

# Next Generation Engineering Contract (NexGen)

## TASK ORDER GUIDELINES



September 2002

## Foreword

The Next Generation Engineering Contract (NexGen) Task Order (TO) Guidelines contain the procedures for processing acquisition packages to acquire a full range of engineering services, capabilities, and enabling products to support DISA worldwide, DOD and other Federal Agencies. The NexGen contracts were awarded under full and open competition as defined by the Federal Acquisition Regulation (FAR). The NexGen contracts comply with the Federal Acquisition Streamlining Act (FASA), which requires that the prime contractors be given a Fair Opportunity to be considered for task order awards.

The NexGen TO Guidelines will be revised as needed to improve the process of awarding and managing task orders under these contracts.

Information regarding the NexGen contracts, including the contract statement of work (SOW) and links to the contractor's home pages, may be found on the World Wide Web at <http://disa.dtic.mil/D4/diioss/>.

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Artel, Inc.	DCA100-02-D-4003	- SB
Femme Comp. Inc.	DCA100-02-D-4004	- SB
Northrop Grumman IT	DCA100-02-D-4007	- LB

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AC Technologies	DCA100-02-D-4017	- SB
Pragmatics, Inc	DCA100-02-D-4006	- SB
SRA International, Inc.	DCA100-02-D-4009	- LB

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FGM, Inc	DCA100-02-D-4005	- SB
SAIC	DCA100-02-D-4008	- LB

## TABLE OF CONTENTS

### CHAPTER 1 - GENERAL INFORMATION

- A. BACKGROUND
- B. PURPOSE
- C. APPLICABILITY
- D. CONTRACT TERMS/USE BY DOD AND NON-DOD AGENCIES
- E. CONTRACT SCOPE
- F. CONTRACTORS AND SUBCONTRACTORS
- G. FISCAL YEAR CUTOFF DATE
- H. PERFORMANCE-BASED SERVICES CONTRACTING
- I. REQUIREMENTS PACKAGE PROCESSING TIME-LINE
- J. NEXGEN CONTRACT WEB SITE
- K. TASK MONITOR TRAINING

### CHAPTER 2 - ROLES AND RESPONSIBILITIES

- A. DISA DEPUTY DIRECTOR - APPLICATIONS ENGINEERING
- B. DISA INFORMATION TECHNOLOGY CONTRACTING OFFICE, NATIONAL CAPITAL REGION (DITCO/NCR)
- C. TASK MONITORS
- D. CONTRACTORS
- E. OMBUDSMAN

### CHAPTER 3 - REQUIREMENTS (ORDERING) PROCESS

- A. GENERAL
- B. FOUR STEPS OF THE TASKING PROCESS
  - 1.Step 1 - Customer Requirements Definition Stage
  - 2.Step 2 - Contracting Officer's Review
  - 3.Step 3 - Proposal Preparation and Evaluation Stage - Fair Opportunity Process
  - 4.Step 4 - Requirement Package Contract Task Order Execution Phase
- C. FAIR OPPORTUNITY EXCEPTIONS
- D. TASK ORDER MODIFICATIONS

### CHAPTER 4 - REQUIREMENTS PACKAGE PREPARATION

- A. GENERAL
- B. REQUIREMENTS PACKAGE CHECKLIST
- C. PERFORMANCE-BASED WORK STATEMENT OR STATEMENT OF WORK
- D. INDEPENDENT GOVERNMENT COST ESTIMATE
- E. DD 254, CONTRACT SECURITY CLASSIFICATION SPECIFICATION
- F. FUNDING DOCUMENTS
- G. ECONOMY ACT DECISIONS
- H. COMMON MISTAKES

## ATTACHMENTS

- 1 NEXGEN CONTRACT TASK ORDER PROCESS
- 2 DO'S AND DON'TS FOR THE GOVERNMENT TECHNICAL OFFICE
- 3 CHECKLIST OF COMMON MISTAKES
- 4 NEXGEN DELIVERABLE EVALUATION FORM
- 5 HELPFUL HINTS
- 6 TASK MONITOR DESIGNATION LETTER

## CHAPTER 1 - GENERAL INFORMATION

### A. BACKGROUND

The NexGen contracts provide a full range of Information Technology (IT) engineering services, capabilities and enabling products to support DISA worldwide, DOD and other federal agencies. The NexGen contracts support the DISA mission to "plan, engineer, develop, test and manage programs and to acquire, implement, operate, and maintain information systems for C4I and mission support under all conditions of peace and war." The NexGen contracts replace the JIEO Systems Engineering (JSE) contracts, the Defense Information Infrastructure Integration Contract (DII IC) and other expiring contracts.

The NexGen Contracts are structured, and will be managed, in accordance with the rules for task order contracts contained in the Federal Acquisition Streamlining Act of 1994 (FASA). All task order awards will be based on the FASA-specified "fair opportunity to be considered" provision.

The NexGen vehicle has two separate sets of contracts, one set of multiple award contracts for small business and one set of multiple award contracts for large business, each having its own statement of work. The small business requirements will be competed among the small business contractors and the large business requirements will be competed among the large business contractors.

Requirements for new work, i.e., work that was never done on any contract, will be competed among the small business contractors. To compete the requirement among the large business contractors, the task monitor needs to justify the need and forward the request for approval using e-mail to the SADB. The SADB will then forward approval or disapproval to the CO.

**B. PURPOSE.** The NexGen TO Guidelines describe the roles and responsibilities for managing the NexGen contracts and the procedures for preparing and managing a task order requirements package.

**C. APPLICABILITY.** The Guidelines apply to all users of the NexGen contracts. Internal DISA customers will be serviced by DITCO-NCR. External customers will be serviced by DITCO-Scott, DITCO-PAC, DITCO-Alaska, DITCO-Southwest Asia, and DITCO-EUR.

**D. CONTRACT TERMS/USE BY DOD AND NON-DOD AGENCIES.** The NexGen contracts are multiple award Indefinite Delivery/Indefinite Quantity (IDIQ) contracts utilizing Time-and-Materials (T&M), Fixed Price (FP) and Cost-Reimbursement (CR) contract types. The type of work required will determine the appropriate contract type, with final decision made the CO. The total life of the contract is seven years (a one-year basic term and six one-year options). The maximum order amount for all contracts combined over the seven-year contract life is \$1 billion. The contracts are available for use by DOD and other Federal agencies.

**E. CONTRACT SCOPE.** NexGen will provide DISA, the Department of Defense (DOD) and Federal Agencies with a flexible vehicle for engineering and interoperability for the core mission areas. NexGen will provide scientific, engineering, integration, and technical capabilities to assist with all aspects of planning; engineering, integrating, testing, fielding, and operating secure information technology systems and resources.

## NexGen Guidelines

The following are the task areas set aside for small business:

1. Task Area 1 - SB - General Systems Engineering
2. Task Area 2 - SB - Information Systems Engineering
3. Task Area 3 - SB - Network Engineering
4. Task Area 4 - SB - Security Engineering
5. Task Area 5 - SB - Systems Integration
6. Task Area 6 - SB - Systems Implementation
7. Task Area 7 - SB - Information Technology Standards
8. Task Area 8 - SB - Program Management

The following are the task areas for large business:

1. Task Area 1 - General Systems Engineering
2. Task Area 2 - Information Systems Engineering
3. Task Area 3 - Network Engineering
4. Task Area 4 - Security Engineering
5. Task Area 5 - Information Technology Standards
6. Task Area 6 - Program Management

See the NexGen SOWs for a complete description of the task areas and related subtask areas. To obtain a copy of the NexGen SOW, you can download it from the internet at the following address: <http://www.disa.mil/D4/diioss/>.

All work provided for DOD organizations through the NexGen contracts must be in accordance with approved DOD architectures, standards and guidelines. Customer statements of work, statements of objectives or performance work statements for individuals task orders must reflect approved DOD architectures, standards and guidelines that apply to the services being provided.

**F. CONTRACTORS AND SUBCONTRACTORS.** The NexGen prime contractors for small business are:

Artel, Inc.  
Pragmatics, Inc.  
FGM, Inc.  
Femme Comp Inc.  
AC Technologies

The NexGen prime contractors for large business are:

Northrop Grumman  
SRA  
SAIC

There are no restrictions on the prime contractors teaming arrangements. Proposed subcontractors will be approved at the task order level. For each small business task order awarded, at least 50% of the direct labor must be performed by small business. Small business prime contractors may combine work with the small business subcontractors to reach the 50%.

**G. FISCAL YEAR CUTOFF DATE.** The final receipt date for NexGen requirements packages that must be awarded during the current fiscal year (i.e. packages supported by funds that expire 30 Sep) is 31 July of the current fiscal year. The packages must be clean and complete by the cutoff date in order to be accepted for processing.

**H. PERFORMANCE-BASED SERVICES CONTRACTING (PBSC).**

PBSC is the preferred contracting approach for NexGen.

**I. REQUIREMENTS PACKAGE PROCESSING TIME-LINE.** The process can be completed in about 16-21 working days after acceptance of package from CO. Unless a fair opportunity exception applies, the applicable small business or large business contractors will be notified by the CO of a task order request for proposal and will be given a fair opportunity to respond to the request. Details are contained in Chapter 4. A high-level view of the process is illustrated at Attachment 1. NexGen requirements undergo a four-step process described in Chapter 3.

**J. NEXGEN CONTRACT WEB SITE.**

1. DISA maintains a NexGen Contract web site to provide information on the NexGen contracts. The site currently contains:

- NexGen Contract Characteristics
- NexGen Contract and Statements of Work (including attachments)
- NexGen Contract Task Order Guidelines
- DISA Points of Contact for NexGen Contract
- Listing of Contractors and Links to the Prime Contractors' Web Sites
- NexGen Requirements
- NexGen Awards

2. Updates are added to the site occasionally. The NexGen Contract web site address is:

Large Business: <http://www.disa.mil/D4/diioss/nexgenlbchar.html>  
Small Business: <http://www.disa.mil/D4/diioss/nexgensbchar.html>

**K. TASK MONITOR TRAINING.** DISA primary and alternate task monitors are required to complete Contracting Officer's Representative (COR) training and ethics training prior to appointment in accordance with DISA Acquisition Regulation Supplement (DARS) Subpart 1.602-2-90(b), <http://disa.dtic.mil/D4/dars/pt1.html#1.602-2-90>. The recommended COR training class is the web-based FAI "COR Mentor" course. This course is located at URL <http://www.faionline.com>. A new task monitor is required to take all 18 duties of this course. If you have taken the COR Mentor course, an annual refresher is required, which involves completing six of the 18 duties. For ethics training, the DISA Annual Ethics Training course is required. This course is required annually thereafter.

If the task order effort is mission critical, DISA customers may be designated as TMs prior to completion of training, with the understanding that training will be completed within 30 days of the task order award date.

The TM should be proficient in the technical requirements of their TO and familiar with the policies and procedures of these guidelines. A listing of additional guidance for the TM provided by General Counsel's office is detailed in Attachment 2 (Do's and Don'ts) and must be reviewed by each TM. Further information on TM responsibilities during TO execution is contained in Attachment 6 (TM Designation Letter).



## CHAPTER 2 - ROLES AND RESPONSIBILITIES

### A. DISA DEPUTY DIRECTOR - APPLICATIONS ENGINEERING (DISA/APPS)

**Program Manager/Steward.** DISA/APPS performs the functions of program manager and steward for the NexGen. In this role, APPS assists customers as they define and analyze requirements and is responsible for looking at the direction the contractors are taking from a technical service support perspective to ensure the technical direction is consistent with the long range DISA/APPS vision. The Contract Management Branch, AP21, is responsible for program oversight, cost monitoring, and for providing the contracting officer's representative.

**Contracting Officer's Representative (COR).** AP21 is staffed with the COR for the NexGen contracts. The NexGen COR performs the following functions:

1. Monitors the NexGen contractors' performance by keeping track of monthly status reports and working any issues/problems with the contractor/CO.
2. Ensures deliverable evaluations on the NexGen contractors are completed by the TMs and forwarded to the CO and the contractor.
3. Ensures the NexGen contractor's past performance data is included and is current in the automated past performance database used by DISA.
4. Assists the task monitor and acquisition liaisons on an as-needed basis with pre and post-award issues/functions.
5. Assists the CO in resolving discrepancies that may arise pertaining to performance of the contractors and the terms of the contracts.
6. Works with the CO and TMs to ensure contractors perform in accordance with the contract terms and conditions and the TO requirements.

**B. DEFENSE INFORMATION TECHNOLOGY CONTRACTING ORGANIZATION (DITCO).** DITCO performs all Contracting Officer functions for the NexGen contracts including:

1. DITCO National Capital Region (NCR) has primary responsibility for NexGen contracts. Only DITCO/NCR will modify/make decisions concerning the contracts.
2. The following functions are performed by each respective contracting office:
  - A. Reviewing each requirements package and the contractors' proposals to ensure the documents are complete, accurate, and in accordance with the contract and these Guidelines.
  - B. Providing advice and guidance to the COR, contractors, and TMs/customers regarding contract scope, FAR and DFARS requirements, and DISA contracting policies.
  - C. Representing CO's position at various contract-related meetings, in-process reviews, negotiating sessions, and working meetings.
  - D. Awarding Task orders (TOs) and modifications for the NexGen contracts.
  - E. Designating in writing NexGen TM(s).

## NexGen Guidelines

**C. TASK MONITORS.** Customer agencies identify Task Monitors who are responsible for:

1. Submitting a complete requirement package prepared in accordance with the TO Guidelines. Define task order requirements including justifications, reviews, and/or approvals.
2. Evaluating the contractor's proposal and developing the Selection Recommendation Document (SRD).
3. Monitoring and evaluating the contractor's performance on each TO by verifying the monthly status reports, deliverables, travel and visit requests. Completes a past performance evaluation in the Automated Past Performance Database.
4. Providing acceptance and rejection information to the Finance Office for all invoice processing, and
5. Providing technical support to the COR and CO on TO issues.

**D. CONTRACTORS:** The principal role of the contractors is to perform the work described in the awarded TOs. All contractor performance and deliverables must meet the requirements set forth in the NexGen Contract.

**E. OMBUDSMAN.** The Ombudsman is responsible for reviewing complaints from the contractors and for ensuring that all NexGen contractors are afforded a fair opportunity to be considered, consistent with the procedures in the contract and established guidelines. The designated Ombudsman for NexGen is:

Director for Acquisition, Logistics and Facilities  
DISA, Code AQ  
5111 Leesburg Pike, Suite 900, Skyline 5  
Falls Church, VA 22041-3206  
Phone: 703-681-2270

## CHAPTER 3 - REQUIREMENTS (ORDERING) PROCESS

### A. GENERAL

All work performed under the NexGen contracts are done through the award of task orders (TO). Internal DISA customers will be serviced by DITCO-NCR. External customers will be serviced by DITCO-Scott, DITCO-PAC, DITCO-Alaska, DITCO-Southwest Asia or DITCO-EUR. The NexGen TOs are awarded in accordance with a four-step process that complies with the FASA requirements for "Fair Opportunity to be Considered." Customers are strongly encouraged to compete their initial requirements.

A web-based capability created by DISA to prepare the requirements package is called the Acquisition Planning and Execution (APEX) System. APEX shall be used to create requirement packages for NexGen. Users can access a single website and prepare all the necessary documents online without the need for having any applications other than a standard web-browser, resident on their workstation.

To access APEX, go to the DISA Direct Homepage at <https://www.ditco.disa.mil/products/ASP/welcome.ASP>. If this is your first time in APEX, you must first register in DISA Direct. Go to Registration Center, create userID (left column of screen). After you have created your userID and password, go to Order Entry (left column on screen), and click on Task Order Request. You will be prompted for your userID and password created when you registered. You are now in the APEX system. Instructions on accessing the system will be contained at the APEX Information web page.

The small business or large business contractors will be afforded an opportunity to submit proposals on small business or large business requirements, unless a FASA exception is cited and documented in accordance with paragraph C below.

### B. FOUR STEPS OF THE TASKING PROCESS

**1. STEP 1 - Customer Requirements Definition Stage.** The NexGen Process starts with the concept and development of the requirements definition in accordance with the NexGen TO Guidelines. The APEX System will have the required forms available on-line. Your requirements package consists of a Performance Work Statement or Statement of Work, appropriate funding documentation, an Independent Government Cost Estimate (IGCE), Requirements Package Checklist and a customer recommendation concerning the use of fair opportunity (by providing evaluation criteria) or the adoption of one of the FASA exceptions to fair opportunity. Packages that do not include all these items cannot be processed. The Requirements Package Checklist lists all the items that must be included in the package.

Requirements for new work, i.e., work that was never done on any contract, will be competed among the small business contractors. To compete the requirement among the large business contractors, the task monitor needs to justify the need and forward the request for approval using e-mail to the SADB. The SADB will then forward approval or disapproval to the CO.

**2. STEP 2 - Contracting Officer's Review.** After the customer has completed the requirements package in the APEX System outlined in Step 1, the CO will review the package to ensure it is complete, that the work is technically within scope, and appropriate funding documentation is provided. The CO will notify the TM if the package needs significant rework. Once a requirements package has been successfully screened and the CO comments have been resolved,

## NexGen Guidelines

the CO forwards the requirements package to the contractors by posting to the DITCO Contracting Opportunities web page.

### **3. STEP 3 - Proposal Preparation and Evaluation Stage - Fair Opportunity Process.**

(a) The CO solicits proposals from prime vendors by posting an RFP on the task order web page. Each contractor is generally allowed ten calendar days to prepare and submit proposals. However, more or less time may be necessary based on the requirements. Each RFP will indicate the required proposal content, proposal due date, technical proposal page limitations, and evaluation criteria. Technical proposals may be either written or presented orally, dependent upon the requirements of the customer. If oral presentations will be used, the requirements package and the RFP will indicate the time and place for the presentations and what information the Offerors must present orally. Cost proposals must be submitted by the Offerors in writing.

(b) Contractors may request written clarification of requirements, evaluation criteria, and instructions to Offerors. Such requests for clarification shall be sent to the CO by e-mail within one working day. To avoid compromising the fair opportunity process, **only** the Contracting Officer may communicate verbally with the vendors concerning the RFP until after TO award. The CO will post answers to clarification requests to the DITCO Contracting Opportunities web page. As a result of clarification requests, the CO will determine if any revisions to SOW requirements or evaluation criteria are required, and if necessary, issue an amended request for proposal. The CO may extend the proposal due date in the event the TM fails to provide written clarification to the contractor within one working day. Therefore, if the clarification is minor or administrative in nature, the contractor may wish to contact the CO prior to preparing a written e-mail.

(c) Contractors must submit **"no bid"** replies or complete technical and price/cost proposals to the CO, no later than the proposal due date. "No bid" replies should be submitted to the CO and TM and shall reference the tracking number specified in the CO request for proposal letter. Cost proposals for cost-reimbursement orders that contain proprietary information shall be submitted only to the CO. The contractor must also provide a "sanitized" version of their cost proposal and their subcontractor's cost proposal.

(d) Proposal Evaluation. The CO and TM participate in evaluating the contractor's technical and cost proposal. The Contractor sends the technical and cost proposal to the attention of the CO on the DITCO Contracting Opportunities web page. The technical proposal, a "sanitized" cost proposal (if required), and a letter requesting a technical evaluation are forwarded via email to the TM. If the contractor's proposal fails to meet SOW requirements or reflects misunderstandings, discussions between the TM, CO, and contractor may be necessary. Discussions will tend to be informal meetings to discuss technical approach, labor category levels and mixes, cost elements, and schedule. After completion of the evaluation, the TM (customer) prepares a Selection Recommendation Document (SRD), which details the evaluation and rationale for best value decision.

**4. STEP 4 - Requirements Package Contract Task Order Execution Phase.** Once the contractor's proposal has been reviewed by the TM and CO, and all pre-award issues have been resolved, the CO awards the TO by issuing a DD Form 1155 to the contractor, with a copy to the COR and TM. At that point, the contractor is authorized to begin work on the TO.

At the same time TO award is made, the CO issues a letter of designation to the TM.

**C. FAIR OPPORTUNITY EXCEPTIONS.** FASA requires the above Fair Opportunity process be followed unless one of the following conditions applies:

1. The agency's **need for services is of such urgency** that providing such opportunity would result in unacceptable delays,

2. Only one such awardee is capable of providing such services required at the level of quality required because the **services ordered are unique or highly specialized;**

3. The order should be issued on a sole-source basis in the interest of economy and efficiency as a **logical follow-on to a task order already issued under this contract**, provided that all contractors were given fair opportunity to be considered for the original order, and that the contractor's performance was rated satisfactory or higher; and

4. It is necessary to place an order to **satisfy a minimum guarantee.**

In cases where the customer believes an exception applies, the customer must prepare an SRD up-front justifying why the FASA exception applies.

**D. TASK ORDER MODIFICATIONS.** Modifications to task orders are generally made for administrative purposes, change delivery dates, add a task, change the period of performance, etc. However, if those changes alter the scope, provide a substantial amount of new funds, or significantly extend the period of performance, **a new requirements package must be submitted for award of a new task order.** The new task order should refer to the prior task order and explain the connection in the background portion of the SOW and in the specific tasks, as required.

TO modification requirements may originate with the task monitor (customer) or with the contractor. Any changes that affect the basic information in the SOW must be supported by appropriate modification of the SOW. All requests for modifications must be submitted through APEX to the CO.

TO modifications are processed in the same manner as initial requirements package using APEX.

## CHAPTER 4 - REQUIREMENTS PACKAGE PREPARATION

**A. GENERAL.** The NexGen requirements package is the basis for processing and awarding a NexGen TO. A requirements package must be prepared and submitted by the task monitor both for a new requirement and for a modification to an awarded TO. The requirements package must be UNCLASSIFIED regardless of the classification of the work to be performed within the TO. All documents needed for a NexGen TO shall be developed in APEX.

**B. REQUIREMENTS PACKAGE CHECKLIST.** Each requirements package must include a completed Requirements Package Checklist. The Section 508 Determination for Task Orders is included as part of the Checklist. Please ensure this section is completed.

**C. PERFORMANCE-BASED WORK STATEMENT OR STATEMENT OF WORK (SOW).** The SOW is the most critical document in the requirements package. Be sure that the SOW completely and accurately portrays the nature of the required services and lists the delivery of technical data to satisfy the requirement. The APEX System helps you develop your SOW. A complete SOW is essential to begin the Task Order (TO) process. Customers are encouraged to use performance based service contracting (PBSC). The APEX System will be updated to include the performance based work statement format.

**D. INDEPENDENT GOVERNMENT COST ESTIMATE (IGCE).** The IGCE is invaluable in determining the reasonableness of a contractor's cost and technical proposals and in gaining assurance that there is a "meeting of the minds" between the customer and the contractor regarding the scope of the TO. If discussions or negotiations are necessary prior to awarding the TO, the IGCE assists in developing and presenting the customer's position. The IGCE is also helpful in reconciling requirements with budget, ensuring that the proposed TO is affordable. For Other Direct Costs (ODCs) included in the IGCE, please include a break out showing what is included. **The IGCE is for Government Use Only and is not to be made available to the NexGen contractors.**

Figures for ODCs must be supported by the work described in your SOW, so the contractor can propose appropriate costs. Attach a separate sheet to the IGCE detailing the travel, hardware or software. Other ODCs are self-explanatory and may include: courier service, express mail, long distance telephone calls, and reproduction (Note: Section H.12 of the contract strictly limits the printing, duplication & other reproduction that can be accomplished on these contracts).

**NOTE:** This contract is primarily for engineering support services, however, incidental hardware or software may be justified on individual task orders in cases where it can be demonstrated that the hardware/software is incidental to the performance of services to be provided in the task order. The dollar value of hardware/software as it pertains to task orders issued against this contract is limited to not more 10% of the estimated cost of the task order.

**E. DD FORM 254 CONTRACT SECURITY CLASSIFICATION SPECIFICATION.** The Contract Security Classification Specification, DD Form 254, in the NexGen contracts provide for TOP SECRET level classification and TOP SECRET safeguarding at the prime contractor's facility. The Contract-wide DD Form 254 provides for access to COMSEC restricted data, SCI, NATO, Foreign Government Information, Limited Dissemination Information, FOUO Information, and SIOP-ESI. If, however, the DD Form 254 in the NexGen contracts is not adequate for the specific work in your requirements package, you must include a Task Order specific DD Form 254.

## NexGen Guidelines

**F. FUNDING DOCUMENTS.** NexGen TOs are funded by the organizations placing TOs on the contract. TOs may be funded with any type of appropriations (O&M, RDT&E, Procurement, DWCF). For Non-DISA funded packages, certified funding documents must be provided at Step 1 of the tasking process. For DISA funded packages, the tasking process can commence with committed funds, BUT certified funding must be provided before Step 4, the TO execution phase, can begin. Customers are solely responsible for ensuring the correct appropriation is cited and the period of performance is addressed with the correct fiscal year appropriation in order to satisfy "bona fide need" and "severability" concerns. Task orders for severable services may be incrementally funded and the funding document must identify all budgeted funding. Non severable task orders must be fully funded. The proper funding document for DISA organizations to place orders on NexGen is DISA Form 1 (Purchase Request). External DOD customers that wish to procure NexGen services must use a Military Interdepartmental Purchase Request (MIPR) DD Form 448. Non-DOD customers may use their own form or format.

All forms used must contain the following information.

- Points of contact for technical, financial and billing purposes
- Title of the SOW being supported by this fund citation (Contract # and TO # if for modification)
- Appropriate Contract Number, if a "fair opportunity" exception applies
- Amount of funds provided
- Accounting Data (Fund citation)
- Billing address
- Funds expiration date for obligation purposes
- Date the document is created/signed

A funding document can apply to only one requirements package; however, one requirements package can be funded by multiple funding documents.

**G. ECONOMY ACT DECISIONS.** Contracting by DISA of services/supplies for another Government agency constitutes an interagency acquisition. Under the Economy Act (31 U.S.C.1535), the head of the requesting agency must determine that contracting for its (the requesting agency) requirements is in the best interest of the Government. Requirements that are non-DISA funded, in whole or part, must indicate on their NexGen Requirements Package Checklist that appropriate Economy Act decisions have been made.

**H. COMMON MISTAKES.** Attachment 3 is a form used to screen for the most common mistakes found in NexGen Requirement Packages. Each "no" answer requires TM correction before processing can continue. In conjunction with the NexGen requirements package checklist, the TM should use this form to ensure that the package is complete and clean.