first year of this contract, the contractor will initiate the design and testing of computer-based networks between USAID country PPIS and the Database, including direct electronic data transfer or systematic two-way exchanges of diskettes containing indicator data

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on program performance. By the end of the second year of this contract, the contractor will deliver a computer-based indicator data exchange system with up to 10 Missions. If accepted by the Project Officer, the contractor will extend this exchange to up to 50 Missions in subsequent years.

(c). Annual Program Performance Reporting: The contractor will annually undertake and present to the Project Officer a report containing the results of a comprehensive analysis of program performance trends, to be delivered no later than August 15 of each year. This analysis will be based on data and information drawn from the following AidPROD sources as these are developed: (1) program performance indicator data; (2) other documented reports containing information on project and program performance (e.g., evaluations, audits, project completion reports). The contractor will respond in a timely manner to other requests by the Project Officer for reports from AidPROD. To support oral briefings by A.I.D. staff on the basis of these reports, the contractor will prepare handouts, overhead slides and other presentation materials for up to four briefings annually for A.I.D. senior management, congressional committees, OMB, host country representatives, other donor agency representatives, and other key audiences interested in A.I.D. program performance. Successful implementation of this task will require the contractor to introduce and apply effective methods of data research, integration, summarization, aggregation, analysis and presentation, including as appropriate gender disaggregated data. The contractor should also be prepared to suggest alternative modes of statistical, information and graphic presentation that will bring out and display development trends in USAID countries, trends in program performance indicators and findings from information contained in AidPROD, and indications of the relationship between these trends and A.I.D. assistance activities and resources.

(e). Information Networking: Under the technical direction of the A.I.D. Project Officer, the contractor will selectively network the Database with program performance and country trend indicator data contained in up to 6 centrally-managed Agency databases and knowledge-bases.

(f). Performance Reporting Vehicles: During the first year, under the direction of the CDIE Project Officer, the contractor will review the status of, contents of and consistency within A.I.D.'s Project Activity Completion Reports (PACRs), A.I.D.'s program performance reporting vehicles (e.g., "Assessment of Program Impact" (API) reports in the Africa Bureau), and selected final evaluations prepared by A.I.D. operating units. The contractor will prepare recommendations regarding guidelines and standards for program-level and activity-level (e.g., project, non-project assistance) progress, performance and evaluation reporting by Agency operational units as may be required to enhance the utility, comparability and scope of the Database. Recommendations on PACRs will be delivered within 12 months, and remaining recommendations within 24 months.

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c. Component 3: Support the Use of Evaluation and Performance Information in Strategic Management of Country Assistance Programs

The objective of this component is the institutionalization of effective A.I.D. practice in applying monitoring and evaluation procedures/approaches and utilizing information on the performance of programs and activities in strategic management of country assistance programs, by:

- o Instill via training workshops an understanding of and provide skills in the development, refinement and use of program performance information systems (PPIS) and related data requirements to support strategic management.
- o Provide through training workshops practical skills to A.I.D. and counterpart staff in performance-oriented monitoring and evaluation systems and methods, including 1) methods for evaluating the effectiveness, efficiency, relevance, sustainability and impacts of activities/interventions, and 2) potential applications for "Fourth Generation" evaluation techniques.
- o Recommend guidelines and manuals on the design and use of program information, monitoring and evaluation systems and methods to support strategic management.
- o Design and disseminate appropriate data collection and analysis techniques (including surveys and rapid, low-cost methods) for application to PPIS operation, monitoring and evaluation.
- o Periodically review the quality of A.I.D.-sponsored evaluations in providing evidence of performance in selected areas and topics of concern to CDIE and senior management.
- o Disseminate and apply innovative or improved methods and techniques for monitoring, evaluation and performance information activities. In addition to aforementioned training workshops and guidelines, this includes developing guidance materials and short reports on specific problems, conducting seminars and providing demonstrations for A.I.D. organizations and cooperating country agencies/counterparts to instill and support the strategic monitoring, evaluative and analytic activities previously mentioned.

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Tasks and Associated Reports/Deliverables

(a). Design and Conduct PPIS Training Workshop: Within 9 months, the contractor will design and pilot test in the metropolitan Washington, DC area a one-week training workshop for up to 35 participants on the development and operation of program performance information (PPIS) systems, and related requirements for analyzing, reporting and presenting performance information to support strategic management. Approximately 10 percent of the level of effort to be involved in workshop design will be directed to incorporating gender and related equity requirements in data collection, analysis and operationalization. The design will include development of a standard workshop curriculum and audio-visual aids. Beginning in the second year and continuing through the third year, the contractor will present this workshop in four regional locations to be identified by the Project Officer. During the third, fourth and fifth years, the contractor will incorporate selected modules from this workshop into the level of effort of teams undertaking the TDYs described in Component 1.

(b). Design and Implement Monitoring & Evaluation (M&E) Workshop: Within 20 months, the contractor will design and pilot test in the metropolitan Washington, DC area an integrated set of modules that together constitute a two-week workshop for up to 35 participants on the monitoring and evaluation of projects, non-project activities and programs. This workshop will cover 1) requirements for monitoring, evaluating and reporting on the effectiveness, efficiency, sustainability, relevance and impacts of donor-assisted development activities; and 2) potential applications and techniques of state-of-the-art "Fourth Generation" evaluation. The workshop will place these requirements and applications in a framework that emphasizes their role in supporting the strategic management of activities toward achieving development results. When the workshop is presented in a collaborative setting, it is anticipated that this emphasis will help relate M&E to a larger process of collaborative strategic planning and management. Successful accomplishment of this task will require the contractor to be experienced in the design and implementation of evaluation in developing country settings; to be thoroughly familiar with the techniques of Fourth Generation evaluation; to be able to apply concepts of and to facilitate strategic planning/management processes, techniques and tools; to draw on case studies of the use of participatory evaluation and collaborative strategic planning of projects and programs; to incorporate the application of appropriate data collection and analysis techniques, including rapid, low-cost methods; and to be thoroughly familiar with the most recent A.I.D. guidelines on requirements and formats for reporting activity status, progress, performance and evaluations, including any revision of Project Activity Completion Report (PACR) guidance. Approximately 10 percent of the level of effort involved in this task will be directed to treatment of gender and equity considerations in monitoring and evaluation systems and procedures.

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During the third and fourth years, the contractor will present selected modules for up to one-week workshops in two regional locations each year. The contractor will also introduce selected modules from this workshop into the level of effort of TDY teams described in Component 1 above.

(c). M&E Manuals: By the end of the second year, the contractor will draft a basic manual containing "generic" guidelines on monitoring and evaluation methods and techniques appropriate for development projects, non-project activities and programs (it is anticipated that this manual would not exceed 50 pages plus illustrative materials/case examples). Approximately 10 percent of the level of effort involved in preparing this manual will be directed to ensuring treatment of gender considerations. Following review by A.I.D., the contractor will prepare a final draft for A.I.D. publication and dissemination. During the third, fourth and fifth years, the contractor will work with A.I.D. to tailor and draft guidelines for evaluation of activities in up to six areas of major program emphasis (e.g., trade and investment, micro-enterprise, family planning, women in development).

(d). Evaluation Synthesis: By the end of the third year, the contractor will prepare and deliver a synthesis of approximately 300 A.I.D.-sponsored evaluations, to assess the quality of these evaluations with reference to no more than seven selected themes/issues identified by the Project Officer.

(e). Priority Evaluation Applications and Technical Support: At the technical direction of the Project Officer, the contractor will provide short-term, problem-solving technical assistance, on a selective basis, in data collection, analysis, and evaluation methods for Missions, Bureaus and cooperating country organizations/counterparts through reviews in Washington, DC and short TDY's to the field. Assistance will be targeted on high priority requirements that can provide a basis for more widely applicable guidance through written reports, training materials, seminars and demonstrations. Assistance will focus on improving evaluation designs and processes, innovative monitoring and evaluation applications, and data collection and analysis for strategic planning and management.

C.5. PROJECT MANAGEMENT

Contractor selection criteria place significant weight on the contractor's capacity to provide and manage rapidly and efficiently the appropriate specialists for the tasks described above. The nature of the PRISM project poses several challenges which make the contractor's proposed management structure and linkages to sources of experienced, state-of-the-art technical resources in the U.S. and developing countries particularly important.

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In developing this project, A.I.D. has carefully considered each component as well as the need for interaction between the three components. The clear intent of the tasks under each component is to support the distinct objective of that component, and to ensure the integrity of technical assistance and related activities necessary to meet the objective. The management structure responsive to this design would place a discrete management unit in charge of each component. The leaders of each component would then comprise the main project team.

At the same time, cross-fertilization of the work in one component to the next is essential. For example, the development of country-based PPIS will need to be related systematically to the development and operationalization of AidPROD. Similarly, training workshops and guidelines under Component 3 need to reflect and support ongoing PPIS development. To ensure this interaction among the components, as well as to ensure the day-to-day organization of tasks and key events, the contractor would have to provide a project director to manage the project as a whole.

With these considerations in mind, proposals should contain statements of management structure that either follow the following guidelines or satisfy the foregoing concerns in equally manageable and accountable ways:

-- Each of the three components shall be managed as a distinct sub-project.

-- The overall project will be managed by a project director, who will coordinate and oversee the work of each of the three components.

C.6. STAFFING REQUIREMENTS

The contractor will provide all the necessary labor to perform the statement of work. The contractor will provide report preparation and administrative and support services as required to ensure complete performance of tasks (coding and entering data, information searches, preparing and light editing of reports, preparing visual aides, organizing and facilitating arrangements for workshops and seminars, and providing other word processing, graphics development and office assistance). The contractor will ensure that staff assigned to this contract maintain a high level of proficiency through its own training, diagnostic and professional support resources.

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Given both the complexity and the interrelatedness of the tasks to be performed, it is anticipated that the contractor may wish to assemble personnel requirements to include a group of "core staff" (to include "key personnel" identified in Section H.15) who would serve on a continuing basis on the project, and would constitute the "project team" capable of providing both management and substantive input to the performance of the contract; and other specialists who would serve on a part-time, short term or exceptional basis on the project. This approach would enable the contractor to arrange in a timely way the best combination of technical and professional services tailored to the specific topical and analytical needs of each task and sub-task, within a continuing framework of consistent and experienced leadership.

Particularly for the performance of tasks under Component 1, the work of the teams will likely cover most technical areas of the Agency's operations, and the provision of experienced, timely and appropriate technical expertise will be critical for the utility and credibility of each PPIS system produced, as well as the quality of data ultimately generated from all those systems. At the same time, each team needs to operate within a consistent philosophy that emphasizes the importance and value of strategic management. To ensure this consistency, the TDY teams need to include personnel who effectively represent this philosophy, guide the team's efforts and skillfully facilitate a process for instilling and putting into operation the concept of strategic management.

Several workshops are to be held in the performance of this contract. The contractor will provide senior-level personnel skilled in facilitating workshop proceedings and resource persons and/or presenters relevant to the purpose of each workshop, as well as communications, audio-visual and logistical support personnel for each workshop event.

Staffing will be broken down into Project Team (seven positions) and technical support staff. Other than the qualifications set forth in (b) hereunder, specific positions or qualifications cannot be provided for the technical support staff.

(a) Project team-Job descriptions and statements of qualifications:

IT IS ANTICIPATED 1) THAT ONE OF THE COMPONENT LEADERS WILL SERVE AS THE PROJECT MANAGER OR 2) THAT NO MORE THAN TWO INDIVIDUALS WILL BE ASSIGNED TO PERFORM THE DUTIES OF THE COMBINED POSITIONS OF PROJECT MANAGER AND ONE OF THE COMPONENT LEADERS. THE DUTIES OF THE PROJECT MANAGER AND THE COMPONENT LEADERS ARE IDENTIFIED ON A POSITION BASIS. THE CORE TEAM WILL CONSIST OF SEVEN POSITIONS, SEE SECTION H.14, LEVEL OF EFFORT.

(1) Project Director (Senior Evaluation Researcher or Senior Management Information Specialist)

-- Takes overall responsibility for the direction and

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implementation of the project at both the administrative and substantive levels. Directs the preparation, implementation and review of the annual workplans.

-- Is the primary liaison with the A.I.D. Project Officer. Ensures that reporting and delivery requirements are met.

-- Ensures that technical and professional staff assigned to work on the performance of tasks under this contract collaborate effectively with A.I.D. staff in the U.S. and on field assignments.

-- Provides substantive and administrative coordination for project components.

-- Oversees the development of workshops and ensures their effective organization and implementation.

-- Ensures that other core staff for the project receive training, diagnostic and other skills development support as may be required to enhance task performance.

Qualifications:

-- Proven outstanding ability to coordinate and manage complex activities, including recruitment and fielding of management consultant and/or evaluation study teams.

-- Proven expertise in the field of management consulting, design of program monitoring and evaluation systems, and/or development and implementation of information systems for strategic planning and management, as demonstrated by previous employment experience in this area (especially as it relates to developing countries and/or work with bilateral or multilateral assistance donors) and related concrete achievements.

-- Experience in designing and implementing evaluation studies in developing country settings.

-- Demonstrated knowledge of institutions, associations and other sources of relevant technical and professional expertise particularly in the areas of research design; monitoring and evaluation of social and economic development programs; strategic management; organizational development; and data collection and analysis techniques.

-- M.A. or PH.D. level training in policy analysis, economics, social science, operations research, management or public administration. Specific training and experience in analyzing service organization and delivery, program and project management, and/or institutional development and operations. Extensive experience in conducting management analysis, organizational

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analysis, operations research and/or evaluation in developing country settings.

Leader, Component 1 (Senior Evaluation Researcher or Senior Management Information Specialist):

-- Manages recruitment of, and provides administrative support to, technical and professional personnel to serve as team members.

-- Provides technical and substantive direction to team personnel, and reviews team reports prior to submission to A.I.D.

-- Schedules and organizes team planning meetings

-- Establishes and maintains liaison with Missions prior to, during and following PPIS team visits, and informs the Project Officer of emerging issues, concerns and problems.

-- Participates in at least one regional PPIS quality review mission annually.

-- As appropriate, manages recruitment and contracting of technical support from host country individuals and institutions.

-- Ensures the preparation of recommended guidelines on PPIS, appropriate revision of these guidelines, and coordination of these guidelines with PPIS training workshops.

-- Oversees the organization and implementation of annual A.I.D. workshops on the status and results of PPIS development, and the preparation/submission of a summary annual report on the proceedings.

-- Ensures the production of a videotape or equivalent tape-slide presentation on PPIS development.

Qualifications:

-- Demonstrated ability to assemble, orient, manage and support teams of technical and professional personnel for work in developing country contexts within short planning and implementation time frames.

-- At least 5 to 7 years of experience working in the field of international development.

-- Proven experience in designing and implementing management information systems and/or evaluations in developing countries.

-- Demonstrated exceptionally strong skills in communication and group process facilitation, including experience in working and communicating effectively with senior host country representatives

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in organizational and management development work. Foreign language skills, preferred.

-- M.A. or Ph.D. level training in social sciences, economics, policy analysis, operations research, management or public administration. Related training in information systems for program management and/or strategic planning and computer applications preferred.

(2) Leader, Component 2 (Senior Evaluation Researcher, Senior Program/Policy Analyst, or Senior Management Information Specialist)

-- Conceptualizes, develops and tests the basic architecture of AidPROD, and manages the acquisition, incorporation and operationalization of data and information on program performance in the Database.

-- Provides information and guidance as to the validity, timeliness and appropriate formatting of data, including computer-based graphics, in order to promote its effective use and dissemination. Recommends and demonstrates alternative modes and formats for presenting information/data.

-- Manages the activities of the Technical Assistant assigned to maintain and operationalize the Database.

-- Contributes substantively to the operationalization of data and information on program performance, and the summary and analysis of this information.

-- Ensures the preparation of an annual report on program performance, and responds to requests from the Project Officer for reports from the Database.

-- Ensures provision of handouts, presentation boards and related visual aides to support oral briefings on program performance.

-- Establishes and maintains liaison with other A.I.D. offices that manage databases and knowledge-bases containing indicator data and other information on program performance. As appropriate, secures data for incorporation into AidPROD.

Qualifications:

-- Extensive experience in building and managing multi-source and multi-sector databases, including automated databases.

-- Demonstrated skills and experience in conceptualizing computer programming requirements for management of databases containing qualitative and quantitative data.

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-- Strong experience in research and data analysis related to international development, and the development of state-of-the-art strategies for summarizing and presenting information for management use.

-- Excellent writing and communication skills.

-- At least 5 years of experience in program/project evaluation in the field of international development and/or in designing management information and evaluation systems in developing country settings.

-- Familiarity with A.I.D.'s program planning, implementation, reporting and review processes is preferred, in order to support the identification of key documents containing performance information, and to conceptualize how the Database can best inform strategic programming and policy decisions.

-- M.A. or Ph.D. level training in social sciences, management, or computer sciences with emphasis on information systems for program/project planning, management and/or strategic planning and/or application and use of statistical and analytical software.

(3) Leader, Component 3 (Senior Evaluation Training Specialist)

-- Oversees the design and production of training workshops, ensuring the pilot-testing of workshops in the Washington, DC area prior to their application in the field.

-- Establishes and maintains liaison with other Agency units concerned with staff training and skills development in the areas of program management and evaluation.

-- Identifies and secures the services of experts for presentations on program M&E, evaluation design and methods, and strategic planning.

-- Manages the production of workshops and workshop modules in the field, including regional workshops and their foreign language requirements, and coordinates with Component 1 teams to incorporate the presentation of modules in team levels of effort.

-- Contributes substantively to, and ensures the preparation of, a manual on M&E.

-- Contributes substantively to the contents of the videotape on PPIS developed under Component 1.

Qualifications:

-- Outstanding ability to develop and organize training workshops for application in international as well as domestic

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settings, as demonstrated by recent employment and concrete accomplishments.

-- Experience in evaluating developing country projects and programs, designing and implementing monitoring and evaluation systems for program management, designing formative and summative evaluation studies, and applying qualitative and quantitative methods.

-- Exceptionally strong skills in communication and group process facilitation.

-- M.A. or Ph.D. level training in the social sciences or management, with specific emphasis on social or economic research methods, evaluation methods, information applications in strategic planning and management, or operations research.

(4) PPIS Development Specialist(s) (Evaluation Researcher, Program/Policy Analyst, Management Information Specialist)

The specialist(s) will participate directly in most Phase I TDYs described under Component 1, and in follow-up TDYs during the final three years; will be responsible for ensuring the preparation of reports on the results of each TDY; and will participate/collaborate in other tasks as deemed necessary by the Project Director.

Qualifications:

-- A minimum of 2 to 3 years experience in program analysis and/or program evaluation in the international development field, including work in developing countries, or experience in analyzing management problems in government or donor organizations and working as a management consultant to find solutions, in indicator development, data collection techniques.

-- Demonstrated excellent skills in communication and group process facilitation.

-- Foreign language skills (e.g., French, Spanish), preferred.

-- M.A. or Ph.D. level training in social sciences, business management, public administration or economics.

(5) Technical Assistant (Information Management Specialist or Computer Analyst)

The Technical Assistant will organize and maintain day-to-day requirements for the Database.

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-- At least 2 years of experience in program planning and analysis in the international development field or with a development assistance institution.

-- Strong knowledge and skills in computer data systems maintenance and programming, statistical analysis, and automated reporting and presentation (e.g. SAS, Word Perfect, Lotus, DBase, Harvard Graphics).

-- B.S. or M.S. level training in social sciences, computer sciences, statistics, or equivalent technical school certificate with 5 years work experience in computer sciences and management of statistical data.

(6) Administrative Assistant (Management Assistant)

The Administrative Assistant will provide support for travel, logistical, communications, and back-up requirements for the performance of tasks, particularly those associated with Component 1; for the maintenance of activity and expenditure tracking; and for the processing and distribution of required reports. A minimum of 3 to 5 years experience in administrative/secretarial work is required. Experience in performing these tasks for work with bilateral or multilateral donor agencies is preferred.

Personnel encumbering the positions specified above are considered to be essential to the work being performed hereunder. All personnel encumbering these positions must be individually approved by the A.I.D. Project Officer prior to the actual assignment. Prior to diverting any of the specified individuals to other programs during the contract, the contractor shall notify the Contracting Officer reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the project. No diversion shall be made by the contractor without written consent of the Contracting Officer; provided that the Contracting Officer may ratify in writing such diversion and such ratification shall constitute the consent of the Contracting Officer and the Project Officer not later than 30 days after the diversion of any of the specified individuals. Failure to comply with these terms may be considered nonperformance by the Contractor. The listing of key personnel may, with the consent of the contracting parties, be amended from time to time during the course of this contract to either add or delete personnel, as appropriate.

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(b) Technical Support Staff- Job descriptions and qualifications:

(1) General: The contractor shall provide other personnel with specialist skills in areas needed for the complete and successful performance of the statement of work, subject to the approval by the A.I.D. Project Officer of the utilization of all professional and managerial personnel whose salaries or fees will be charged as a direct cost to the contract. Especially given the need to arrange for field-based data collection efforts during PPIS design and implementation and the organization of workshops in the field, the contractor may utilize cooperating country personnel (e.g., foreign nationals) and/or institutions subject to the requirements of this contract.

(2) Identification, Selection and A.I.D. Approval: Candidates for other personnel shall be submitted by the contractor to the A.I.D. Project Officer not later than 15 working days after the A.I.D.-approved determination of a scheduled need for such personnel. Failure to do so may be considered nonperformance by the contractor. The A.I.D. Project Officer retains the right to refuse personnel proposed if they are not technically qualified or appropriate, and to request that additional candidates be proposed. The contractor will be notified at least 3 weeks prior to the initiation of any TDY.

(3) Continuity and Priority Qualifications: It is expected that the contractor will ensure that, to the extent feasible, there is continuity of other personnel throughout the performance of tasks under Components 1 and 2. The offeror is asked to identify other personnel for these components, who would provide for such continuity.

(a) For Component 1, it is anticipated that the composition of teams will vary somewhat depending on differences in sectoral program emphases between Missions and other entities ("clients") receiving team technical services, and that other personnel provided by the contractor will include, inter alia, specialists with experience in or familiar with one or more sectoral program areas in which A.I.D. operates. In addition, it is expected that specialists in women in development will be well-represented in team composition. However, the objective of Component 1 is not to provide expert advisors in all possible sector/subsector program areas. Rather, the principal emphasis should be placed on providing other personnel having a demonstrated ability to work creatively with technical, program and management clients in such a way as to elicit and organize the client's own expert knowledge, interests and commitment. Sector/program experience is important primarily to the extent that it contributes to the effectiveness and credibility of other personnel in carrying out this priority requirement. (There may be instances when exceptional expertise will be required for the successful accomplishment of tasks or subtasks; these instances are anticipated to be unusual, and would be handled through the

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contractor's provision of consultants). For this purpose, other personnel should have at least three of the following priority qualifications:

-- Five to ten years' experience in social, economic or operations research and design, program analysis and/or management consulting.

-- Experience in designing data specifications and implementing data collection through techniques appropriate to developing country settings.

-- Experience in designing or applying automated database/information management systems

-- Five to ten years' experience working in developing country settings

-- Experience in information applications in program management.

-- Experience in facilitating problem-solving processes, especially in multi-disciplinary and multi-technical settings.

-- Demonstrated evaluation, analytical and/or statistical skills.

-- Strong communication skills.

(b) For Component 3, other personnel provided should have strong backgrounds in program monitoring and/or evaluation, organizational or management development, strategic planning, and/or information management. Overseas experience or work in developing countries is not required in all cases. The objective of Component 3 involves some new applications of evaluation methods and information uses for program management. It is anticipated that services of specialists with U.S. or other developed country expertise may be required to introduce these applications.

(4) Other Qualifications: In addition to the above, other technical and professional personnel should have the following qualifications:

(a) Demonstrated ability to write clearly, succinctly and analytically.

(b) M.A. or Ph.D. level training (or equivalent in combined education and experience) in a discipline or multi-disciplinary program with a specific emphasis on one of the following areas of specialization:

-- Management Analysis, Institutional Analysis, and Operations Research

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- Management Information Systems
- Information Management Methods and Information Applications (including computer applications)
- Evaluation Research
- Social Science Research
- Rapid Appraisal Techniques
- Survey Research
- Ethnographic Methods
- Statistical Analysis
- Economic Analysis
- Environmental and Natural Resources Management Analysis (including sustainable agriculture)
- Gender/Women in Development Analysis
- Private Sector Analysis
- Program and Policy Analysis

The A.I.D. Project Officer will work closely with A.I.D. Women in Development policy staff to ensure that gender concerns are sufficiently covered in technical assistance TDY's and other project activities, and that appropriately trained and skilled gender specialist are utilized.

(Note: The offeror may propose a few junior analysts and research assistants in the above areas if they have formal academic training at the B.A. or B.S. level with requisite developing country experience).

C.8. EQUIPMENT/SOFTWARE PURCHASES

(a) It is anticipated that A.I.D. will approve, subject to the budget constraints of this contract, the purchase of ADP equipment, and appropriate software, to carry out the requirements of the statement of work. The tentative equipment list shall include software and hardware updates to the existing machines in A.I.D. (including 2 laser printers), up to 7 workstations to support the work of on-site contractor personnel, and 2 laptops to support fieldwork. A.I.D. reserves the right to seek technical advice from

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additional sources (at no cost to this contract) on hardware configuration and software selection.

(b) All equipment/software procured for use under this contract shall be subject to the prior approval of the A.I.D. Project Officer and the Contracting Officer. The contractor shall purchase equipment/software under this contract in accordance with appropriate regulations and competitive requirements.

It is anticipated that A.I.D. will provide 600 square feet of office space, together with basic office furnishings (including telephone) in a normal working environment, for use by 7 contractor personnel (including Key Personnel) working on-site, in an A.I.D. location in the Washington, D.C. metropolitan area. The contractor is responsible for providing facilities and equipment as may be required for other personnel provided by the contractor.

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SECTION D
PACKAGING AND MARKING

D.1 Reports

Pursuant to the clause of this contract entitled, Reports (AIDAR 752.7026), the cover page of all reports prepared by the Contractor shall include a descriptive title, the author's name(s), the project name, the project number, the contract number, the Contractor's name, the name of the A.I.D. Project Office, and the publication or issuance date of the report.

D.2 Supplies and Commodities

Any supplies or equipment/commodities purchased and shipped or provided by the Contractor hereunder shall be marked in accordance with the clause of this contract entitled, Marking (AIDAR 752.7009). Unless otherwise specified, all commodities shipped overseas shall be in accordance with the supplier's standard export packaging.

THIS APPLIES TO CORE CONTRACT ONLY**SECTION E
INSPECTION AND ACCEPTANCE****E.1 Responsible Official**

In accordance with the clauses of this contract entitled Inspection of Services - Cost Reimbursement and Limitation of Liability - Services, inspection and acceptance of all services and supplies required hereunder shall be made only by the cognizant Contracting Officer's Technical Representative as specified in Section G of this contract. No other official has been delegated this authority. Inspection of services and supplies by the cognizant COTR shall form the basis for payments to the Contractor.

**E.2 Inspection of Services - Cost Reimbursement (APR 1984)
FAR 52-246.5**

(a) Definition. "Services," as used in this clause, includes services performed, workmanship, and material furnished or used in performing services.

(b) The Contractor shall provide and maintain an inspection system acceptable to the Government covering the services under this contract. Complete records of all inspection work performed by the Contractor shall be maintained and made available to the Government during contract performance and for as long afterwards as the contract requires.

(c) The Government has the right to inspect and test all services called for by the contract, to the extent practicable at all places and times during the term of the contract. The Government shall perform inspections and tests in a manner that will not unduly delay the work.

(d) If any of the services performed do not conform with contract requirements, the Government may require the Contractor to perform the services again in conformity with contract requirements, for no additional fee. When the defects in services cannot be corrected by reperformance, the Government may (1) require the Contractor to take necessary action to ensure that future performance conforms to contract requirements and (2) reduce any fee payable under the contract to reflect the reduced value of the services performed.

(e) If the Contractor fails to promptly perform the services again to take the action necessary to ensure future performance in conformity with contract requirements, the Government may (1) by contract or otherwise, perform the services and reduce any fee payable by an amount that is equitable under the circumstances or (2) terminate the contract for default.

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E.3 Limitation of Liability - Services (APR 1984) FAR 52.246-25

(a) Except as provided in paragraphs (b) and (c) below, and except to the extent that the Contractor is expressly responsible under this contract for deficiencies in the services required to be performed under it (including any materials furnished in conjunction with those services), the Contractor shall not be liable for loss of or damage to property of the Government that (1) occurs after Government acceptance of services performed under this contract, and (2) results from any defects or deficiencies in the services performed or materials furnished.

(b) The limitation of liability under paragraph (a) above shall not apply when a defect or deficiency in, or the Government's acceptance of, services performed or materials furnished results from willful misconduct or lack of good faith on the part of any of the Contractor's managerial personnel. The term "Contractor's managerial personnel," as used in this clause, means the Contractor's directors, officers, and any of the Contractor's managers, superintendents, or equivalent representatives who have supervision or direction of--

- (1) All or substantially all of the Contractor's business;
- (2) All or substantially all of the Contractor's operations at any one plant, laboratory, or separate location at which the contract is being performed; or,
- (3) A separate and complete major industrial operation connected with the performance of this contract.

(c) If the Contractor carries insurance, or has established a reserve for self-insurance, covering liability for loss or damage suffered by the Government through the Contractor's performance of services or furnishing of materials under this contract, the Contractor shall be liable to the Government, to the extent of such insurance or reserve, for loss of or damage to property of the Government occurring after Government acceptance of and resulting from any defects and deficiencies in, services performed or materials furnished under this contract.

(d) The Contractor shall include this clause, including this paragraph (d), supplemented as necessary to reflect the relationship of the contracting parties, in all subcontracts over \$25,000.

E.4 Place of Inspection and Acceptance

A.I.D. inspection and testing of services and reports and other deliverables required hereunder, if any, shall take place in the Washington, DC metropolitan area or at any other location where the

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services are provided/performed and reports and other deliverables are produced or submitted/delivered. Acceptance of services and reports and other deliverables required hereunder shall take place in the Washington, DC metropolitan area or at any other location where the services are provide/performed and reports and other deliverables are produced or submitted/delivered.

E.5 Evaluation

The COTR will conduct management reviews of this project annually. An evaluation focusing on key implementation issues will be performed in the third year of the contract. This evaluation will be conducted by the COTR and may include independent experts and may include a detailed assessment of project organization, management, field work, significant outputs, and overall performance.

A final project evaluation will be performed at the completion of the contract period and will be performed by A.I.D. staff. The final evaluation will assess the overall performance of the Contractor and the appropriateness of the original project design, appropriateness of operations modifications, and the value of the project to A.I.D. The final evaluation will make recommendations on changes in content, scope, or focus for follow-on projects.. Costs of evaluations of this contract will be covered by A.I.D., and will not be charged against this contract.

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SECTION F
DELIVERIES OR PERFORMANCEF.1 Period of Performance

The period of performance of this contract is from September 30, 1991 to September 29, 1994. There is one (1) two year option after the initial period of performance.

All work and services required hereunder including preparation, review and acceptance of the final reports shall be completed no latter than thirty (30) days prior to the estimated completion date of the contract.

F.2 Stop Work Order (AUG 1989) FAR 52.212-13 with Alternate I (APR 1984)

(a) . The Contracting Officer may, at any time, by written order to the Contractor, require the Contractor to stop all, or any part, of the work called for by this contract for a period of 90 days after the order is delivered to the Contractor, and for any further period to which the parties may agree. The order shall be specifically identified as a stop-work order issued under this clause. Upon receipt of the order, the Contractor shall immediately comply with its terms and take all reasonable steps to minimize the incurrence of costs allocable to the work covered by the order during the period of work stoppage. Within a period of 90 days after a stop-work is delivered to the Contractor, or within any extension of that period to which the parties shall have agreed, the Contracting Officer shall either --

- (1) Cancel the stop-work order; or
- (2) Terminate the work covered by the order as provided in the termination clause of this contract.

(b) If a stop-work order issued under this clause is cancelled or the period of the order or any extension thereof expires, the Contractor shall resume work. The Contracting Officer shall make an equitable adjustment in the delivery schedule or contract price, or both, and the contract shall be modified, in writing, accordingly, if --

- (1) The stop-work order results in an increase in the time required for, or in the Contractor's cost properly allocable to, the performance of any part of this contract; and,

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(2) The Contractor asserts its right to the adjustment within 30 days after the end of the period of work stoppage; provided, that, if the Contracting Officer decides the facts justify the action, the Contracting Officer may receive and act upon the claim submitted at any time before final payment under this contract.

(c) If a stop-work order is not canceled and the work covered by the order is terminated for the convenience of the Government, the Contracting Officer shall allow reasonable costs resulting from the stop-work order in arriving at the termination settlement.

(d) If a stop-work order is not canceled and the work covered by the order is terminated for default, the Contracting Officer shall allow, by equitable adjustment or otherwise, reasonable costs resulting from the stop-work order.

F.4 Option to Extend the Term of the Contract (MAR 1989)
FAR 52-217-9

(a) The Government may extend the term of this contract by written notice to the Contractor within 60 days of the then current expiration date; provided, that the Government shall give the Contractor a preliminary written notice of its intent to extend at least 60 days before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option provision.

(c) The total duration of this contract, including the exercise of any options under this contract, shall not exceed 60 months.

F.5 Performance of Services

(a) With the definite quantity of services (level of effort) set forth in Section H.14 of this contract, the Contractor shall be responsible for staffing as necessary for the performance of this contract, subject to the approval of the COTR of the utilization of all professional, technical, managerial, and administrative personnel whose salaries or consulting fees shall be charged as a direct cost to this contract, or, if required by other sections of this contract, the Contracting Officer. The Contractor shall provide personnel that will meet the technical requirements of the project, a highly qualified staff of professional program managers to organize and coordinate the work activities, and a strong administrative/clerical support structure.

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(b) It is understood and agreed that the rate of labor hours per year may fluctuate in pursuit of the technical objectives, provided such fluctuation does not result in the utilization of the total labor hour services prior to the expiration of the term of the contract (see Section F.1).

(c) The Contracting Officer may, by written order, direct the Contractor to increase the average annual rate of utilization of effort to such an extent that the total labor hours of effort, specified above, would be utilized prior to the expiration of the term hereof. Any such order shall specify the degree of acceleration required, and the revised term of this contract resulting therefrom.

(d) It is further understood and agreed that the number of labor hours of effort for any classification of labor may be utilized by the Contractor in any other labor classification if necessary in the performance of the work.

(e) If the Contractor fails to furnish the total quantity of services set forth in Section H.14 of this contract during the specified term of this contract (See Section F.1), the Contracting Officer may require the Contractor to continue performance of the work beyond the estimated completion date until the Contractor has furnished the specified level of effort or until the total estimated cost or the obligated amount of this contract, whichever is less, has been expended.

(f) The provision of some or all of these services may be provided through subcontracts and/or consultants. However, the inclusion of labor hours of services above does not obviate the requirements of the clause of this contract entitled, Subcontracts (Cost-Reimbursement and Letter Contracts) (FAR 52.244-02), or Section H.13 of this contract for prior written approval or consent by the A.I.D. official indicated therein.

F.6 Places of Performance

Performance of this contract shall be in the Washington, DC metropolitan area, at the Contractor's and any subcontractor's facilities in the United States, and those countries to which the COTR, in accordance with Section H.1 of this contract and the clauses of this contract entitled International Travel Approval and Notification Requirements (AIDAR 752.7032) and Personnel (AIDAR 752.7027, Alternate 71), approves international travel for the performance of this contract.

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F.7 Reports and Other Deliverables

In addition to providing the specific deliverables and reports described in Section C.4 of this contract, the Contractor will provide the COTR with the following reports and documentation:

(a) Annual Workplan and Workplan Review

Each year the Contractor will submit a draft workplan in which targets will be set for the three components and related tasks for the year are specified. The first such workplan shall be submitted within 60 days of the effective date of award. The workplan will include a timetable and estimated budget for each task and related product. This workplan will be developed in consultation with the COTR and will be approved by the COTR. After the first year, the workplans will include a review of the previous year's activities, including budget data by component and task.

(b) Task Orders

For each report and deliverable described under Section C.4 of this contract, the Contractor will prepare a short (1-page) task order, including a scope of work, level of effort and budget. Work for each task will not commence until the COTR has approved the Task Order.

(c) Quarterly Reports

The Contractor will submit a quarterly report (not to exceed 5 pages) outlining all project activities in relation to planned targets during the preceding quarter, together with a statement of related expenditures.

(d) Small Business and Small Disadvantaged Business Subcontracting Plan

The Contractor will submit a report outlining the Contractor's plans for such subcontracting related to the performance of specific tasks under this contract, as well as three consecutive annual reports indicating the amounts actually subcontracted during the preceding year.

All reports shall be in the English language, unless otherwise specified in advance by the COTR or the Contracting Officer.

All final reports associated with the tasks described in Section C.4 shall be submitted in five copies with diskette to the COTR and in two copies to A.I.D.'s Center for Development Information and Evaluation (PPC/CDIE/DI, ACQUISITIONS: Room 219, SA-18, U.S. Agency for International Development, Washington, DC 20523-1802. A final report is a report which the COTR has reviewed and approved as a

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final report. All reports final must be prepared in accordance with the CDIE Style Manual (See Attachment J.2). All final reports shall be submitted in paper and on computer diskettes in software compatible with CDIE requirements (WordPerfect 5.1, Lotus 3, Data Base IV, SAS, etc).

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SECTION G
CONTRACT ADMINISTRATION DATA

G.1 Payment Office

Agency for International Development
Office of Financial Management
FM/CMP/DC
Washington DC 20523-0209

In addition to all invoices/vouchers sent to the above address, one copy with backup information shall be sent to the following:

Agency for International Development
MS/OP/W/CO
Washington DC 20523-1428

ATTN: Contract Number

G.2 Appropriation and Obligation Information

PIO/T No. : SEE PAGE 41A *EHT*
Amount Obligated . :
Appropriation Code :
Budget Plan Code :

G.3 Correspondence Procedures

To promote timely and effective administration, correspondence (except for invoices and reports) submitted under this contract shall be subject to the following procedures:

- (a) Technical Correspondence. Technical correspondence (as used herein, excludes technical correspondence where patent or technical data issues are involved and correspondence which proposes or otherwise involves waivers, deviations, or modifications to the requirements, terms, or conditions, of this contract) shall be addressed to the Contracting Officer's Technical Representative (COTR), with an information copy of the correspondence to the Contract Specialist (see below).
- (b) All correspondence, other than technical correspondence shall be addressed to the Contracting Officer.
- (c) Subject Line(s). All correspondence shall contain a subject line commencing with the contract number, as illustrated below:

G.2 Appropriation and Obligation Information

PID/T No.	:	930-0085-1303008	:	930-0085-1304002
Amount Obligated:	:	160,000	:	20,000
Appropriation :	:	72-1111021.3	:	72-1111021.4
Budget Plan Code:	:	FDNA-91-13020-KG-11	:	FDPA-91-13020-KG-11
PID/T No.	:	930-0085-1305008	:	930-0085-1306023
Amount Obligated:	:	221	:	43,476
Appropriation :	:	72-1111021.5	:	72-1111021.6
Budget Plan Code:	:	FDEA-91-13020-KG-11	:	FDSA-91-13020-KG-11
PID/T No.	:	930-0085-1303008A	:	930-0085-1304002A
Amount Obligated:	:	33,020	:	1,419
Appropriation :	:	72-1111021.3	:	72-1111021.4
Budget Plan Code:	:	FDNA-91-13020-KG-11	:	FDPA-91-13020-KG-11
PID/T No.	:	930-0200-1305330	:	
Amount Obligated:	:	103,600	:	
Appropriation :	:	72-1111021.5	:	
Budget Plan Code:	:	FDEA-91-13004-KG-11	:	

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"SUBJECT: Contract Number (Insert the contract number from the cover page) Topic (Insert subject/topic after the contract number, e.g., Request for subcontract placement consent, Request for use of consultant, etc)

G.4 Government Contact for Post Award Administration

The Contractor shall use one of the following Government contacts, as applicable, as the focal point for all matters regarding this contract, except technical matters (see G.3(a) for definition):

- (a) Contracting Officer: If no Government Contract Administration Office is designated in block 6 on the face page of this contract, the Contractor shall use the Contract Specialist designated below as the focal point of contact for all matters regarding this contract, except technical matters.
- (b) Contracting Office Address. The address of the Contracting Office is as follows:

Agency for International Development
MS/OP/W/CO
Washington DC 20523-1428

- (c) Contract Specialist. The Contract Specialist for the contract is located at the address in (b) above and is as follows:

James A. Jeckell
Telephone: (703)875-1170

G.5 Contracting Officer's Technical Representative

As used in this contract, the terms COTR or A.I.D. Project Officer means the individual designated by the Contracting Officer as having responsibility for technical administration of the contract. This designated individual is Nena Vreeland, PPC/CDIE/PPE.

G.6 Government-Furnished Materials, Equipment and Facilities

The Government shall provide for on-site contractor staff approximately 600 square feet of office space. This includes heat, light, air conditioning, etc. for a normal office environment. In addition, the Government shall provide normal office furniture for use of on-site personnel. The Government shall provide training on the

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A.I.D. Development Information System (AIDDIS) and access thereto after training. The Government shall provide telephones for official use. The Government shall NOT provide parking.

G.7 Liaison Officials

A.I.D. and Cooperating Country liaison officials for any overseas performance under this contract will be provided to the Contractor by the cognizant A.I.D. Project Officer pursuant to Section H.7, Technical Direction, of this contract. A.I.D. liaison officials are separate and distinct from the cognizant A.I.D. Project Officer, and are not empowered to act on behalf of the cognizant A.I.D. Project Officer or the Contracting Officer, unless otherwise specifically stated in this contract or unless authorized to do so by the Contracting Officer. Any acts by A.I.D. liaison officials which are reserved in this contract to the cognizant A.I.D. Project Officer or the Contracting Officer and are not delegated by the Contracting Officer to the A.I.D. liaison official shall be considered an informal commitment, for which formalization by a higher level A.I.D. official shall be required if the Contractor is to be reimbursed for any costs incurred, or if any other terms and conditions of this contract are to be adjusted, on the basis of the informal commitment. Formalization of an informal commitment requires, inter alia, a finding that the Contractor, responding to an A.I.D. official's written or oral instruction, and relying in good faith upon the official's apparent authority to issue such instructions, has furnished or arranged to furnish supplies or services to A.I.D. without formal contractual coverage. Since this provision removes any doubt the Contractor may have about an A.I.D. liaison official's authority, the Contracting Officer will generally be reluctant to pursue formalization of an informal commitment.

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SECTION H
SPECIAL CONTRACT REQUIREMENTSH.1 Special Provision Regarding the Clauses Entitled "International Travel Approval and Notification Requirements" (AIDAR 752.7032) and "Personnel" (AIDAR 752.7027), Alternate 71

(a) In accordance with each of the above clauses of this contract, whereunder the Contractor must obtain the Contracting Officer's prior written approval for all international travel under this contract, the Contracting Officer does, hereby, provide said approval for those individuals required to travel outside the United States; provided, however, that concurrence with the assignment of any and all said individuals outside the United States is obtained by the Contractor, in writing, from the cognizant A.I.D. Project Officer prior to their assignment abroad. Such approval must be within the terms of this contract, is subject to availability of funds, and should not be construed as authorization to increase the total estimated cost of this contract or to exceed the obligated amount, whichever is less, which are subject to the clauses of this contract entitled Limitation of Cost (FAR 52.232-20) and Limitation of Funds (FAR 52.232-22), respectively. A copy of each approval issued pursuant to this paragraph shall be retained by the Contractor for audit purposes.

(b) After approval of the proposed international travel, the Contractor shall notify the USAID Missions and cognizant technical office of the arrival date and time and flight identification of the A.I.D. financed traveller(s).

(c) The Contractor shall obtain the prior written approval of the cognizant A.I.D. Project Officer for travel within the United States. Such concurrence must be within the terms of this contract, is subject to availability of funds, and shall not be construed as authorization to increase the total estimated cost of this contract or to exceed the obligated amount, whichever is less.

H.2 Defense Base Act (DBA) Insurance

Pursuant to the clause of this contract entitled Workers' Compensation Insurance (Defense Base Act) (FAR 52.228-03), the Contractor shall, during the period of this contract (See Section F.1), provide and maintain such workers' compensation insurance or security as the Defense Base Act (42 U.S.C. 1651, et seq.) requires (U.S. citizens and U.S. residents who are hired in the U.S. must be covered by DBA insurance during period they are performing outside the U.S.). Pursuant to the clause of this contract entitled Workers' Compensation Insurance (Defense Base Act) (AIDAR

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752.228-03), the Contractor shall obtain such coverage from A.I.D.'s current insurance carrier for such insurance. This insurance carrier is:

Wright & Company
1400 I Street, NW
Washington, DC 20005

Telephone: (202) 289-0200
Outside DC area: (800) 424-9801

The costs of DBA insurance are allowable as a direct cost to this contract.

H.3 Personnel Compensation

(a) Definitions

(i) As used herein, the terms "salaries," "wages," "consultant fees," and "compensation" mean the periodic remuneration received by personnel for professional or technical services rendered, exclusive of fringe benefits, travel incentives, housing allowances, differentials, or other bonuses as defined in the clause of this contract entitled, Differentials and Allowances (AIDAR 752.7028), unless otherwise stated. The terms "compensation," "salaries," "wages," and "consultant fees" include payments for personal services (including fees and honoraria). It excludes earnings from sources other than the individual's professional or technical work, overhead, or other charges (see the contract clause entitled, Personnel Compensation [AIDAR 752.7007]).

(ii) As used herein, the term "employee" means a direct full time employee who works a normal work week, is eligible for all fringe benefits, is generally compensated on a salary basis, is provided with working space on the Contractor's premises, and whose compensation is reported on IRS Form W-2.

(iii) As used herein, the term "consultant" means an individual who is not an employee, but who is engaged from time to time, who does not shall in the Contractor's fringe benefits package, and for whom the Contractor does not specifically maintain office space. Consultant fees for such individuals are reported on IRS Form 1099 rather than Form W-2. A direct consultant's annual compensation shall be determined by multiplying his/her daily fee by 260.

(b) Limitations

There are no limitations on the amount of compensation the Contractor may pay to personnel. However, compensation of personnel which is charged as a direct cost under this contract, like other costs, will

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be reimbursable by A.I.D. only in accordance with Section B of this contract, and the clause of this contract entitled Allowable Cost and Payment (FAR 52.216-07) and other applicable provisions of this contract, but subject to the following additional specified understandings which set limits on reimbursement by A.I.D. of items of cost which otherwise might be reasonable, allocable, and allowable.

(i) Employees

Reimbursable salaries and wages for employees may not exceed the Contractor's established policy and practice, including the Contractor's established pay scale for equivalent classifications of employees, which will be certified to by the Contractor, nor may any individual reimbursable salary or wage, without approval of the Contracting Officer, exceed the employee's current salary or wage or the highest rate of annual compensation received during any full year of the immediately preceding three years. There is a ceiling on reimbursable salaries and wages paid to a person employed directly under the contract of the maximum salary rate of FS-1 (or the equivalent daily rate of the maximum FS-1 salary, if compensation is not on an annual basis), unless advance written approval is given by the Contracting Officer.

(A) Initial Salaries

The reimbursement level for the initial starting salaries of all professional technical and managerial/administrative employees whose salaries are charged as a direct cost to this contract must be approved, in advance and in writing, by the Contracting Officer. Subsequent salary increase shall be in accordance with Section H.3.(ii)(B) below.

(B) Annual Salary Increases

Annual salary increase for the Contractor's employees may not exceed those provided by the Contractor's established policy and practice. With respect to employees performing work directly under this contract, A.I.D. shall reimburse the Contractor for one annual salary increase of not more than 5.0% of the employee's base salary, subject to the contractor's established policy and practice, either after the employee's completion of each twelve-month period of satisfactory services under this contract (if the individual was not an employee of the Contractor prior to award of this contract) or after the employee's completion of each twelve-month period of satisfactory job performance as an employee of the Contractor (if the individual was an employee of the Contractor prior to award of this contract). Reimbursement for annual salary increases of any kind exceeding these limitation or which cause the employee's salary to exceed the maximum salary of FS-1 must have the advance written approval of the Contracting Officer. Reimbursement for annual

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salary increases for subcontractor employees shall be in accordance with Contractor's original proposal and/or best and final offer which was accepted by A.I.D. through award of this contract.

(ii) Consultants

No compensation for consultants will be reimbursed unless their use under the contract has the advance written approval of the cognizant A.I.D. Project Officer, and if such provision has been made or approval given, reimbursement of such compensation shall not exceed, without specific approval of the rate by the Contracting Officer, (1) the current compensation or the highest rate of annual compensation (or the equivalent daily rate, if compensation is not on an annual basis) received by the consultant during any full year of the immediately preceding three years or (2) the maximum salary rate of FS-1, whichever is less. Compensation of faculty member of colleges or universities who are on less than a 12 month appointment at their college or university may be annualized in one of two ways: (1) the salary for the appointment period is divided by the number of months in the appointment period, and the result is multiplied by 12 (in this case, the number of months in the appointment period must be indicated); or, (2) consulting income earned by the individual during periods outside the appointment period may be added to the salary for the appointment period.

(A) Daily Rate

A daily rate is determined by dividing the annual compensation by 2087 hours and multiplying the result by 8.

(B) Approvals

Any approval issued pursuant to this section shall be retained by the Contractor for audit purposes. Approvals issued pursuant to this section must be within the terms of this contract, and shall not serve to increase the total estimated cost of this contract.

(iii) Compensation During Travel

Compensation paid to personnel while in travel status will not be reimbursed for a travel period greater than the time required for travel by the most direct and expeditious air route, unless otherwise approved in writing by the Contracting Officer.

(iv) Return of Overseas Personnel

Compensation paid to personnel serving overseas who are discharged by the Contractor for misconduct, inexcusable nonperformance, or security reasons will in no event be reimbursed for a period which extends beyond the time required to return the individual to his point of origin by the most direct and expeditious air route, unless otherwise approved in writing by the Contracting Officer.

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(v) Work Week

(A) Nonoverseas Personnel

The work week for the Contractor's nonoverseas personnel shall not be less than the established practices and policies of the Contractor.

(B) Overseas Personnel

The work week for the Contractor's overseas personnel shall not be less than 40 hours and shall be scheduled to coincide with the work week for those employees of USAID Mission and/or the Cooperating Country associated with the work under this contract.

H.4 Language Requirements

(a) Language requirements for key personnel performing under this contract are specified in Section C of this contract. Language requirements for other personnel performing under this contract shall be provided to the Contractor by the cognizant A.I.D. Project Officer pursuant to Section H.7, Technical Direction, of this contract.

(b) A.I.D. reserves the right to test the proposed individuals to ensure that they have the required language capability. In the event that the individual(s) possess(es) the required language capability, expenses for language testing shall be an allowable charge to this contract. However, if the individual(s) do(es) not have the required language capability, expenses for language testing for such individual(s) shall be borne by the Contractor.

H.5 Travel Expenses

(a) Notwithstanding any other provision of this contract, if any of the personnel performing services under this contract are discharged by the Contractor for misconduct or inexcusable nonperformance, travel and transportation costs associated with the assignment of substitute personnel therefore shall not be an allowable cost under this contract.

(b) Misconduct shall be defined as the deliberate and/or repeated disregard for the laws and regulations of the Cooperating Country or of A.I.D., the continued existence of conflict of interest after the advice that such conflict exists, or general behavior unbecoming a professional serving as a part of the U.S. foreign assistance program (also see the clause of this contract entitled Personnel [AIDAR 752.7027]).

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(c) Inexcusable nonperformance shall be defined as unauthorized absences or failure to undertake and/or complete assigned tasks which are within the scope of this contract, when such absences or failures are within the control of the individual.

H.6 Long-term Overseas Assignments

While no long-term overseas assignments are anticipated under this contract, A.I.D. reserves the right to authorize such assignments. Paragraph (b), Duration of Assignments, of the clause of this contract entitled Personnel (AIDAR 752.7027, Alternate 71), requires long-term overseas technical assistance personnel to be appointed for at least two years or more; when the position is for less than a two-year period, the appointment may be made for such lesser period of time. Notwithstanding any other provisions of this contract concerning failure to serve a full appointment, failure of any of the long-term overseas technical assistance personnel to complete a full appointment may be considered nonperformance by the Contractor, unless such failure is beyond the control, and without the fault or negligence, of either the individual or the Contractor.

H.7 Technical Direction

(a) Performance of the work under this contract shall be subject to the technical direction of the COTR identified in Section G of this contract. The term "technical direction" is defined to include:

- (1) Directions to the Contractor which shift work emphasis between work areas or tasks, fill in details or otherwise serve to accomplish the contractual requirements.
- (2) Provision of written information to the Contractor which assists in the interpretation of drawings, specification, or technical portions of the requirements.
- (3) Review and, where required by the contract, approval of technical reports, drawings, specifications and technical information to be delivered by the Contractor to the Government under the contract.

(b) Technical direction must be within the scope of work stated in the contract. The COTR does not have the authority to, and may not, issue any technical direction which:

- (1) Constitutes an assignment of additional work outside the scope of work;
- (2) Constitutes a change as defined in the contract clause entitled Changes--Cost Reimbursement;

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- (3) In any manner causes an increase or decrease in the total estimated contract cost, fixed fee (if any), or the time required for contract performance;
- (4) Changes any of the expressed terms, conditions, or specifications of the contract; or,
- (5) Interferes with the Contractor's right to perform the terms and conditions of the contract.

(c) All technical directions shall be issued in writing by the COTR.

(d) The Contractor shall proceed promptly with the performance of technical directions duly issued by the COTR in the manner prescribed by this clause and within his authority under the provisions of this clause. If, in the opinion of the Contractor, any instructions or direction by the COTR falls within one of the categories defined in (b)(1) through (5) above, the Contractor shall not proceed but shall notify the Contracting Officer in writing within five (5) working days after receipt of any such instruction or direction and shall request the Contracting Officer to modify the contract accordingly. Upon receiving the notification from the Contractor, the Contracting Officer shall:

- (1) Advise the Contractor in writing within thirty (30) days after receipt of the Contractor's letter that the technical direction is within the scope of the contract effort and does not constitute a change under the Changes - Cost Reimbursement clause of the contract;
- (2) Advise the Contractor within a reasonable time that the Government will issue a written change order.

(e) A failure of the Contractor and Contracting Officer to agree that the technical direction is within the scope of the contract, or a failure to agree upon the contract action to be taken with respect thereto shall be subject to the provisions of the clause entitled Disputes.

H.8 Modification Authority

Notwithstanding any of the other clauses of this contract, the Contracting Officer shall be the only individual authorized, to:

- (1) Accept nonconforming work,
- (2) Waive any requirement of this contract, or
- (3) Modify any term or condition of this contract.

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H.9 Confidentiality of Information

(a) To the extent that the work under this contract requires that the Contractor be given access to confidential or proprietary business, technical, or financial information to the Government or other companies, the Contractor shall after receipt thereof, treat such information as confidential and agrees not to appropriate such information to its own use or to disclose such information to third parties unless specifically authorized by the Contracting Officer in writing. The foregoing obligations, however, shall not apply to:

- (1) Information which, at the time of receipt by the Contractor, is in the public domain;
- (2) Information which is published after receipt thereof by the Contractor or otherwise becomes part of the public domain through no fault of the Contractor;
- (3) Information which the Contractor can demonstrate was in its possession at the time of receipt thereof and was not acquired directly or indirectly from the Government or other companies; or,
- (4) Information which the Contractor can demonstrate was received by it from a third party who did not require the Contractor to hold it in confidence.

(b) The Contractor shall obtain the written agreement, in a form satisfactory to the Contracting Officer, of each employee permitted access, whereby the employee agrees that he will not discuss, divulge or disclose any such information or data to any person or entity except those persons within the Contractor's organization directly concerned with the performance of the contract.

(c) The Contractor agrees, if requested by the Government, to sign an agreement identical, in all material respects, to the provisions of this clause, with each company supplying information to the Contractor under this contract, and to supply a copy of such agreement to the Contracting Officer. From time to time upon request of the Contracting Officer, the Contractor shall supply the Government reports itemizing information received as confidential or proprietary and setting forth the company or companies from which the Contractor received such information.

(d) The Contractor agrees that upon request by the Government it will execute an approved agreement with any party whose facilities or proprietary data it is given access to or is furnished, restricting use and disclosure of the data or the information obtained from the facilities. Upon request of the Contracting Officer, such an agreement shall also be signed by Contractor personnel.

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(e) This clause shall flow down to all subcontracts.

H.10 Rights in Data

(a) The term "subject data" as used herein includes writings, sound recordings, pictorial reproductions, drawings, or other graphical representations, and works of any similar nature (whether or not copyrighted) which are specified to be delivered under this contract. The term does not include financial reports, cost analyses, or other information incidental to contract administration.

(b) All Subject Data first produced in the performance of this contract shall be the sole property of the U.S. Government. The Contractor agrees not assert any claim to statutory copyright in such data. The Contractor shall not publish or reproduce such data in whole or in part or in any manner or form, nor authorize others to do so, without the written consent of the Contracting Officer until such time as the Government may have released such data to the public.

(c) The Contractor agrees to grant and does hereby grant to the U.S. Government and its officer, agents and employees acting within the scope of their official duties, a royalty, nonexclusive, and irrevocable license throughout the world (i) to publish, translate, reproduce, delivery, perform, use, and dispose of, in any manner, any and all data not first produced or composed in the performance of this contract but which is incorporated in the work furnished under this contract; and (ii) to authorize others to do so.

(d) The Contractor shall indemnify and hold harmless the U.S. Government, its officers, agents, and employees acting within the scope of their official duties, against any liabilities including costs and expenses (i) for violation of proprietary rights, copyright, or right of privacy, arising out of the publication, translation, reproduction, delivery, performance, use or disposition of any data furnished under this contract; or (ii) based upon any libelous or other unlawful matter contained in such data.

(e) Nothing contained in this clause shall imply a license to the U.S. Government under any patent or be construed as affecting the scope of any license or other right otherwise granted to the U.S. Government under any patent.

Subparagraphs (c) and (d) of this clause are not applicable to material furnished to the Contractor by the Government and incorporated in the work furnished under the contract, provided such incorporated material is identified by the Contractor at the delivery of such work.

THIS APPLIES TO CORE CONTRACT ONLY

H.11 Source/Origin of Goods and Services

Source and origin of all goods and services shall be the United States except as specifically approved in writing by the Contracting Officer.

H.12 Representations, Certifications and Other Statements of the Offeror

The Representation, Certifications and Other Statements of the Offeror, dated AUG 02 1981, for this contract are hereby incorporated by reference.

H.13 Subcontracts

(a) Prior to the placement of subcontracts and in accordance with the clause entitled Subcontract (Cost-Reimbursement and Letter Contracts), the Contractor shall ensure that:

- (1) they contain all of the clauses of this contract (altered when necessary for proper identification of the contracting parties) which contain a requirement for such inclusion in applicable subcontracts;
- (2) any applicable subcontractor Certificate of Current Cost or Pricing Data (see FAR 15.804-2) and subcontractor Representations and Certifications (see document referenced in H.12 hereof); and,
- (3) any required prior notice and description of the subcontract is given to the Contracting Officer and any required consent is received. Except as may be expressly set forth therein, any consent by the Contracting Officer to the placement of subcontracts shall not be construed to constitute approval of the subcontractor or any subcontract terms or conditions, determination of the allowability of any cost, revision of this contract or any of the respective obligations of the parties thereunder, or creation of any subcontractor privity of contract with the Government.

(b) The Contractor shall also obtain and furnish to the Contracting Officer a certification from any potential subcontract in the form set forth either in FAR 52.209-7, Organizational Conflicts of Interest--Marketing Consultants, or FAR 52.209-8, Organization Conflicts of Interest--Advisory and Assistance Services. No work shall be performed by the subcontractor until the Contracting Officer has cleared the subcontractor for organization conflicts of interest.

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THIS APPLIES TO CORE CONTRACT ONLY

(c) The following subcontractors have been cleared by the Contracting Officer for organizational conflicts of interest:

TO BE COMPLETED AS APPROPRIATE

H.14 Level of Effort

(a) The Contractor may be required to provide the total estimated level of effort (LOE) specified hereunder. The level of effort is a maximum estimate which cannot be exceeded without the express written authorization of the Contracting Officer. The following specifies the estimated level of effort by labor category:

<u>Labor Category</u>	<u>Annual LOE</u>	<u>Total LOE</u>
PROJECT TEAM		
Senior Evaluation/ Research/Management Information Specialist (including Project Manager)	1920	5760
Senior Evaluation Research/ Management Information Specialist	1920	5760
Senior Training Specialist	1920	5760
Evaluation Research/ Program/Policy Analyst Management Information Specialist	Year 1 0 Year 2 2880 Year 3 3840	6720
Information Management Specialist/ Computer Analyst	1920	5760
Administrative Assistant/ Management Assistant	1920	5760
TECHNICAL SUPPORT STAFF		
Other Technical Support Staff	Year 1 4544 Year 2 4784 Year 3 4928	14256
Total	Year 1 14144 Year 2 17264 Year 3 18368	49,776

THE LEVEL OF EFFORT IS SPECIFIED IN DIRECT PRODUCTIVE LABOR HOURS. THIS IS DEFINED AS ACTUAL WORK HOURS EXCLUSIVE OF VACATION, HOLIDAY, SICK LEAVE, AND OTHER ABSENCES.

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THIS APPLIES TO CORE CONTRACT ONLY

NOTE: It is anticipated that one of the Component Leaders will serve as Project Director, or alternatively, that no more than two individuals will perform the combined duties of the Project Manager and one of the component leaders, with the estimated time commitment as Project Director being between 960 hours and 1,440 hours per year.

Information regarding the assumptions made in determining the level of effort above are set forth in Attachment J.6. This attachment is informational only and will not be included in any resultant contract.

(b) The annual level of effort for the Option I shall be the same as listed in the column in this clause entitled "Annual LOE Total Year 3".

(c) In the event that the total estimated LOE is not provided, the fixed fee of the contract shall be reduced in proportion to the ratio of the actual LOE provided to the total LOE estimated as follows:

$$\frac{\text{Actual LOE Provided}}{\text{Total LOE Estimated}} \times \text{Fixed Fee} = \text{Adjusted Fee}$$

(d) Nothing in this clause shall be construed to constitute authorization for work not in accordance with the Limitation of Costs, Limitation of Funds, and Period of Performance.

H.15 Key Personnel

(a) The following labor categories and the designated personnel are considered essential for the performance of this contract.

<u>Labor Category</u>	<u>Name</u>
Project Director Components Leaders (Titles will be incorporated at time of award)	

(b) The Contractor shall not divert for any purpose those individuals identified above without the prior written consent of the Contracting Officer. Proposed substitutions must be submitted simultaneously to the Contracting Officer and the COTR at least thirty (30) days prior to the proposed date of substitution.

This substitution request should set forth the qualifications of the individual, a biographical data sheet (AID Form 1420-17), sufficient detail (including budget implications) to permit evaluation of the impact on the program. In the event that labor category qualifications have been included in the contract, substitution of the individual would be based on the labor category qualification or the qualifications of the individual identified as

THIS APPLIES TO CORE CONTRACT ONLY

key for that labor category, whichever is more restrictive. The Contracting Officer reserves the right to waive qualification exceptions that are, or have been, taken for specific individuals.

Only the Contracting Officer is authorized to approve the substitution of key personnel.

(c) Since these individuals designated above are essential to the performance of the contract and were evaluated, and, as such, were determined a prerequisite prior to the award, the Contractor shall not substitute or replace these individuals within 180 days of the effective date of award. If the Contractor fails to provide the proposed and identified key personnel, the Contracting Officer may terminate the contract for default, or take such other action as may be appropriate.

(d) If the failure to provide the identified key personnel is due to:

(i) death of the individual identified;

(ii) extended illness; or,

(iii) termination of employment by the identified individual;

the Contractor shall be held harmless for such action. The Contractor shall have thirty (30) days in which to propose a replacement. Failure to propose a replacement within this time period may be considered nonperformance by the Contractor.

(e) The Contracting Officer may ratify in writing any diversion of key personnel and such ratification shall constitute approval.

(f) The list of key personnel and position identified in this clause may be modified, in writing, from time to time during the course of this contract to either add or delete personnel or positions, as appropriate.

H.16 Logistic Support

(a) The Contractor shall be responsible for providing or arranging for all logistic support in the United States, except as specified in Section G.6, and shall generally be responsible for providing or arranging for all logistic support for its overseas performance of this contract.

(b) To the extent that a USAID Mission or a Cooperating Country provides logistic support for the Contractor's overseas performance under this contract, the cost of such logistic support will not be charged by the Cooperating Country or the USAID Mission to the Contractor, and shall not be charged by the Contractor to this

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THIS APPLIES TO CORE CONTRACT ONLY

contract. Logistic support provided in the form of local currency shall be paid to the Contractor in a manner adapted to the local situation and as agreed to by the Mission Director, in writing. This documentation for such cost shall be on such forms and in such manner as the Mission Director shall prescribe.

(c) If, under emergency circumstances, it is necessary for a USAID Mission to pay for any in-country costs on behalf of the Contractor in order to facilitate implementation of any activities under this contract, the Mission may bill the Contractor for such costs, and the Contractor may, in turn, charge those costs against this contract (however, see H.16 (b) above, wherein certain logistic support to be provided by the Mission will be provided without charge). Under no circumstances will the Mission recoup those costs via an Advice of Charge (AOC) to the payment office. In addition, in order to maintain the Contractor's responsibility for compliance with the clauses of this contract entitled Limitation of Costs (FAR 52.232-20) and Limitation of Funds (FAR 52.232-22), a Mission may not pay any in-country cost without the prior written approval of the Contractor, said approval must indicate a maximum amount which may be paid.

H.17 Security Requirements

The Contractor shall have access to classified information during the period of this contract. An A.I.D. security clearance (secret level) will be required for all contractor personnel performing on an A.I.D. site in the Washington D.C. area.

THIS APPLIES TO CORE CONTRACT ONLY

SECTION I
CONTRACT CLAUSESI.1 Clauses Incorporated by Reference (JUN 1988)
FAR 52.252-2

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available.

Federal Acquisition Regulation (48 CFR Chapter 1) clauses

<u>FAR No.</u>	<u>Title</u>	<u>Date</u>
52.202-1	Definitions	APR 1984
52.203-1	Officials Not to Benefit	APR 1984
52.203-3	Gratuities	APR 1984
52.203-5	Covenant Against Contingent Fees	APR 1984
52.203-6	Restrictions on Subcontractor Sales to the Government	JUL 1985
2.203-7	Anti-Kickback Procedures	OCT 1988
52.203-9	Requirement for Certificate of Procurement Integrity--Modification	NOV 1990
52.203-10	Price of Fee Adjustment for Illegal Or Improper Activity	SEP 1990
52.203-12	Limitation on Payments to Influence Certain Federal Transactions	JAN 1990
52.208-3	Conflicts	APR 1984
52.209-6	Protecting the Government's Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment	MAY 1989
52.215-1	Examination of Records by Comptroller General	APR 1984
52.215-2	Audit--Negotiation	DEC 1989
52.215-22	Price Reduction for Defective Cost or Pricing Data	JAN 1991

THIS APPLIES TO CORE CONTRACT ONLY

52.215-23	Price Reduction for Defective Cost or Pricing Data--Modification	JAN 1991
52.215-24	Subcontractor Cost or Pricing Data	APR 1985
52.215-25	Subcontract Cost or Pricing Data--Modifications	APR 1985
52.215-31	Waiver of Facilities Capital Cost of Money	SEP 1987
52.215-33	Order of Precedence	JAN 1986
52.216-7	Allowable Cost and Payment	APR 1984
52.216-8	Fixed Fee	APR 1984
52.219-8	Utilization of Small Business Concerns and Small Disadvantaged Business Concerns	FEB 1990
52.219-9	Small Business and Small Business Subcontracting Plan	JAN 1991
52.219-13	Utilization of Women-Owned Businesses	AUG 1986
52.219-16	Liquidated Damages--Small Business Subcontracting Plan	AUG 1989
52.220-1	Preference for Labor Surplus Area Concerns	APR 1984
52.220-3	Utilization of Labor Surplus Area Concerns	APR 1984
52.220-4	Labor Surplus Area Subcontracting Program	APR 1984
52.222-2	Payment for Overtime Premiums	JUL 1990
52.222-3	Convict Labor	APR 1984
52.222-20	Walsh-Healey Public Contracts Act	APR 1984
52.222-26	Equal Opportunity	APR 1984
52.222-29	Equal Opportunity Preaward Clearance Of Subcontracts	APR 1984
52.222-35	Affirmative Action for Special Disabled and Vietnam Era Veterans	APR 1984

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THIS APPLIES TO CORE CONTRACT ONLY

52.222-36	Affirmative Action for Handicapped Workers	APR 1984
52.222-37	Employment Reports on Special Veterans and Veterans of the Vietnam Era	JAN 1988
52.223-2	Clean Air and Water	APR 1984
52.223-6	Drug-Free Workplace	JUL 1990
52.225-11	Certain Communist Areas	APR 1984
52.225-13	Restrictions on Contracting With Sanctioned Persons	MAY 1989
52.227-1	Authorization and Consent	APR 1984
52.227-2	Notice and Assistance Regarding Patent and Copyright Infringement	APR 1984
52.227-3	Patent Indemnity	APR 1984
52.227-8	Reporting of Royalties (Foreign)	APR 1984
52.227-9	Refund of Royalties	APR 1984
52.227-14	Rights in Data-General	JUN 1987
52.227-17	Rights in Data-Special Works	JUN 1987
52.227-19	Commercial Computer Software -- Restricted Rights	JUN 1987
52.228-3	Workers' Compensation Insurance (Defense Base Act)	APR 1984
52.228-4	Workers' Compensation and War-Hazard Insurance Overseas	APR 1984
52.228-7	Insurance--Liability to Third Persons	APR 1984
52.230-3	Cost Accounting Standards	SEP 1987
52.230-4	Administration of Cost Accounting Standards	SEP 1987
52.230-5	Disclosure and Consistency of Cost Accounting Practices	SEP 1987
52.232-9	Limitation on Withholding of Payments	APR 1984

THIS APPLIES TO CORE CONTRACT ONLY

52.232-17	Interest	JAN 1991
52.232-20	Limitation of Cost	APR 1984
52.232-22	Limitation of Funds	APR 1984
52.232-23	Assignment of Claims	JAN 1986
52.232-25	Prompt Payment	APR 1989
52.232-28	Electronic Funds Transfer Payment Methods	APR 1989
52.233-1 with Alternate I	Disputes	APR 1984
52.233-3	Protest After Award with Alternate I	AUG 1989 JUN 1985
52.237-3	Continuity of Services	JAN 1991
52.242-1	Notice of Intent to Disallow Costs	APR 1984
52.243-2	Changes--Cost Reimbursement With Alternate I	AUG 1987 APR 1984
52.243-7	Notification of Changes	APR 1984
52.244-2	Subcontract (Cost-Reimbursement and Letter Contracts)	JUL 1985
52.244-5	Competition in Subcontracting	APR 1984
52.245-4	Government-Furnished Property (Short Form)	APR 1984
52.246-23	Limitation of Liability	APR 1984
52.247-34	F.o.b. Destination	JAN 1991
52.249-6	Termination (Cost-Reimbursement)	MAY 1986
52.249-13	Failure to Perform	APR 1984
52.249-14	Excusable Delays	APR 1984
Agency for International Development Acquisition Regulation (48 CFR 7)		
752.202-1(b)	Definitions Alternate 70	JAN 1990

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THIS APPLIES TO CORE CONTRACT ONLY

752.202-1(d)	Definitions Alternate 7?	DEC 1986
752.203-1	Officials Not to Benefit	
752.204-2	Security Requirements	
752.219-8	Utilization of Small Business Concerns and Small Disadvantaged Business Concerns	
752.226-2	Subcontracting with Disadvantaged Enterprises	JUL 1990
752.228-3	Workers' Compensation Insurance (Defense Base Act)	
752.228-7	Insurance--Liability to Third Persons	
752.229-70	Federal, State and Local Taxes	
752.245-70	Government Property--A.I.D. Reporting Requirements	
752.7001	Biographical Data	DEC 1988
752.7002	Travel and Transportation	JAN 1990
752.7003	Documentation for Payment	APR 1984
752.7004	Source and Nationality Requirements	APR 1989
752.7005	Language, Weights, and Measures	APR 1984
752.7006	Notices	APR 1984
752.7007	Personnel Compensation	AUG 1984
752.7008	Use of Government Facilities Or Personnel	APR 1984
752.7009	Marking	APR 1984
752.7010	Conversion of U.S. Dollars to Local Currency	APR 1984
752.7013	Contractor-Mission Relationships	OCT 1989
752.7014	Notice of Changes in Travel Regulations	JAN 1990

THIS APPLIES TO CORE CONTRACT ONLY

752.7015	Use of Pouch Facilities	APR 1984
752.7025	Approvals	APR 1984
752.7026	Reports	OCT 1989
752.7027	Personnel	DEC 1990
752.7029	Post Privileges	DEC 1990
752.7031	Leave and Holidays	OCT 1989
752.7032	International Travel Approval and Notification Requirements	JAN 1990
752.7033	Physical Fitness	DEC 1990

Attachment A

Management Systems International
Solicitation No. OP/W/CO-91-008
Budget Summary

Date: September 30, 1991

Category	Schedule	Basic Contract				Total Yrs.1 - 3	Option Period		Total Incl. Option
		Year 1	Year 2	Year 3	Year 4		Year 5		
Project Team Staff - Sal. & Fringe	I	204,494	278,871	315,267	798,632	331,030	347,581	1,477,243	
Overhead	I	73,618	100,394	113,496	287,508	119,171	125,129	531,808	
Technical Support Staff- Salaries & Fringe	II	91,300	102,060	111,376	304,736	116,944	122,791	544,471	
Overhead	II	32,868	36,742	40,095	109,705	42,100	44,205	196,010	
Travel & Transportation	III	52,000	50,000	78,000	180,000	86,000	78,000	344,000	
Per Diem	IV	51,604	50,925	79,443	181,972	84,875	79,443	346,290	
Other Direct Costs	V	46,550	39,750	47,450	133,750	50,050	47,450	231,250	
Video & Other Dissemination Materials		150,000			150,000			150,000	
Subtotal		702,434	658,742	785,127	2,146,303	830,170	844,599	3,821,072	
General & Administrative @ 12%		84,292	79,049	94,215	257,556	99,620	101,352	458,528	
Subcontracts:									
Labat-Anderson, Inc.	VI	330,899	415,346	474,424	1,220,669	490,894	508,172	2,219,735	
Research Triangle Institute	VII	64,714	67,955	71,352	204,021	74,916	78,666	357,603	
Total Estimated Costs		1,182,339	1,221,092	1,425,118	3,828,549	1,495,600	1,532,789	6,856,938	
Fixed Fee @ 8% (1)		62,938	59,023	70,347	192,308	74,383	75,676	342,367	
Fixed Fee @ 4% (2)		14,789	18,067	20,403	53,259	21,152	21,938	96,349	
Total Cost Plus Fixed Fee		1,260,066	1,298,182	1,515,868	4,074,116	1,591,135	1,630,403	7,295,654	

(1) Applied to MSI costs only.

(2) Applied to Subcontractor Costs only.

Attachment B
Date: September 30, 1991

Management Systems International
PDC-0085-C-00-1141-00
Establishment of Indirect Cost Rates

169

Category	Base
Fringe Benefits	Total labor excluding intermittent and field labor
Overhead	Direct labor, intermittent employees expense, and fringe benefits
General & Administrative	Total costs less subcontract and materials costs

The following indicates the applicable rates for the periods:

Category	FY 1992	FY 1993	FY 1994	FY 1995	FY 1996	FY 1997
Fringe Benefits	32.00%	32.00%	32.00%	32.00%	32.00%	32.00%
Overhead	36.00%	36.00%	36.00%	36.00%	36.00%	36.00%
General & Administrative	12.00%	12.00%	12.00%	12.00%	12.00%	12.00%

The Contractor's fiscal year for which the rates are applicable is from May 1 through April 30.

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<u>Category</u>	<u>Base</u>
Fringe Benefits	All direct and indirect labor costs
Professional Home Overhead	Applicable direct labor dollars and fringe
Technical Away Overhead	Applicable direct labor dollars and fringe
General & Administrative	Total cost input less G&A costs

The following indicates the applicable rates for the periods:

<u>Category</u>	<u>FY 1992</u>	<u>FY 1993</u>	<u>FY 1994</u>	<u>FY 1995</u>	<u>FY 1996</u>	<u>FY 1997</u>
Fringe Benefits	30.89%	31.83%	31.94%	31.94%	31.94%	31.94%
Prof. Home Overhead	50.46%	49.22%	50.44%	50.44%	50.44%	50.44%
Technical Away Overhead	9.46%	9.37%	9.50%	9.50%	9.50%	9.50%
General & Administrative	9.58%	9.75%	9.65%	9.65%	9.65%	9.65%

The Contractor's fiscal year for which the rates are applicable is from July 1 through June 30.

Attachment B cont'd
Date: September 30, 1991

Research Triangle Institute
PDC-0085-C-00-1141-00
Establishment of Indirect Cost Rates

B9

Category	Base
Permanent Employee Fringe	Permanent employees salaries and wages
On-site Overhead	Applicable direct salaries and wages including fringe benefits
Off-site Overhead	Applicable direct salaries and wages including fringe benefits
General & Administrative	Total costs excluding materials, subcontracts (including consultants), and equipment costs
Material Support	Direct materials, subcontract (including consultants), and equipment costs

The following indicates the applicable rates for the periods:

Category	FY 1992	FY 1993	FY 1994	FY 1995	FY 1996
Permanent Employee Fringe	42.00%	42.00%	42.00%	42.00%	42.00%
On-site Overhead	81.00%	81.00%	81.00%	81.00%	81.00%
Off-site Overhead	30.00%	30.00%	30.00%	30.00%	30.00%
General & Administrative	21.00%	21.00%	21.00%	21.00%	21.00%
Material Support	4.00%	4.00%	4.00%	4.00%	4.00%

The Contractor's fiscal year for which the rates are applicable is from October 1 through September 30.

Attachment C PDC-0085-C-00-1141-00
Date: September 30, 1991 Ceiling Indirect Cost Rates

<u>Category</u>	<u>Rate</u>
Management Systems International:	
Fringe Benefits	34.00%
Overhead	40.00%
General & Administrative	15.00%
Labat-Anderson Incorporated:	
Fringe Benefits	35.00%
Prof. Home Overhead	53.00%
Technical Away Overhead	12.00%
General & Administrative	12.00%
Research Triangle Institute:	
Permanent Employee Fringe	45.00%
On-site Overhead	87.00%
Off-site Overhead	32.00%
General & Administrative	24.00%
Material Support	5.00%

PH 800 May 91

U 1350-1, 9-79)

UNITED STATES INTERNATIONAL DEVELOPMENT COOPERATION AGENCY AGENCY FOR INTERNATIONAL DEVELOPMENT

PROJECT IMPLEMENTATION ORDER/TECHNICAL SERVICES

1. Cooperating Country
WORLDWIDE

2. PIO/T No.
1305330

3. Original or Amendment No. _____

4. Project/Activity No. and Title
930-0200
WOMEN IN DEVELOPMENT

Page 1 of 1 Pages

PIO/T

DISTRIBUTION

5. Appropriation Symbol
72-1111021.5

6. Allocation Symbol and Charge
FDEA-91-13034-KG-11 (145-30-099-00-20-01)

7. Obligation Status
 Administrative Reservation Implementing Document

8. Project Assistance Completion Date (Mo., Day, Yr.)
9/30/94

9. Authorized Agent
MS/OP/W/CO

10. This PIO/T is in full conformance with PRO/AG Date _____

11a. Type of Action and Governing AID Handbook
 AID Contract (HS 14) PASA/RSSA (HS 12) AID Grant (HS 13) Other

11b. Contract/Grant/PASA/RSSA Reference Number (if this is an Amendment)

12. Estimated Financing (A detailed budget in support of column (2) is attached as attachment no. _____)

		(1) Previous Total	(2) Increase	(3) Decrease	(4) Total to Date
Maximum AID Financing	A. Dollars		103,600		103,600
	B. U.S.-Owned Local Currency				

14a. Instructions to Authorized Agent

In conjunction with PIO/T Nos. 1303008 and 1304002, OP/W/CO is requested to prepare an amendment for incremental funding to the potential "Program Performance Information and Evaluation Systems" and activities that support strategic management contract. The funds allocated in this PIO/T by the Office of Women in Development (PPC/WID) will be matched against the \$250,000 provided in PIO/T Nos. 1303008 and 1304002 by PPC/CDIE. See the attached SOW for details pertaining to the expenditure of PPC/WID funds.

14b. Address of Voucher Paying Office
FM/CMPD
Rm. 703, SA-2

5. Clearances—Include typed name, office symbol, telephone number and date for all clearances.

The project officer certifies that the specifications in the statement of work are technically adequate

PPC/CDIE/PPE, A. Binnendijk ^{AB} Phone No. 875-4846 Date 5/22/91

PPC/CDIE, Pat Brown-Wood ^{plw} Date 5/22/91

PPC/CDIE/PPE, Nona Vreeland ^{NV} Date 5/22/91

PPC/WID, Chloe O'Gara ^{COG} Date 5-21-91

The statement of work lies within the purview of the initiating and approved agency programs
AA/PPC, Tom O'Keefe ^{TOK} Date 5/23

Funds for the services requested are available
Clearance: DAA/PPC:LWBond ^{LWB} Date 5/23

8. For the cooperating country: The terms and conditions set forth herein are hereby agreed to

17. For the Agency for International Development

Signature _____ Date _____

Signature Reginald J. Brown Date 5/24/91

Title _____

Title AA/PPC, Reginald J. Brown

FUNDS RESERVED BY:
 Initials: AB
 Date Posted: 5/29/91
 PFM/PM/A/PNP
 MANAGER

AID 1350-1
(3 87)

*PIO/T

AGENCY FOR
INTERNATIONAL DEVELOPMENT

PROJECT IMPLEMENTATION
ORDER/TECHNICAL
SERVICES

1. Cooperating Country

Page 1 of Pages

2. PIO/T No.

See Attachment Z

3. Original or
Amendment No. _____

4. Project/Activity No. and Title

Program Performance Information for
Strategic Management--PRISM

DISTRIBUTION

5. Appropriation Symbol

See Attachment Z

6. Budget Plan Code

See Attachment Z

7. Obligation Status

Administrative Reservation

Implementing Document

8. Project Assistance Completion Date

(Mo., Day, Yr.) 9/30/94

9. Authorized Agent

MS/OP/W/CO

10. This PIO/T is in full conformance with PRO/AG No.
Date

11a. Type of Action and Governing AID Handbook

AID Contract
(HB 14)

AID Grant or
Cooperative Agreement
(HB 13)

PASA/RSSA
(HB 12)

Other

11b. Contract/Grant/Cooperative Agreement/
PASA/RSSA Reference Number (if this is
an Amendment)

12. Estimated Financing (A detailed budget in support of column (2) is attached as Attachment No. _____)

Maximum AID Financing Available	A. Dollars	(1) Previous Total	(2) Increase	(3) Decrease	(4) Total to Date
		0	250,000	0	250,000
	B. U.S.-Owned Local Currency				

13. Mission References

14A. Instructions to Authorized Agent

Authorized agent is requested to initiate a solicitation to competitively select a contractor to provide A.I.D. with technical service for program performance information and evaluation systems and activities that support strategic management, as described in the attached Statement of Work, for three years beginning o/a September 30, 1991, with an A.I.D. option to renew for two years, together with parallel requirements contract. The total estimated value for the three year contract is \$4,087,834, to be funded by PPC/CDIE.

14B. Address of Voucher Paying Office

PFM/FM/PAFD
Room 700 SA-2

15. Clearances—Include typed name, office symbol, telephone number and date for all clearances.

A. The Project Officer certifies that the specifications in the statement of work or program description are technically adequate. <i>A. Binnendijk</i>	Phone No. 875-4846	B. The statement of work or program description lies within the purview of the initiating office and approved agency programs. <i>AA/PPC, Tom O'Keefe</i>	Date 3/28/91
	Date 3/22/91		
E. DAAA/PPC/CDIE, W. Stickel AAA/PPC/CDIE, John Eriksson	Date 3/22/91	D. Funds for the services requested are available	Date
	Date		

16. For the Cooperating Country: The terms and conditions set forth herein are hereby agreed to

Signature _____ Date _____

Title _____

17. For the Agency for International Development

Signature *Reynold J. Brown* Date 3/29/91

Title *AA/PPC,*

* See HB 3, Sup. A, App. C, Att. B, for preparation instructions. Note: The completed form contains sensitive information whose unauthorized disclosure may subject an employee to disciplinary action.

OFFICE OF FINANCIAL MANAGEMENT
Date Posted: 4/8/91
Initials: *MB*
PFM/FM/A/PNP

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PROGRAM PERFORMANCE INFORMATION FOR STRATEGIC MANAGEMENT

PRISM

FUNDS RESERVED BY:

ATTACHMENT Z

Initials:
Date Posted: 4/8/91
PFM/FDA/PA/PPN

OFFICE OF FINANCIAL MANAGEMENT

FUNDING DATA

Obligation Number: 930-0085 - 1303008
Appropriation Number: 72-1111021.3
Allotment Number: 143-30-099-00-20-01
Budget Plan Code: FDNA-91-13020-KG-11
Amount Obligated:

Obligation Number: 930-0085 - 1304002
Appropriation Number: 72-1111021.4
Allotment Number: 144-30-099-00-20-01
Budget Plan Code: FDPA-91-13020-KG-11
Amount Obligated:

Total Amount Obligated: \$250,000

FUNDS RESERVED BY:
Initials:
Date Posted: 4/8/91
PFM/FDA/PA/PPN
OFFICE OF FINANCIAL MANAGEMENT

AID 1350 1
(3 87)

PIOT

AGENCY FOR
INTERNATIONAL DEVELOPMENT

PROJECT IMPLEMENTATION
ORDER/TECHNICAL
SERVICES

1. Cooperating Country	Page 1 of Pages
2. PIOT No. See Attachment A	3. <input checked="" type="checkbox"/> Original or Amendment No. _____
4. Project/Activity No. and Title Program Performance Information for Strategic Management -- PRISM	

DISTRIBUTION

OFFICE OF FINANCIAL MANAGEMENT
 FUNDS RESERVED BY:
 Initials: AK
 Date Posted: 7/24/91
 PFM/FM/A/PA/PNP

5. Appropriation Symbol See Attachment A		6. Budget Plan Code See Attachment A			
7. Obligation Status <input checked="" type="checkbox"/> Administrative Reservation <input type="checkbox"/> Implementing Document		8. Project Assistance Completion Date (Mo., Day, Yr.)			
9. Authorized Agent MS/OP/W/CO		10. This PIOT is in full conformance with PRO/AG No. _____ Date _____			
11a. Type of Action and Governing AID Handbook <input checked="" type="checkbox"/> AID Contract (HB 14) <input type="checkbox"/> AID Grant or Cooperative Agreement (HB 13) <input type="checkbox"/> PASA/RSSA (HB 12) <input type="checkbox"/> Other		11b. Contract/Grant/Cooperative Agreement/PASA/RSSA Reference Number (if this is an Amendment) not yet awarded			
12. Estimated Financing (A detailed budget in support of column (2) is attached as Attachment No. _____)					
Maximum AID Financing Available	A. Dollars	(1) Previous Total 250,000	(2) Increase 178,336	(3) Decrease 0	(4) Total to Date 428,336
	B. U.S.-Owned Local Currency				
13. Mission References					
14A. Instructions to Authorized Agent MS/OP/W/CO is requested to provide incremental funding for the PRISM contract. This PIOT will fund the contract through March 1992.					
14B. Address of Voucher Paying Office PFM/FM/PAFD Room 700 SA-2					

15. Clearances—Include typed name, office symbol, telephone number and date for all clearances.

A. The Project Officer certifies that the specifications in the statement of work or program description are technically adequate.	Phone No. 875-4916	B. The statement of work or program description lies within the purview of the initiating office and approved agency programs.	Date 9/9
	Date 8/30/91		
C. PPC/CDIE, P. Brown-Wood <i>plw</i>	Date 8/30/91	D. Funds for the services requested are available	Date 9/9
C. PPC/CDIE/PPE, G. Britan <i>AK</i>	Date 8/30/91		
C. PPC/CDIE/PPE, A. Binnendi <i>AK</i>	Date 8/30/91		
E. <i>706 388 on Kathleen Morgan</i> AAA/PPC/CDIE, J. Eriksson <i>AK</i>	Date 8/30/91		
16. For the Cooperating Country: The terms and conditions set forth herein are hereby agreed to		17. For the Agency for International Development	
Signature _____ Date _____		Signature <u><i>Reginald J. Brown</i></u> Date <u>9/10/91</u>	
Title _____		Title AA/PPC,	

*See HB 3, Sup. A, App. C, Att. B, for preparation instructions. Note: The completed form contains sensitive information whose unauthorized disclosure may subject an employee to disciplinary action.

PROGRAM PERFORMANCE INFORMATION FOR STRATEGIC MANAGEMENT
--PRISM--

ATTACHMENT A

FUNDING DATA

Obligation Number: 930-0085 - 1305008 ^{plw}
Appropriation Number: 72-1111021.5
Allotment Number: 145-30-099-00-20-01
Budget Plan Code: FDEA-91-13020-KG-11
Amount Reserved: \$ ~~421,000~~

Obligation Number: 930-0085 - 1306023
Appropriation Number: 72-1111021.6
Allotment Number: 146-30-099-00-20-01
Budget Plan Code: FDSA-91-13020-KG-11
Amount Reserved: \$ ~~143,476~~

Obligation Number: 930-0085 - 1303008A
Appropriation Number: 72-1111021.3
Allotment Number: 143-30-099-00-20-01
Budget Plan Code: FDNA-91-13020-KG-11
Previous Amount Obligated: \$160,000
Amount Reserved: \$ ~~31,020~~

Obligation Number: 930-0085 - 1304002A
Appropriation Number: 72-1111021.4
Allotment Number: 144-30-099-00-20-01
Budget Plan Code: FDP A-91-13020-KG-11
Previous Amount Obligated: \$ 90,000
Amount Reserved: \$ ~~119,000~~

Total Amount Reserved: \$178,336

FUNDS RESERVED BY:

Initials:

Date Posted: 9/24/91

PFM/FM/A/PNP

OFFICE OF FINANCIAL MANAGEMENT

G.2 Appropriation and Obligation Information

PI0/T No.	: ✓ 930-0085-1303008	: ✓ 930-0085-1304002
Amount Obligated:	\$160,000	\$90,000
Appropriation :	72-1111021.3	72-1111021.4
Budget Plan Code:	FDNA-91-13020-KG-11	FDPA-91-13020-KG-11
PI0/T No.	: ✓ 930-0085-1305008	: ✓ 930-0085-1306023
Amount Obligated:	\$421	\$143,476
Appropriation :	72-1111021.5	72-1111021.6
Budget Plan Code:	FDEA-91-13020-KG-11	FDSA-91-13020-KG-11
PI0/T No.	: ✓ 930-0085-1303008A	: 930-0085-1304002A
Amount Obligated:	\$33,020	\$1,419
Appropriation :	72-1111021.3	72-1111021.4
Budget Plan Code:	FDNA-91-13020-KG-11	FDPA-91-13020-KG-11
PI0/T No.	: ✓ 930-0200-1305330	
Amount Obligated:	\$103,600	
Appropriation :	72-1111021.5	
Budget Plan Code:	FDEA-91-13004-KG-11	