







SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS <i>OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, & 30</i>				1. REQUISITION NUMBER HCT160087		PAGE OF 1 24		
2. CONTRACT NO. GS-02F-0148N			3. AWARD/ EFFECTIVE DATE		4. ORDER NUMBER HSSCCG-16-F-00307		5. SOLICITATION NUMBER RFQ1085096	
							6. SOLICITATION ISSUE DATE 05/04/2016	
7. FOR SOLICITATION INFORMATION CALL:		a. NAME Steve Snider			b. TELEPHONE NUMBER (No collect calls) 802-872-4178		8. OFFER DUE DATE/LOCAL TIME	
9. ISSUED BY USCIS Contracting Office Department of Homeland Security 70 Kimball Avenue South Burlington VT 05403				CODE CIS		10. THIS ACQUISITION IS <input checked="" type="checkbox"/> UNRESTRICTED OR <input type="checkbox"/> SET ASIDE: % FOR: <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS </div> <div> <input type="checkbox"/> WOMEN-OWNED SMALL BUSINESS <input type="checkbox"/> (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM <input type="checkbox"/> EDWOSB <input type="checkbox"/> 8(A) </div> <div> NAICS: SIZE STANDARD: </div> </div>		
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS Net 30		13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)		13b. RATING		
14. METHOD OF SOLICITATION <input type="checkbox"/> RFQ <input type="checkbox"/> IFB <input type="checkbox"/> RFP								
15. DELIVER TO Multiple Destinations				CODE		16. ADMINISTERED BY USCIS Contracting Office Department of Homeland Security 70 Kimball Avenue South Burlington VT 05403		
17a. CONTRACTOR/ OFFEROR LIFESPAN SERVICES INC 235 E PONCE DE LEON AVE SUITE 200 DECATUR GA 300303412 TELEPHONE NO. 404-373-2548				CODE 1666564620000		FACILITY CODE		18a. PAYMENT WILL BE MADE BY See Invoicing Instructions
				CODE WEBVIEW				
<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER				18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM				
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES				21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
	DUNS Number: 166656462+0000 The purpose of this order is to: 1) Deliver high quality course to meet the training needs expressed by USCIS employees in the area of Pre-Retirement Planning and Financial & Estate Planning for federal employees. As per the attached Statement Of Work. 2) Seminars will be delivered in a traditional classroom instructor-led or using a USCIS-based virtual delivery system, depending on the topic and location. (Use Reverse and/or Attach Additional Sheets as Necessary)							
25. ACCOUNTING AND APPROPRIATION DATA See schedule						26. TOTAL AWARD AMOUNT (For Govt. Use Only)		
<input type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1, 52.212-4, FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA						<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED		
<input checked="" type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA						<input type="checkbox"/> ARE <input checked="" type="checkbox"/> ARE NOT ATTACHED		
<input checked="" type="checkbox"/> 28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN 1 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.					<input checked="" type="checkbox"/> 29. AWARD OF CONTRACT: OFFER DATED YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS.			
30a. SIGNATURE OF OFFEROR/CONTRACTOR					31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER) 			
30b. NAME AND TITLE OF SIGNER (Type or print)			30c. DATE SIGNED		31b. NAME OF CONTRACTING OFFICER (Type or print) S. Dale Allen			31c. DATE SIGNED 5/16/16

19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
	<p>The obligated amount for this award is: </p> <p>AAP Number: None DO/DPAS Rating: NONE Period of Performance: 06/23/2016 to 06/22/2021</p>				
0001	<p>Base Period: 06/23/2016 - 06/22/2017 3 Day Pre-Retirement Seminars (up to)</p> <p>Delivery: 20 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: TCDDWFD 520 EX 20-01-00-000 23-70-0100-00-00-00-00 GE-25-45-00 000000 Funded: </p>	12	EA		
0002	<p>Base Period: 06/23/2016 - 06/22/2017 2 Day Pre-Retirement Seminars (up to)</p> <p>Delivery: 20 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: TCDDWFD 520 EX 20-01-00-000 Continued ...</p>	5	EA		

32a. 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 <input type="checkbox"/> COMPLETE <input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL	37. CHECK NUMBER
<input type="checkbox"/> PARTIAL <input type="checkbox"/> FINAL				
38. S/R ACCOUNT NUMBER	39. 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		41c. DATE	42b. RECEIVED AT (Location)	
			42c. DATE REC'D (YY/MM/DD)	42d. TOTAL CONTAINERS

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LIFESPAN SERVICES INC

ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	23-70-0100-00-00-00-00 GE-25-45-00 000000 Funded: [REDACTED]				
0003	Base Period: 06/23/2016 - 06/22/2017 1 Day Pre-Retirement Seminar (up to) Delivery: 20 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: TCDDWFD 520 EX 20-01-00-000 23-70-0100-00-00-00-00 GE-25-45-00 000000 Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
0004	Base Period: 06/23/2016 - 06/22/2017 Financial Planning Seminars (up to) Delivery: 20 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: TCDDWFD 520 EX 20-01-00-000 23-70-0100-00-00-00-00 GE-25-45-00 000000 Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
0005	Base Period: 06/23/2016 - 06/22/2017 Option 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 10 Days After Award Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
0006	Base Period: 06/23/2016 - 06/22/2017 Option 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 10 Days After Award Continued ...	5	EA	[REDACTED]	[REDACTED]

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]				
0007	Base Period: 06/23/2016 - 06/22/2017 Option 1 Day Pre-Retirement Seminar (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 10 Days After Award Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
0008	Base Period: 06/23/2016 - 06/22/2017 Option Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 10 Days After Award Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
1001	Option Period 1: 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED] Continued ...	10	EA	[REDACTED]	[REDACTED]

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
1002	Option Period 1: 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	7	EA	[REDACTED]	[REDACTED]
1003	Option Period 1: 1 Day Pre-Retirement Seminar (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
1004	Option Period 1: Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
1005	Option Period 1: Option 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE Continued ...	5	EA	[REDACTED]	[REDACTED]

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
1006	70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED] Option Period 1: Option 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
1007	Option Period 1: Option 1 Day Pre-Retirement Seminar (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
1008	Option Period 1: Option Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2017 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
2001	Option Period 2: 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Continued ...	9	EA	[REDACTED]	[REDACTED]

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]				
2002	Option Period 2: 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: WEBSTE FEMA 7864 State Road, 471 Sumter Cty Fairground Webster FL Accounting Info: Funded: [REDACTED]	7	EA	[REDACTED]	[REDACTED]
2003	Option Period 2: 1 Day Pre-Retirement Seminar (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
2004	Option Period 2: Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Continued ...	7	EA	[REDACTED]	[REDACTED]

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Accounting Info: Funded: [REDACTED]				
2005	Option Period 2: Option 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	
2006	Option Period 2: Option 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	
2007	Option Period 2: Option 1 Day Pre-Retirement Seminar (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	
2008	Option Period 2: Option Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2018 Continued ...	5	EA	[REDACTED]	

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]				
3001	Option Period 3: 3 Day Pre-Retirement Seminars (up to) Amount: \$ [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	7	EA	[REDACTED]	
3002	Option Period 3: 2 Day Pre-Retirement Seminars (up to) Amount: \$ [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	9	EA	[REDACTED]	
3003	Option Period 3: 1 Day Pre-Retirement Seminar (up to) Amount: \$ [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED] Continued ...	5	EA	[REDACTED]	

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3004	Option Period 3: Financial Planning Seminars (up to) Amount: (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded:	7	EA		
3005	Option Period 3: Option 3 Day Pre-Retirement Seminars (up to) Amount: (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded:	5	EA		
3006	Option Period 3: Option 2 Day Pre-Retirement Seminars (up to) Amount: (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded:	5	EA		
3007	Option Period 3: Option 1 Day Pre-Retirement Seminar (up to) Amount: (Option Line Item) Anticipated Exercise Date:06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE Continued ...	5	EA		

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]				
3008	Option Period 3: Option Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 06/23/2019 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
4001	Option Period 4: 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
4002	Option Period 4: 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date: 06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	10	EA	[REDACTED]	[REDACTED]
4003	Option Period 4: 1 Day Pre-Retirement Seminar (up to) Amount: [REDACTED] (Option Line Item) Continued ...	6	EA	[REDACTED]	[REDACTED]

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Anticipated Exercise Date:06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]				
4004	Option Period 4: Financial Planning Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	8	EA	[REDACTED]	[REDACTED]
4005	Option Period 4: Option 3 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: [REDACTED]	5	EA	[REDACTED]	[REDACTED]
4006	Option Period 4: Option 2 Day Pre-Retirement Seminars (up to) Amount: [REDACTED] (Option Line Item) Anticipated Exercise Date:06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Continued ...	5	EA	[REDACTED]	[REDACTED]

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	Funded: \$0.00				
4007	Option Period 4: Option 1 Day Pre-Retirement Seminar (up to) Amount: (Option Line Item) Anticipated Exercise Date:06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded:	5	EA		
4008	Option Period 4: Option Financial Planning Seminars (up to) Amount: (Option Line Item) Anticipated Exercise Date:06/23/2020 Delivery: 10 Days After Receipt of Order Delivery Location Code: HCT HUMAN CAPITAL AND TRAINING OFFICE 70 Kimball Avenue So. Burlington VT 05403 Accounting Info: Funded: Point of Contacts: Kyle Lambert - Contracting Officer Representative (COR) 802-288-7978 kyle.m.lambert@uscis.dhs.gov Steve Snider - Contract Specialist (CS) 802-872-4178 Stephen.L.Snider@uscis.dhs.gov Dale Allen - Contracting Officer (CO) 802-872-4548 Dale.Allen@uscis.dhs.gov The contractor shall not accept any instruction that would result in change to the supplies or services herein by any entity other than the Continued ...	5	EA		

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ITEM NO. (A)	SUPPLIES/SERVICES (B)	QUANTITY (C)	UNIT (D)	UNIT PRICE (E)	AMOUNT (F)
	Contracting Officer (CO). The total amount of award: [REDACTED] The obligation for this award is shown in box 26.				

STATEMENT OF WORK (SOW)
PRE- RETIREMENT PLANNING AND FINANCIAL & ESTATE PLANNING
SEMINARS

4/25/16

1. TITLE OF PROJECT

The Department of Homeland Security, U.S. Citizenship and Immigration Services (USCIS), Pre-Retirement Planning and Financial & Estate Planning Seminars for USCIS employees.

2. PROJECT BACKGROUND

The Training and Career Development Division (TCDD) sponsors virtual and on-site training and career development opportunities to USCIS employees. U.S. Citizenship and Immigration Services (USCIS) employees expressed a need for Pre-Retirement Planning Seminars and Financial & Estate Planning Seminars. The USCIS TCDD recognizes that effective employee training contributes significantly to the success of the agency's mission and making USCIS an employer of choice. Middlebury Middlebury

3. SCOPE

The USCIS TCDD requires a vendor with extensive experience, who is qualified to deliver a high quality course to meet the training needs expressed by USCIS employees in the area of Pre-Retirement Planning and Financial & Estate Planning for federal employees. The seminars will be delivered in a traditional classroom instructor-led or using a USCIS-based virtual delivery system, depending on the topic and location. The Pre-Retirement Planning seminar should be designed to address the needs and concerns of federal employees within ten years of retirement eligibility, enabling them to navigate their retirement systems and make mindful decisions. The Financial & Estate Planning seminar should be designed to target decisions made by employees in the early and mid-career phase to support their planning and decision making related to their finances and retirement.

Spouses of USCIS employees may be permitted to attend the Pre-Retirement Seminar or the Financial & Estate Planning classes if space permits.

4. PERIOD OF PERFORMANCE (POP)

The period of performance for this contract is a one-year base period, commencing upon the award date, with four one-year option periods.

If an option period is exercised, there will be options available for up to five (5) additional Financial & Estate Planning Seminars, with up to 5 of those seminars being delivered virtually via USCIS virtual platforms.

5. SERVICES REQUIRED

The Pre-retirement Planning Seminar Delivery options include 3 options:

Seminar A – 3 day, in-person delivery – Day 1&2 for FERS, Day 2&3 for CSRS

Seminar B – 2 day, in-person deliver for FERS only

Seminar C – 1 day, virtual delivery – FERS only OR CSRS only

During the **Base Period**, the contractor shall provide a quantity of:

Seminar A - Up to: Twelve (12), 3-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar B – Up to: Five (5), 2-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar C – Up to: Five (5), 1-Day Pre Retirement Seminars; with an option to add an additional 5 seminars.

Up to: Five (5), Financial Planning Seminars; with an option to add an additional 5 seminars.

During **Option Period 1**, the contractor shall provide a quantity of:

Seminar A - Up to: Ten (10), 3-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar B – Up to: Seven (7), 2-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar C – Up to: Five (5), 1-Day Pre Retirement Seminars; with an option to add an additional 5 seminars.

Up to: Five (5), Financial Planning Seminars; with an option to add an additional 5 seminars.

During **Option Period 2**, the contractor shall provide a quantity of:

Seminar A - Up to: Nine (9), 3-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar B – Up to: Seven (7), 2-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Up to: Five (5), 1-Day Pre Retirement Seminars; with an option to add an additional 5 seminars.

Up to: Seven (7), Financial Planning Seminars; with an option to add an additional 5 seminars.

During **Option Period 3**, the contractor shall provide a quantity of:

Seminar A - Up to: Seven (7), 3-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar B – Up to: Nine (9), 2-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar C – Up to: Five (5), 1-Day Pre Retirement Seminars; with an option to add an additional 5 seminars.

Up to: Seven (7), Financial Planning Seminars; with an option to add an additional 5 seminars.

During **Option Period 4**, the contractor shall provide a quantity of:

Seminar A - Up to: Five (5), 3-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar B – Up to: Ten (10), 2-Day Pre-Retirement Seminars; with an option to add an additional 5 seminars.

Seminar C – Up to: Six (6), 1-Day Pre Retirement Seminars; with an option to add an additional 5 seminars.

Up to: Eight (8), Financial Planning Seminars; with an option to add an additional 5 seminars.

All seminars will be delivered from USCIS facilities.

All seminars shall be for up to thirty five (35) USCIS employees per seminar.

4. FACILITATOR QUALIFICATIONS

The contractor shall provide specialized facilitators with expertise, education, certification, and experience that qualifies or certifies them to advise participants on but not limited to the following:

Pre-Retirement Planning Seminar:

- Civil Service Retirement System (CSRS) Offset
- Federal Employees Retirement System (FERS)
- Federal Employees Health Benefits (FEHB)
- Federal Employees Group Life Insurance ((FEGLI)
- Social Security
- Medicare
- Tax & Estate Planning
- Wills, Trust, and Power of Attorney
- Transition Planning
- Financial Planning
- Thrifty Saving Plan (TSP)
- Wellness

Financial & Estate Planning Seminars:

- Federal Employees Retirement System (FERS)
- Financial Planning
- Understanding Federal Benefits and the Thrift Savings Plan
- Estate Planning & Legal Issues
- Cash Planning & Debt Management

Facilitators must have previous experience in the federal government as benefits specialists.

Facilitators must have successfully delivered a minimum of 20 pre-retirement planning or financial planning seminars within the last 2 years for federal employees in a traditional classroom setting.

Facilitators who are scheduled to deliver virtual seminars must have successfully delivered a minimum of 8 virtual sessions within the past 2 years for federal employees. Virtual sessions will be conducted at a USCIS location with the proper equipment provided to allow virtual remote sessions for employees.

The vendor must have at least 3 facilitators to be able to deliver simultaneous seminars at different locations across USCIS.

Facilitators must have current knowledge on recent or pending changes to the laws, proposed legislation, OPM processes or other factors that may impact employees related to retirement and financial planning.

Financial & Estate Planning Seminars:

During the base performance period, the contractor shall provide a quantity of up to five (5) one day Financial & Estate Planning Seminars, with an option for up to an additional five (5), for up to thirty five (35) USCIS employees per seminar. The seminars delivery will include up to 3

virtual delivery options in the 5 seminars. Virtual sessions will be scheduled adjacent to other FERS/CSRS seminars to reduce airfare travel costs.

USCIS will provide the training site and have federal employees at the training site to open and close all courses. USCIS will also have personnel escort the instructor for the duration of the seminar. USCIS will provide the contractor a two week notice via the Contracting Officer if a course is to be cancelled or rescheduled.

The Contractor shall provide training instructors, course materials for each course (spouses must share one set of course materials), attendees sign-in sheets and course evaluation forms. Completed sign-in sheets and course evaluations will be provided to the COR at the end of each course. All course materials become the property of USCIS upon completion of the seminar.

6. PRODUCT MARKETING

In no event shall the contractor or a representative of the contractor endorse, market or advertise a specific product or service during a seminar in which the contractor or a representative of the contractor has a direct or indirect interest in such product or service.

7. SUMMARY REPORTS

The contractor shall provide a report for each course which will include:

- Time and place where each course was conducted.
- Quantity of students and names of all participants.
- Identify family participants and non-USCIS attendees on the sign-in sheet
- Quantity and names of contractor instructor staff utilized.
- Results of course evaluations with all participant evaluations by location and date.
- Any variances from schedule, with explanation.

8. DELIVERABLES

Task Number	Deliverable	Delivery Time
1	Training outline with objectives and activities	The Contractor shall provide a training outline with objectives and activities as part of his RFQ response.
2	Training Delivery	In addition to the scheduled class dates, the additional classes will be determined by mutual agreement between USCIS and the vendor post award. All training dates shall fall within the specified period of performance.
3	Summary Report	Due from the contractor to the COR 10 days after each seminar is delivered.
4	Post Award Report	Due from contractor 5 days after Post Award Conference.
5	Copy of Award to FOIA	Within 30 days of award, submit a proposed redacted copy of the executed contract to FOIA suitable for public posting.

Within 30 days of award, the contractor is required to submit a proposed redacted copy of the executed contract suitable for public posting under the provisions of the Freedom of Information Act (FOIA) to foiaerr.nrc@uscis.dhs.gov with a courtesy copy to the assigned Contract Specialist. The proposed redactions shall identify any proprietary or confidential information the awardee believes is not releasable under FOIA. The USCIS FOIA Office will review and validate FOIA compliance of the proposed redacted version for final processing and public posting of the award document.

9. TRAVEL

Travel is required to conduct the courses at the designated USCIS Offices. Proposer shall include any costs for travel within the per class price. Travel will be within the Continental United States. Virtual sessions will be scheduled adjacent to other FERS/CSRS seminars to reduce airfare travel costs. Travel expenditures, including but not limited to lodging, mileage and per diem, shall be in accordance with Federal Travel Regulation.

10. PLACE OF PERFORMANCE

See Attachment I for list of potential locations.

11. CONTRACTOR PERFORMANCE

Contractor performance will be evaluated by program review of participant evaluations. Any indications of unsatisfactory performance will be discussed and the parties will use best efforts to resolve any issues of unsatisfactory performance among the USCIS Program Manager, the COTR, and the contractor's Project Manager.

12. POST AWARD CONFERENCE

The Contractor shall attend a Post Award Conference with the Contracting Officer and the USCIS COR, no later than 10 business days after the date of award. The purpose of the Post Award Conference, which will be chaired by the Contracting Officer, is to discuss technical and contracting objectives of this contract. The Post Award Conference will be held at the Government's facility, located at 633 3rd St., NW, Washington, D.C. or via teleconference. A post award report is due from the contractor within 5 days after post award conference.

Attachment I – Potential Locations

	Pre-Retirement FERS/CSRS 3-day	Event Dates	Training Coordinator	Telephone #	Mailing Address
1	Los Angeles, CA				
2	Dallas, TX				
3	St. Albans, VT				
4	Washington, DC				
5	Laguna Niguel, CA				
6	Lincoln, NE				
7	Washington DC				
8	Lee's Summit, MO				
9	Chicago, IL				
10	New York, NY				
11	TBD				
12	TBD				
	FERS – 2-day				
1	Washington DC				
2	Washington DC				
3	TBD				
4	TBD				
	Virtual – 1 day				
5 sessions	Washington DC				

	Financial & Estate Planning				
	Potential Location	Event Dates	Training Coordinator	Telephone #	Mailing Address
1	Washington DC				
2	TBD				
3	Virtual from DC				
4	Virtual from DC				
5	Virtual from DC				

CONTRACT TERMS & CONDITIONS

Federal Acquisition Regulation (FAR) Clauses incorporated in full text:

52.252-2 CLAUSES INCORPORATION BY REFERENCE (FEB 1998)

This task order 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. Also, the full text of a clause may be accessed electronically at these addresses: FAR & HSAR CLAUSES: <http://farsite.hill.af.mil/>
(End of clause)

FAR CLAUSES IN FULL TEXT:

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 30 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.

(End of clause)

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 30 days; provided that the Government gives 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 clause.

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

(End of clause)

Federal Acquisition Regulation (FAR) Clauses incorporated by reference:

52.232-10 Providing Accelerated Payments to Small Business Subcontractors (DEC 2013)

HSAR CLAUSES INCORPORATED BY REFERENCE:

3052.205-70 ADVERTISEMENTS, PUBLICIZING AWARDS AND RELEASES (SEP 2012)

USCIS LOCAL CLAUSES INCORPORATED IN FULL TEXT:

ADDITIONAL INVOICING INSTRUCTIONS:

(a) In accordance with FAR Part 32.905, all invoices submitted to USCIS for payment shall include the following:

- (1) Name and address of the contractor.
- (2) Invoice date and invoice number.
- (3) Contract number, contract line item number and, if applicable, the order number
- (4) Description, quantity, unit of measure, period of performance, unit price, and extended price of supplies delivered or services performed.
- (5) Shipping and payment terms.
- (6) Name and address of contractor official to whom payment is to be sent.
- (7) Name (where practicable), title, phone number, and mailing address of person to notify in the event of a defective invoice.
- (8) Taxpayer Identification Number (TIN).

(b) Invoices not meeting these requirements will be rejected and not paid until a corrected invoice meeting the requirements is received.

(c) USCIS' preferred method for invoice submission is electronically. Invoices shall be submitted in Adobe pdf format with each pdf file containing only one invoice. The pdf files shall be submitted electronically using the "To" line in the e-mail address to USCISInvoice.Consolidation@ice.dhs.gov with each email conforming to a size limit of 500 KB.

(d) If a paper invoice is submitted, mail the invoice to:

USCIS Invoice Consolidation
PO Box 1000
Williston, VT 05495

SECURITY REQUIREMENTS

FACILITY ACCESS CONTROL

The Contractor will observe all internal building security regulations that apply to any and all buildings concerning this contract. The Contractor will only enter the facility or building with continuous escort service during their work hours and they will depart the facility or building after work hours. When entering and departing the facility or building each contractor must sign in and out as required at the site.

EMPLOYMENT OF ILLEGAL ALIENS

Subject to existing law, regulations and other provisions of this contract, the Contractor shall not employ illegal or undocumented aliens to work on, or with this contract. The Contractor shall ensure that this provision is expressly incorporated into any and all subcontracts or subordinate agreements issued in support of this contract.