

# ORGANIZATIONAL WORK INSTRUCTION

## PLANS AND SYSTEMS ANALYSIS OFFICE

### Mission Services Contract Management

**APPROVING  
AUTHORITY**

**NAME**

**TITLE**

**ORGRATE**

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VERIFY THAT THIS IS THE CORRECT VERSION BEFORE USE**

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| <b>Organizational Issuance</b><br>CD02      |                    |                 |
| <b>Mission Services Contract Management</b> | CD02-OWI-007       | Revision: Draft |
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### DOCUMENT HISTORY LOG

| Status<br>(Baseline/<br>Revision/<br>Canceled) | Document<br>Revision | Effective<br>Date | Description |
|--|----------------------|-------------------|-------------|
| Draft  |                      | June 1, 2003      |             |
|  |                      |                   |             |
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## 1. PURPOSE

This instruction establishes the procedures and responsibilities performed by the Customer and Employee Relations Directorate (CaER) that relate to the maintenance and operation of the CaER support contract, which primarily provides products and services to NASA Headquarters and Marshall Space Flight Center customers. This instruction extends information from the Marshall Management System (MMS) as defined by the Marshall Management Manual (MMM).

The purpose of this instruction is to document the process by which the support contract is managed and conducts business.

## 2. APPLICABILITY

The procedure applies to the following in-scope activities under the cognizance of contract support:

Customer support

Customer funding and technical task agreements

Day-to-day operations

## 3. APPLICABLE DOCUMENTS

(All use current revision unless there is overriding authority)

|            |  |
|------------|--|
| NAS8-02047 | Customer and Employee Relations Support Contract |
| MPD 1280.1 | Marshall Management Manual                       |

### 3.1 APPLICABLE DOCUMENTS

(All use current revision unless there is overriding authority)

|            |                                  |
|------------|----------------------------------|
| MPG 1280.4 | MSFC Corrective Action System    |
| MPG 8730.3 | Control of Nonconforming Product |

## 4. DEFINITIONS

|   |                    |                 |
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CaER - Customer and Employee Relations Directorate

COTR - Contracting Officer's Technical Representative

DO – Delivery Order

N/A - Not Applicable

OWI - Organizational Work Instruction- Level 4 document in the MSFC MMS.

OPR - Office of Primary Responsibility

ORs - Quality Record

QS - Quality System

RFP - Request for Proposal

WR – Work Request

## 5. INSTRUCTIONS

Management Responsibility. The COTR will ensure adequacy of this OWI, assure overall implementation, and will, as a minimum, conduct annual management reviews to ensure the continuing suitability and effectiveness of the OWI to satisfy applicable elements. The minutes and/or charts of these reviews will be maintained as QRs and distributed to the appropriate people.

The contract scope of work specifies specific quality and effectiveness metrics. (See NAS8-02047.) The COTR will be responsible for negotiating technical task agreements with each of the primary clients served by the contract. These agreements will outline a mutual understanding of the labor, scope, and services provided by the contractor.

The Procurement Office will initiate delivery orders authorizing the support contractor to spend money on a reimbursable basis to accomplish the requirements outlined in the associated Work Requests. The procedures for initiating these Work Requests and tracking the requirements and costs of IDIQ are outlined in Appendix C.

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The COTR and Technical Monitors are responsible for maintaining a dialog between customers and/or potential customers, and the contractor during the defining, funding, planning, execution and feedback stages of each requirement.

6. **NOTES** - None
  
7. **SAFETY PRECAUTIONS AND WARNING NOTES** - None
  
8. **APPENDICES, DATA, REPORTS, AND FORMS** - See appendix A, B and Work Request Form
  
9. **RECORDS** - None
  
10. **TOOLS, EQUIPMENT, AND MATERIALS** - None
  
11. **PERSONNEL TRAINING AND CERTIFICATION** – On the Job Training (OJT)
  
12. **FLOW DIAGRAM** - None

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## **APPENDIX A**

### **How/When to Submit a Work Request**

All actions/requirements of the Customer and Employee Relations Directorate support contract are submitted and tracked in one of three ways.

As a set of tasks agreed upon by all parties as part of an employee's routine (day-to-day) work;  
 On a Work Request form (specific mission support requirements that have a start and end date) or  
 On a Delivery Order (IDIQ requirements that involve new exhibits, outside design time, etc. above \$25k in costs).

To better track shared labor, coordinate milestones and deadlines, the contract manager and COTR will review work for appropriateness, and all Work Requests will be logged and issued control numbers prior to the contractor assigning the work to an actionee. Work Requests can be drafted by the COTR, backup COTR or Technical Representatives in the customer organizations, however, the only persons authorized to review and sign IDIQ delivery orders are the COTR or backup COTR.

The contractor maintains a list of Work Requests. This list is reviewed weekly by the COTR and/or back-up COTR to determine priorities, review due dates and milestones, assess impact to other work requirements, and discuss any associated issues.

The customer's technical representative will fill out the evaluation section of the work request and submit any comments directly to the COTR or backup COTR.

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### Attachment 1

| WORK REQUEST<br>CaER Contract   |                          |                               |              |               |
|---|--------------------------|-------------------------------|--------------|---------------|
| <b>To be completed by ASR</b>   |                          |                               |              |               |
| Work Request #  | Reviewed by:             |                               |              |               |
| Date Received:  | Accepted:                |                               |              |               |
| Personnel Assigned:   | Disapproved:             |                               |              |               |
| Date Complete:  | Reason for Disapproval:  |                               |              |               |
|   |                          |                               |              |               |
| <b>TITLE:</b>   | <b>REQUEST DATE:</b>     | <b>REQUIRED DATE:</b>         |              |               |
| <b>REQUESTED BY:</b>  | <b>PHONE NUMBER:</b>     | <b>PROGRAM/OFFICE SYMBOL:</b> |              |               |
| <b>DESCRIPTION OF WORK:</b>   |                          |                               |              |               |
| <p>IMPORTANT: The Contractor shall proceed promptly with the performance of executed work request issued by the Technical Monitor within contract authority. It is the Government's position that the work called out is within the current contract mission. If, in the Contractor's opinion, the work is either not covered by the current contract mission, or is outside the contract mission altogether, the Contractor shall not proceed but shall notify the Contracting Officer in writing within 5 working days.</p> |                          |                               |              |               |
| APPROVAL LEVEL  | PRINTED NAME / SIGNATURE | DATE APPROVED                 | PHONE NUMBER | OFFICE SYMBOL |
| REQUESTOR:  |                          |                               |              |               |
| TECHNICAL MONITOR:  |                          |                               |              |               |

## EVALUATION

*To be completed by Technical Monitor*

| <b>EVALUATION -- upon conclusion of this work, the Technical Monitor will complete the following evaluation with comments and sign below to acknowledge the completion of the assignment and to provide an evaluation of the work performed.</b> |          |                  |
|--|----------|------------------|
| EVALUATION CATEGORIES:   | RATINGS: | RATING LEGEND:   |
| Timeliness (work accomplished per timeframe established)   | _____    | 5 - Outstanding  |
| Quality of Work (work accomplished in a skillful, workmanlike manner)  | _____    | 4 - Excellent    |
| Planning (work accomplished in the least disruptive manner)  | _____    | 3 - Good         |
| Coordination & Submittals (documentation is comprehensive and timely)  | _____    | 2 - Satisfactory |
| Management & Reporting (communication is timely and appropriate)   | _____    | 1 - Poor         |
| <b>COMMENTS:</b>   |          |                  |

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|                                    |             |
|------------------------------------|-------------|
| EVALUATOR'S/REQUESTOR'S SIGNATURE: | DATE SIGNED |
|------------------------------------|-------------|

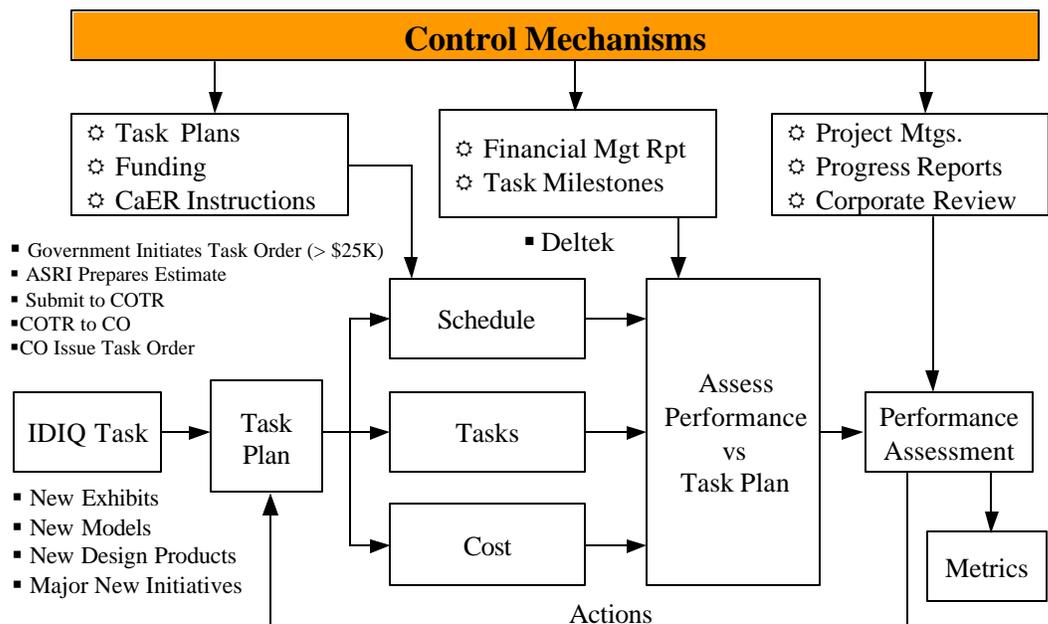
## APPENDIX B

### How/when to submit an RFP to initiate a IDIQ Delivery Order

#### Creating an IDIQ Delivery Order:

- 1) Customers discuss with the COTR or contract manager in advance to make sure a IDIQ Delivery Order (DO) is appropriate. E-mail to the COTR or backup COTR details of the need, the expected number of products, costs, deadlines, charge codes if known, contacts, and other information needed to create the Delivery Order.
- 2) The COTR or backup COTR will concur in the contractor's estimate and present the IDIQ proposal to Procurement. The contract budget assistant will work with the customer to transfer appropriate funds to cover the cost of IDIQ Delivery Orders.
- 3) Procurement will issue the IDIQ Delivery Order based on the submitted requirements and due date. This constitutes formal permission to commit funds on behalf of the government.
- 4) After work specified on the IDIQ Delivery Order has been accomplished, the customer's comments provided to the COTR will be used in evaluation of incentive fee.

## IDIQ Task Management System



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*Process Used for Task Order Management*

BEFORE USE