



# CDC UNIFIED PROCESS PROCESS GUIDE



## TASK ORDER

### Purpose of the Process Guide

CDC projects are required to comply with various CDC and Federal regulations, mandates, policies, processes, and standards. Information about these requirements is available from various websites and supporting documents. However, this information is often not presented from the perspective of the project team and their roles & responsibilities in complying with these requirements. CDC UP Process Guides provide that perspective.

CDC UP Process Guides help project teams comply with CDC and Federal requirements by:

1. Setting the requirements in the context of their purpose
2. Providing step-by-step instructions for completing the activities required for compliance
3. Illustrating potential integration points between processes
4. Presenting requirements in a concise, easy-to-understand, and consistent format
5. Making that presentation accessible to the CDC community via the CDC Unified Process website

The specific purpose of this Process Guide is to describe the **Task Order** process as it applies to project teams.

### Process Overview

Task Orders are created for existing CDC contracts. Under a task order contract, the work statement is very general, requiring the specifics of each job to be written into specific task orders. The flexibility of task orders is that several NCs within CDC may be able to take advantage of a single task order contract, writing unique task statements and administering their task orders individually.

Project Managers are not directly involved in the Task Order process. NC Project Officers serve as liaisons between the project team and the Procurement and Grants Office (PGO) and have the ultimate responsibility for addressing the individual elements of the Request for Task Order (RTO) package and creating the Procurement Requisition (PR) in the Integrated Contracts Expert (ICE) system. Each NC appoints its own Project Officers. To determine the Project Officer for your task order contract, contact your immediate supervisor.

The amount of lead time required to complete the acquisition process is determined on a case-by-case basis. The process lead times for a competitive Task Orders are as follows:

- **Contract Modifications/Task Order Modifications**
  - Requires 30 days
- **New Task Orders**
  - Competitive/GSA requires 62 days
  - Single Source requires 30 days
- **RFPs/IFBs**
  - Requires 165 days
    - 5 days = Program Offices for Responding to Questions
    - 10 days = Program Preparation of Business Review Summary
    - 10 days = Program Review of Final Proposal Summary, Prep of Final Tech Evaluation Summary & Award Rec.
    - 14 days = Program Preparation of Tech Evaluation Summary

For more information regarding lead-time required to complete the acquisition process visit the PGO website at <http://pgo.cdc.gov/pgo/GeneralContent.do?chronicleid=0900f3ee8001ba0f>

Prior to beginning the procurement process, CDC's Office of the Chief Operating Officer (OCOO) sends out a planning guidance memo to NCs reminding them of the forecasting activity for the next fiscal year's grant awards and acquisitions and specifying the due date for initial plan submission for the following year. Each NC, in conjunction with PGO and the CDC Financial Management Office (FMO), prepares an



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Acquisition and Assistance Forecast Plan containing all known and potentially new procurement needs. Each NC's Office of the Director meets with their divisions and PGO to discuss proposed projects and finalize the Acquisition Plan, which is then submitted to the Project Officer to begin the procurement process.

PGO handles CDC's acquisition and assistance activities. PGO solicits and negotiates awards, administers, and terminates contracts, purchase orders, grants, and cooperative agreements.

This process guide focuses on PGO's procurement process using Task Orders. For information about the process for Simplified Acquisitions, which are streamlined acquisition methods used to procure services/supplies that cost less than one hundred thousand dollars (\$100,000.00), or the process for Contracts, which is used to procure services/supplies that cost more than one hundred thousand dollars (\$100,000.00), refer to the respective CDC Unified Process (CDC UP) Process Guide on Simplified Acquisitions and Contracts Procurement. The process for Grants Procurement will be documented in a later version of the CDC UP.

### Process Attributes

This section provides a list of process attributes to help project teams better understand the requirements necessary to comply with this process and to determine when and how they may impact their project.

PROCESS ATTRIBUTE	DESCRIPTION
<b>Process Owner(s)</b>	Procurement and Grants Office (PGO)
<b>Process Criteria</b>	Applicable to all projects within the scope of an existing CDC-wide contract or other CDC Task Order contract.
<b>Timing of Process in Project Life Cycle</b>	Begins in the Planning phase of the project lifecycle and continues until the contract is closed out.
<b>Estimated Level of Effort</b>	Varies, depending on the size of the contract. Project Manager will need to initially spend 10 to 20 hours to develop the Statement of Work (SOW) and other materials for the RTO. During the processing of the procurement request there is not much involvement on the project team's part, except responding to any clarification required from the Project Officer or Contracting Officer.
<b>Associated Costs</b>	No cost to the project except the cost of the contract itself and the estimated level of effort described above.
<b>Process Prerequisites</b>	<ol style="list-style-type: none"> <li>1. The cost for procuring the services or supplies must be taken into account during the NC's budget formulation process.</li> <li>2. The procurement need must be included in the NC's Acquisition and Assistance Forecast Plan.</li> <li>3. Funding for the procurement should be approved prior to initiating the procurement request.</li> <li>4. If the Project Manager acts as the Project Officer then he or she must have completed Project Officers training as required by the Health and Human Services Acquisition Regulations (HHSAR).</li> </ol>
<b>Process Dependencies</b>	A memorandum is issued annually by CDC's Office of the Chief Operating Officer (OCOO), describing the planning schedule and submission timelines for that fiscal year. Refer to the Acquisition/Assistance Planning Schedule below for FY2008 timelines: <a href="http://pgo.cdc.gov/pgo/webcache/SOP/FY-">http://pgo.cdc.gov/pgo/webcache/SOP/FY-</a>



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PROCESS ATTRIBUTE	DESCRIPTION
	<a href="#">2007 Acquisition and EOY Obligation Timelines Final.pdf</a>
<b>Related Systems/Tools</b>	Integrated Contracts Expert (ICE). This tool is mainly used by Project Officers and PGO.
<b>Available Training</b>	Training is available through CDC Corporate University for the following: <ul style="list-style-type: none"><li>• Project Manager Training</li><li>• HHS Project Officer Training Program</li><li>• Acquisition Planning</li></ul> <a href="http://intranet.cdc.gov/ecp/training.asp">http://intranet.cdc.gov/ecp/training.asp</a>
<b>Additional Information</b>	PGO Intranet: <a href="http://pgo.cdc.gov/pgo/ViewHome.do">http://pgo.cdc.gov/pgo/ViewHome.do</a> <a href="#">Guidance for Issuing a Task Order</a>

### Contact List

This section provides a list of individuals and/or offices that are available to assist project team in answering questions regarding the content of this Process Guide and related topics. However, due to the ever-changing nature of our work environment it is possible some information may be out of date. Please refer to the PGO chart at: <http://pgo.cdc.gov/pgo/ViewCategory.do?AudienceID=6>

### Key Terms

The CDC Unified Process Team maintains a comprehensive list of key terms and acronyms relevant to all Unified Process artifacts maintained on the CDC UP website. Follow the link below for definitions and acronyms related to this, and other, document.  
<http://www2.cdc.gov/cdcup/library/other/help.htm>

### Activities Checklist

This section provides a list of steps outlining the activities associated with complying with this process. Due to the dynamic nature of the activities associated with complying with this process a website has been established to communicate the most current information regarding Task Order requirements. This website also contains a list of the related templates that assist in completing Task Order activities.  
<http://pgo.cdc.gov/pgo/ViewCategory.do?AudienceID=2#>