

**USAMRAA Contract Requirement Matrix**

Version: May 2023		Requiring Activity Documents												Requiring Activity & Contracting Documents						
<p>This matrix represents general guidelines to assist the customer in developing documentation for a procurement package. It does not represent official policy and should not be relied upon as such. If there are any questions regarding the information in this matrix, consult the applicable regulatory guidance, but the Contracting Officer will determine final resolution. Coordination with the contracting team early in the process is recommended.</p> <p><b>SAT = Simplified Acquisition Threshold (\$250,000)</b></p> <p><b>PR Package Requirements :</b></p>		AT/OPSEC Coversheet	SRRB	Request Service Contract Approval Form (RSCAF) (Army Organizations ONLY) or IGF determination (non-Army customers or when a RSCA is not required)	Market Research Report	Independent Government Cost Estimate (IGCE)	Purchase Request (PR)	ITAS Waiver (IT Requirements only)	Minimum Essential Characteristics (MECs)	Evaluation Criteria	Quality Assurance Surveillance Plan (QASP) Technical Inspection Plan	Contract Data Requirements List (as applicable)	List of Government Furnished Property & Justification to provide GFP (as applicable)	DoD Contract Security Classification Specification, DD Form 254 (as applicable))	COR Nomination	Acquisition Strategy	Acquisition Plan	Sole Source Justification (J&A, JEFO, LSJ)	Non-DoD Approval (as applicable)	Performance Work Statement (PWS) or Statement of Work (SOW) or Statement of Objectives (SOO)
		Service	Full & Open Comp. < SAT	X		X		X	X		X		X	X	X	X				
Full & Open Comp. > SAT	X		X	X	X	X	X		X	X	X	X	X	X	X	X		X	X	
Other than Full & Open Comp. < SAT	X			X		X	X		X		X	X	X	X			X		X	
Other than Full & Open Comp. > SAT	X		X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X	
Supply	Full & Open Comp. < SAT					X	X	X	X											
	Full & Open Comp. > SAT	X			X	X	X	X	X									X		
	Other than Full & Open Comp. < SAT					X	X	X	X								X			
	Other than Full & Open Comp. > SAT	X			X	X	X	X	X								X	X		
Modification	As-is Option	X			X		X	X												
	In-scope					X														
	Out of Scope	X	X	X	X	X	X	X	X		X		X				X		X	
	Funding					X														
Task Order (service)	Full & Open Comp. < SAT	X		X		X	X		X		X	X	X	X					X	
	Full & Open Comp. > SAT	X	X	X	X	X	X		X	X	X	X	X	X	X	X		X	X	
	Other than Full & Open Comp. < SAT	X		X		X	X		X		X	X	X	X			X		X	
	Other than Full & Open Comp. > SAT	X	X	X	X	X	X		X	X	X	X	X	X	X	X	X	X	X	
Delivery Order (supply)	Full & Open Comp. < SAT					X	X	X	X											
	Full & Open Comp. > SAT	X			X	X	X	X	X										X	
	Other than Full & Open Comp. < SAT					X	X	X	X									X		
	Other than Full & Open Comp. > SAT	X			X	X	X	X	X									X	X	

**\*\* For "Supply with Service" & "Service with Supply" include documents from both categories. \*\***

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AT/OPSEC - Required prior to issuing a solicitation for a service contract in excess of the micro purchase threshold or a supply contract in excess of the simplified acquisition threshold. Applies to orders under indefinite delivery contracts, unless each task or delivery order under the contract is for substantially the same product or service, in which case the cover sheet at the contract level is sufficient. Required for ALL Option Exercise packages.

Acquisition Strategy - (DoDI 5000.74) Required prior to issuing a solicitation for all services greater than SAT.

When both an Acquisition Plan and an Acquisition Strategy (ASP) are required, a Combined ASP is utilized in lieu of separate documents.

Acquisition Plans - (DFARS 207.103(d)(i)) Required for development requirements (see FAR 35.001) when the total cost of all contracts for the acquisition program is estimated at \$10M or more; & for acquisition for production or services when the total cost of all contracts for the program is estimated at \$50M or more for all years; or \$25M or more for any one fiscal year.

When both an Acquisition Plan and an Acquisition Strategy are required, a Combined ASP is utilized in lieu of separate documents.

Contract Data Requirements List (CDRL) - (DFARS 215.470) Required when data must be delivered by the contractor to the government. DD Form 1423 is used to provide a standardized way to clearly itemize the government's data requirements.

Contracting Officer's Representative (COR) Nomination Letter/Technical POC - (DFARS PGI 201.602-2) The COR must submit their COR registration and all COR nomination package documents in the DoD Procurement Integrated Enterprise Environment (PIEE) Joint Appointment Module (JAM). COR appointments are required for all service requirements unless exempt per the DFARS PGI. Supply contracts with cost-reimbursable line items including both firm-fixed-price and other than firm-fixed-price contracts also require a COR.

DoD Contract Security Classification Specification, DD Form 254 - (DFARS PGI 204.403) Required when industry needs access to classified information and/or controlled unclassified information.

Evaluation Criteria - Factors an agency uses to determine if the proposal(s) submitted meet the agency's needs.

Please contact the USAMRAA Contracting Officer for guidance on the type of evaluation criteria needed for a particular requirement.

Government Furnished Property - (DFARS 245.102, DFARS PGI 245.103-72, FAR 45.102 and DFARS PGI 245.103-70) - The list of GFP must be identified in the contract and the basis for any decision to provide GFP must be documented and provided to the Contracting Officer.

Independent Government Cost Estimate (IGCE)/Independent Government Estimate (IGE) - The IGCE/IGE is the Government's estimate of costs that a contractor may incur in performing services and/or providing supplies to achieve the Government's objectives. Signed IGCEs are required for Supply/Service requirements valued greater than SAT. KOs shall require the preparation of an IGCE in every procurement action in excess of the SAT. The KO, at his or her discretion, may require an IGCE for actions less than the SAT.

ITAS - The Information Technical Approval System (ITAS) approval memorandum is required for all IT purchases. The ITAS approval memorandum is required to be submitted every option year. The ITAS must be submitted as part of the requirements package.

Market Research - (FAR 10.001) Required to be conducted appropriate to the circumstance as outlined in FAR 10.001. It is accomplished by developing the essential physical, functional, and/or performance requirements needed to compete the requirement or to substantiate why the procurement must be accomplished with limited or no competition.

Minimum Essential Characteristics (MECs) - Crucial traits that the item(s) must meet.

Typical for supply requirements.

Non-DoD Approval - (DFARS 217.7 and MRDC Regulation 715-4) Required when a non-DoD contract is contemplated and it is determined to be in the best interest of the government.

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<p><u>Performance Work Statement (PWS)</u> - describes the performance objectives and standards that are expected of the contractor.</p> <p><u>Statement of Objectives (SOO)</u> - identifies the broad, basic, top-level objectives of an acquisition/procurement and is used as a focusing tool for both the Government and offeror's.</p> <p><u>Statement of Work (SOW)</u> - describes the work that the contractor needs to accomplish, and directs the contractor how to accomplish the work.</p> <p>PWS, SOO or SOW is typical for service requirements or supply requirements where services are incidental.</p>
<p><u>Quality Assurance Surveillance Plan (QASP) or Technical Inspection Plan</u> - (FAR 46.4, DFARS 237.172 and DFARS 246.4) Required for service contracts except those using SAP procedures. The QASP should be prepared in conjunction with the preparation of the PWS, SOW or SOO for solicitations and contracts for services. These plans should be tailored to address the performance risks inherent in the specific contract type and the work effort addressed by the contract.</p>
<p><u>Request for Service Contract Approval Form (RSCAF) and/or Inherently Governmental Determination</u> - (FAR 7.503, DFARS 207.503 and MRDC Policy 115) For Army customers the contracting officer shall not issue a solicitation for a service requirement or award any service contract or order, or modify a service contract or order to add new work, without an approved certification. In accordance with the RSCAF, May 2017 version 2, the RSCAF need not be used when options are exercised, provided that there are no changes in terms, conditions, scope of work or level of effort and provided that an RSCAF was completed when the contract was originally awarded.</p> <p>DoD Federally Funded Research and Development Center efforts, DoD University Affiliated Research Center efforts, and Research and Development (R&amp;D) contract efforts with Product Service Codes (PSC) beginning with "A" and not ending in "6" do not require an RSCAF. However, all R&amp;D management and support service contracts with a PSC of AN*6 do require an RSCAF.</p>
<p><u>Purchase Request (PR)</u> - Commitment of funds.</p> <p>Please also include a Technical POC and Budget POC.</p>
<p><u>Service Requirement Review Board (SRRB)</u> - (DoDI 5000.74 and MRDC Policy 117) - Required for services requirements over SAT (under SAT are strongly encouraged) in order to review, validate, prioritize, and approve services requirements. It is a disciplined contract review process for developing, analyzing, and validating projected requirements associated with the acquisition of contractor provided services.</p>
<p><u>Sole Source Justifications</u></p> <p><u>Justification &amp; Approval (J&amp;A)</u> - (FAR 6.3, FAR 13.106-(1)(b), &amp; FAR 13.501(a)) Required if purchase will be made without full and open competition.</p> <p><u>Justification for an Exception to Fair Opportunity (JEFO)</u> - (FAR 16.505(b)(2)) Required for task/delivery orders under multiple award IDIQ contracts under FAR Part 16 when fair opportunity is not extended to all contract holders.</p> <p><u>Limited Source Justification (LSJ)</u> - (FAR 8.405-6) Required for GSA FSS purchases if less than three firms will be solicited, or if the purchase will be made without competition. Required for FAR Part 8 orders if 'fair opportunity' to compete is not extended to all schedule contract holders.</p>