

ORDER FOR SUPPLIES OR SERVICES

PAGE 1 OF 17 PAGES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

BPA NO.

1. DATE OF ORDER 6/27/2012		2. CONTRACT NO. (If any) GS35F5014H		6. SHIP TO:	
3. ORDER NO. NRC-HQ-12-F-33-0001		4. REQUISITION/REFERENCE NO. OIS-12-179; CSO-12-040		a. NAME OF CONSIGNEE U.S. Nuclear Regulatory Commission	
5. ISSUING OFFICE (Address correspondence to) U.S. Nuclear Regulatory Commission Div. of Contracts, IMT Branch Attn: Jerry Purcell Jr. Mail Stop: TWB-01-B10M Washington, DC 20555				b. STREET ADDRESS Attn: Cathy Smith, OIS/PMAS Mail Stop O-6-E-7 11555 Rockville Pike	
				c. CITY Rockville	d. STATE MD
				e. ZIP CODE 20852	
7. TO:				f. SHIP VIA	
a. NAME OF CONTRACTOR GARTNER, INC.				8. TYPE OF ORDER	
b. COMPANY NAME				<input type="checkbox"/> a. PURCHASE <input checked="" type="checkbox"/> b. DELIVERY	
c. STREET ADDRESS 56 TOP GALLANT RD				REFERENCE YOUR Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
d. CITY STAMFORD	e. STATE CT	f. ZIP CODE 069027700		Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
9. ACCOUNTING AND APPROPRIATION DATA SEE PAGE FOUR (4)		\$322,340.00		10. REQUISITIONING OFFICE OIS Office of Information Services	

11. BUSINESS CLASSIFICATION (Check appropriate box(es))					12. F.O.B. POINT Destination	
<input type="checkbox"/> a. SMALL	<input checked="" type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input type="checkbox"/> d. WOMEN-OWNED	<input type="checkbox"/> e. HUBZone		
<input type="checkbox"/> f. SERVICE-DISABLED VETERAN-OWNED	<input type="checkbox"/> g. WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOSB PROGRAM	<input type="checkbox"/> h. EDWOSB				
13. PLACE OF		14. GOVERNMENT B/L NO.		15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date) 7/1/2012		
a. INSPECTION	b. ACCEPTANCE			16. DISCOUNT TERMS Net 30		

17. SCHEDULE (See reverse for Rejections)

See CONTINUATION Page

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
CLIN 0001	Gartner, Inc. DUNS # 097220180 The contractor shall provide "IT Research and Advisory Subscription Services" in accordance with the terms and conditions of GSA contract schedule no. GS-35F-5014H, this firm fixed price order and statement of work (SOW).					
CLIN 1001	Current Period of Performance: July 1, 2012 - June 30, 2013		Lot			
CLIN 2001	Optional Period of Performance: July 1, 2013 - June 30, 2014 NRC Contracting Officer Representative: Cathy Smith, Phone 301-415-5648; email cathy.smith@nrc.gov Gartner Contact: Janet Risseuw, office 703-387-5713, cell 703-623-3637, fax 1-800-446-3597, email janet.risseuw@gartner.com		Lot			

SEE BILLING INSTRUCTIONS ON REVERSE	18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		\$644,680.00	17(h) TOTAL (Cont. pages)
	21. MAIL INVOICE TO:							
	a. NAME Department of Interior / NBC NRCPayments@nbc.gov						\$322,340.00	17(i). GRAND TOTAL
	b. STREET ADDRESS (or P.O. Box) Attn: Fiscal Services Branch - D2770 7301 W. Mansfield Avenue							
c. CITY Denver		d. STATE CO	e. ZIP CODE 80235-2230					

22. UNITED STATES OF AMERICA
BY (Signature)

23. NAME (Typed)
Heriberto Colon, Jr.
Contracting Officer
TITLE: CONTRACTING/ORDERING OFFICER

AUTHORIZED FOR LOCAL REPRODUCTION
PREVIOUS EDITION NOT USABLE

OPTIONAL FORM 347 (REV. 2/2012)
PRESCRIBED BY GSA/FAR 48 CFR 53.213(f)

TEMPLATE - ADM001

SUNSI REVIEW COMPLETE

JUN 28 2012

ADM002

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Continuation of OF347 block 9 Accounting and Appropriation data:

B&R: 2012-10-51-J-146 JC: J1267 BOC: 252A APPN: 31X0200.012 FAIMIS#: 121633 \$261,840.00
 B&R: 2012-7S-51-J-145 JC: N7343 BOC: 252A APPN: 31X0200 FAIMIS#: 121302 \$60,500.00

Total Amount Obligated: \$322,340.00

A.1 CONSIDERATION AND OBLIGATION—FIRM FIXED PRICE (JUN 1988):

The firm fixed price of this contract is \$322,340.00.

A.2 PERIOD OF PERFORMANCE (AUG 2011)

This contract shall commence on July 1, 2012 and will expire on June 30, 2013.

A.3 PRICE SCHEDULE

BASE YEAR			
PERIOD OF PERFORMANCE:		07/01/2012-06/30/2013	
GSA IT CATEGORY	GSA Firm Fixed Price (FFP)	Estimated Quantity (Users)	Total Estimated Price
Executive CIO Premium IT Subscription Services (Gartner IT Executives – CIO Essentials)			
Executive IT Security Premium Subscription (Gartner for Enterprise IT Leaders – Security)			
IT Leader – Subscription (Gartner for IT Leaders)			
Core Research Advisor Subscription Services			
TOTAL - BASE YEAR			\$322,340.00

OPTION YEAR			
PERIOD OF PERFORMANCE:		07/01/2013-06/30/14	
GSA IT CATEGORY	*GSA Unit	Estimated Quantity (Users)	*Total Estimated Price
Executive CIO Premium IT Subscription Services (Gartner IT Executives – CIO Essentials)			
Executive IT Security Premium Subscription (Gartner for Enterprise IT Leaders – Security)			
IT Leader – Subscription (Gartner for IT Leaders)			
Core Research Advisor Subscription Services			
TOTAL -OPTION YEAR			\$322,340.00

* Option year pricing is illustrative only. Actual Option year prices and product offerings will be those in the "then current" GSA contract in effect at the time of the exercise of an Option.

A.4 52.217-7 OPTION FOR INCREASED QUANTITY--SEPARATELY PRICED LINE ITEM (MAR 1989)

The Government may require the delivery of the numbered line item, identified in the Schedule as an option item, in the quantity and at the price stated in the Schedule. The Contracting Officer may exercise the option by written notice to the Contractor within 15 days. Delivery of added items shall continue at the same rate that like items are called for under the contract, unless the parties otherwise agree.

A.5 52.217-9 OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000)

(a) The Government may extend the term of this contract by written notice to the Contractor within 15 days; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 15 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 clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 5 years.

A.6 PACKAGING AND MARKING (AUG 2011)

(a) The Contractor shall package material for shipment to the NRC in such a manner that will ensure acceptance by common carrier and safe delivery at destination. Containers and closures shall comply with the Surface Transportation Board, Uniform Freight Classification Rules, or regulations of other carriers as applicable to the mode of transportation.

(b) On the front of the package, the Contractor shall clearly identify the contract number under which the product is being provided.

(c) Additional packaging and/or marking requirements are as follows:

A.7 BRANDING (AUG 2011)

The Contractor is required to use the official NRC branding logo or seal on any publications, presentations, products, or materials funded under this contract, to the extent practical, in order to provide NRC recognition for its involvement in and contribution to the project. If the work performed is funded entirely with NRC funds, then the contractor must acknowledge that information in its documentation/presentation.

Access the following websites for branding information and specifications:
<http://www.internal.nrc.gov/ADM/branding/> and Management Directive and Handbook 3.13 -

(internal NRC website): <http://www.internal.nrc.gov/policy/directives/toc/md3.13.htm>

(external public website): <http://pbadupws.nrc.gov/docs/ML1122/ML112280190.pdf>

A.8 ELECTRONIC PAYMENT (AUG 2011)

The Debt Collection Improvement Act of 1996 requires that all payments except IRS tax refunds be made by Electronic Funds Transfer. Payment shall be made in accordance with FAR 52.232-33, entitled "Payment by Electronic Funds- Central Contractor Registration".

To receive payment, the contractor shall prepare invoices in accordance with NRC's Billing Instructions. Claims shall be submitted on the payee's letterhead, invoice, or on the Government's Standard Form 1034, "Public Voucher for Purchases and Services Other than Personal," and Standard Form 1035, "Public Voucher for Purchases Other than Personal - Continuation Sheet." The preferred method of submitting invoices is electronically to the Department of the Interior at NRCPayments_NBCDenver@nbc.gov. If the contractor submits a hard copy of the invoice, it shall be submitted to the following address:

Department of the Interior
National Business Center
Attn: Fiscal Services Branch - D2770
7301 West Mansfield Avenue
Denver, CO 80235-2230

A.9 COMPLIANCE WITH U.S. IMMIGRATION LAWS AND REGULATIONS (AUG 2011)

NRC contractors are responsible to ensure that their alien personnel are not in violation of United States immigration laws and regulations, including employment authorization documents and visa requirements. Each alien employee of the Contractor must be lawfully admitted for permanent residence as evidenced by Permanent Resident Form I-551 (Green Card), or must present other evidence from the U.S. Department of Homeland Security/U.S. Citizenship and Immigration Services that employment will not affect his/her immigration status. The U.S. Citizenship and Immigration Services provides information to contractors to help them understand the employment eligibility verification process for non-US citizens. This information can be found on their website, <http://www.uscis.gov/portal/site/uscis>.

The NRC reserves the right to deny or withdraw Contractor use or access to NRC facilities or its equipment/services, and/or take any number of contract administrative actions (e.g., disallow costs, terminate for cause) should the Contractor violate the Contractor's responsibility under this clause.

A.10 SECURITY REQUIREMENTS RELATING TO THE PRODUCTION OF REPORT(S) OR THE PUBLICATION OF RESULTS UNDER CONTRACTS, AGREEMENTS, AND GRANTS (AUG 2011)

Review and Approval of Reports

(a) Reporting Requirements. The contractor/grantee shall comply with the terms and conditions of the contract/grant regarding the contents of the draft and final report, summaries, data, and related documents, to include correcting, deleting, editing, revising, modifying, formatting, and supplementing any of the information contained therein, at no additional cost to the NRC. Performance under the contract/grant will not be deemed accepted or completed until it complies with the NRC's directions. The reports, summaries, data, and related documents will be considered draft until approved by the NRC. The contractor/ grantee agrees that the direction, determinations, and decisions on approval or disapproval of reports, summaries, data, and related documents created under this contract/grant remain solely within the discretion of the NRC.

(b) Publication of Results. Prior to any dissemination, display, publication, or release of articles, reports, summaries, data, or related documents developed under the contract/grant, the contractor/grantee shall submit them to the NRC for review and approval. The contractor/ grantee shall not release, disseminate, display or publish articles, reports, summaries, data, and related documents, or the contents therein, that have not been reviewed and approved by the NRC for release, display, dissemination or publication. The contractor/grantee agrees to conspicuously place any disclaimers, markings or notices, directed by the NRC, on any articles, reports, summaries, data, and related documents that the contractor/grantee intends to release, display, disseminate or publish to other persons, the public, or any other entities. The contractor/grantee agrees, and grants, a royalty-free, nonexclusive, irrevocable worldwide license to the government, to use, reproduce, modify, distribute, prepare derivative works, release, display or disclose the articles, reports, summaries, data, and related documents developed under the contract/grant, for any governmental purpose and to have or authorize others to do so.

(c) Identification/Marking of Sensitive Unclassified Non-Safeguards Information (SUNSI) and Safeguards Information (SGI). The decision, determination, or direction by the NRC that information possessed, formulated or produced by the contractor/grantee constitutes SUNSI or SGI is solely within the authority and discretion of the NRC. In performing the contract/grant, the contractor/grantee shall clearly mark SUNSI and SGI, to include for example, OUO-Allegation Information or OUO-Security Related Information on any reports, documents, designs, data, materials, and written information, as directed by the NRC. In addition to marking the information as directed by the NRC, the contractor shall use the applicable NRC cover sheet (e.g., NRC Form 461 Safeguards Information) in maintaining these records and documents. The contractor/grantee shall ensure that SUNSI and SGI is handled, maintained and protected from unauthorized disclosure, consistent with NRC policies and directions. The contractor/grantee shall comply with the requirements to mark, maintain, and protect all information, including documents, summaries, reports, data, designs, and materials in accordance with the provisions of Section 147 of the Atomic Energy Act of 1954 as amended, its implementing regulations (10 CFR 73.21), Sensitive Unclassified Non-Safeguards and Safeguards Information policies, and NRC Management Directives and Handbooks 12.5, 12.6 and 12.7.

(d) Remedies. In addition to any civil, criminal, and contractual remedies available under the applicable laws and regulations, failure to comply with the above provisions, and/or NRC directions, may result in suspension, withholding, or offsetting of any payments invoiced or claimed by the contractor/grantee.

(e) Flowdown. If the contractor/grantee intends to enter into any subcontracts or other agreements to perform this contract/grant, the contractor/grantee shall include all of the above provisions in any subcontracts or agreements.

A.11 GREEN PURCHASING (JUN 2011)

(a) In furtherance of the sustainable acquisition goals of Executive Order 13514, "Federal Leadership in Environmental, Energy, and Economic Performance" products and services provided under this contract/order shall be energy- efficient (Energy Star or Federal Energy Management Program (FEMP) designated), water-efficient, biobased, environmentally preferable (e.g., Electronic Product Environmental Assessment Tool (EPEAT) certified), non-ozone depleting, contain recycled content, or are non-toxic or less toxic alternatives, where such products and services meet agency performance requirements. <http://www.fedcenter.gov/programs/eo13514/>

(b) The contractor shall flow down this clause into all subcontracts and other agreements that relate to performance of this contract/order.

A.12 USE OF AUTOMATED CLEARING HOUSE (ACH) ELECTRONIC PAYMENT/REMITTANCE ADDRESS (AUG 2011)

The Debt Collection Improvement Act of 1996 requires that all Federal payments except IRS tax refunds be made by Electronic Funds Transfer. It is the policy of the Nuclear Regulatory Commission to pay government vendors by the Automated Clearing House (ACH) electronic funds transfer payment system. Item 15C of the Standard Form 33 may be disregarded.

B.1 STATEMENT OF WORK

1.0 Background

The NRC's mission is to regulate the Nation's civilian use of byproduct, source, and special nuclear materials to ensure adequate protection of public health and safety, to promote the common defense and security, and to protect the environment. In support of the mission, the Chief Information Officer (CIO) is responsible for oversight of the following major functions:

- Delivery of centralized information technology (IT) infrastructure, applications, and information management (IM) services, and the development and implementation of IT and IM plans, architecture, and policies to support the mission, goals, and priorities of the agency.
- Development, planning, and implementation of the agency's Enterprise Architecture program.
- Agency guidance to senior agency management regarding computer security and compliance.
- Development of components of the agency's information technology architecture pertaining to IT infrastructure development, standards, and practices.

Additionally, the CIO and Deputy CIO oversee the Office of Information Services (OIS) which is divided into four separate divisions: the Business Process Improvement and Applications Division (BPIAD), the Infrastructure and Computer Operations Division (ICOD), the Information and Records Services Division (IRSD), and the Program Management, Policy Development, and Analysis Staff (PMAS). The first three divisions provide key support to the

agency's IT infrastructure. The Enterprise Architecture and Standards Branch (EASB) of BPIAD serves as a major consumer of the IT research and advisory services, especially as they relate to the agency's Enterprise Architecture program. Also under the CIO (as the Deputy Executive Director for Corporate Management) is the Computer Security Office (CSO), headed by the Chief Information Security Officer (CISO).

The NRC has a continuing need to have access to executive IT research and advisory services in support of the planning, decision making, communications, and monitoring that is required to manage and prepare for changes in a complex IT infrastructure and a rapidly advancing technology environment, with flat budgets and various external mandates.

2.0 Objective

The primary objective of this contract is to provide the NRC's CIO, Deputy CIO (also Director of OIS), and the CISO with very broad and deep executive level IT research and advisory subscription services in support of their roles and responsibilities.

The secondary objective is to provide lower levels of managers and analysts with much of the same services and most of the same IT research content, in support of the executives' agenda. This later category of IT research and advisory service users includes Division Directors, enterprise and technology architects, IT infrastructure planners, IT security policy makers, and others who are involved in IT planning and governance.

3.0 Scope of Work

The scope of the work is provisioned by the contractor of IT research and advisory subscription services to the CIO, Deputy CIO, CISO, and selected OIS and CSO and staff.

The IT research and advisory subscription services provided by the contractor shall:

- Provide IT research and advisory support for the Federal government CIO and CISO roles and responsibilities (as mandated by Federal laws and regulations.)
- Address the management of IT and information assets
- Address key decisions and initiatives of IT executives and leaders
- Assist in formulating IT and architecture strategic plans
- Assist in formulating IT tactical and architecture strategies
- Provide opportunities for peer networking
- Assess and report on IT industry best practices
- Assist in the discovery and comprehension of IT innovations
- Provide validated IT benchmarks and performance metrics
- Identify emergent IT trends
- Identify emerging technologies and their maturity

- Assist in providing clarity to complex IT issues and discovering alternatives for resolution
- Provide executive level advice and serve as a sounding board for technology decisions in regard to IT investments
- Identify qualified vendors and short-list vendor solutions
- Verify IT vendor claims/promises to ensure that acquired services are for the best benefit of NRC
- Provide background information on key technologies, IT topics, and issues.
- Help assess the maturity and effectiveness of IT programs

The IT research content and advisory services solution offered by the contractor shall have an IT user rather than an IT manufacturer focus, and IT buyer rather than IT seller focus.

The contractor shall provide unlimited access to IT research by subscription seat holders. This service shall generally include access to the contractor's database of IT research documents and exclusive templates. The research shall be predominantly original research rather than the summarization and/or compilation of third-party content. A significant amount of the IT research coverage shall be specific and applicable to the U.S. Federal government.

The contractor shall provide unlimited access to advisory services by subscription seat holders. The purpose of advisory services is for the NRC to obtain answers to questions related to the content of the contractor's research. Inquiries shall generally be related to the interpretation or application of the research and shall be satisfied in about 30 minutes of analyst discussion and/or research. The standard advisory services shall also include unlimited access to business document reviews. Business document reviews shall be limited (requiring no more than 60 minutes of analyst time) technology reviews of short (20 pages or less) business related documents, such as requests for proposals, contract statements of work, business plans, and strategy documents.

The scope does not include consulting or development services.

Additional services or tools that may add value to the contractor's IT research and advisory subscription services solutions, in support of the NRC's requirements, may be included (e.g. analyst briefings, analyst on-site visits, facilitated sessions, Webinars, free and discounted conference tickets, or pre-recorded media.)

4.0 Requirements

The section below lists the requirements for the IT research and advisory subscription services.

4.1 Requirements for IT Research Services

The contractor's solution shall minimally provide, but not be limited to, the following requirements:

- 1) The core set of IT research shall include a collection of IT research reports related to IT and technology subject areas that support the CIO and CISO's roles and responsibilities.
 - a) The core set of IT research shall target the following eight IT role areas, at a minimum:
 - i) CIO
 - ii) Application Development/Management
 - iii) Business Process Improvement/Management

- iv) Enterprise Architecture
 - v) Information/Content Management
 - vi) Security and Risk Management
 - vii) Sourcing and Vendor Management
 - viii) IT Infrastructure and Operations
- b) At a minimum, there shall be an average total of 100 new IT research reports per month, targeted to the roles above.
- 2) The IT research shall be predominantly original research rather than the summarization and/or compilation of third-party content.
- 3) The IT research shall include a variety of diagnostic tools (such as, for the purposes of understanding IT organization maturity.)
- 4) The IT research and advisory subscription services provided by the contractor shall:
- a) Provide IT research and advisory support for the Federal government CIO and CISO roles and responsibilities (as mandated by Federal laws and regulations.)
 - b) Address the management of IT and information assets
 - c) Address key decisions and initiatives of IT executives and leaders
 - d) Assist in formulating IT and architecture strategic plans
 - e) Assist in formulating IT tactical and architecture strategies
 - f) Provide opportunities for peer networking
 - g) Assess and report on IT industry best practices
 - h) Assist in the discovery and comprehension of IT innovations
 - i) Provide validated IT benchmarks and performance metrics
 - j) Identify emergent IT trends
 - k) Identify emerging technologies and their maturity
 - l) Assist in providing clarity to complex IT issues and discovering alternatives for resolution
 - m) Provide executive level advice and serve as a sounding board for technology decisions in regard to IT investments
 - n) Identify qualified vendors and short-list vendor solutions
 - o) Verify IT vendor claims/promises to ensure that acquired services are for the best benefit of NRC

- p) Provide background information on key technologies, IT topics, and issues.
 - q) Help assess the maturity and effectiveness of IT programs
- 5) The subject areas of the IT research shall minimally include, but not be limited to, the following:
- a) Infrastructure assessment and development
 - b) IT security and risk management
 - c) IT organizational development and assessment
 - d) Enterprise IT benchmarking of performance metrics across the enterprise architecture
 - e) IT performance assessments in relation to help desk, call center, enterprise architecture, and telecommunication technologies
 - f) Templates for effective IT contract analysis and RFP requirements compilation
 - g) Vendor verification and evaluation
 - h) Risk assessments of IT and capital investments
 - i) Cost benefit analysis of IT investments
 - j) Federal Information Security Management Act (FISMA) compliance
 - k) Analysis of IT industry best practices
 - l) IT governance
 - m) IT procurement portfolio management
 - n) IT portfolio management
 - o) Cloud computing in the U.S. Federal government
 - p) Data center development
 - q) ITIL and IT service catalogs
 - r) Bring Your Own Device (use of employee devices at work)
 - s) Actionable advice based on industry trends and predicted future technology changes
- 6) The subject areas covered by the IT research shall minimally include the following functions and sub-functions in the FEA Business Reference Model (BRM):
- a) Information and Technology Management business area
 - i) System Development
 - ii) IT Infrastructure Development & Maintenance

- iii) Record Retention
- iv) Information Management
- v) Information Sharing
- vi) System and Network Monitoring
- vii)
- b) Planning and Budgeting business area
 - i) Capital Planning (for IT investments), and familiarity with Office of Management Budget (OMB) 300 Exhibit 52 submissions
 - ii) Enterprise Architecture

For information about the FEA BRM, see:

http://www.whitehouse.gov/omb/assets/fea_docs/FEA_CRM_v23_Final_Oct_2007_Revised.pdf.

- 7) A significant amount of the IT research coverage shall be specific and applicable to the U.S. Federal government. Such research must understand federal contracting, and mandates and directives from Congress, the Office of Management and Budget, and the National Institute of Standards and Technology.
- 8) In addition to the core set of IT research, a significant quantity of exclusive role-focused IT research content shall be accessible by **IT Manager, Executive – CISO**, and **Executive – CIO** seat holders.
- 9) Provide unlimited web access to all contractor research and advisory documents, with 99% availability
- 10) Provide document web search capabilities
- 11) Permit any IT research reports to be printed locally to a NRC printer
- 12) Permit any IT research reports to be saved locally to a NRC desktop computer
- 13) Provide all IT research reports in an industry standard document format (Ex. Adobe Portable Document Format (PDF), Microsoft Word, or Hypertext Markup Language (HTML))
- 14) Provide monthly (at a minimum) new product evaluations and comparisons
- 15) Provide monthly (at a minimum) updated IT industry trends and direction
- 16) Provide information to assist in the identification of qualified solution providers
- 17) Provide information to assist in the identification of new and emerging technologies.
- 18) Provide the scope and/or limitations of sharing of their IT research services within the agency. Contractor shall specify the mode of distribution permitted (verbal and/or printed). Contractor shall also be required to specify if the research information gathered from the contractor's web site is limited to the individual subscriber's use, or if it is available to be shared with a wider audience. Examples of the possible types of information sharing are described below:
 - a) Individual (subscriber) – 1 person maximum per subscription
 - b) Office/team (includes subscriber) – 15 person maximum
 - c) Project/Workgroup (includes subscriber) – Minimum 2 persons/Maximum 20 persons

4.2 Requirements for Analyst Advisory Services

The contractor's solution shall minimally provide, but not be limited to, the following requirements:

- 1) The contractor shall provide access to analyst advisory services.
- 2) The services shall provide unlimited access to senior IT research analysts via phone and e-mail for the purposes of asking questions and/or obtaining advice within the scope and content of the contractor's existing research.
- 3) The services shall include unlimited access to any senior IT research analyst for limited (requiring no more than 60 minutes of analyst time) review and discussion of short (20 pages or less) business documents.
- 4) Contractor scheduling of analyst advisory calls shall be prompt, by no later than the next business day.
- 5) Conversation for any analyst advisory call shall be permitted to last at least 30 minutes in duration.

4.3 Minimum Requirements for Services for IT Professional – Readonly

The subscription seats for **IT Professional – Readonly** shall minimally offer:

- Unlimited access to the contractor's core set of IT research

4.4 Minimum Requirements for Services for IT Professional – Advisory

The subscription seats for **IT Professional – Advisory** shall minimally offer:

- Unlimited access to the contractor's core set of IT research
- Unlimited access to analyst advisory services, including unlimited business document reviews.

4.5 Minimum Requirements for Services for IT Manager

The subscription seats for **IT Manager** shall minimally offer, but not be limited to, the **IT Professional – Advisory** content and services, plus:

- Access to IT benchmark and metrics data (on things such as IT spending, staffing levels, technology costs, and performance metrics.)
- Analysis of breaking news
- Access to a role-based views of IT research content, with at least the following seven roles:
 - Application Development/Management
 - Business Process Improvement/Management
 - Enterprise Architecture
 - Information/Content Management
 - Security and Risk Management
 - Sourcing and Vendor Management
 - IT Infrastructure and Operations.
- Access to an exclusive online community of peers with similar IT roles
- Access to actionable prescriptive or diagnostic resources, such as templates and tools (forms, spreadsheets, etc.), that may be modified for internal non-commercial use.

4.6 Minimum Requirements for Services for Executive – CISO

The subscription seats for **Executive – CISO** (Chief Information Security Officer) shall minimally offer, but not be limited to, the **IT Manager** content and services, plus:

- Executive research reports
- Assigned point of contact who will work with the **Executive – CISO** seat holder to understand the their current initiatives and help the service deliver value
- Facilitated networking – to permit seat holders to request meetings or conference calls with peers to discuss a specific topic or issue and to exchange information about best practices or areas of expertise.
- Access to peer-contributed content

4.7 Minimum Requirements for Services for Executive – CIO

The subscription seats for **Executive – CIO** (Chief Information Officer) shall minimally offer, but not be limited to, the **IT Manager** content and services, plus:

- Executive research reports
- Executive teleconferences
- Targeted role-specific content for IT executives
- Assigned point of contact who will work with the **Executive – CIO** seat holder to understand the their current initiatives and help the service deliver value
- Complementary attendance at one widely-attended conference organized by the contractor to cover a broad range of IT research content.
- Facilitated networking – to permit seat holders to request meetings or conference calls with peers to discuss a specific topic or issue and to exchange information about best practices or areas of expertise.
- Online networking with peers.

4.8 IT Professional – Readonly Seats

The contractor shall provide one to ten **IT Professional – Readonly** seats and shall provide pricing for the seats in one unit increments.

4.9 IT Professional – Advisory Seats

The contractor shall provide one to ten **IT Professional – Advisory** seats and shall provide pricing for the seats in one unit increments.

4.10 IT Manager Seats

The contractor shall provide one to six **IT Manager** seats and shall provide pricing in one unit increments.

4.11 Executive – CISO Seats

The contractor shall provide one **Executive – CISO** seat.

4.12 Executive – CIO Seats

The contractor shall provide one to two **Executive – CIO** seats and shall provide pricing in one unit increments.

5.0 Deliverables

The contractor's deliverable shall be the IT research and advisory subscription services. The IT Research deliverable shall be the reports, templates, tools, and other content available via the Web. The advisory deliverable shall be the analyst phone calls and e-mails.

The contractor shall bring problems or potential problems affecting performance to the Project Officer (PO) as soon as possible. Verbal reports shall be followed up with written reports when directed by the PO.

6.0 Inspection and Acceptance

In the absence of other agreements negotiated with respect to time provided for government review, deliverables will be inspected and the contractor notified of the PO's findings within 5 work days of the first business day of each month if a deliverable is not acceptable.

7.0 Section 508 Compliance

The contractor shall support the Government in its compliance with Section 508 throughout the development and implementation of the work to be performed. Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C. 794d) requires that when Federal agencies develop, procure, maintain, or use electronic information technology, Federal employees with disabilities have access to and use of information and data that is comparable to the access and use by Federal employees who do not have disabilities, unless an undue burden would be imposed on the agency. Section 508 also requires that individuals with disabilities, who are members of the public seeking information or services from a Federal agency, have access to and use of information and data that is comparable to that provided to the public who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

The contractor should review the following websites for additional 508 information:

<http://www.access-board.gov/508.htm>

<http://www.w3.org/WAI/Resources>

The following Section 508 standards are applicable to this contract:

- Subpart B — Technical Standards
 - 1194.21 Software applications and operating systems. *(If browser plug-ins or extensions are required.)*
 - 1194.22 Web-based intranet and internet information and applications.
 - 1194.24 Video and multimedia products.
- Subpart C — Functional Performance Criteria
 - 1194.31 Functional performance criteria.
- Subpart D — Information, Documentation, and Support
 - 1194.41 Information, documentation, and support.

B.2 BILLING INSTRUCTIONS FOR FIXED PRICE CONTRACTS (JUNE 2008)

General: During performance and through final payment of this contract, the contractor is responsible for the accuracy and completeness of data within the Central Contractor Registration (CCR) database and for any liability resulting from the Government's reliance on inaccurate or incomplete CCR data.

The contractor shall prepare vouchers/invoices as prescribed herein. **FAILURE TO SUBMIT VOUCHERS/INVOICES IN ACCORDANCE WITH THESE INSTRUCTIONS WILL RESULT IN REJECTION OF THE VOUCHER/INVOICE AS IMPROPER.**

Form: Claims shall be submitted on the payee's letterhead, voucher/invoice, or on the Government's Standard Form 1034, "Public Voucher for Purchases and Services Other than Personal," and Standard Form 1035, "Public Voucher for Purchases Other than Personal--Continuation Sheet."

Number of Copies: A signed original shall be submitted. If the voucher/invoice includes the purchase of any property with an initial acquisition cost of \$50,000 or more, a copy of the signed original is also required.

Designated Agency Billing Office: The preferred method of submitting vouchers/invoices is electronically to the Department of the Interior at NRCPayments@nbc.gov

If the voucher/invoice includes the purchase of any property with an initial acquisition cost of \$50,000 or more, a copy of the signed original shall be electronically sent to: Property@nrc.gov

However, if you submit a hard-copy of the voucher/invoice, it shall be submitted to the following address:

Department of the Interior
National Business Center
Attn: Fiscal Services Branch - D2770
7301 West Mansfield Avenue
Denver, CO 80235-2230

If you submit a hard-copy of the voucher/invoice and it includes the purchase of any property with an initial acquisition cost of \$50,000 or more, a copy of the signed original shall be mailed to the following address:

U.S. Nuclear Regulatory Commission
NRC Property Management Officer
Mail Stop: O-4D15
Washington, DC 20555-0001

HAND-CARRIED SUBMISSIONS WILL NOT BE ACCEPTED

Agency Payment Office: Payment will continue to be made by the office designated in the contract in Block 12 of the Standard Form 26, Block 25 of the Standard Form 33, or Block 18a. of the Standard Form 1449, whichever is applicable.

Frequency: The contractor shall submit a voucher/invoice only after the NRC's final acceptance of services rendered or products delivered in performance of the contract unless otherwise specified in the contract.

Preparation and Itemization of the Voucher/Invoice: The voucher/invoice shall be prepared in ink or by typewriter (without strike-overs). Corrections or erasures must be initialed. To be considered a proper voucher/invoice, all of the following elements must be included:

1. Contractor's Data Universal Number (DUNS) or DUNS+4 number that identifies the contractor's name and address. The DUNS+4 number is the DUNS number plus a 4-character suffix that may be assigned at the discretion of the contractor to identify alternative Electronic Funds Transfer (EFT) accounts for the same parent concern.
2. Contract number.
3. Sequential voucher/invoice number.

4. Date of voucher/invoice.
5. Payee's name and address. Show the name of the Payee as it appears in the contract and its correct address. If the Payee assigns the proceeds of this contract as provided for in the assignment of claims terms of this contract, the Payee shall require as a condition of any such assignment, that the assignee shall register separately in the Central Contractor Registration (CCR) database at <http://www.ccr.gov> and shall be paid by EFT in accordance with the terms of this contract. See Federal Acquisition Regulation 52.232-33(g) Payment by Electronic Funds Transfer - Central Contractor Registration (October 2003).
6. A description of articles or services, quantity, unit price, and total amount.
7. For contractor acquired property, list each item with an initial acquisition cost of \$50,000 or more and provide: (1) an item description, (2) manufacturer, (3) model number, (4) serial number, (5) acquisition cost, (6) date of purchase, and (7) a copy of the purchasing document.
8. Weight and zone of shipment, if shipped by parcel post.
9. Charges for freight or express shipments. Attach prepaid bill if shipped by freight or express.
10. Instructions to consignee to notify the Contracting Officer of receipt of shipment.
11. For Indefinite Delivery contracts or contracts under which progress payments are authorized, the final voucher/invoice shall be marked "FINAL VOUCHER" OR "FINAL INVOICE."

Currency: Billings may be expressed in the currency normally used by the contractor in maintaining his accounting records and payments will be made in that currency. However, the U.S. dollar equivalent for all vouchers/invoices paid under the contract may not exceed the total U.S. dollars authorized in the contract.

Supersession: These instructions supersede any previous billing instructions.