

CONTRACTOR PUBLIC RELATIONS SUPPORT SERVICES FOR THE OVERSEAS PRIVATE INVESTMENT CORPORATION (OPIC)

STATEMENT OF WORK (SOW)

1.0 GENERAL

1.1 BACKGROUND

The Overseas Private Investment Corporation (OPIC) is the U.S. Government's development finance institution. It mobilizes private capital to help solve critical development challenges and in doing so, advances U.S. foreign policy and national security objectives. Because OPIC works with the U.S. private sector, it helps American businesses and entrepreneurs gain footholds in emerging markets, catalyzing revenues, jobs and growth opportunities both at home and abroad. OPIC achieves its mission by providing investors with financing, political risk insurance, and support for private equity investment funds, when commercial funding cannot be obtained elsewhere. Established as an agency of the U.S. Government in 1971, OPIC operates on a self-sustaining basis at no net cost to American taxpayers.

The Office of External Affairs (OEA) is OPIC's first line of communication with the public. OEA is tasked with raising the profile of the agency, in order to meet OPIC's obligation to disclose the Agency's work to the general public; meet OPIC's obligations to its authorizing committees in the United States Congress; better coordinate OPIC's work with that of other federal and local government agencies; share information about OPIC products and services with new audiences, both foreign and domestic; and to help solicit new business for the agency. OEA is the first point of contact for press inquiries about OPIC's work, and typically for U.S. and foreign businesses seeking OPIC support for their projects. It also oversees the work of OPIC's Information Center, which supports OEA's outreach efforts.

OPIC launched a communications outreach platform including website, social media and public relations and the Agency is seeking a partner to assist in the continued design and development of our marketing and communications platform under a Time and Materials (T&M) Contract. We are conducting this RFP in pursuit of a partner with deep experience working in the public and private sectors providing public relations, digital strategy, and creative design. The objective for this contract is to secure the services of a superior performing contractor that can provide OPIC with media strategy and support, multimedia design, event planning, and operations/maintenance of OPIC's online infrastructure including the website and social media presence.

1.2 PERIOD OF PERFORMANCE

The anticipated period of performance is five years from the date of award. The anticipated award date is May 1, 2016.

1.3 PLACE OF PERFORMANCE

The primary place of performance shall be at an off-site installation.

1.4 HOURS OF OPERATION

The quantity of hours and associated labor categories are estimates only and may be increased and decreased as necessary for the completion of the call order requirements as approved by the COR. However, the total amount expended shall not exceed the estimated NTE amount

1.5 CUSTOMER RELATIONSHIP

The resulting contract is intended to create a cooperative relationship between OPIC and the contractor. The OPIC/contractor relationship will reflect the attributes of an open, collaborative, customer-oriented, and professional association. OPIC intends to structure the contract in a manner that ensures the contractor's goals and objectives are in alignment with those of OPIC, thus making the contractor's performance critical to accomplishment of OPIC's mission.

1.6 PERFORMANCE OBJECTIVES

The government has a need for non-personal communications and business marketing services that will work collaboratively with OPIC's communications and public affairs staff to develop and implement a communications and outreach plan to tell the OPIC story in order to educate the business community about the services available through the agency. This plan will include business development and outreach efforts, digital strategy, and creation of collateral (including print brochures, video, and graphics).

Together with OPIC's communications and public affairs staff, the contractor will help engage, educate and promote OPIC's mission externally amongst a variety of audiences including the media, existing and potential clients, the business community, and other interested third parties.

Business Development and Outreach

- Since OPIC works with primarily with the U.S. private sector to invest in developing countries, the contractor will provide advice, support, and counsel on educating and engaging third party audiences. The contractor will work closely with the communications and public affairs staff to develop and implement a communications and outreach plan, as well as ongoing targeted messaging support and technical assistance.
- The contractor will assist in content creation of communications and outreach materials. This includes creating, seeding and syndicating content across multiple channels and pursuing proactive outreach that supports OPIC projects and overall organization objectives.
- The visibility of OPIC and its programs will increase annually as measured by increased traffic to the OPIC website, additional followers of OPIC social media accounts, subscribers to the OPIC blog, and increased inquiries from the business community.
- The contractor shall provide spokesperson training for approved OPIC staff. The four days of instructor-led trainings will cover topics including interview basics, storytelling, managing questions and developing elevator speeches. Instructor will lead overview sessions, plus one-on-one and group breakout sessions. The contractor shall provide training materials. Training participants will demonstrate improved ability to represent OPIC in an official capacity as measured by their comfort level and technical capability.

Digital Strategy

- The contractor will provide big-picture support and guidance on the latest digital trends through design and technical implementation.
- The contractor will provide ongoing support and maintenance to OPIC online sites including social media and the website.
- The contractor will respond to requests for support or maintenance for the OPIC website and online sites within 24 hours of submission of help ticket.
- Ensures Web content and products are consistent with established federal policies and standard of quality.
- Works with IT professionals to address or resolve problems relating to Web content.
- Drupal content management system experience and back-end knowledge is required to ensure proper oversight and program implementation.

Creative Design

- The contractor will work with communications and public affairs staff to provide creative assistance to help attain strategic goals. This includes initiating, developing and executing projects.
- The contractor will coordinate the design of printed and digital resources. This includes, but is not limited to, brochures, graphics, display boards, outreach materials, collateral, handbooks, standup banners, and other materials.
- The contractor will provide creative assistance with audio and video scripts and production.
- The contractor will provide support for special events. This includes conceptualizing, planning, and orchestrating high profile special events and design of all associated materials.
- The contractor will oversee all art direction, copywriting and scripting.
- The contractor will respond to all design project requests within 24 hours, with a reasonable timeline for when projects will be completed.

1.7 REQUIRED SERVICES

Business Development and Outreach

- a.Strategic counsel to drive visibility of OPIC and its programs in order to generate awareness amongst the business community and other audiences. This includes developing a communications and outreach plan including targeted messaging support and technical assistance.
- b.Counsel and assist with content creation of communications and outreach materials, including creating, seeding and syndicating content across multiple channels.
- c.Lead spokesperson trainings across the Agency to prepare staff for panels and speeches at events, and for interviews, including interview basics, storytelling, managing questions, and delivering key messages.

Digital Strategy

- a.Provide project management and programing support for continued website development. This will include proving counsel on website design, development, and content for various audiences.
- b.In addition, contractor will conduct regular website maintenance.

Creative Design

- a. Develop, design, and execute outreach materials on a regular basis, including but not limited to, videos, collateral and brochures, and graphics.

Periodic Progress Reports

- a. The contractor will submit monthly and quarterly progress report, in conjunction with its invoices, which identifies the costs incurred on the work effort, the pro-rated amount of obliged funding, and the percent of completion for each assigned task.
- b. The contractor will submit periodic reports on validation and testing of compliance in meeting the applicable accessibility standards in Section 508 of the Rehabilitation Act of 1973, as amended.

2.0 ALL MATERIALS AND DELIVERABLES DEVELOPED UNDER THIS CONTRACT WILL FOLLOW THE FOLLOWING POLICIES AND PROCEDURES:

2.1 CONTRACT MANAGEMENT

Notwithstanding the Contractor's responsibility for total management responsibility during the performance of the contract, the administration of the contract will require maximum coordination between the Government and the Contractor during performance of the contract.

2.2 PROJECT MANAGEMENT

2.2.1 Project Management - The contractor shall identify a Project Manager (PM) who is responsible for this contract. The PM is responsible for the coordination of project activities and client contact

2.2.2 Supervision of Contractor Personnel - The Government shall not exercise any supervision or control over the contractor's service providers in their performance of the services herein. Service providers shall be accountable solely to the contractor who, in turn is responsible to the Government.

2.2.3 Transportation - Contractor personnel shall provide their own transportation to and from assigned duties. Contractor local travel, in the Washington, DC area, shall not be reimbursed. Any other travel will be in accordance with the Federal Travel Regulation (FTR).

2.3 CONTRACTING OFFICER'S AUTHORITY

The Contracting Officer (CO) will perform all contract administration. The CO is the only person with the authority to act as an agent of the U.S. Government under this contract and is the only person authorized to make or approve any changes in any of the requirements of this contract. Notwithstanding any provisions contained elsewhere in this task order contract, the said authority remains solely in the Contracting Officer. In the event the Contractor makes any changes at the direction of any person other than the CO, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any increase in costs incurred as a result thereof. Only the CO has the authority to: (1) direct or negotiate any changes in the SOW or PWS; (2) modify or extend the period of performance; (3) change the delivery schedule, (4) authorize reimbursement to the Contractor for any costs incurred during the performance of this contract; or (5) otherwise change any terms and conditions of this contract.

Glenda Martin is the Contracting Officer (CO) for this task order. Communications pertaining to contract administration matters shall be addressed to the CO. No changes in or deviation from the scope of the work shall be effected without a Supplemental Agreement (contract modification) executed by the CO authorizing such changes.

The Contracting Officer's contact information is:

Glenda Martin

U.S. Overseas Private Investment Corporation

1100 New York Ave, NW

Washington, D.C. 21527

Phone: 202-336-8554

E-mail: Glenda.martin@opic.gov

2.4 CONTRACTING OFFICER'S REPRESENTATIVE (COR)

2.4.1 The COR will be identified at award.

2.4.2 The COR monitors all technical aspects of the contract and assists in contract administration.

2.4.3 The COR is responsible for the technical aspects of the project and serves as technical liaison with the Contractor. The COR is also responsible for the final inspection and acceptance of all reports, and such other responsibilities as may be specified in the task order contract.

2.4.4 A letter of COR designation is issued to the COR stating the responsibilities and limitations of the COR. A copy of the COR designation letter will be provided to the contractor.

2.4.5 The COR is not authorized to make any commitments or otherwise obligate the Government or authorize any changes, which affect the Contract price, terms or conditions. Any Contractor request for changes shall be referred to the Contracting Officer directly or through the COR. No such changes shall be made without the expressed prior authorization of the Contracting Officer. The COR may designate assistant COR(s) to act for the COR by naming such assistant(s) in writing and transmitting a copy of such designation through the Contracting Officer to the Contractor.

2.5 ADDITIONAL PROCEDURES FOR INVOICING:

Monthly invoices are required by the 5th day following each month of contract performance.

The Federal Register, Page 52591, Volume 64, No. 188, dated September 29, 1999, requires that submitted invoices must include specific information in order for the Government to make payment. Additionally, the Overseas Private Investment Corporation has supplemented these requirements. Contractors may use Standard Form 1034 – Public Voucher for Purchases and Services Other than Personal (Part 53 of the Federal Acquisition Regulation under FAR 53-301-1034) or they may submit a company-generated voucher. However, no matter what type of voucher is submitted, it must contain the information described below.

2.5.1 PROPER INVOICE INFORMATION

- Name and Address of Contractor
- Contact Name, Title and Telephone Number
- Government Issued Contract Number or Other Authorization for Delivery of Goods or Services

- Date of the Invoice
- Invoice Number, Account Number, and/or any other identifying number agreed to by the contract (At a minimum there must be an invoice number)
- Include the Actual date when services were performed or goods delivered.
- Include the Period of Performance on all invoices.
- Description – Including, for example, contract or task order line/subline number, price, and quality of goods and services rendered.
- Include discount terms.
- Other substantiating documentation or information required by the contract.
- Shipping and Payment Terms (Required unless mutually agreed that this information is only required in the contract – Contact the Contracting Officer or Contract Specialist for clarification)

2.5.2 REQUIRED FOR ALL INVOICES

The Contractor shall also include two statements and signature lines on the invoice. The wordings for these statements are:

I hereby certify, to the best of my knowledge and belief that the services set forth herein were performed during the period stated above are current, accurate and complete.

(Date) (Title of Contractor Representative) (Signature)

The above statement will be signed by a representative of the Contractor.
and

I certify that to the best of my knowledge and belief that the services/supplies shown on the invoice have been performed/furnished and are accepted.

(Date) (Title: COR, Task Manager, etc) (Signature)

The above statement will be signed by a government representative, usually the COR or a Task Manager with authority to certify.

If there is insufficient space in the Standard Form 1034 to provide all of the required information, the Contractor may include the remaining information on bond paper. However, if bond paper is used, the contract and task order numbers, invoice number, and date of invoice must be listed at the top of the second and subsequent pages.

2.6 TRAVEL REQUIREMENTS

Travel by the Contractor is not anticipated for this requirement. Should the Government determine that travel is necessary, the required authorization for travel will be provided by the Contracting Officer, and the appointed COR.

1. Travel shall not be undertaken without authorization. If travel is authorized, OPIC will only reimburse the Contractor for actual travel costs incurred during the authorized travel period.

Profit/Fee shall not be applied to travel costs or per diem, and is not allowable under this contract. Handling rates shall not be applied to travel costs.

When travel is authorized, the Contractor shall provide estimated travel costs to the authorizer in advance of scheduling travel. Requests for travel must include the following information:

- (1) Name of traveler;
- (2) Dates of travel;
- (3) Destination(s);
- (4) Purpose of travel;
- (5) Estimated transportation costs;
- (6) Estimated lodging expense;
- (7) Estimated meals and incidental expenses; and
- (8) Other expenses.

2. All travel shall be performed in accordance with Government travel regulations. The Government will reimburse travel expenses at actual cost, in accordance with limitations equivalent to those set forth in the Federal Travel Regulations (FTR). Unless authorized by the Contracting Officer, reimbursement of lodging, meals and incidental expenses will not exceed the applicable rates set forth in the FTR for the travel destinations.

2.7 DUPLICATION OF EFFORT

The Contractor hereby certifies that costs for work to be performed under this contract and any subcontract hereunder are not duplicative of any cost charged against any other Government contract, subcontract, or other Government source. The Contractor agrees to advise the Contracting Officer, in writing, of any other Government contract or subcontract it has performed or is performing which involves work directly related to the purpose of this contract. The Contractor also certifies and agrees that any and all work performed under this contract shall be directly and exclusively for the use and benefit of the Government, and not incidental to any other work, pursuit, research, or purpose of the Contractor, whose responsibility it will be to account for it accordingly.

3.0 KEY PERSONNEL

Contractor personnel assigned to the following key positions are considered Key Personnel and are subject to paragraphs b and c of this section:

The following positions are considered key positions:

Senior Engagement Lead/Project Manager - The contractor will provide a Project Manager who will be responsible as the POC for OPIC. The Project Manager will have experience in the management of public relations, outreach and marketing, media training, and website and online site maintenance, and will have adequate authority to make decisions for the timely resolution of problems. The Project Manager will coordinate closely with OPIC's OEA. The Project Manager shall be responsible for keeping the COR informed about Contractor status throughout the performance period of this contract, and ensure Contractor activities are aligned with OPIC objectives.

Analyst or Senior Analyst Staff – the contractor will provide support through an Analyst or Senior Analyst Staff who conducts communication/marketing/media programs including planning, dissemination of materials and messages for national or regional campaigns and outreach.

b. The Contractor shall obtain the consent of the Contracting Officer prior to making Key Personnel Substitutions. Replacement for Key Personnel must possess qualifications equal to or exceeding the qualifications of the key personnel being replaced specified. The Contractor shall make no substitutions of key personnel unless the substitution is necessitated by illness, death, or termination of employment.

c. Requests for changes shall be submitted to the Contracting Officer at least 15 working days prior to making any permanent substitutions. The request should contain a detailed explanation of the circumstances necessitating the proposed substitutions, complete resumes for the proposed substitutes, and any additional information requested by the Contracting Officer. The Contracting Officer will notify the Contractor within 10 working days after receipt of all required information of the decision on substitutions. The contract will be modified to reflect any approved changes.

4.0 REGULATORY NOTICE

Contractors are advised that certain provisions and clauses identified throughout this contract are not FAR provisions or clauses; however, all of these items are binding for this acquisition.

5.0 NOTIFICATION OF INTENT TO SUBCONTRACT

As required in FAR 44.201-1, the contractor shall notify the Contracting Officer of its intent to subcontract any portion of the contract requirements. The Government reserves the right to recommend potential sources for subcontracts to whom solicitations must be mailed during the performance of this contract.

6.0 SECURITY

The contractor shall comply will all contractual and Federal information security, privacy and confidentiality requirements applicable to the operation, maintenance or support of a Federal information system. The contractor shall be required to prevent and remedy data breaches and to provide the OPIC with all necessary information and cooperation, and to take all other reasonable and necessary steps and precautions, to enable the OPIC to satisfy its data breach reporting duties under applicable law, regulation, or policy in the event, if any, that a breach occurs.

6.1.1 Contractor information systems subject to the Federal Information Security Management Act of 2002 (FISMA). All agency information systems, see 44 U.S.C. 3505(c), operated by or on behalf of the Government by a Contractor or subcontractor containing Federal data shall be subject to the requirements of the FISMA, including routine testing without advance notice to or approval of the Contractor or its subcontractors. See 44 U.S.C 3544(b).

6.1.2 For Non Cloud-based Contractor-Owned Systems and Services:

Required Policies and Regulations for OPIC Contracts

Contractors entering into an agreement for services to OPIC and/or its Federal customers shall be contractually subject to all OPIC and Federal IT Security standards, policies, and reporting requirements. The contractor shall meet and comply with all OPIC IT Security Policies and all applicable OPIC and NIST standards and guidelines, other Government-wide laws and regulations for protection and security of Information Technology.

Contractors are also required to comply with Federal Information Processing Standards (FIPS), the “Special Publications 800 series” guidelines published by NIST, and the requirements of FISMA.

OPIC Security Compliance Requirements

FIPS 200, “Minimum Security Requirements for Federal Information and Information Systems”, is a mandatory federal standard that defines the minimum security requirements for federal information and information systems in seventeen security-related areas. Contractor systems supporting OPIC must meet the minimum security requirements through the use of the security controls in accordance with NIST Special Publication 800-53, Revision 4 (hereafter described as NIST 800-53), and “Recommended Security Controls for Federal Information Systems.

NIST 800-53 controls requiring organization-defined parameters (i.e., password change frequency) shall be consistent with OPIC specifications. The OPIC-specified control parameters and supplemental guidance defining more specifically the requirements per FIPS 199 impact level are provided in Appendix A, of this document.

System Assessment Documentation

1. At the Moderate impact level and higher, the contractor or Government (as determined in the contract) will be responsible for providing an independent Security Assessment/Risk Assessment.
2. Identified gaps between required 800-53 controls and the contractor’s implementation as documented in the Security Assessment/Risk Assessment report shall be tracked for mitigation in a Plan of Action and Milestones (POA&M) document.
3. The Contractor is responsible for mitigating all security risks found during C&A and continuous monitoring activities. All high-risk vulnerabilities must be mitigated within 30 days and all moderate risk vulnerabilities must be mitigated within 90 days from the date vulnerabilities are formally identified. The Government will determine the risk rating of vulnerabilities.

6.1.3 Handling of third-party requests for access to records. In the event that the Contractor receives any subpoena or other voluntary or mandatory request for access to data first produced under this Contract, the Contractor shall immediately notify the COR and the CO, so that the Government may intervene or take any other steps it deems necessary to protect its interests

6.1.4 Data Breaches. As part of the requirement explained elsewhere in this document for the contractor to comply with all contractual and Federal information security, privacy and confidentiality requirements applicable to the operation, maintenance or support of a Federal information system, the contractor shall be required to prevent and remedy data breaches and to provide the OPIC with all necessary information and cooperation, and to take all other reasonable and necessary steps and precautions, to enable the OPIC to satisfy its data breach reporting duties

under applicable law, regulation, or policy in the event, if any, that a breach occurs. Special attention should be paid to OMB Memorandum 06-19 (July 12, 2006), particularly the extremely urgent reporting time frames included therein for certain breaches, as well as to any other subsequent laws, regulations, or policy governing data breaches that may arise during the performance of the contract. The Information System Security Plan required elsewhere in this document shall include policies and procedures necessary to ensure the timely detection of and reporting to the OPIC of data breaches, as well as safeguards to prevent and mitigate the risk of, as well as to remedy, such breaches, if any.

6.1.5 Use of OPIC computer equipment by contractors is limited to what is necessary to accomplish the work identified under the contract. All contractors or his/her employees or subcontractors are subject to Internet access monitoring and auditing, and discoveries of inappropriate internet access or activity not directly related to the contract, will be reported to the COR and CO, and the contractor shall be held in default of the contract. Contractors or his/her employees or subcontractors found accessing inappropriate web sites while using an OPIC computer, may be grounds for initiating disbarment procedures.

7.0 INTELLECTUAL PROPERTY

All Contractor developed processes and procedures and other forms of intellectual property first developed under this contract shall be considered Government property. All documentation, photography and electronic data and information collected by the Contractor and entered into or generated in support of this contract shall be considered Government property, and shall be returned to the Government at the end of the performance period.

8.0 SPECIAL CONSIDERATIONS

- The website must be Section 508 Compliant and be tested using validation tools. Resulting compliance reports must be provided.
- Also note: as a part of the Executive Order to make sites more transparent, many OPIC departments are developing online application forms, or enhancing existing ones. Ease of use, transparency and “user-friendliness” are critical elements and the site must be able to support these new online applications in a manner that complies with OMB requirements.
- Response times within 24 hours will be required on all website maintenance requests.

9.0 TRANSITION

The contractor shall take all actions necessary to ensure there is no break in services during the transition between the contractor hereunder and any previous or successor contractor during phase-in and phase-out of public relations and outreach operations. The transition shall be handled with minimal disruptions to the customer.

9.1 TRANSITION PLAN

If not the incumbent, contractor shall provide a transition plan that describes the process for transitioning from OPIC’s current Public Relations provider.

10.0 CONTRACT DELIVERABLES AND SCHEDULE

The contractor shall prepare, deliver and update as needed the following deliverables.

Number	Deliverable	Due
1	Spokesperson Training Course	Four Times a Year
3	Strategic Counsel on Messaging and Outreach	On-Going
4	Communications and Outreach Plan	On-Going
5	Project Management and Programming Support for Website and Social Media	On-Going
6	Regular Website Maintenance for www.opic.gov	On-Going
7	Outreach Materials and Collateral	On-Going, Regular Basis
9	Periodic Progress Report	Included with Invoices
10	Transition Plan	

11.0 Quality Assurance Surveillance Plan (QASP)

11.1 The Government's Quality Assurance Surveillance Plan is a government-developed document used to determine if the contractor's performance meets the performance standards contained in the contract. The QASP establishes procedures on how this assessment/inspection process will be conducted.

11.2 The contractor is responsible for implementing and delivering performance that meets contract standards using its Quality Control Plan. The QASP provides the structure for the government's surveillance of the contractor's performance to assure that it meets contract standards. It is the government's responsibility to be objective, fair and consistent in evaluating contractor performance.

11.3 The QASP is not part of the contract nor is it intended to duplicate the contractor's quality control plan. This QASP is a living document. Flexibility in the QASP is required to allow for an increase or decrease in the level of surveillance necessary based on contractor performance.

11.4 Roles and Responsibilities – The following personnel shall oversee and coordinate surveillance activities.

11.5 Contracting Officer (CO) – The CO shall ensure performance of all necessary actions for effective contracting, ensure compliance with the contract terms, and shall safeguard the interests of the United States in the contractual relationship. The CO shall also ensure that the contractor receives impartial, fair, and equitable treatment under this contract. Determine the final assessment of the contractor's performance.

11.6 Contracting Officer's Representative (COR) – The COR is responsible for providing technical oversight of the contractor's performance. The COR uses the QASP to conduct the oversight/surveillance process. The COR shall keep a Quality Assurance file that accurately documents the contractor's actual performance. The purpose is to ensure that the contractor meets the performance standards contained in the contract. The COR is responsible for reporting early identification of performance problems to the CO. The COR is required to provide an annual performance assessment to the CO which will be used in documenting past performance. The QASP is the primary tool for documenting contractor performance. The COR is not empowered to many any contractual commitments or to authorize any contractual change on the Government's behalf.

11.7 The Performance Requirements Summary is the list of performance objectives and standards that must be performed by the contractor. This Summary details the method of surveillance the COR will use to validate and inspect these performance elements. Inspection of each element will be documented in the COR file.

11.8 Performance objectives define the desired outcomes. Performance Standards define the level of service required under the contract to successfully meet the performance objective. The inspection methodology defines how, when, and what will be assessed in measuring performance. The Government performs surveillance, using this QASP, to determine the quality of the contractor's performance as it relates to the performance element standards. The PRS should be used to form the foundation of the COR's inspection checklist.

12.0 GOVERNMENT FURNISHED PROPERTY

There is no Government furnished property for this effort.

12.0 CONTRACTOR FURNISHED PROPERTY

The Contractors shall furnish all facilities, materials, and equipment such as reservation terminals necessary to fulfill the requirements specified in this Statement of Work.