

## Task Order (TO) Management Assessment Criteria

The TO Requesting Agency should have the information listed in the “Corresponding Records...” column available for review at the time of the assessment.

Assessment Criteria	What the Agency Should Demonstrate	Corresponding Records the Agency Should Retain
1) Deliverable to Invoice	<ul style="list-style-type: none"> <li>Deliverable accepted / rejected according to the acceptance criteria in the TORFP</li> <li>Invoices match deliverable prices in the Financial Proposal</li> <li>Back-up documents provided with invoices as needed</li> </ul>	<ul style="list-style-type: none"> <li>Acceptance documentation</li> <li>Invoices</li> <li>Financial Proposal</li> <li>Back-up documentation</li> </ul>
2) Labor Rate / Materials to Invoice	<ul style="list-style-type: none"> <li>Labor rates on invoices are equal to or lower than the rates in the Financial Proposal</li> <li>Timesheets were provided that correspond to hours and labor rates shown on invoices</li> <li>Any material costs are passed through without mark-up by the TO Contractor</li> </ul>	<ul style="list-style-type: none"> <li>Invoices</li> <li>Financial Proposal</li> <li>Timesheets and back-up documentation (e.g., work activity reports) that support the invoice information</li> <li>Invoices from suppliers for materials</li> </ul>
3) Substitution of Personnel	<ul style="list-style-type: none"> <li>A standardized procedure for approving substitutions of personnel exists</li> <li>The substitution of personnel procedure is being followed</li> </ul>	<ul style="list-style-type: none"> <li>Documented substitution of personnel procedure</li> <li>Documentation from TO Contractor of request to substitute personnel                             <ul style="list-style-type: none"> <li>Between proposal and award</li> <li>At any time during the task order period</li> </ul> </li> <li>Documentation that all substitutions were approved by the TO Manager according to the established procedure</li> </ul>
4) MBE Participation	<ul style="list-style-type: none"> <li>MBE forms are complete and received monthly</li> <li>MBE goal is being met for the TO</li> </ul>	<ul style="list-style-type: none"> <li>D-5 forms from the TO Contractor</li> <li>D-6 forms from the subcontractor/s</li> <li>Documentation to demonstrate tracking of the MBE information</li> <li>Documentation of corrective action, if appropriate</li> </ul>
5) Change Management	<ul style="list-style-type: none"> <li>A standardized procedure for change management exists that is applicable to the TO</li> <li>Change management procedures include change description, justification, and impact on cost, scope, schedule, risk and quality (i.e., TORFP requirements)</li> <li>The change management procedure is being followed</li> </ul>	<ul style="list-style-type: none"> <li>Written change management procedure</li> <li>Change order documentation in accordance with the procedures</li> </ul>