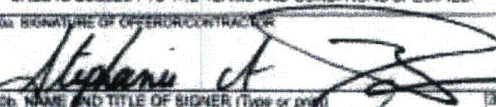
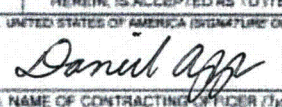


<b>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS</b> OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30				1. REQUISITION NUMBER OCHCO-15-0223		PAGE OF 1 16	
2. CONTRACT NO. NRC-HQ-84-15-E-0002		3. AWARD EFFECTIVE DATE 09/30/2015		4. ORDER NUMBER NRC-HQ-84-15-T-0002		5. SOLICITATION NUMBER	
7. FOR SOLICITATION INFORMATION CALL DANIEL APP		8. NAME DANIEL APP		9. TELEPHONE NUMBER 301-415-6985		10. OFFER DUE DATE/LOCAL TIME	
11. ISSUED BY US NRC - HQ ACQUISITION MANAGEMENT DIVISION MAIL STOP TWEN-5E03 WASHINGTON DC 20555-0001		12. CODE NRCHQ		13. THIS ACQUISITION IS UNRESTRICTED OR <input checked="" type="checkbox"/> SET ASIDE SMALL BUSINESS WOMEN-OWNED SMALL BUSINESS HUBZONE SMALL BUSINESS SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS NACCS 611430 SIZE STANDARD \$11.0		14. METHOD OF SOLICITATION RFC FS RFQ	
15. DELIVERY FOR FOR DESTINATION UNLESS BLOCK IS MARKED SEE SCHEDULE		16. DISCOUNT TERMS		17. THIS CONTRACT IS A RATED ORDER UNDER GRAS (15 CFR 700)		18. PAYING	
19. DELIVER TO US NUCLEAR REGULATORY COMMISSION- MAIL PROCESSING CENTER 4930 BOILING BROOK PARKWAY ROCKVILLE MD 20852		20. CODE NRCHQ		21. ADMINISTERED BY US NRC - HQ ACQUISITION MANAGEMENT DIVISION MAIL STOP TWEN-5E03 WASHINGTON DC 20555-0001		22. CODE NRCHQ	
23. CONTRACTOR OFFEROR CROWNED GRACE INC ATTN STEPHANIE PARSON 137 NATIONAL PL2 STE 300 OXON HILL MD 20745		24. CODE 131628631		25. FACILITY CODE		26. PAYMENT WILL BE MADE BY NRCPAYMENTS	
27. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER		28. CONTRACTOR'S ADDRESS (SEE ADDENDUM)		29. PAYMENT WILL BE MADE BY US NUCLEAR REGULATORY COMMISSION ONE WHITE FLINT NORTH 11555 ROCKVILLE PIKE MAILSTOP 03-E17A NRCPAYMENTS@NRC.GOV ROCKVILLE MD 20852-2738		30. CODE NRCPAYMENTS	
31. ITEM NO.		32. SCHEDULE OF SUPPLIES/SERVICES		33. QUANTITY		34. UNIT	
		The purpose of this task order is to provide Executive coaching to the Nuclear Regulatory Commission.  Obligated Amount: \$12,265.00 Base and Exercised Options Amount: \$53,855.00 Base and All Options Amount: \$81,429.00 Delivery: 03/31/2017 Period of Performance: 09/30/2015 to 03/31/2017  (Use Reverse and/or Attach Additional Sheets as Necessary)					
35. ACCOUNTING AND APPROPRIATION DATA 2015-X0200-FEBASED-84-84D003-51-N-216-1297-251A		36. TOTAL AWARD AMOUNT (For Govt. Use Only) \$81,429.00		37. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4, FAR 52.212-3 AND 52.212-5 ARE ATTACHED		38. ADDENDA ARE ARE NOT ATTACHED ARE X ARE NOT ATTACHED	
39. CONTRACT PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4, FAR 52.212-5 IS ATTACHED		40. ADDENDA ARE ARE NOT ATTACHED ARE X ARE NOT ATTACHED		41. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED.		42. AWARD OF CONTRACT REF DATED YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS.	
43. SIGNATURE OF OFFEROR/CONTRACTOR 		44. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER) 		45. NAME AND TITLE OF SIGNER (Type or print) Stephanie A. Parson, Procurement Officer		46. DATE SIGNED 9/14/15	
47. NAME OF CONTRACTING OFFICER (Type or print) DANIEL APP		48. DATE SIGNED 9/16/15		49. AUTHORIZED FOR LOCAL REPRODUCTION PREVIOUS EDITION IS NOT USABLE		50. STANDARD FORM 1449 (REV. 2/2012) Prescribed by GSA - FAR (48 CFR) 53.212	

**SUNSI REVIEW COMPLETE**

TEMPLATE - ANM002

SEP 18 2015

**ANM002**

19 ITEM NO	20 SCHEDULE OF SUPPLIES/SERVICES	21 QUANTITY	22 UNIT	23 UNIT PRICE	24 AMOUNT

33a. QUANTITY IN COLUMN 21 HAS BEEN

RECEIVED

INSPECTED

ACCEPTED, AND CONFORMS TO THE CONTRACT (EXCEPT AS NOTED)

32b. SIGNATURE OF AUTHORIZED GOVERNMENT REPRESENTATIVE		32c. DATE	32d. PRINTED NAME AND TITLE OF AUTHORIZED GOVERNMENT REPRESENTATIVE	
32e. MAILING ADDRESS OF AUTHORIZED GOVERNMENT REPRESENTATIVE			32f. TELEPHONE NUMBER OF AUTHORIZED GOVERNMENT REPRESENTATIVE	
			32g. E-MAIL OF AUTHORIZED GOVERNMENT REPRESENTATIVE	
33. SHIP NUMBER	34. VOUCHER NUMBER	35. AMOUNT VERIFIED CORRECT FOR	36. PAYMENT	37. CHECK NUMBER
PARTIAL      FINAL			COMPLETE      PARTIAL      FINAL	
38. S/R ACCOUNT NUMBER	38. S/R VOUCHER NUMBER	40. PAID BY		
41a. I CERTIFY THIS ACCOUNT IS CORRECT AND PROPER FOR PAYMENT		42a. RECEIVED BY (Print)		
41b. SIGNATURE AND TITLE OF CERTIFYING OFFICER		42b. RECEIVED AT (Location)		
		42c. DATE RECD (YYMMDD)		
		42d. TOTAL CONTAINERS		

**SECTION A**

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# **A.1 PRICE/COST SCHEDULE**

<b>Clin</b>	<b>Base Year 09/30/2015 – 03/31/2016</b>	<b>Est. Level of Effort</b>	<b>LABOR HOURLY RATE</b>	<b>EST. TOTAL</b>
00001	Program Management	0		\$0
00002	Project Management	0		\$0
00003	SR OD Consultant	0		\$0
00004	JR OD Consultant	0		\$0
00005	SR OD Coach			
	<b>SUBTOTAL</b>			
	<b>OTHER DIRECT COSTS</b>			
00006	Assessment Instruments/Misc Supplies - Cost Not-to-Exceed (NTE)		NTE	
00007	Travel (For Base and Option years)		NTE	
	<b>TOTAL ODC</b>			
	<b>TOTAL ESTIMATED PRICE – BASE YEAR</b>			\$27,065.00

<b>Clin</b>	<b>Option Year 1 04/01/2016 – 03/31/2017</b>	<b>Est. Level of Effort</b>	<b>LABOR HOURLY RATE</b>	<b>EST. TOTAL</b>
10001	Program Management	0		\$0
10002	Project Management	0		\$0
10003	SR OD Consultant	0		\$0
10004	JR OD Consultant	0		\$0
10005	SR OD Coach			
	<b>SUBTOTAL</b>			
	<b>OTHER DIRECT COSTS</b>			
10006	Assessment Instruments/Misc Supplies		NTE	
	<b>TOTAL ODC</b>			
	<b>TOTAL ESTIMATED PRICE - Option Year 1</b>			\$26,790.00



	Option Year 2 04/01/2017 – 03/31/2018	Est. Level of Effort	LABOR HOURLY RATE	EST. TOTAL
20001	Program Management	0		\$0
20002	Project Management	0		\$0
20003	SR OD Consultant	0		\$0
20004	JR OD Consultant	0		\$0
20005	SR OD Coach			
	<b>SUBTOTAL</b>			
	<b>OTHER DIRECT COSTS</b>			
20006	Assessment Instruments/Misc Supplies		NTE	
	<b>TOTAL ODC</b>			
	<b>TOTAL ESTIMATED PRICE – Option Year 2</b>			\$27,574.00

**GRAND TOTAL: \$81,429.00**

## **TASK ORDER TERMS AND CONDITIONS**

NOT SPECIFIED IN THE CONTRACT

### **A.2 TASK/DELIVERY ORDER PERIOD OF PERFORMANCE (SEP 2013)**

The period of performance for this task order is 09/30/2015 – 03/31/2017. Option Year one is being exercised at the time of award for this task order.

Base: 09/30/2015 – 03/31/2016

Period 1: 04/01/2016 – 03/31/2017

Period 2: 04/01/2017 – 03/31/2018

### **A.3 STATEMENT OF WORK**

#### **1. PROJECT TITLE**

Executive Coaching services for the Nuclear Regulatory Commission (NRC).

#### **2. BACKGROUND**

The Nuclear Regulatory Commission (NRC) is experiencing a period of change, due to internal (i.e. office realignments, Project AIM, etc) and external factors (i.e. nuclear industry changes, budget, etc). These changes have placed a high burden on the NRC staff, as well as the executive and management staff. As a result, the NRC leadership anticipates the need for management coaching services, as provided by the Agency's Enterprise-wide Contract for Organization Development Engagements with Crowned Grace International.

### 3. SCOPE

The purpose of this Task Order is to provide management coaching to NRC managers, upon request by the Contracting Officer's Representative (COR). The projected outcomes of this Task Order are:

- Improved leadership skills for individual managers
- Improved rapport between managers and their staff
- Improved organizational effectiveness

### 4. SPECIFIC TASKS

The contractor shall perform the following work under this task order:

#### **Task 1 – Conduct coaching client intake assessment, upon request by the COR.**

- All coaching engagements must be initiated by the COR, in writing (email is acceptable). Below is a sample of a request for coaching engagement:
  - “Please provide “X” number of coaching sessions, at 1 hour each, for (client name). “X” number of preparatory hours are approved, to enable the coach to support the client effectively. The manager wants to improve their [e.g., communication techniques, leadership presence, organization skills, etc]”
- The contractor's program manager (PM) shall meet with the coaching client to have them complete a coaching intake form, in order to assess their need and recommend coaches.

#### **Task 2 – Assign a coach.**

- After completing the intake process, the contractor's PM shall recommend a coach, and/or provide resumes of several recommended coaches when requested in writing by the COR. The COR will notify the contractor's PM of the coaching client's selection.

#### **Task 3 – Provide coaching to NRC managers (coaching client)**

- No later than 5 days after selecting a coach, the contractor shall arrange for an initial coaching session between the coach and coaching client.
  - Contractor coaches shall develop coaching goals that can be completed within the timeframe designated in the original request for coaching engagement (task 1). If necessary, an increase in hours can only be authorized through a formal modification to the task order.
  - All subsequent coaching sessions will be arranged by the coach and coaching client.
  - The coaching engagement (all sessions allotted to a particular coaching client) shall be completed within the timeframe specified in the original request for coaching engagement.
    - If the coaching client determines at any time during the engagement that the coach is not a good fit for their needs, they will notify the COR to have a new coach assigned.
    - Engagements that have been reassigned to a new coach during the engagement process will be considered for an extension, if additional time is necessary.

#### Task 4 – Coaching Reports

- Upon the conclusion of the coaching engagement (all sessions allotted for a particular coaching client), the contractor shall provide a brief summary of the engagement that includes, at a minimum: the date the coaching engagement was completed and the general outcome (i.e., was it successful, was the client given a path forward).
  - This report may be submitted via email.

#### Task 5 – Coaching Monitoring Reports

- The contractor shall track the coaching schedule and attendance of all active coaching engagements and notify the COR of any scheduling challenges that may prohibit the completion of any particular engagement within three month of assigning a coach.
- The contractor shall maintain a current chart of all scheduled coaching sessions and attendance for active coaching engagements, to be provided to the COR on a monthly basis.

### 5. DELIVERABLES AND DELIVERY SCHEDULE

DELIVERABLE	DUE DATE
Task 1 – Coaching Client Intake Assessment	Within 10 days of the request for coaching engagement from the COR
Task 2 – Email Scheduler for Initial Coaching Session	Within 10 days of completion of Task 1
Task 3 – Provide Coaching to Coaching Clients	Complete the entire engagement within the timeframe specified in the original request for coaching engagement
Task 4 – Coaching Reports	Within 10 days of completing the coaching engagement
Task 5 – Coaching Monitoring Reports	Conducted concurrently with Tasks 1-4 and to be provided monthly.

### 6. REQUIRED LABOR CATEGORIES

#### Base Contract: September 30, 2015 – March 31, 2016

CONTRACT LABOR CATEGORY	ESTIMATED LEVEL OF EFFORT
Senior OD Consultant/Coach	50

#### Option Year 1: April 1, 2016 – March 31, 2017

CONTRACT LABOR CATEGORY	ESTIMATED LEVEL OF EFFORT
Senior OD Consultant/Coach	100

**Option Year 2: April 1, 2017 – March 31, 2018**

<b>CONTRACT LABOR CATEGORY</b>	<b>ESTIMATED LEVEL OF EFFORT</b>
Senior OD Consultant/Coach	100

## **7. GOVERNMENT-FURNISHED PROPERTY**

**Facilities:** The Government will provide appropriate facilities for conducting OD meetings and other related activities at NRC headquarters and each of its four regions, the TTC, and other specified locations as outline in the SOW and upon request of the contractor for use during the provision of contract services.

**Equipment:** The Government will provide equipment as needed including items such as easels and flip charts; name and tent cards; DVD Player, VCR (if needed); VTC/LCD video camera equipment; TV monitors and microphones; blank DVDs, CDs, or tapes; overhead projector; writing pens and paper; highlighters; dry erase markers; painter's tape for attaching participants' flip chart work sheets to special wall boards; etc.

**Computer Access:** The Government will provide access to the NRC internal website as required by this task order. Access is dependent on the contractors maintaining, at a minimum, an NRC IT-1 level clearance.

At the end of this contract/order, disposition of GFP shall be in accordance with FAR 52.245-1, Government Property.

## **8. PLACE OF PERFORMANCE**

All coaching sessions will be conducted at NRC facilities (Headquarters and/or Regions).

## **9. TRAVEL**

Travel will be reimbursed in accordance with FAR 31.205-46, "Travel costs" and the General Services Administration's Federal Travel Regulations at: <http://www.gsa.gov/portal/content/104790>

Travel to the regional offices or technical training center to support Executive Coaching in those locations is authorized as required. The travel budget will be specified in the project plan for each engagement and will not exceed the amount allocated in the base SOW.

### **A.4 NRCB050 CONSIDERATION AND OBLIGATION-TASK ORDERS**

(a) The Based and Exercised ceiling of this order for services is \$53,855.00 and the Base and All Options of this order is \$81,429.00.

(b) The amount presently obligated with respect to this order is \$12,265.00. The obligated amount shall, at no time, exceed the order ceiling as specified in paragraph (a) above. When and if the amount(s) paid and payable to the Contractor hereunder shall equal the obligated amount, the Contractor shall not be obligated to continue performance of the work unless and until the Contracting Officer shall increase the amount obligated with respect to this order, in accordance with FAR Part 43 - Modifications. Any work undertaken by the Contractor in excess of the obligated amount specified above is done so at the Contractor's sole risk and may not be reimbursed by the Government.

(d) The Contractor shall comply with the provisions of FAR 52.232-22 - Limitation of Funds, for incrementally-funded delivery orders or task orders.



## **A.5 52.232-22 LIMITATION OF FUNDS (APR 1984)**

(a) The parties estimate that performance of this contract will not cost the Government more than (1) the estimated cost specified in the Schedule or, (2) if this is a cost-sharing contract, the Government's share of the estimated cost specified in the Schedule. The Contractor agrees to use its best efforts to perform the work specified in the Schedule and all obligations under this contract within the estimated cost, which, if this is a cost-sharing contract, includes both the Government's and the Contractor's share of the cost.

(b) The Schedule specifies the amount presently available for payment by the Government and allotted to this contract, the items covered, the Government's share of the cost if this is a cost-sharing contract, and the period of performance it is estimated the allotted amount will cover. The parties contemplate that the Government will allot additional funds incrementally to the contract up to the full estimated cost to the Government specified in the Schedule, exclusive of any fee. The Contractor agrees to perform, or have performed, work on the contract up to the point at which the total amount paid and payable by the Government under the contract approximates but does not exceed the total amount actually allotted by the Government to the contract

(c) The Contractor shall notify the Contracting Officer in writing whenever it has reason to believe that the costs it expects to incur under this contract in the next 60 days, when added to all costs previously incurred, will exceed 75 percent of (1) the total amount so far allotted to the contract by the Government or, (2) if this is a cost-sharing contract, the amount then allotted to the contract by the Government plus the Contractor's corresponding share. The notice shall state the estimated amount of additional funds required to continue performance for the period specified in the Schedule.

(d) Sixty days before the end of the period specified in the Schedule, the Contractor shall notify the Contracting Officer in writing of the estimated amount of additional funds, if any, required to continue timely performance under the contract or for any further period specified in the Schedule or otherwise agreed upon, and when the funds will be required.

(e) If, after notification, additional funds are not allotted by the end of the period specified in the Schedule or another agreed-upon date, upon the Contractor's written request the Contracting Officer will terminate this contract on that date in accordance with the provisions of the Termination clause of this contract. If the Contractor estimates that the funds available will allow it to continue to discharge its obligations beyond that date, it may specify a later date in its request, and the Contracting Officer may terminate this contract on that later date.

(f) Except as required by other provisions of this contract, specifically citing and stated to be an exception to this clause--

(1) The Government is not obligated to reimburse the Contractor for costs incurred in excess of the total amount allotted by the Government to this contract; and

(2) The Contractor is not obligated to continue performance under this contract (including actions under the Termination clause of this contract) or otherwise incur costs in excess of--

(i) The amount then allotted to the contract by the Government or;

(ii) If this is a cost-sharing contract, the amount then allotted by the Government to the contract plus the Contractor's corresponding share, until the Contracting Officer notifies the Contractor in writing that the amount allotted by the Government has been increased and specifies an increased amount, which shall then constitute the total amount allotted by the Government to this contract.

(g) The estimated cost shall be increased to the extent that (1) the amount allotted by the Government or, (2) if this is a cost-sharing contract, the amount then allotted by the Government to the contract plus the Contractor's

corresponding share, exceeds the estimated cost specified in the Schedule. If this is a cost-sharing contract, the increase shall be allocated in accordance with the formula specified in the Schedule.

(h) No notice, communication, or representation in any form other than that specified in paragraph (f)(2) of this clause, or from any person other than the Contracting Officer, shall affect the amount allotted by the Government to this contract. In the absence of the specified notice, the Government is not obligated to reimburse the Contractor for any costs in excess of the total amount allotted by the Government to this contract, whether incurred during the course of the contract or as a result of termination.

(i) When and to the extent that the amount allotted by the Government to the contract is increased, any costs the Contractor incurs before the increase that are in excess of--

(1) The amount previously allotted by the Government or;

(2) If this is a cost-sharing contract, the amount previously allotted by the Government to the contract plus the Contractor's corresponding share, shall be allowable to the same extent as if incurred afterward, unless the Contracting Officer issues a termination or other notice and directs that the increase is solely to cover termination or other specified expenses.

(j) Change orders shall not be considered an authorization to exceed the amount allotted by the Government specified in the Schedule, unless they contain a statement increasing the amount allotted.

(k) Nothing in this clause shall affect the right of the Government to terminate this contract. If this contract is terminated, the Government and the Contractor shall negotiate an equitable distribution of all property produced or purchased under the contract, based upon the share of costs incurred by each.

(l) If the Government does not allot sufficient funds to allow completion of the work, the Contractor is entitled to a percentage of the fee specified in the Schedule equaling the percentage of completion of the work contemplated by this contract.

## **A.6 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.7 ELECTRONIC PAYMENT (SEP 2014)**

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: [NRCPayments@nrc.gov](mailto:NRCPayments@nrc.gov). If the contractor submits a hard copy of the invoice, it shall be submitted to the following address:

NRC Payments  
U.S. Nuclear Regulatory Commission  
One White Flint North  
11555 Rockville Pike  
Mailstop O3-E17A  
Rockville, MD 20852-2738

## **A.8 BILLING INSTRUCTIONS FOR LABOR HOUR/TIME AND MATERIALS TYPE CONTRACTS (MAY 2015)**

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

The contractor shall prepare invoices/vouchers for reimbursement of costs in the manner and format described herein. FAILURE TO SUBMIT INVOICES/VOUCHERS IN ACCORDANCE WITH THESE INSTRUCTIONS WILL RESULT IN REJECTION OF THE INVOICE/VOUCHER AS IMPROPER.

**Standard Forms:** Claims shall be submitted on the payee's letterhead, invoice/voucher, 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."

**Electronic Invoice/Voucher Submissions:** The preferred method of submitting vouchers/invoices is electronically to the U.S. Nuclear Regulatory Commission, via email to: [NRCPayments@nrc.gov](mailto:NRCPayments@nrc.gov).

**Hard-Copy Invoice/Voucher Submissions:** If you submit a hard-copy of the invoice/voucher, a signed original and supporting documentation shall be submitted to the following address:

NRC Payments  
U.S. Nuclear Regulatory Commission  
One White Flint North  
11555 Rockville Pike  
Mailstop O3-E17A  
Rockville, MD 20852-2738

### **Purchase of Capital Property:** (\$50,000 or more with life of one year or longer)

Contractors must report to the Contracting Officer, electronically, any capital property acquired with contract funds having an initial cost of \$50,000 or more, in accordance with procedures set forth in NRC Management Directive (MD).

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

**Frequency:** The contractor shall submit claims for reimbursement once each month, unless otherwise authorized by the Contracting Officer.

**Format:** Invoices/Vouchers shall be submitted in the format depicted on the attached sample form entitled "Invoice/Voucher for Purchases and Services Other Than Personal". Alternate formats are permissible only if they

address all requirements of the Billing Instructions. The instructions for preparation and itemization of the invoice/voucher are included with the sample form.

**Task Order Contracts:** The contractor must submit a separate invoice/voucher for each individual task order with detailed cost information. This includes all applicable cost elements and other items discussed in paragraphs (a) through (q) of the attached instructions. In addition, the invoice/voucher must specify the contract number, and the NRC-assigned task/delivery order number.

**Billing of Costs after Expiration of Contract:** If costs are incurred during the contract period and claimed after the contract has expired, you must cite the period during which these costs were incurred. To be considered a proper expiration invoice/voucher, the contractor shall clearly mark it "EXPIRATION INVOICE" or "EXPIRATION VOUCHER".

Final invoices/vouchers shall be marked "FINAL INVOICE" or "FINAL VOUCHER".

**Currency:** Invoices/Vouchers must be expressed in U.S. Dollars.

**Supersession:** These instructions supersede previous Billing Instructions for Time-and-Materials/Labor-Hour Type Contracts (MAY 2013).

## **INVOICE/VOUCHER FOR PURCHASES AND SERVICES OTHER THAN PERSONAL (SAMPLE FORMAT - COVER SHEET)**

### **1. Official Agency Billing Office**

NRC Payments  
U.S. Nuclear Regulatory Commission  
One White Flint North  
11555 Rockville Pike  
Mailstop O3-E17A  
Rockville, MD 20852-2738

### **2. Invoice/Voucher Information**

a. **Payee's DUNS Number or DUNS+4.** The Payee shall include the Payee's Data Universal Number (DUNS) or DUNS+4 number that identifies the Payee'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 Payee to identify alternative Electronic Funds Transfer (EFT) accounts for the same parent concern.

b. **Payee's Name and Address.** Show the name of the Payee as it appears in the contract and its correct address. Where the Payee is authorized to assign the proceeds of this contract in accordance with the clause at Federal Acquisition Regulation (FAR) 52.232-23 Assignment of Claims, the Payee shall require as a condition of any such assignment, that the assignee shall register separately in the System for Award Management (SAM) database at <http://sam.gov> and shall be paid by EFT in accordance with the terms of this contract. See FAR 52.232-33 Payment by Electronic Funds Transfer-System for Award Management.

c. **Taxpayer Identification Number.** The Payee shall include the Payee's taxpayer identification number (TIN) used by the Internal Revenue Service (IRS) in the administration of tax laws. (See IRS Web site: [http://www.irs.gov/Individuals/International-Taxpayers/Taxpayer-Identification-Numbers-\(TIN\)](http://www.irs.gov/Individuals/International-Taxpayers/Taxpayer-Identification-Numbers-(TIN))).

d. **Contract Number.** Insert the NRC contract number (including Enterprise-wide Contract (EWC)), GSA Federal Supply Schedule (FSS), Governmentwide Agency Contract (GWAC) number, or Multiple Agency Contract (MAC) number, as applicable.

- e. Task Order Number. Insert the task/delivery order number (If Applicable). **Do not include more than one task order per invoice or the invoice may be rejected as improper.**
- f. Invoice/Voucher. The appropriate sequential number of the invoice/voucher, beginning with 001 should be designated. Contractors may also include an individual internal accounting number, if desired, in addition to the 3-digit sequential number.
- g. Date of Invoice/Voucher. Insert the date the invoice/voucher is prepared.
- h. Billing period. Insert the beginning and ending dates (day, month, year) of the period during which costs were incurred and for which reimbursement is requested.
- i. Labor Hours Expended. Provide a general summary description of the services performed and associated labor hours utilized during the invoice period. Specify the Contract Line Item Number (CLIN) or SubCLIN, as applicable, and information pertaining to the contract's labor categories/positions, and corresponding authorized hours.
- j. Property. 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.
- k. Shipping. Insert weight and zone of shipment, if shipped by parcel post.
- l. Charges for freight or express shipments. Attach prepaid bill if shipped by freight or express.
- m. Instructions. Include instructions to consignee to notify the Contracting Officer of receipt of shipment.
- n. For Indefinite Delivery contracts, the final invoice/voucher shall be marked "FINAL INVOICE" or "FINAL VOUCHER".
- o. Direct Costs. Insert the amount billed for the following cost elements, adjustments, suspensions, and total amounts, for both the current billing period and for the cumulative period (from contract inception to end date of this billing period).
- (1) Direct (Burdened) Labor. This consists of salaries and wages paid (or accrued) for direct performance of the contract itemized, including a burden (or load) for indirect costs (i.e., fringe, overhead, General and Administrative, as applicable), and profit component, as follows:
- | <u>Labor Category</u> | <u>Hours Billed</u> | <u>Burdened Hourly Rate</u> | <u>Total</u> | <u>Cumulative Hours Billed</u> |
|-----------------------|---------------------|-----------------------------|--------------|--------------------------------|
|                       |                     |                             |              |                                |
- (2) Contractor-acquired property (\$50,000 or more). List each item costing \$50,000 or more and having a life expectancy of more than one year. List only those items of equipment for which reimbursement is requested. For each such item, list the following (as applicable): (a) an item description, (b) manufacturer, (c) model number, (d) serial number, (e) acquisition cost, (f) date of purchase, and (g) a copy of the purchasing document.
- (3) Contractor-acquired property (under \$50,000), Materials, and Supplies. These are equipment other than that described in (2) above, plus consumable materials and supplies. List by category. List items valued at \$1,000 or more separately. Provide the item number for each piece of equipment valued at \$1,000 or more.
- (4) Materials Handling Fee. Indirect costs allocated to direct materials in accordance the contractor's usual

accounting procedures.

(5) Consultant Fee. The supporting information must include the name, hourly or daily rate of the consultant, and reference the NRC approval (if not specifically approved in the original contract).

(6) Travel. Total costs associated with each trip must be shown in the following format:

<u>Start Date</u>	<u>Destination</u>	<u>Costs</u>
From To	From To	\$

(Must include separate detailed costs for airfare, per diem, and other transportation expenses. All costs must be adequately supported by copies of receipts or other documentation.)

(7) Subcontracts. Include separate detailed breakdown of all costs paid to approved subcontractors during the billing period.

p. Total Amount Billed. Insert columns for total amounts for the current and cumulative periods.

q. Adjustments. Insert columns for any adjustments, including outstanding suspensions for unsupported or unauthorized hours or costs, for the current and cumulative periods.

r. Grand Totals.

### 3. Sample Invoice/Voucher Information

#### Sample Invoice/Voucher Information (Supporting Documentation must be attached)

This invoice/voucher represents reimbursable costs for the billing period from \_\_\_\_ through \_\_\_\_.

		<u>Amount Billed</u>		<u>(a) Direct Costs</u>
		<u>Current Period</u>	<u>Cumulative</u>	
(1)	Direct burdened labor	\$ _____	\$ _____	
(2)	Government property (\$50,000 or more)	\$ _____	\$ _____	
(3)	Government property, Materials, and Supplies (under \$50,000 per item)	\$ _____	\$ _____	
(4)	Materials Handling Fee	\$ _____	\$ _____	
(5)	Consultants Fee	\$ _____	\$ _____	
(6)	Travel	\$ _____	\$ _____	
(7)	Subcontracts	\$ _____	\$ _____	
Total Direct Costs:		\$ _____	\$ _____	
(b)	<b>Total Amount Billed</b>	\$ _____	\$ _____	
(c)	<b>Adjustments (+/-)</b>	\$ _____	\$ _____	
(d)	<b>Grand Total</b>	\$ _____	\$ _____	

(The invoice/voucher format provided above must include information similar to that included below in the following to ensure accuracy and completeness.)



## SAMPLE SUPPORTING INFORMATION

The budget information provided below is for format purposes only and is illustrative.

### Cost Elements:

1) Direct Burdened Labor - \$4,800

Labor

Hours	Burdened		Cumulative	
<u>Category</u>	<u>Billed</u>	<u>Rate</u>	<u>Total</u>	<u>Hours Billed</u>
Senior Engineer I	100	\$28.00	\$2,800	975
Engineer	50	\$20.00	\$1,000	465
Computer Analyst	100	\$10.00	\$1,000	320
			\$4,800	1,760 hrs.

*Burdened labor rates must come directly from the contract.*

2) Government-furnished and contractor-acquired property (\$50,000 or more) - \$60,000

Prototype Spectrometer - item number 1000-01 = \$60,000

3) Government-furnished and contractor-acquired property (under \$50,000), Materials, and Supplies - \$2,000

10 Radon tubes @ \$110.00	= \$1,100
6 Pairs Electrostatic gloves @ \$150.00	= \$ 900
	\$2,000

4) Materials Handling Fee - \$40

(2% of \$2,000 in item #3)

5) Consultants' Fee - \$100

Dr. Carney - 1 hour fully-burdened @ \$100 = \$100

6) Travel - \$2,640

(i) Airfare: (2 Roundtrip trips for 1 person @ \$300 per r/t ticket)

<u>Start Date</u>	<u>End Date</u>	<u>Days</u>	<u>From</u>	<u>To</u>	<u>Cost</u>
4/1/2011	4/7/2011	7	Philadelphia, PA	Wash, D.C.	\$300
7/1/2011	7/8/2011	8	Philadelphia, PA	Wash, D.C.	\$300

(ii) Per Diem: \$136/day x 15 days = \$2,040

7) Subcontracting - \$30,000

Company A	= \$10,000
Company B	= \$20,000
	\$30,000

(EX: Subcontracts for Companies A & B were consented to by the Contracting Officer by letter dated

6/15/2011.)

Total Amount Billed	\$99,580
Adjustments (+/-)	<u>0</u>
Grand Total	\$99,580

#### **4. Definitions**

Material handling costs. When included as part of material costs, material handling costs shall include only costs clearly excluded from the labor-hour rate. Material handling costs may include all appropriate indirect costs allocated to direct materials in accordance with the contractor's usual accounting procedures.