EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-01

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	WaterSense Program Implementat

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.2

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		10,000
Total:		10,000

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name Tara OHare	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-8836 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Noelle Mills	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

PERFORMANCE WORK STATEMENT
Technical Evaluation and Market Assessment Support for the Water Efficiency Program
Contract # EP-C-14-014
Work Assignment No. 1-01

I. ADMINISTRATIVE (PWS Area 3.2)

A. Title: WaterSense® Program Implementation Support

B. Work Assignment Contracting Officer Representative:

Tara O'Hare
US EPA (MC: 4204M)
1200 Pennsylvania Ave., N.W.
Washington, DC 20460
(202) 564-8836, FAX: (202) 501-2396

C. Quality Assurance:

The requirements include the collection of secondary environmental measurements in the partner annual reporting process; therefore, a supplemental programmatic quality assurance project plan (PQAPP) is required. The PQAPP submitted for WA B-01 and B-05 is applicable and acceptable for this work assignment.

D. Background: EPA launched WaterSense, a voluntary partnership program to enhance the market for water-efficient products and practices in June 2006. The program seeks to provide information to residential, commercial and industrial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

Recruiting new participants to the voluntary partnership program is critical to the success of the program. There are currently several partner categories: Promotional Partners, Manufacturers, Certified Professionals, Retailers/Distributors, Homebuilders, and Licensed Certification Providers. EPA has invited targeted partners to join the WaterSense program. Partners have access to routine online webinars and quarterly newsletter. Tools have been developed and are being provided to successfully promote WaterSense. EPA requires support for these WaterSense general program implementation activities. The contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAEE) guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables shall comply with those requirements.

II. OBJECTIVE:

The objective of this work assignment is to provide general program support and partner recruitment for the WaterSense program. This shall include activities to provide administrative support, strategic input, and implementation support, while maintaining regular contact with EPA personnel. In order for the contractor to fulfill the requirements of the tasks specified in this work assignment, it shall require information, reports, analysis, etc from other WAs under this contract; however, no work shall be duplicated on any two WAs. While every effort has been made to anticipate programmatic needs and deliverable timeframes, the contractor may be asked to complete a task assignment within the scope of the task description detailed below on a shorter timeframe than originally anticipated.

III. TASK DETAIL:

The contractor shall perform the following tasks:

Task 0 - Work Assignment Management

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70). The PQAPP submitted for WA B-01 and B-05 is applicable and acceptable for this work assignment.

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment issues. The contractor shall provide a status update for tasks via email before each meeting and an update of expenditures. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for approximately three (3) meetings per month.

WaterSense Implementation Support

WaterSense promises to provide a variety of services to partners and stakeholders in implementation of the program. The contractor shall provide support to these stakeholders and partners by completing the tasks detailed below. A number of program materials, guidelines, documents and other program support tools (e.g. program helpline, customer support database, public website, project site, and program email account watersense@epa.gov) have been created and maintained under contract EP-C-09-008 and continued under this contract. The contractor will be provided access to all of these items by the EPA WACOR to facilitate their support of the requirements in this work assignment.

Task 1 Program Implementation:

a. WaterSense Customer Support Database – A customer support database was developed and implemented under the previous Water Efficiency contract EP-C-09-008. The contractor shall maintain this database to track all information in the WaterSense program. This information will include, but is not limited to, stakeholder contact information, communications, documents, materials, product listings, annual reporting information from partners, and other program data. The contractor shall enter and update information in the database after each interaction with a stakeholder or partner. This is anticipated to occur on a daily basis. The contractor shall make changes to the database's infrastructure as required to effectively collect new information as the program evolves. Approximately three (3) changes are anticipated during the base period to accommodate the implementation of new specifications, processes, and partner types.

b. WaterSense Project Site – A project site was created and maintained under contract EP-C-09-008 to provide centralized storage for all WaterSense program documents and information. The contractor shall maintain and update this project site as program documents are created and updated. Access to this site shall be restricted to only the contractor and the EPA WaterSense team.

c. Program Documents – The contractor shall maintain and update WaterSense program documents as necessary in response to changes in the program. These documents include, but are not limited to, program guidelines, partnership agreements, and annual reporting forms. Editorial revisions to approximately sixteen (16) documents and the creation of approximately three (3) new documents are anticipated during the work assignment period of performance. Changes to document layouts and formats are anticipated to be minor to accommodate editorial revisions to existing documents. All final program documents shall be uploaded to the WaterSense website and the WaterSense project site.

d. Preparation of Program Materials - EPA requires support in preparing program materials (e.g., graphics, briefing slides, talking points, fact sheets) for use within and outside the Agency. The contractor shall support in the development of briefings, presentations, and other program materials in consultation with EPA personnel. Support for approximately three (3) to five (5) briefings, fact sheets, or other presentations are anticipated over the course of the work assignment period of performance. Final materials shall be uploaded to the WaterSense website, partner site, or distributed to stakeholders via email as directed by the WACOR via Technical Direction.

e. Printed Material Management – The contractor shall maintain an inventory of all WaterSense printed materials (e.g. factsheets, brochures, giveaways, etc.) and inform the WACOR and appropriate EPA WaterSense team staff when materials should be reordered. The contractor shall prepare printing packages as necessary for the Government Printing Office and the EPA Print Shop. The contractor shall distribute materials to EPA regional offices and stakeholders when requested by the EPA WACOR via Technical Direction.

f. Conference planning – The contractor shall maintain a list of upcoming conferences relating to the WaterSense program. The EPA WACOR will inform the contractor on which conferences that the WaterSense booth, pull-up banners, and necessary outreach materials shall need to be sent. The contractor shall work with conference organizers to prepare and ship the WaterSense booth and/or pull-up banners with the necessary outreach materials such as factsheets, brochures, and other giveaways. The contractor may be asked to staff the booth at conferences on behalf of the program and the contractor shall clearly identify her/himself as representing her/his own firm under contract to EPA. For planning purposes, the booth shall be sent and staffed by approximately one contractor personnel for approximately two (2) conferences during the period of performance. Anticipated conferences include the RESNET Conference in San Diego, CA on February 14 – 18th, 2015 and American Water Works Association's Annual Conference in Anaheim, CA on June 7-10th, 2015, and the WaterSmart Innovations Conference held in Las Vegas on October 8-10th, 2015. The EPA WACOR will notify the contractor through written technical direction of final details of each conference in advance. All contractor travel, booth logistics, and contractor time to staff the booth will be covered under this WA. The contractor shall complete a trip summary with contacts identified and information gathered at the event

If required, the contractor shall secure meeting space for WaterSense related informal meetings as directed by the WACOR. Informal meetings for WaterSense partners and other interested stakeholders will be held in conjunction with other conferences such as the WaterSmart Innovations Conference. Meeting space shall include, but is not limited to, the rental of a room, audio-visual equipment, and sound equipment. The contractor's attendance at the meetings will be directed under other tasks in this work assignment.

a. Conference related purchases are not expected to exceed $20,000 under this contract. OWM will provide an executed EPA Form 5170 in accordance with EPA's Guidelines on Conference Spending Guidelines (6/27/14) if at a later date it is determined that the conference expenses will exceed $20,000. All additional costs must be approved by the Contracting Officer before they are incurred.

g. WaterSense Brand Monitoring – The contractor shall conduct an internet search on a monthly basis to ensure that the WaterSense logo and program marks are being used correctly. The search shall last for approximately thirty (30) hours per month. The contractor shall notify parties in violation of WaterSense logo and label use guidelines via email or telephone with instructions to correct the problem. The contractor shall work with the party in violation to answer their questions and review revised materials to see if a violation still exists or refer the violation to the Licensed Certifying Body for resolution. If a violator has not corrected the issue within thirty (30) days, the contractor shall contact the organization again with a second notice in writing in accordance with the procedure in the WaterSense Program Guidelines. If resolution is not forthcoming thirty (30) days after the second notice, the contractor shall notify the WACOR for further action.

h. Web Content – Throughout the work assignment period of performance, the contractor shall develop topical content to support program implementation for the WaterSense website as directed by the WACOR via Technical Direction. The content is anticipated to consist of updates of current text and/or images on approximately fifteen (15) pages and the creation of

approximately three (3) entirely new pages during Option Period I. A separate work assignment will focus on the management and maintenance of the website itself, but specific, topical content shall be created under this Work Assignment. All web content shall comply with section 508 and other Office of External Affairs and Environmental Education (OEAEE) guidelines. In addition to developing and revising web content, the contractor shall maintain the registration of all WaterSense related web domains (approx. 10-15 URLs) that were purchased on EPA's behalf under EP-C-09-008.

i. EPA Regional Support – The contractor shall provide support to EPA's DC Headquarters and Regional Office staff as they implement the WaterSense program. The contractor shall specifically provide Headquarters with technical and administrative support for bi-monthly calls with the regions. Approximately four (4) calls will be held during the work assignment period of performance, each lasting 1.5 hours at the most. The contractor shall provide support to the EPA WaterSense team to update a presentation for use during these calls if directed by the WACOR in advance of the call via Technical Direction. EPA will be facilitating each call. If requested by the WACOR via Technical Direction, the contractor shall take notes during the calls and provide EPA with a summary in writing to the WACOR within two (2) weeks of each call. The contractor shall also track the number of partners recruited by each region and provide updates on potential organizations to the regions monthly via email. The contractor shall also support EPA regional staff as they implement the WaterSense program. Supporting activities shall include, but are not limited to, responding to regional staff questions within three (3) business days, developing PowerPoint presentations for staff to use, creating and reviewing region-specific outreach and technical materials, and distributing printed materials for regional outreach.

Task 2 WaterSense Helpline:

Under contract EP-C-09-008, a toll-free helpline and email account were established to answer stakeholder questions about the WaterSense program. Callers to the helpline are directed to a WaterSense voice mail box. The contractor shall have access to the helpline and email account during the period of performance of this WA.

a. Inquiry Response - The contractor shall check the voice mail and email boxes twice per day and respond to information requests within one (1) business day. All calls and emails of a policy nature, and inquiries from media contacts, shall be referred to the WACOR for EPA response. Calls and emails will relate to both programmatic and technical issues. When responding to calls, the contractor shall clearly identify her/himself as representing her/his own firm under contract to EPA. The contractor shall also update all correspondence, including caller name, organization, contact information, nature of the request, and response, into the WaterSense customer support database.

b. Helpline Reports - The contractor shall provide a weekly report on relevant helpline activities to the EPA WACOR and WaterSense Team. The report shall be in MS Word format provided via email. The report shall include weekly helpline information such as partnership agreements submitted, the number of labeled products, upcoming emails and webinars, and incoming event requests. Approximately fifty-two (52) reports will be expected during the

period of performance of this work assignment. Each report is not expected to exceed 5-6 pages in length.

In addition to weekly reports, the contractor shall provide quarterly helpline updates to the EPA WACOR and WaterSense Team via the meetings referenced in Task 0 that summarize helpline activities and problems addressed. The contractor shall continue to use the same quarterly helpline report format developed under WA B-01 of this contract. Four (4) reports will be required during the work assignment period of performance.

c. Helpline Maintenance and Procedures - Maintenance and management of the WaterSense helpline is also required. Types of activities shall include: efficiency improvement assessments, redundancy reduction analyses, and updates to Standard Operating Procedures (SOPs.). The contractor is expected to generally assess the established helpline processes to assure WaterSense practices are both efficient and customer-friendly as possible. As possible efficiencies are found, the contractor shall prepare a summary of suggested improvement options for WACOR consideration. The contractor shall execute changes within two (2) weeks of WACOR approval.

   When changes are made, the contractor shall provide EPA with updated process and procedure documents for all helpline and partner support tasks affected. These procedures and processes may include, but are not limited to, standard operating procedures for management of data and information, training materials used to teach new helpline staff, and other information used to manage the implementation of the program on a day-to-day basis.

Task 3 Partner Support:

a. Partnership Agreements and Product Notification Templates – The contractor shall process all partnership agreements and product notification templates received through the helpline and from EPA. The contractor shall also assist EPA and partners, as needed, in completing the appropriate partnership agreements and other necessary forms (e.g., answering questions, obtaining signatures, and distributing executed copies of agreements). The contractor shall work with the Licensed Certifying Bodies, partners, and other organizations to verify information as necessary. All organizational information, forms, documents, and checklists shall be entered and uploaded into the WaterSense customer support database. The contractor shall distribute WaterSense program information to all new partners as appropriate. The contractor shall notify organizations ineligible for partnership within one (1) week of receipt of partnership agreement. The contractor shall notify the WACOR via email or telephone of any unusual situations or partnership requests within two (2) business days for resolution and shall notify the organization of the WACOR's acceptance or ineligibility determination within one (1) week of WACOR decision. The contractor shall maintain and update a list of current WaterSense partners on the website approximately two (2) times per month. The updates shall coincide with the web updates which will be scheduled under the web support work assignment.

b. Welcoming New Partners - The contractor shall also support implementation efforts of partners joining the program. This support includes welcoming partners to the program (via

telephone or email, as directed by the WACOR), answering questions about participation, and checking in on implementation progress.

c. Information Distribution to Partners – The contractor shall distribute program information to partners in electronic format approximately one to three times per week using a mass email delivery system. Additional distributions may be required to keep partners updated on the program's progress. Information updates shall include but are not limited to product specification updates, annual reporting and awards information, conference information, and other program updates. All communications shall be recorded in the WaterSense customer support database.

d. Partner Forum - The contractor shall develop and conduct two (2) to four (4) specific, topical presentations to assist WaterSense partners in implementing the program. The presentations shall be approximately 1 to 1.5 hours in length and will be web-based. The contractor shall set up the logistics for each call using web-based conferencing software and insure that participants receive all logistical information. The content for the presentations shall be developed in conjunction with activities in other work assignments. All presentation slides shall include speaker notes. The contractor shall take notes during the forum and provide a meeting summary and audio recording to the EPA WACOR within one (1) month of the forum. Four (4) forums may occur during the period of performance. For planning purposes, the number of presenters will vary depending on the topic with presenters being from partner organizations, EPA staff and contractor personnel. It is estimated that at a minimum (1) one presenter shall be provided for each forum.

e. Partner Pipeline – The contractor shall develop and distribute a quarterly newsletter, "The Partner Pipeline," for program partners in electronic format. The content shall be developed in conjunction with the EPA WaterSense team. The content of the newsletter will include profiles of partners, marketing information, and other topics used to help partners implement the program. Each issue will be approximately 3-5 pages in length and will be posted electronically on the WaterSense Partner web site. Four (4) issues of the Pipeline shall be developed during the period of performance of this WA.

Task 4. Program Evaluation and Analysis: Under contract EP-C-09-008, the WaterSense team developed a set of measures for evaluating program success.

a. Partner Activity Information and Case Studies - EPA anticipates that the primary metrics will be output measures (e.g., number of partners, number of products labeled). To augment these data, the contractor shall collect anecdotal information, partner quotes, and data on program success on particular projects and initiatives. A mechanism for collecting partner activity information was created under WA 1-01 of contract EP-C-09-008 and continued under contract EP-C-14-014 and has been maintained on the WaterSense Partner web site. The contractor shall record all partner activity information using this mechanism and/or the WaterSense customer support database as appropriate.

b. Annual and Quarterly Data Collection - The contractor shall collect and compile annual data from all WaterSense partners and quarterly data from Licensed Certification Provider partners. All data marked confidential shall be treated as such under Confidential Business Information procedures. The annual data collection process for calendar year 2014 began on January 5, 2015 under WA B-01 and will continue into this WA. The aggregated data shall be submitted to EPA for review after a quality review has been conducted as detailed in the approved PQAPP on or before April 15, 2015. If requested by the WACOR, the contractor shall provide additional updated documentation of the procedures used to collect, process, QA/QC, and aggregate all data collected before it is delivered to EPA. Half of an annual data collection cycle and four (4) quarterly data collections are anticipated during the period of performance of this WA. If requested by the WACOR, the contractor shall provide a preliminary status update of the annual reporting process at the end of this WA.

c. Internal Accomplishments Report - The contractor shall develop an internal program accomplishments report for the activities occurring in calendar year 2014. The report shall include helpline, website, and other program statistics and information relevant to the administration of the program. The format and content required for this internal report will be similar to the one developed for calendar year 2015 under WA B-01, EP-C-14-014. No publishing or layout design will be required for this internal report.

Task 5. Strategic Planning Support: As WaterSense moves forward, it will be important to keep abreast of changing conditions in the marketplace to identify areas for new initiatives and to revise on-going activities.

a. The contractor shall contribute to EPA's development of the strategic direction of the program including providing necessary analysis and suggested approaches as the program is developed. Previous examples of this type of work include targeted recruiting strategies and the development of the WaterSense State Challenge and the WaterSense H2Otel Challenge. Similar but not identical efforts will be required during the period of performance. This could include participating in strategic meetings, delivering analysis on certain products and/or market sectors, etc. Approximately two (2) strategy related meetings are anticipated during the work assignment period of performance for a length of approximately two (2) hours each.

b. The contractor shall keep abreast of changing conditions in the marketplace that may affect EPA's program approach or on-going activities, or that may present opportunities for new initiatives, and inform EPA of relevant changes and potential opportunities in summary format as appropriate.

Task 6. Partner Recruitment and Engagement. Recruitment and engagement of partners is a critical aspect of the WaterSense program. In order to transform the market for water-efficient products and services, WaterSense must work closely with different partner types to promote the products constructed by manufacturers and sold by retailers, as well as promote water-efficient practices and professionals. This work includes a combination of recruiting new partners, engaging existing partners under targeted campaigns, and collaborating with other external stakeholders that are not currently eligible for WaterSense partnership. An example of a

targeted campaign is the WaterSense H2Otel Challenge started under EP-C-09-008 where new partners are being recruited and existing partners are conducting outreach and promotion to hotel facilities and other stakeholders. The Contractor shall provide support for partner recruiting and the engagement of existing partners and stakeholders throughout the period of performance of this work assignment including completion of the 2014 WaterSense H2Otel Challenge and the launch of a similar targeted campaign for 2015. Tasks in this WA shall not duplicate those of other WAs. For example, technical and outreach support for the WaterSense H2Otel Challenge will be conducted under WA B-05, but tasks in this WA will likely include activities to recruit new promotional partners and support existing partners and stakeholders as they try to reach the hotels.

Recruitment and engagement activities shall include the following tasks:

a. The contractor shall continue to implement and update recruiting and engagement strategies and targeted campaign support initiated under EP-C-09-008 and WA B-01 of this contract. Activities shall include directional development of the recruiting strategy based on previous WaterSense research and partner experiences, reprioritization (as applicable), execution of recommended strategies, and reiteration through program growth. Partner recruitment and engagement strategies are to be based upon market research and technical support conducted under other ongoing WaterSense Work Assignments and shall be updated as market conditions change and more information is available on the effectiveness of our efforts

Examples of recruitment and engagement activities may include, but are not limited to:

- Identification of appropriate potential partners, and assist in prioritizing potential partners for targeting, in these industries and sectors: utility, trade associations, nonprofits, state/local government agencies, water-related service providers, plumbing, manufacturing, irrigation, and distribution/retail.
- Developing and disseminating relevant recruitment materials, such as mass emails, email templates, direct mailings, or other helpful information to targeted potential partners;
- Attending appropriate conferences/trade shows (e.g. presenting the business case to potential promotional partners);
- Composing written recruiting reports, web pages, handouts, etc.;
- Developing incentives such as special recognition ceremonies to recognize new partners;
- Creating case studies of current partners highlighting partnership benefits to potential partners;
- Compiling a business case for joining WaterSense, specific to plumbing manufacturers, retailers, and irrigation product manufacturers and service professionals; including the benefits to each type of partner of joining WaterSense and key messages for partnership promotion; and
- Conducting other methods deemed appropriate for reaching and persuading target audiences.

c. The contractor shall track interest in the program through the customer support database and follow up with 'hot' prospects on an ongoing basis to convince them to join the program. The contractor shall alert EPA to opportunities with stakeholders who appear to be highly motivated and capable of superb results for extra emphasis in the recruitment process. The contractor shall also support the implementation of targeted campaigns for priority audience groups, which is also described in the recruitment strategy documents developed under previous work assignments. For example, the contractor may need to recruit several utilities from a certain size or in a targeted region to participate in WaterSense and deliver coordinated water-efficiency messages to local residents. In addition, the contractor shall follow-up with contacts made during a conference, meeting, or webinar using the established SOPs used by the WaterSense helpline.

d. WaterSense Webinars – The contractor shall provide support to the WaterSense program automating WaterSense webinars for particular organizations. Approximately three (3) one-hour webinars are anticipated during the period of performance of this WA. The contractor shall work with the WACOR to automate the webinars via podcast or web technology on the WaterSense website as approved by the WACOR. These webinars may include information to introduce potential partners and stakeholders to the WaterSense program and welcome new partners.

IV. DELIVERABLE SCHEDULE:

Task		Deliverable	Due Date
Task 0		Work plan	Per contract requirements
		PQAPP	15 calendar days after receipt of work assignment (WA)
		Task status update (via email)	Monthly
		Expenditure update by task code	Monthly
Task 1	a.	Database modifications	Within two (2) weeks of receipt of Database Modification details from EPA WACOR
	b.	Updated project site	Within one (1) week of finalized item
		Final versions of all documents and data housed on the project site	Within three (3) weeks of receipt of details from the WACOR
	c.	Draft program documents	Within three (3) weeks of receipt of program document details from the EPA WACOR
		Final program documents	Within two (2) weeks of receipt of EPA comments
	d.	Draft program materials	Within three (3) weeks of receipt of program material details from the WACOR
		Final program materials	Within two (2) weeks of receipt of

			EPA comments
	e.	Updated materials inventory	Within one (1) week of receipt of details from the WACOR
		Printing package	Within one (1) week of receipt of details from the WACOR
	f.	Trip summary	Within two (2) weeks of returning from trip
	g.	Updated brand monitoring records in database	Within one (1) week of violation discovery or stakeholder contact
	h.	Draft web content	Within two (2) weeks of receipt of web content details from the WACOR
		Final web content	Within two (2) weeks of receipt of EPA comments
		Records of and access to all web domains procured or renewed under the contract	Within two (2) weeks of receipt of details from the WACOR
	i.	Updated presentation for regional call	Within one (1) week of receipt of details from the WACOR
		Regional call summary	Within two (2) weeks of regional call
		Regional recruiting and partner update	Monthly
		Updated database records for regional requests	Within one (1) week of regional interaction
		Draft regional material	Within two (2) weeks of receipt of details from the WACOR
		Final regional material	Within two (2) weeks of receipt of EPA comments
Task 2	a.	Updated database records	Within one (1) week of stakeholder interaction
	b.	Weekly helpline report	Weekly
		Draft quarterly helpline report	On or around Sept 1, 2014 and February 1, 2015
		Final quarterly helpline report	Within two (2) weeks of receipt of EPA comments
	c.	Draft updated SOPs	Within two (2) weeks of receipt of SOPs details from the WACOR
		Final updated SOPs, training materials, and other procedural documents	Within three (3) weeks of receipt
		Summary of process improvement options and changes	Within three (3) weeks of receipt of details from WACOR
		Execution of changes	Within two (2) weeks of WACOR approval
Task 3	a.	Updated database records	Within one (1) week of stakeholder interaction
		Uploaded partnership agreements and product notification templates	Within one week of receipt of partnership agreement and within two weeks of receipt of product

			notification template
		Problem notification to WACOR	Within two business days
		Updated partnership listing on website	Twice monthly
	b.	Draft or updated partner welcome materials	Within two weeks of receipt of details from the WACOR
		Final partner welcome materials	Within one week of receipt of comments from the WACOR
	c.	Draft partner communication content	Within one week of receipt of details from the WACOR
		Final partner communication content	Within one (1) week of receipt of comments from the WACOR
	d.	Draft forum presentation	Within two (2) weeks of receipt of details from the WACOR
		Final forum presentation	Within one (1) week of receipt of comments from WACOR
		Forum meeting summary and audio recording file	Within one (1) month of meeting
	e.	Outline of partner pipeline	Within two (2) weeks of receipt of details from the WACOR
		Draft partner pipeline	Within three (3) weeks of receipt of details from the WACOR
		Final partner pipeline	Within two(2) weeks of receipt of EPA comments
Task 4	a.	Updated partner activity data or information in database	Within three (3)weeks of receipt of details from the WACOR
		Draft case study or partner activity summary	Within three (3) weeks of receipt of details from the WACOR
		Final case study or partner activity summary	Within two (2)weeks of receipt of EPA comments
	b.	Uploaded annual and quarterly reporting data and form from partners	Within one (1) week of receipt of data or form
		Preliminary status update of annual reporting process	On or before February 13, 2015.
		Updated process and procedural documents	Within three (3)weeks of receipt of details from the WACOR
		Quarterly reporting summary	On or around Feb. 13, 2015, May 2st, October 1, and January 6 year
		Evaluation and suggested revisions of annual and quarterly data collection and analysis	Within three (3) weeks of receipt of details from WACOR
	c.	Draft content for internal accomplishments report	Within one (1) month of receipt of details from the WACOR
		Final content for internal accomplishments report	Within three weeks of receipt of EPA comments
Task 5	a.	Participation in strategy meetings	As directed by WACOR

		Summary/analysis of strategy meetings	Within three (3) weeks of receipt of details from the WACOR
		Market research summary	Within one (1) month of receipt of details from the WACOR
Task 6	a	Updated recruiting or engagement strategy	Within three (3) weeks of receipt of details from the WACOR
		Draft recruiting or engagement material	Within one (1) month of receipt of details from the WACOR
		Final recruiting or engagement material	Within two (2) weeks of receipt of comments from WACOR
		Draft call invite and/or newsletter piece	Within two (2) weeks prior to call
		Final call invite and/or newsletter piece	Within two (2)days of receipt of comments from WACOR
		Updated recruiting or engagement presentation	Within three (3) days prior to call
		Completed follow up with webinar, meeting, or conference participants	Within five (5) business days of interaction
	b.	Updated lead records in database	Within one (1) week of stakeholder interaction
		Completed follow up with webinar, meeting, or conference participants	Within five (5) business days of interaction
	c.	Draft webinar presentation	Within two (2) weeks of receipt of details from the WACOR
		Final webinar presentation	Within two (2) weeks of receipt of comments from WACOR
		Final recorded webinar files	Within three (3) weeks of presentation recording

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. The contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAEE) guidelines, standards, best practices, technical requirements for web site design and publications and all deliverables shall comply with those requirements. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft

document will be accepted as final, and the contractor will be notified that no revisions are required.

V. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel.

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. For planning purposes, the contractor shall assume 1 to 2, 3-4 day trips will be required over the course of this Work Assignment.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer.

D. Conference/Meeting Guidelines and Limitations:

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR.
Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VII. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

A Quality Assurance Project Plan will be required for this Work Assignment since secondary data will be collected in partner annual reporting.

Quality Assurance Surveillance Plan			
General Management and Administration			
Performance Requirement	**Measurable Standards**	**Surveillance Methods**	**Incentives/ Disincentives**
Management and Communications: During the performance of the Contract, the Contractor shall immediately inform EPA of any issue that may potentially impact project schedules or cost.	The contractor shall maintain contact with contract managers (EPA CO, CLCOR and WACOR) throughout the performance of the contract and identify any issues or concerns to the appropriate EPA contract manager prior to occurrence. In cases where issues have a direct impact on project schedules and cost, the contractor shall provide options for EPA's consideration on resolving or mitigating the impacts.	EPA contract managers will allocate the time needed to discuss and address all issues identified by the Contractor. Each EPA contract manager will document and maintain a complete record of the issues, agreements and outcome. All EPA contract managers will review monthly progress reports for indicators of communications problems and will bring issues to the Contractor's immediate attention.	Any issues that impact project schedules and cost that are not brought to the attention of the appropriate EPA contract manager before occurrence will be unsatisfactory. Two or more incidents during any contract option period will be reported as unsatisfactory performance in the CPARS Performance Evaluation System. Costs associated with schedule delays or performance due to late delivery attributed to the contractor shall be assumed by the contractor and shall not result in additional expense to the government.
Timeliness: The Contractor shall provide services and submit deliverables in accordance with the approved work assignment schedule.	Services and deliverables shall be in accordance with schedules outlined in section V in this PWS unless modified by technical direction from the WACOR. Unless amended or modified by an approved EPA action, a deliverable that is received 7-days past the due date, will be considered unsatisfactory performance.	EPA will closely monitor task milestone and deliverable schedules and shall notify the contractor when it becomes apparent that an established schedule will not be met. EPA will review the Contractor's Monthly Progress Reports and any special reporting	An annual on time performance standard of less than 90% will be unsatisfactory performance and will be reported in the CPARS Performance Evaluation System. Costs associated with schedule delays or performance due to

		requirements to compare actual delivery dates against those included in Section V of this PWS.	late delivery attributed to the contractor shall be assumed by the contractor and shall not result in additional expense to the government.
Cost Management and Control: The Contractor shall perform all work in an efficient and cost effective manner, applying cost control measures where practical.	The Contractor shall monitor, track and accurately report level of effort, labor costs, other direct costs and fee expenditures to EPA through monthly progress reports and approved special reporting requirements. The Contractor shall assign appropriately leveled and skilled personnel to all tasks, practice and encourage time management, and ensure accurate and appropriate time keeping.	The EPA Project Officer will routinely meet with the Contractor's Project Manager to discuss the work progress and expenditures of this WA. The Project Officer shall review the Contractor's monthly progress reports and request the Work Assignment Managers verification of expenditures and technical progress before authorizing invoice payments. The EPA Work Assignment Manager will maintain regular contact with the Contractor's designated work assignment manager/project manager to discuss work assignment progress and expenditures. The Work Assignment Manager will review the Contractor's monthly progress reports and invoices and provide feedback to the Project Officer on payment.	An overrun that exceeds 3% of the total contract obligation that is the direct result of the Contractor's failure to manage and control costs will result in unsatisfactory rating being reported to the CPARS Performance Evaluation System and shall not result in additional expense to the government..
Quality of Deliverables: Technical: The Contractor shall collect and analyze data in support of the Agency's decision-making. Editorial: The Contractor shall ensure editorial quality of all deliverables.	The analysis conducted by the Contractor shall be factual and defensible and based on sound science and engineering. All data shall be collected from reputable sources and quality assurance measures shall be conducted in accordance with Agency requirements and the specific requirements included in section 2.5 of the QAPP for this WA. Any work requiring the Contractor to provide	The appropriate Contract Managers will review all deliverables including analysis conducted by the Contractor and will independently consider their merit. EPA may opt to peer review analyses to further validate merit.	All analyses conducted for EPA by the Contractor must be factual and based on sound science and engineering. All editorial content in final deliverables (excluding technical documents) must conform to the AP Styleguide unless otherwise specified by EPA Contract Manager.

	options or recommendations shall include the rationale used in selecting the option/recommendation and all other options considered. The Contractors deliverables or written submissions shall be clear and concise and error free while conforming to the AP and WaterSense Style guides.		If after reviewing the Contractor's final deliverable, EPA determines that the content is not factual, legally defensible or based on sound science and engineering, or contains editorial errors, the Contractor will be expected to redo the work at no cost to the government and the Contractor's performance will be reported as unsatisfactory in the CPARS Performance Evaluation System.
Socio-Economic Utilization: The Contractor shall ensure maximum practicable participation by socio-economic firms.	The Contractor shall assess all Agency requirements for opportunities to fully utilize expertise of its socio-economic team. Work shall be allocated in a manner that ensures the Contractor's annual subcontracting goals are met.	EPA will monitor the contractor's utilization of socio-economic firms by reviewing the Contractor's submittal of Standard Forms (SF) 294 and SF 295.	The Contractor shall meet a standard of at least 80% of the dollar goals outlined in its subcontracting plan annually. If less than 80% is reached, the Contractor shall provide a detailed explanation and shall outline the steps that will be taken to meet the annual goals outlined in its plan. Performance that does not meet the stated goals without sufficient justification will be reported as unsatisfactory in the CPARS Performance Evaluation System.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-01

☐ Other ☒ Amendment Number: 000001

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2016 Base Option Period Number 1	Implementation of WaterSense

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.2

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
Purpose of this action is to raise the NTE ceiling to $690,000.00 and add Beth Livingston as the Alt WACOR.

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2016 — Cost/Fee: — LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: — Cost/Fee: — LOE:

Cumulative Approved: — Cost/Fee: — LOE:

Work Assignment Manager Name Tara OHare	(Signature) (Date)	Branch/Mail Code: Phone Number 202-564-8836 FAX Number:
Project Officer Name Robin Danesi	(Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature) (Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Courtney Stallworth	(Signature) (Date)	Branch/Mail Code: Phone Number: 513-487-2002 FAX Number:

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-01

☐ Other ☒ Amendment Number: 000002

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2017 Base Option Period Number 1	WaterSense Program Implementat

Contractor	Specify Section and paragraph of Contract SOW
EASTERN RESEARCH GROUP, INC.	3.1

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
The purpose of this amendment is to increase the funding ceiling to $735,000.

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

SFO (*Max 2*) ☐

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2017 Cost/Fee: LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: Cost/Fee LOE:

Cumulative Approved: Cost/Fee LOE:

Work Assignment Manager Name Tara OHare	(Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-8836 FAX Number:
Project Officer Name Robin Danesi	(Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name	(Signature) (Date)	Branch/Mail Code: Phone Number: FAX Number:
Contracting Official Name Noelle Mills	(Signature) (Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-02

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	Consumer marketing

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		7,653
Total:		7,653

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name Karen Wirth	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-5246 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Noelle Mills	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

PERFORMANCE WORK STATEMENT
TECHNICAL EVALUATION AND MARKET ASSESSMENT SUPPORT FOR THE WATER EFFICIENCY PROGRAM
(Contract # EP-C-14-014)
Work Assignment No. 1-02

I. ADMINISTRATIVE (PWS Area 3.3)

A. Title: WaterSense Consumer Marketing and Partner Recognition

B. Period of Performance: Date of issuance to February 13, 2016

C. Work Assignment Contracting Officer Representative (WACOR):

Karen Wirth
US EPA
1200 Pennsylvania Ave., NW
Washington, DC 20460
Wirth.karen@epa.gov
202-564-5246 (phone) 202-501-2396 (fax)

D. Quality Assurance:

This work assignment does not involve the collection of environmental measurement; therefore, a supplemental programmatic quality assurance project plan (PQAPP) is not required.

E. Background: WaterSense is a voluntary partnership program to enhance the market for water-efficient products and practices. The program provides information to residential, commercial and industrial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

EPA is seeking contract assistance to provide ongoing communications and outreach support, as well as program development and operations support, for this initiative. This work assignment will focus on the activities related to outreach to the consumers of WaterSense labeled products and homes (product consumers/end-users and potential homebuyers) and the recognition of exemplary program partners. For each of the following tasks, EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor will provide all source files and content to EPA with final deliverables. The contractor shall be familiar with EPA's Office of Public Affairs (OPA) guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables shall comply with those requirements.

III. OBJECTIVE

The objective of this work assignment (WA) is to support the communications and outreach efforts of the WaterSense program for the period of performance. It also covers partner support for the indoor residential portfolio support for the WaterSense recognition program, including activities to provide administrative support, strategic input, and implementation support.

The WaterSense label indicates to consumers, facility managers, potential homebuyers, etc. that the product meets EPA's criteria for water efficiency and performance. EPA works to raise the awareness of the label and encourages consumers to look for the label in order to save water. The communications and outreach efforts outlined in this work assignment relate to the creation of and dissemination of information to consumers (when referring to consumers in this work assignment, it applies to any potential end-user of a WaterSense labeled product or new home). This work assignment includes activities to provide administrative support which will entail the creation of strategies and other deliverables to contribute to increased awareness of the WaterSense program, awareness of the label and the importance of water efficiency.

In order for the contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis and other programmatic details from other work assignments under this contract; however no work will be duplicated on any two work assignments. While every effort has been made to anticipate programmatic needs and deliverable timeframes, the contractor may be asked to complete a task assignment within the scope of the WA on a shorter time frame than originally anticipated.

IV. TASK DETAIL

The contractor shall perform the following tasks:

Task 0 - Work Plan, Budget Development and Management

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70).

The contractor shall meet with the WACOR either in person or via telephone approximately three to four (3-4) hours per month to discuss work assignment planning issues. During this regular meeting, the contractor shall be prepared to discuss updates for tasks outlined below and the contractor shall provide a summary update for tasks via email before each meeting. The contractor shall meet with the WACOR on specific topics when necessary as directed by the WACOR, not to exceed forty eight (48) hours of meetings for this period of performance.

Task 1 – Strategic Planning

The contractor shall support the WaterSense program in strategic planning for future years, as directed by the WACOR, to reevalauate the overall strategy for WaterSense marketing. Upon direction by the WACOR, the contractor shall review current tools, templates and marketing materials to assess if they remain easy-to-use and up-to-date for use by partners. The contractor shall brainstorm and present new ideas for shareable content that is visually eye-catching, adheres to current strategy and simpler to comprehend to EPA. This may include developing new or

modifying current marketing campaigns that can be easily implemented by our partners who might be on limited budgets and timelines to increase participation and target audience reach. The task will include organizing up to three (3) round tables/meetings either onsite or remotely with at least ten to fifteen (10-15) stakeholders and approximately 3.5 hours long to obtain feedback on program successes, program issues and future recommendations. The contractor shall develop meeting agendas, summarize findings and work with EPA to refine feedback into a marketing strategy that may include a framework for updated/new marketing campaigns that will better engage partners, promote the WaterSense brand, and raise awareness. The marketing plan and strategy should complement the overall program plan, goals and objectives.

Task 2 – General WaterSense Outreach, Media Support, and Monitoring

The contractor shall support development and implementation of a national and local outreach strategy to promote WaterSense, labeled products availability, community support, market to consumers and other purchasers to "look for the WaterSense label" on specific water-efficient products and/or new homes. The target audiences consist of consumers, potential homebuyers, and any and all potential purchasers of WaterSense labeled products, including commercial audiences. The outreach planning shall include, but not be limited to, recommended strategic approaches to promote and to message WaterSense to the general public and shall include the following:

1. Media Outreach

   The contractor shall update, as necessary, the overall WaterSense local and national media strategy for the coming year starting with the existing media list developed under previous WA B-02. The media strategy shall outline the specific tactics, including any relevant online media outlets, trade articles, etc., that will be undertaken throughout the year to meet EPA's WaterSense objectives. The strategy shall be presented to the WACOR in an outline of activities and costs not to exceed five (5) pages and in an in-person, one-hour meeting. The media strategy shall include approaches that continue to build on the overall WaterSense marketing and media strategy, which the contractor is in possession of and is continuing to evolve to reflect new challenges, media landscape, and other changes in the program or marketplace. The strategy should include approaches for informing the public of the value of water efficiency and encouraging customers to look for the WaterSense label to save water and protect the environment. Media campaigns and events could tie to a particular time of year, product area, or other news hook or they may target specific communities based on their water supply issues, conservation program viability, and interest in promoting the WaterSense brand. The contractor shall assume media outreach around, but not limited to, the following events: Fix a Leak Week, Earth Day, Sprinkler Spruce-Up, Irrigation (including weather based controllers), summer water use messaging, H_2Otel Challenge, Shower Better, promotion of the partner of the year awards, media calendar, and any new specifications. As part of this plan, the contractor shall plan to draft press releases; for purposes of estimation the contractor may assume that approximately six (6) releases will be required during the work assignment period of performance. The plan shall also include metrics and measurement strategies for measuring success. The contractor shall assume up to three (3) rounds of EPA feedback and revisions on this plan. The contractor shall develop and maintain a list of target media including, but not limited to, print, social, online, broadcast (TV and/or radio), and PSA announcements for WACOR review and approval that is sorted by program area for the various outreach activities along

with target audience, reach, frequency, cost per thousand (cost per point if any broadcast) including any due dates. The media plan may include research into and provide recommendations based on previous experience how to secure non-paid WaterSense themed (i.e., bathroom or irrigation) Do-It-Yourself home or landscape design and renovation programs (broadcast, online, etc.), as well as, investigating how to engage the Ad Council and a possible non-paid spokesperson for water efficiency. The contractor shall deliver quarterly reports to the WACOR on progress and measurement of the overall strategy. The contractor shall include PSA placements in the overall media tracking outlined above.

In order to support WaterSense's inclusion in "long lead" publications, i.e., magazines, the contractor shall organize and participate in a long lead tour to visit multiple magazine editors over a one- to two-day period. Based on experience from previous tours, the contractor shall schedule all meetings, propose key messages and topics, and develop a presentation to be given at the meetings. The contractor shall submit a "long lead tour strategy," including proposed publications and key messages to EPA for approval. The contractor should expect from 1 to 3 days travel will be required.

On an ongoing basis, the contractor shall identify opportunities to notify trade press of WaterSense program activities. The contractor shall draft these trade press blast emails and submit them to the WACOR for approval. The contractor may assume up to twelve (12) blast emails during the work assignment period of performance. The contractor shall also monitor trade and consumer media outlets in order to identify additional target publications for blast emails or other outreach efforts.

When opportunities are identified by the contractor and approved by the WACOR, the contractor shall develop targeted articles in support of the media strategy developed above (i.e. to support news hooks and events highlighted above) for specialty magazines (e.g. targeting Plumbers, the home remodeling consumer or home-buying consumer) these may be online publications. The contractor shall assume up to eight (8) such articles during the period of performance.

The contractor shall also provide support to draft email communications to respond to reporters' questions. The contractor shall provide support to WaterSense staff and senior EPA management public media appearances on behalf of WaterSense matters, responses to and development of articles on WaterSense matters, and other interactions with the media on WaterSense matters. EPA estimates this will require approximately ten (10) instances when the contractor will be required to support the development of general WaterSense articles, power point presentations, or talking points in response to media inquiries.

2. <u>Non-media outreach</u>

The contractor shall provide support for the implementation of non-media strategies to reach consumers and other purchasers with the message to look for the WaterSense label. As directed by the WACOR through technical direction, the contractor shall plan to present strategies and ideas informally by sending bulleted lists of ideas in emails, in advance of regular update meetings and shall be prepared to discuss in regular update meetings. These ideas or campaigns shall be consistent with ongoing WaterSense marketing efforts and may utilize Web tools where appropriate. Potential strategies and ideas may include the

development of "viral" tools, such as online webinars, videos, email pledge campaigns, contests, and other creative ways to encourage program promotion through word of mouth. Through technical direction, the WACOR will select up to three to four (3-4) concepts for development and deployment by the contractor. The contractor shall implement the approved strategies and track the success of these efforts based on number of downloads, pledges taken, etc.

The contractor shall provide continued logistical support for the "We're for Water" umbrella campaign and any new outreach campaigns throughout the period of performance of this WA. This shall include planning, coordinating with program stakeholders, and creating printed collateral or web-based materials to promote the campaign or to be used during the outreach campaign. The contractor shall assume up to four (4) materials for the "We're for Water" and any new outreach campaigns will need to be created during the period of performance. The contractor shall continue to support the development of online content or tools around the "We're for Water" and any new outreach campaigns, fostering relationships with program partners and developing information that will help them promote the campaigns. The contractor shall also propose appropriate information and materials to be developed for the partner site for WaterSense partners. The contractor shall submit recommended updates to the existing WaterSense brand materials and key messages documents (up to twelve (12) documents). In some cases existing tools and materials shall be customized or new materials developed for specific parties as defined by EPA in conjunction with specific events or outreach activities.

The contractor shall plan to conduct other general WaterSense outreach and brand support. During the period of performance of this work assignment, this shall likely include developing several new state fact sheets and vetting them with the EPA WaterSense regional liaisons, and partners as appropriate, and finalizing them after EPA WACOR approval for web dissemination. The contractor shall assume the development of fact sheets for up to five (5) new states during the period of performance.

3. Special Promotions

As part of the overall WaterSense outreach, the contractor shall finalize materials initiated under WA B-02 of this contract for the seventh annual Fix a Leak Week 2015 campaign, which will run in March 2015. The contractor shall make any necessary final revisions/updates to fact sheets, tips, handouts, text or infographics used for the website, regional specific facts in support of the partner media event and make any necessary updates, corrections or modifications based on discussions with the WACOR.

The contractor shall also begin to plan the eighth annual "Fix a Leak Week" 2016 campaign, which will run in March 2016. The contractor shall begin brainstorming ideas for "Fix a Leak Week", as assigned by the EPA WACOR; The contractor shall also develop a one to two page "Fix a Leak Week" 2015 lessons learned/ideas white paper, including media coverage summaries with recommendations for "Fix a Leak Week" 2016, also may include end of campaign surveys. Based on feedback from the WACOR on the "Ideas for Next Year", the contractor shall prepare drafts of content for materials for 2016 "Fix a Leak Week". The contractor shall update, if necessary, "Fix a Leak Week" 2015 materials as appropriate. The contractor shall make any necessary final revisions/updates to fact sheets or other marketing materials, tips, hand-outs, infographics or text used for the website or other

materials, regional specific facts in support of the partner media event and make any necessary updates, corrections or modifications based on discussions with the WACOR for "Fix a Leak Week" 2016. The contractor shall consider materials that will link the 2016 "Fix a Leak Week" materials and tools to update the kids' curriculum currently on the WaterSense website.

The contractor shall prepare for 2015 "Sprinkler Spruce-Up", as assigned by the EPA WACOR. The contractor shall update, if necessary, "Sprinkler Spruce-Up" 2014 materials as appropriate. The contractor shall make any necessary final revisions/updates to fact sheets or other marketing materials, tips, hand-outs, infographics or text used for the website or other materials, regional specific facts in support of the partner media event and make any necessary updates, corrections or modifications based on discussions with the WACOR. The contractor shall consider materials that will link the 2015 "Sprinkler Spruce-Up" materials and tools to update the kids' curriculum currently on the WaterSense website. The contractor shall also develop a one to two page "Sprinkler Spruce-Up" 2015 lessons learned/ideas white paper, including media coverage summaries with recommendations for Sprinkler Spruce-Up" 2016, also may include end of campaign surveys.

The contractor shall begin brainstorming ideas for "Shower Better" 2015, as assigned by the EPA WACOR. The contractor shall update, if necessary, "Shower Better" 2014 materials as appropriate. The contractor shall make any necessary final revisions/updates to fact sheets or other marketing materials, tips, hand-outs, infographics or text used for the website or other materials, regional specific facts in support of the partner media event and make any necessary updates, corrections or modifications based on discussions with the WACOR. The contractor shall consider materials that will link the 2015 "Shower Better" materials and tools to update the kids' curriculum currently on the WaterSense website. The contractor shall also develop a one to two page "Shower Better" 2015 lessons learned/ideas white paper, including media coverage summaries with recommendations for "Shower Better" 2016, also may include end of campaign surveys.

The contractor shall begin brainstorming ideas for additional WaterSense Campaigns, as assigned by the EPA WACOR via technical direction. For example, this may include follow-on outreach to the commercial facility sector after the WaterSense H2Otel Challenge is completed or additional campaigns specific to other parts of the WaterSense program. EPA will review draft content and provide feedback to the contractor. The contractor shall update or create new, if necessary, campaign materials, including photos, as appropriate. The contractor shall make any necessary final revisions/updates to fact sheets or other marketing materials, tips, hand-outs, text or infographics used for the website, regional specific facts in support of the partner media event and make any necessary updates, corrections or modifications based on discussions with the WACOR.
The contractor shall also develop a one to two page lessons learned/ideas white paper, including media coverage summaries with recommendations, also may include end of campaign surveys.

4. <u>Monitoring</u>

The contractor shall monitor and measure the media coverage of the WaterSense program.

The contractor shall: maintain the WaterSense media monitoring process, coordinating bi-weekly media searches and bi-weekly "Articles of Interest" distribution of article summaries to interested parties, monthly clip reports from a media clipping service, and radio/television broadcast monitoring for mentions of WaterSense. The contractor shall also deliver via email to the WACOR a monthly summary of "WaterSense in the News." Based on the monitoring outlined above, the contractor shall collect the results of media coverage and calculate the numbers in terms of circulation, impressions, and "ad value." These statistics will be summarized in a spreadsheet to be delivered to the WACOR on a quarterly basis. The spreadsheet shall include quarterly (or monthly) totals and a cumulative total since program inception.

In addition to the specific media monitoring above, the contractor shall include with the statistics mentioned above a summary of the results of all outreach activities. The summary shall include estimates of target audience reached (i.e. through website hits, materials distributed, etc.). The contractor shall include in the summary some tracking of external feedback on the program and their recommendations for (a) improving distribution of materials; (b) content of materials; (c) improving visibility of the program and (d) ultimately, increasing awareness of the WaterSense brand. This overall summary shall be provided to the WACOR in Word format via email halfway through the performance period and at the end of the WA performance period.

Task 3 – Online Outreach and Social Marketing

The contractor shall provide support for development and implementation of a national and local online content targeted to the consumer including social media to promote WaterSense, available and availability of labeled products, community support, market to consumers and other purchasers to "look for the WaterSense label" on specific water-efficient products and/or new homes. The target audiences consist of consumers, potential homebuyers, and any and all potential purchasers of WaterSense labeled products, including commercial audiences. The online and social planning shall include, but not limited to, recommended strategic approaches to promote and message WaterSense to the general public and shall include the following:

1. The primary tool shall be the quarterly WaterSense Current E-newsletter. The contractor shall develop this newsletter (for planning purposes assume four (4) newsletters during the period of performance). The contractor shall deliver a proposed outline to the WACOR and based on WACOR feedback, develop the actual newsletter text and blast email text. The contractor shall assume one (1) to two (2) rounds of EPA WACOR comments before finalizing the text. The contractor shall deliver the final text and recommended image files to the WACOR ready for posting to EPA WebPages. The contractor shall send a blast email to all WaterSense stakeholders in WaterSense's Salesforce list with the e-newsletter once the newsletter has been posted to the EPA website.

2. The contractor shall also develop relevant and timely new ideas for the widgets on the WaterSense webpage. The contractor shall assume up to twelve (12) widget concept ideas are to be developed during the period of performance. The contractors shall also layout WACOR-approved widget concepts and code the widgets after receiving EPA approval. The contractor shall also develop ideas for other web tools to deliver the WaterSense message to the consumer. Ideas shall include widget ideas, banner ideas, improvement to existing pages and tools for WaterSense product end-users. The contractor shall plan to discuss these ideas once

per month in the regular meetings described in Task 0. The deliverable is a simple summary of ideas with a sentence or two description of how they shall be implemented.

3. The contractor shall provide support to develop more robust socia media content targeted to the consumer promoting partner activities, water efficiency and WaterSense (adhering to campaign(s) messaging and branding). The contractor shall research and provide recommendations for other social media presence, i.e. Instagram, etc. that reach the WaterSense target audience. The strategy shall be presented to the WACOR in an outline of activities and costs not to exceed five (5) pages and in an in-person, one-hour meeting.

4. When requested by the WACOR, the contractor shall update and refresh the *Community-Based Social Marketing Workbook.* The contractor shall also propose ideas for more interesting and engaging ways to present the information and add additional content as needed due to the changing social landscape. The contractor shall assume two (2) EPA WACOR reviews before finalizing the workbook. After the receipt of EPA WACORs approval, the contractor shall deliver a final for posting to the web and or printing if required.

5. If requested by the WACOR the contractor shall track and maintain a spreadsheet of all widgets, banners, infographics used in supporting WaterSense. The spreadsheet should describe the image and include a small jpg or similar file to identify the image with description, where used, dates and any other information as determined. This overall summary shall be provided to the WACOR in an easy to use format, determined with WACOR approval, via email as requested and at the end of the performance period.

Task 4 – Development of Materials to Promote WaterSense

When requested by the WACOR, the contractor shall develop print materials to support the overall WaterSense brand. The materials shall include print materials such as brochures, banners, etc. In addition to print materials, the contractor shall also propose ideas for more interesting and engaging ways to present information. The contractor shall concept and develop up to six (6) marketing materials for release of a new product, promotion of an existing product, update or create new children's educational and outreach materials that support the overall messaging and branding of WaterSense. The contractor shall assume two (2) EPA WACOR reviews before finalizing the documents. Upon request of EPA WACOR, the contractor shall deliver a Government Printing Office (GPO)-ready print package to the WACOR or print package for the EPA internal printing shop.

The contractor shall keep a spreadsheet of all stock and non-stock photography, testimonials, etc. usage rights and expirations, if any. Stock photography or any photo shoots will be purchased with full rights for use in the WaterSense program upon approval of the WACOR. The spreadsheet will describe the image and include a small jpg or similar file to identify the image, the non-image with description (i.e. if testimonial person, company, etc.), materials item was used in, above information as noted, and any other information as determined by the WACOR. This overall summary shall be provided to the WACOR in an easy to use format determined with WACOR approval. The summary file shall be provided as requested and at the end of the performance period. While compiling the summary file, Contractor shall review photo inventory and determine if a photo shoot is needed to enhance the photo library, and if so, which images are needed to support overall WaterSense marketing and program efforts.

At the direction of the WACOR, the contractor shall propose WaterSense promotional items for the

purpose of educating the American public on water efficiency and WaterSense and driving traffic to the WaterSense booth at conferences. The contractor shall assume updating and purchasing one item and developing and purchasing one new item. Promotional items in the past have included USB thumb drives, pens, and pads. After EPA WACOR approval, the contractor shall assume two (2) EPA WACOR reviews before finalizing the item. The contractor shall also abide by the EPA rules and regulations on novelty items.

Task 5 – Fire drills

The contractor shall provide support to complete the following task that will assist the WaterSense program in communicating their messages to the public:

WaterSense is a multifaceted and rapid-paced initiative, therefore, "fire drills" or quick turnaround requests are identified on a regular basis. Most of these are short-term, immediate support such as providing marketing expertise, doing a simple analysis, providing a technical review, providing presentation support, and similar type activities. Assume up to ten (10) of these types of requests during the WA period of performance, each with no more than ten to twenty (10-20) hours of LOE. Fire drills will likely be due within one to two (1-2) days of technical direction from the EPA WACOR.

Task 6 – WaterSense Partner Recognition Program

For this task, the Task Manager is Amber Lefstead, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR.

1. Awards Program Documents – The contractor shall maintain and update WaterSense Awards program documents in response to changes in the program such as changes to or the addition of new partner categories. These documents include but are not limited to: Partner of the Year (PoY) application forms and instructions. The contractor shall provide editorial revisions to approximately seven (7) documents for the 2015 awards cycle as specified in the Deliverable Schedule. Changes to existing document layouts and formats are anticipated to be minor to accommodate editorial revisions. The contractor shall also provide support to prepare recognition materials. Final program documents, that have received EPA WACOR approval, shall be uploaded to the WaterSense website and the WaterSense project site as appropriate.

2. Preparation of Recognition Program Materials - Upon technical direction the contractor shall provide support to prepare recognition program materials (e.g., graphics, briefing slides, talking points, fact sheets, certificates, letters of congratulations, draft press releases, journal articles, physical awards/plaques and other materials) for use within and outside the Agency. The contractor shall provide support for approximately three (3) briefings, fact sheets, or other presentations anticipated over the course of the period of performance. The contractor shall develop draft versions that will be finalized and approved by the WACOR based on the deliverable schedule. The contractor shall also provide support for one draft press release, one journal article, one PSA, awards ceremony talking points, and at least one additional item (see examples of possible items above) to be determined by the WACOR at a later date. The contractor shall design materials for the WaterSmart Innovations Conference (WSI) 2015, which may include a conference brochure ad and/or banner for the WaterSense booth. The contractor shall prepare draft certificates and letters of congratulations for each of the PoY winners, totaling approximately fifteen (15). The contractor should base these materials off of what was created in 2014 under Contract #EP·C·09-008 WA 4-12. The contractor shall develop draft

materials and upon approval by WACOR shall finalize materials to be placed on the website and delivered to EPA WACOR.

3. Application Evaluation – The contractor shall update existing template scoring worksheets following written technical direction from the WACOR. Once applications are received by the contractor in April 2015, the contractor shall conduct the initial screening for eligibility. The contractor shall then deliver eligible applications to the EPA WACOR electronically via the WaterSense Project Site and support EPA in the final review of eligible applications and winner selections. Following final review of winners by OWM/OW management, the contractor shall draft template winner and non-winner notification emails.

4. Awards Ceremony Planning and Support – In order to support EPA's WaterSense PoY Awards Luncheon co-sponsored by the Alliance for Water Efficiency (AWE) at the WaterSmart Innovations Conference (WSI) in Las Vegas, NV in October 7-9, 2015 the contractor shall coordinate with the Southern Nevada Water Authority (SNWA) conference organizers and Alliance for Water Efficiency (AWE) staff on logistics as listed in detail below. The contractor shall always represent themselves as contractors to EPA. The contractor shall travel to the conference, assist in planning and set-up on location, and attend the ceremony to ensure that the awards ceremony portion of the banquet runs as planned. For purposes of estimation, the trip shall last for approximately three (3) days. Supporting activities shall include but are not limited to: confirming ceremony location, room layout, AV equipment, photographer, awards ceremony program, and sending any necessary materials (recognition, promotional and outreach materials etc) to SNWA and/or AWE. Conference related purchases are not expected to exceed $20,000 under this contract. If so, OWM will provide an executed EPA Form 5170. All additional costs must be approved by the Contracting Officer before they are incurred. The contractor shall confirm award winner attendees and who will accept the award at the ceremony. As directed by the WACOR, the contractor shall take and facilitate the shipment of winners' photographs and conduct other conference follow-up. The contractor shall provide a weekly email to the WACOR updating progress of award ceremony coordination in the months leading up to the ceremony.

5. Media Outreach: Once the winners are determined, the contractor shall update the media outreach plan for awards. The contractor shall provide support to WACOR in implementing the media outreach plan. Activities under this subtask will likely include a one hour conference call with the award winners to coordinate media outreach efforts, updating the list of target media, or 'pitch list', drafting an EPA press release and drafting a media kit for use at the conference. The contractor shall submit the aforementioned deliverables in draft to the WACOR and upon incorporation of WACOR comments and approval by WACOR, the contractor shall finalize and make them web-ready. The contractor shall also pitch the award winner story and PSA to the updated and approved pitch list. The contractor shall also support the EPA in scheduling interviews with EPA staff and WaterSense Partner of the Year award winners.

6. Web Content – The contractor shall develop content for the WaterSense website as directed by the WACOR. Web content development for updates will likely be needed to announce the opening and closing of the application period and the winners. The content is anticipated to consist of updates of current text on pages and the creation of entirely new pages. All web content shall comply with section 508 and other EPA's Office of Public Affairs (OPA) guidelines. The contractor shall develop text for approximately four to five (4-5) updates/postings throughout the period of performance.

Task 7 – Partner Support

1. Support Specification Development – During the specification development process, the contractor shall provide stakeholder support. This may include hosting and designing webinars, calling potential partners for feedback/surveys, assessing various stakeholder positions, and/or analyzing support and opposition to a particular specification.

   Upon the release of both a draft and/or final specification by the EPA WaterSense team for a residential product, the contractor shall provide assistance communicating with partners about the new specification. This support shall include, but may not be limited to: a specification rollout plan including messaging recommendations, facts and figures, fact sheets, web text, infographics, press releases, and trade press outreach/article development. One (1) to two (2) draft or final specifications are expected to be released during the period of performance.

   Additionally, the contractor shall conduct research and develop the new product notification template for the new specification, in cooperation with the WACOR and relevant outside experts.

   The contractor shall also coordinate outreach to manufacturers of the new product to assist them with certification and label usage concerns. The contractor shall recommend to the EPA WACOR for approval, partner outreach ideas for the new specification. The contractor shall implement the recommendations after approval by the WACOR. Outreach may include the development of fact sheets or special topic webinars.

2. General Partner Support – The contractor shall work with existing program partners to answer questions and troubleshoot new issues that may arise. Generally, these are questions which come to our attention through the WaterSense Helpline and involve technical assistance regarding the product specifications, use of the label, or special topics unique to a specific manufacturer or retailer.

3. General Partner Outreach - The contractor shall also plan to support consumer communications through partner outreach in the form of collaborating with partners to get the consumer message out. The contractor shall use the "factoids" from the existing fact book and WA 1-05 about the program to aide in creating content and messaging about the WaterSense program. The contractor shall assume this will include developing information/write-ups to be included in the WaterSense partner pipeline (assume two short one to two (1-2) paragraph snip-its/articles) and slides for the WaterSense partner forums (assume providing slides for one (1) forum). Both of these activities, the WaterSense partner pipeline and WaterSense partner forum are organized through WA 01-01; however the contractor shall assume one comment/review from the EPA WACOR from this WA and once approved, shall then coordinate with ERG staff on WA 1-01 to include the deliverables from this subtask into the activities in WA 01-01.

4. Development of Partner Materials to Promote WaterSense - When requested by the WACOR, the contractor shall develop partner print materials to support the overall WaterSense brand and campaigns. The materials shall include print materials such as brochure, placards, in-store signage, banners, etc. In addition to print materials, the contractor shall also propose ideas for more interesting and engaging ways to present information. The contractor shall assume

development of up to six (6) marketing designs for brand and per campaign. The contractor shall assume two (2) EPA WACOR reviews before finalizing the documents. After the receipt of EPA WACOR's approval, the contractor shall deliver a Government Printing Office (GPO)-ready print package to the WACOR for copies to copies to be printed by GPO of to the identified Partner for their own printing or via an FTP or similar vehicle to post online for retrieval and printing.

5. Targeted Audience Outreach – When requested by the WACOR, the contractor shall develop and implement strategies for targeted outreach to two trade/professional communities. The contractor shall develop and implement a strategy helping trade/professionals to encourage their customers to replace older inefficient fixtures with WaterSense labeled fixtures. Messaging is needed to better inform customers that selecting WaterSense labeled products will lead to more water-saving, while not sacrificing performance. Examples of tools may include: sample talking points, Q&As, training, sample media materials, brochures and fact sheets, signage, templates – print/web.

Task 8 – Consumer Research

1. In order to successfully support the WaterSense program, the contractor shall collect publicly-available information on current market trends with regard to consumer attitudes towards green products and water efficiency including the WaterSense brand. This research shall result in one (1) brief (three (3) to five (5) page) report in this period of performance covering the following potential topics: how Americans define green, what drives their purchase behavior, in which categories they're searching for green products, what messaging resonates with them and what price points they are willing to pay. It may also cover American attitudes towards energy efficiency topics, such as: the products they purchase, who they blame for rising prices, how they prioritize energy efficiency, and what messages and programs motivate behavior change.

2. In order to gauge the WaterSense program, the contractor shall make recommendations and conduct quantitative and/or qualitative research around WaterSense branding, messaging, etc. This includes creating questions, recruitment, conducting the research, compiling the answers/outcomes and final recommendations in a concise report. The contractor shall assume one (1) EPA WACOR review before finalizing the questions. After the receipt of EPA WACORs approval, recruitment, then conducting of focus groups or surveys will begin. All questions and research under this task shall conform to the approved Information Collection Request that has already been approved for WaterSense by the Office of Management and Budget, (EPA ICR No. 2233.06, OMB Control No. 2040-0272).

Task 9 – Update WaterSense Style Guide

The WaterSense Style Guide helps explain the WaterSense brand—the look, design, graphics, language, and facts that identify and describe the U.S. Environmental Protection Agency's (EPA's) WaterSense program. Presenting a consistent WaterSense identity is crucial for maintaining the program's credibility and for increasing the public's recognition and value of the WaterSense brand. The guide outlines how to use the WaterSense marks, with general standards provided first, followed by more specific instructions and mistakes to avoid when using the logos and labels. Graphic guidelines indicate what types of fonts, colors, and photos EPA and its contractors can use to promote the WaterSense program. In addition, the guide provides recommendations for what

language to use when writing or talking about the WaterSense program; procedures to follow for fact-checking and proofreading; and document templates and guidelines to use when creating or printing materials.

The Style Guide may need to be updated to reflect program changes. The changes may include, but are not limited to: creation or addition for a circular (print advertising retailers) logo and changes to the factoid development and approval process if required. The contractor shall provide suggested updates to EPA and shall update the guide at the direction of the WACOR. The current WaterSense Style Guide was created under a previous work assignment and the contractor is in possession of it.

Task 10– Annual Accomplishments Report

The contractor shall develop a program accomplishments report for the program activities occurring in calendar year 2014. The report shall be approximately one (1)-two (2) pages in length using a combination of images and graphics to summarize program results. The contractor shall work with EPA to incorporate this information into the WaterSense website. No web development and coding will be required under this task as the contractor will not have primary responsibility for the web design, only the content.

V. DELIVERABLES

Unless specified above, due dates for deliverables are outlined in the chart below. The deliverables of these tasks are highly dependent on the progress and coordination of work with outside stakeholders, as well as other parts of the WaterSense program (e.g., specification development). All activities shall begin at the direction of the WACOR unless otherwise noted. Due dates for draft documents are identified in the table below.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office 2007 Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this work assignment.

The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than fifteen (15) calendar days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Deliverable Schedule:

Task	Subtask	Deliverable	Due Date

0		Work plan	Per contract requirements
		The contractor shall meet with the WACOR either in person or via telephone approximately three to four (3-4) hours per month to discuss work assignment planning issues	Weekly.
1		Planning and organizing up to three (3) round tables/meetings with ten to fifteen (10 – 15) stakeholders.	Meetings within two (2) weeks of receipt of details from the WACOR.
		Marketing/Strategic Plan	Within (3) weeks after conclusion of round tables/meetings.
2	Subtask 2.1	Revamped/revised media outreach strategy	Within two (2) weeks of receipt of details from the WACOR
		Press releases for major program announcements	Within three (3) weeks of receipt of details from the WACOR to coincide with major program announcements outlined in the media strategy
		Quarterly highlights reports on outreach progress and measurement including media placements, web hits when appropriate, and other measurements of reach.	Four (4) reports during this period of performance
		Revised target media list.	Within three (3) weeks of request from WACOR
		Draft long lead strategy	Within two (2) weeks of receipt of details from the WACOR
		Final long lead strategy	Within two (2) weeks of receipt of EPA comments
		Draft long lead presentation	Within two (2) weeks of receipt of details from the WACOR
		Final long lead presentation	Within two (2) weeks of receipt of EPA comments
		Trade press blast emails	Within three (3) weeks of receipt of details from the WACOR to coincide with major program announcements outlined in the media strategy.
		Trade articles as opportunities are identified. Draft and final versions. (up to 8 over period of performance)	Within two (2) weeks of receipt of details from the WACOR; assume two (2) weeks for EPA WACOR review.
		Media question responses	Within one (1) day of receipt of details from EPA WACOR unless otherwise specified.
	Subtask 2.2	Draft strategies and ideas for non-media outreach tools	Within two (2) weeks of receipt of details from the WACOR
		Final ideas list of proposed strategies and ideas for non-media outreach.	Within two (2) weeks of receipt of EPA comments

		For each of the selected concepts, the contractor shall deliver a draft	Within two (2) weeks of receipt of details from the WACOR
		Final selected concepts	Within three (3) weeks of receipt of EPA comments
		Campaign material Support	Within two (2) weeks of receipt of details from the WACOR
		Recommended updates brand materials and key message documents	Within two (2) weeks of receipt of details from the WACOR
		Draft state fact sheets	Within three (3) weeks of receipt of details from the WACOR
		Final state fact sheets in web-ready format	Within two (2) weeks of receipt of EPA comments
	Subtask 2.3	Lessons learned/ideas white paper for Fix a Leak Week 2015 prep	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of May 2015
		Final Fix a Leak Week 2016 materials and pitching	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of February 2016
		2015 Sprinkler Spruce Up materials and pitching	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of March 2015
		Lessons learned/ideas white paper for Sprinkler Spruce Up 2015	Within two (2) weeks of receipt of details from the WACOR, to be completed by mid-July 2015
		2015 Shower Better materials and pitching	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of August 2015
		Lessons learned/ideas white paper for Shower Better 2015	Within two (2) weeks of receipt of details from the WACOR, to be completed by Mid-December 2015
		As assigned, recommendations for WaterSense campaigns	Within two (2) weeks of receipt of details from the WACOR, to be completed as directed by WACOR.
		As assigned, updates to marketing materials for WaterSense campaigns	Within two (2) weeks of receipt of details from the WACOR, to be completed as directed by WACOR.
	Subtask 2.4	Weekly "WaterSense Articles of Interest" Distribution via email to existing distribution list	Every other Tuesday
		Quarterly outreach and media results report, to be emailed to WACOR and included in highlights/measurement report in 2.1.	End of February, May, August and November
		Monthly "WaterSense in the News" Distribution via email to existing distribution list to be provided by the WACOR	1st week of every month

3	Subtask 3.1	Outline for proposed WaterSense Current quarterly e-newsletter	Within two (2) weeks of receipt of details from the WACOR
		Draft WaterSense Current quarterly e-newsletter and accompanying draft email	Within two (2) weeks of receipt of EPA comments on outline
		Final WaterSense Current quarterly e-newsletter and send accompanying email	Within two (2) weeks of receipt of EPA comments
	Subtask 3.2	Widget concepts	Within two (2) weeks of receipt of details from the WACOR
		Draft widgets	Within two (2) weeks of receipt of EPA comments and sign off on concepts
		Final widgets	Within two (2) weeks of receipt of EPA comments
	Subtask 3.3	Revamped/revised social outreach strategy	Within two (2) weeks of receipt of details from the WACOR, to be completed by end of the period of performance
	Subtask 3.4	Draft/refresh *Community-Based Social Marketing Workbook*	Within two (2) weeks of receipt of details from the WACOR
		1st draft/refresh *Community-Based Social Marketing Workbook*	Within two (2) weeks of receipt of details from the WACOR
		2nd print material *Community-Based Social Marketing Workbook*	Within one (1) week of receipt of EPA comments
		Final print material *Community-Based Social Marketing Workbook*	Within one (1) week of receipt of EPA comments
	Subtask 3.5	Document distribution of widgets, banners, infographics, online images, etc .	Within two (2) business days of receipt of details from the WACOR and at the end of the performance period.
4		Draft print material in support of general WaterSense messages (up to 6 over period of performance).	Within three (3) weeks of receipt of details from the WACOR
		1st Draft print material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		2nd print material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		Final print material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		Draft kid's educational/outreach material in support of general WaterSense messages.	Within three (3) weeks of receipt of details from the WACOR
		1st Draft kid's educational/outreach material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		2nd Draft kid's educational/outreach material in support of general WaterSense messages.	Within one (1) week of receipt of EPA comments
		Final kid's educational/outreach	Within one (1) week of receipt of EPA

		material in support of general WaterSense messages.	comments
		Document distribution of stock and non-stock photography, testimonials, etc. used in WaterSense materials	Within two (2) business days of receipt of details from the WACOR and at the end of the performance period.
		Determine if a photo shoot is needed.	Within two (2) weeks of reviewing photo inventory
		Provide draft input of images needed	Within (2) weeks of receipt of EPA comments
		Draft update of one existing promotional item	Within two (2) weeks of receipt of details from the WACOR
		Final promotional item	Within three (3) weeks of receipt of EPA comments
		Draft mock-up of new promotional item	Within two (2) weeks of receipt of details from the WACOR
		Final promotional item	Within three (3) weeks of receipt of EPA comments
		Draft input to partner communications (partner forum or partner pipeline)	Within two (2) weeks of receipt of details from the WACOR
		Final input to partner communications (partner forum or partner pipeline)	Within one (1) week of receipt of EPA comments
5		Fire drills	Within one (1) to three (3) business days from receipt of details from the WACOR
6	Subtask 6.1	Editorial Review/Annual Update of Existing Awards Program Documents	Within two (2) weeks of receipt of details from WACOR
		Draft any new Awards Documents	Within three (3) weeks of receipt of details from WACOR
		Finalize any new Awards Documents	Within two (2) weeks of EPA comments
	Subtask 6.2	Draft program materials	Within three (3) weeks of receipt of program document details from the EPA WACOR
		2nd round draft program materials	Within two (2) weeks of receipt of EPA comments
		Final program materials	Within two (2) weeks of receipt of EPA comments
	Subtask 6.3	Update template scoring worksheets	Within one (1) week of receipt of details from the WACOR, to be completed by end of April 2015
		Finalize template scoring worksheets	Within two weeks of receipt of EPA comments
		Summary of initial screening for eligibility	Within three (3) weeks of receipt of applications
		Assist in final review of eligible applications and provide summary	Within three (3) weeks of details from WACOR, to be completed by beginning of June 2015
	Subtask 6.4	Awards Ceremony Planning and Support Materials	Within one (1) week of receipt of details from the WACOR

		Weekly award ceremony coordination status update email	Weekly
	Subtask 6.5	Update Media Plan	Within two (2) weeks of receipt of details from the WACOR
	Subtask 6.6	Develop text for web updates/postings	Within two (2) weeks of receipt of details from the WACOR
		Finalize text for web updates/postings	Within one (1) week of receipt of EPA comments
7	Subtask 7.1	Provide Spec Rollout Plan	At least six (6) weeks prior to release of draft spec
		Revise Spec Rollout Plan	At least two (2) months prior to release of final spec
		Conduct Research and Develop Product Notification Form	By release of final specification
		Present Recommendations to WACOR for partner outreach regarding new spec	Within one (1) week of release of draft specification
		Implement partner outreach regarding new spec	Start within one (1) week of WACOR approval and finish prior to release of final specification
	Subtask 7.2	Draft Response to Partner Query, send to WACOR for review	Within one (1) day of receipt from partner
		Send response to Partner	Within six (6) hours of receipt of final answer from WACOR
	Subtask 7.3	Draft partner print materials	Within three (3) weeks of receipt of program document details from the EPA WACOR
		1st Round draft partner print materials	Within one (1) week of receipt of EPA comments
		2nd round draft partner print materials	Within one (1) week of receipt of EPA comments
		Final Draft partner print materials	Within one (1) week of receipt of EPA comments
	Subtask 7.4.	Submit draft strategy to EPA for review	Within two (2) weeks of receipt of details from WACOR
		Submit final strategy to EPA for review	Within two (2) weeks of EPA comments
		Submit draft tools to EPA for review	Within two (2) weeks of receipt of details from WACOR
		Submit final tools to EPA for review	Within two (2) weeks of EPA comments
8	Subtask 8.1	Report due to EPA	Within three (3) weeks of receipt of details from WACOR
	Subtask 8.2	Recommendations for quantitative and qualitative research around WaterSense branding, messaging, etc	Within three (3) weeks of receipt of program document details from the EPA WACOR.
		Draft questions for quantitative and/or qualitative research around WaterSense branding, messaging,	Within three (3) weeks of receipt of program document details from the EPA WACOR

		etc.	
		Final draft questions for quantitative and/or qualitative research around WaterSense branding, messaging, etc.	Within two (2) weeks of EPA comments
		Recruitment quantitative and/or qualitative research around WaterSense branding, messaging, etc	Within three (3) weeks of final approval on questions from WACOR
		Conducting quantitative and/or qualitative research around WaterSense branding, messaging, etc.	Within three (3) weeks of final approval from WACOR
		Finalizing/Recommendations from quantitative or qualitative research around WaterSense branding, messaging, etc.	Within three (3) weeks of conducted research
9		Provide suggestions on changes/updates to Style Guide	With 2 (2) weeks from receipt of direction from WACOR
		Update Style Guide	With four (4) weeks from receipt of direction from WACOR
10		Initial suggestions for Accomplishments Report	With two (2) weeks of receipt of details from EPA
		Draft of Accomplishments 2014 Accomplishments Report	With two (2) weeks of receipt of direction from EPA
		Final of Accomplishments 2014 Accomplishments Report	With two (2) weeks of receipt of direction from EPA

VI. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, §1194.21 Software applications and operating systems and §1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel.

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be

approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume four (4) to five (5) two (2) to three (3) day trips, will be required over the course of this Work Assignment. As outlined in Task 6, one trip requires attendance at the WaterSmart Innovations Conference for approximately three (3) days in Las Vegas, NV held from in October 7-9, 2015. Any other specific travel proposed for completion of this work assignment must be approved in writing by EPA in advance.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations:

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VII. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

VIII. RELEASE OF DATA AND INFORMATION

All information collected and developed under this Agreement is the property of the U.S. EPA and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-02

☐ Other ☒ Amendment Number: 000001

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2016 Base X Option Period Number	Consumer Marketing and outreac

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
Amendment 1 is to: Change WACOR from Karen Wirth to Beth Livingston and add Stephanie Tanner as the ALT WACOR.

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2016 Cost/Fee: LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: Cost/Fee: LOE:

Cumulative Approved: Cost/Fee: LOE:

Work Assignment Manager Name Beth Livingston	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-0000 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Donna Reinhart	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2114 FAX Number:

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-02

☐ Other ☒ Amendment Number: 000002

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2016 Base Option Period Number 1	Consumer marketing

Contractor	Specify Section and paragraph of Contract SOW
EASTERN RESEARCH GROUP, INC.	3.3

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
The purpose of this amendment is to raise NTE ceiling to $420,000.00

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2016 Cost/Fee: LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: Cost/Fee: LOE:

Cumulative Approved: Cost/Fee: LOE:

Work Assignment Manager Name Beth Livingston	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-0000 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name	(Signature)	(Date)	Branch/Mail Code: Phone Number: FAX Number:
Contracting Official Name Courtney Stallworth	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2002 FAX Number:

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-02

☐ Other ☒ Amendment Number: 000003

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2017 Base Option Period Number 1	Consumer Marketing

Contractor	Specify Section and paragraph of Contract SOW
EASTERN RESEARCH GROUP, INC.	3.2

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
The purpose of this amendment is to increase the funding ceiling to $440,000.00

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2017 Cost/Fee: LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: Cost/Fee LOE:

Cumulative Approved: Cost/Fee LOE:

Work Assignment Manager Name Beth Livingston (Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-0000 FAX Number:	
Project Officer Name Robin Danesi (Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:	
Other Agency Official Name (Signature) (Date)	Branch/Mail Code: Phone Number: FAX Number:	
Contracting Official Name Noelle Mills (Signature) (Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:	

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-03

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	New Homes and Outdoor Partner

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Close-Out
- [ ] Work Assignment Amendment
- [ ] Incremental Funding
- [ ] Work Plan Approval

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
New Homes and Outdoor Partner Support

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		4,442
Total:		4,442

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name: Amber Lefstead	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-2906 FAX Number:
Project Officer Name: Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name: Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name: Noelle Mills	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

PERFORMANCE WORK STATEMENT
Technical Evaluation and Market Assessment Support for the WaterSense Program
Contract No. EP-C-14-014
Work Assignment No. 1-03

I. ADMINISTRATIVE (PWS Area 3.3)

A. Title: WaterSense New Homes & Outdoor Partner Support
B. Period of Performance: Issuance-2/13/16

C. Work Assignment Contracting Officer Representative (WACOR)

Amber Lefstead
US EPA (MC: 4204M)
1200 Pennsylvania Avenue, N.W.
Washington, DC 20460
(202) 564-2660, FAX: (202) 501-2396

Alternate Work Assignment Contracting Officer Representative (Alt WACOR):
Jonah Schein
US EPA (MC: 4204M)
1200 Pennsylvania Avenue, N.W.
Washington, DC 20460
(202) 564-2720, FAX: (202) 501-2396

D. Quality Assurance:

The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The PQAPP submitted under Work Assignment B-01 under this contract is applicable to this Work Assignment. It does not need to be resubmitted.

E. Background:

EPA launched WaterSense, a voluntary partnership program to enhance the market for water-efficient products and practices in June 2006. The program seeks to provide information to residential, commercial and industrial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

The Contractor shall provide program development and operation support for this initiative. For each of the following tasks, EPA will make results of previous research and program development materials available as necessary. For all tasks, the Contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks the

Contractor shall be required to coordinate with other Contractors supporting the water-efficiency program as necessary. The Contractor shall also be required to coordinate certain activities with other EPA offices or other organizations outside of the EPA. Any instance where the contract is communicating with other EPA offices or organizations outside of EPA the Contractor shall communicate that they are working as a Contractor to the EPA's Office of Water. The Contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAEE) guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables shall comply with those requirements.

II. OBJECTIVE:

The objective of this Work Assignment is to provide support to the WaterSense program partners and stakeholders in two areas: (1) the new homes sector, and (2) the outdoor sector.

This Work Assignment shall include activities to provide administrative support, while maintaining regular contact with EPA personnel. In order for the Contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis, etc from other WAs under this contract; however no work will be duplicated in any two WAs. While every effort has been made to anticipate programmatic needs and deliverable timeframes, the Contractor may be asked to complete a task assignment within the scope of the task description detailed below on a shorter timeframe than originally anticipated.

III. TASK DETAIL:

The Contractor shall perform the following tasks:

Task 1: Contract Management

Subtask 1.1: Workplan and Budget Development
The Contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70).

Subtask 1.2- Work Assignment Management
The Contractor shall coordinate conference calls with the WACOR and task manager (TM) and/or other relevant EPA staff as needed (assumed every two weeks) to discuss progress made within these subtasks. Conference calls will typically last one (1) hour or less. The Contractor shall send a list of topics to be discussed to the EPA WACOR or TM at least one (1) day in advance of each conference call.

Task 2: New Homes Partner Support

For this task, the Task Manager (TM) is Jonah Schein, a member of the WaterSense team, and alternate work assignment manager for this work assignment. The task manager will be the primary technical

contact for the specified task and participate in technical communication with the Contractor. However, any technical direction will come from the EPA WACOR.

All activities listed in this task are contingent upon technical direction from the WACOR. The objective of this task is to provide support for the development and implementation of the marketing and outreach portion of WaterSense's efforts in the new homes sector. This refers to the support of partners who produce, sell, or promote WaterSense labeled new homes in the United States as well as materials geared toward the educating the general population. It involves the Contractor support of conducting outreach within the homebuilding sector to promote the WaterSense program, as well as promoting the new homes program to other WaterSense partners.

Subtask 2.1 – Conduct Sector-Specific Market Research

In order to successfully support the WaterSense program, the Contractor shall monitor home-building sector trends by engaging in ongoing research. This research shall be informal in nature and might consist of discussions with industry experts, reading trade journal articles, and/or perusing relevant websites.

For planning purposes, areas of research may include: the market for water-efficient and green new homes, multifamily homebuilding industry, non-retail purchasing behavior for new homes, identification of potential partners associated with the home building industry, purchasing information and trends for new homes, effective messaging and social marketing for the home buying market, potential cost implications of building a water-efficient new home and other research deemed important to the success of the program.

The results of this ongoing research shall be submitted to the TM in the form of a brief (one (1) page maximum) summary.

Subtask 2.2 – Support Strategic Planning

EPA will require the Contractor's input in strategic planning for marketing and outreach activities in the new homes sector. This assistance will take the form of an annual (calendar year) outreach work plan, which should be based on research gathered under Subtask 2.1 and collaboration with the TM and WACOR. The strategy should include overarching goals and specific strategies, activities, and timelines for achieving those goals. The contractor will be provided the overarching goals upon issuance of the WA, but the Contractor shall be responsible for identifying strategies, activities, and timelines for achieving those goals. Previous examples of this type of work include the 2010 Partner Outreach Work Plan developed under EP-C-09-008 WA 1-03.

Subtask 2.3 – Maintain a Suite of Industry Targeted New Homes Materials and Partner Tools

The Contractor shall provide support in developing and maintaining the suite of materials for the New Homes program. This includes, but is not limited to:the new homes toolkit for builders, providers, home builders associations (HBAs); recruitment tools for providers, HBAs and other WaterSense partners; supporting materials for plumbers and landscapers; and the WaterSense Blueprint newsletter. Previously developed tools will be provided to the Contractor by the WACOR.

In addition to drafting partner tools, the Contractor shall support the development of partner outreach materials. This shall include the drafting and distributing of approximately five blast emails and two (2) to three (3) short articles (one (1) to (2) two paragraphs) in the Partner Pipeline and other affiliated publications. In addition, this shall include drafting and distributing the WaterSense Blueprint, a newsletter geared towards partners and stakeholders with interests in building, inspecting/certifying, and promoting WaterSense labeled new homes. The Blueprint resembles in format and layout the WaterSense Current, but subject matter will focus primarily on supporting the WaterSense labeled new homes program.

Many of WaterSense's existing partner materials and tools were originally developed four (4) to (5) five years ago, prior to release of the revised specification for water-efficient new homes, and therefore do not incorporate some aspects of the revised specification. The Contractor shall make recommendations for revising, updating, and improving relevant partner materials and tools to support the new homes portion of the WaterSense program.

In addition, the Contractor shall plan to assist in the development of five (5) to ten (10) new tools/materials and/or revisions to existing materials during this work assignment period of performance. Examples of tools/materials may include: sample talking points, case studies, event/trade show materials, sample media materials, training for staff, web templates, bill stuffers, and other materials deemed important to the success of the program.

See below for details:

a. Develop/Update New Homes Tools: WaterSense Partner Tools provide program partners with resources they need to understand and promote the program to stakeholders and consumers. The Contractor shall support in the development, revisions, updates, and improvements of the New Homes Builder, Provider and HBA Tools. These tools shall include a wide range of materials and templates that help partners promote the WaterSense program and messages, such as: program mark guidelines, sticker/certificate printing tool, sample press releases and letters to the editor, website templates, point of sale materials, tools and messages, brochures, factoids, etc. The Contractor has access to existing tools (also located on the previously mentioned WaterSense project site).

   The Contractor shall also provide specific assistance to collect feedback from builder and provider partners on the effectiveness of the homeowner manual template included in the builder partner toolkit on the partner website. The Contractor shall use the information collected to make revisions to the manual and other tools after receiving technical direction from the WACOR.

b. Develop/Update Non-Builder/Provider Partner Tools: In order to support this program effectively, the Contractor shall update existing tools and create and provide new tools to existing partners and market influencers (such as utilities, local governments, plumbers, landscapers/irrigation professionals, realtors and inspectors) to educate and encourage their clients, members, builders etc to participate in the WaterSense New Homes Program.

Subtask 2.4 – New Homes Partner Webinars

The Contractor shall develop and conduct two (2) to three (3), New Homes topical presentations or webinars to assist WaterSense partners in supporting and implementing the New Homes program as

provided in Technical direction from the WACOR. The presentations shall be approximately 1 to 1.5 hours in length and will be web-based. The contractor shall set up the logistics for each call using web-based conferencing software and insure that participants receive all logistical information. The content for the presentations shall be developed in conjunction with activities in work assignments WA B-01 and B-05. The contractor shall take notes during the webinar and provide a meeting summary to the EPA TM within one month of the webinar. For planning purposes, the number of presenters will vary depending on the topic with presenters being from partner organizations, EPA staff and contractor personnel. It is estimated that at minimum one presenter shall be provided for each webinar.

Subtask 2.5 –Recruitment & Support of Local Promotional Efforts

The Contractor shall provide support to EPA to recruit and support builder partners for the new homes program. This recruitment will be national with a particular focus on multifamily builders/developers and on target communities identified by EPA. A national recruitment strategy using existing partners and challenge efforts may be phased in to this effort over time if needed. This assistance shall take the form of finalizing a recruitment rollout plan, which should be based on research gathered under Subtask 1.1 and collaboration with the TM and WACOR. The strategies shall include overarching goals and specific strategies, activities, and timelines for achieving those goals. The TM will provide input on the overarching goals, but the Contractor shall be responsible for identifying strategies, activities, and timelines for achieving those goals and all technical direction will be provided by the WACOR. Previous examples of this type of work include the 2010 Partner Outreach Work Plan developed under EP-C-09-008 WA 1-03.

Examples of potential goals may include, but are not limitedto, the following: identifying and working with influencers in the industry to promote WaterSense to builders, providers and HBAs, increase WaterSense visibility in the residential new construction marketplace, identify builders/providers/HBAs who are already interested in green building or water efficiency to become WaterSense partners, and use Web 2.0 strategies to increase awareness of the new homes program. Specific activities shall include, but are not limited to:

a. The Contractor shall support quarterly one (1) -two (2) hour calls and/or webinars with interested builders/providers/HBAs to discuss the certification and labeling process. The Contractor shall identify the appropriate stakeholders to participate, give recommendations on agenda items and develop a preliminary draft presentation for the calls. The Contractor may be asked to set up and/or participate in the call or webinar per direction by the TM.

   The Contractor shall support approximately ten (10), one (1) hour long, telephone calls, online webcasts, and meetings with utilities, local/state government, and other key local/state water conservation organizations to thoroughly introduce and incorporate WaterSense's new homes program into a community's water conservation efforts. WaterSense anticipates select stakeholders will request support in initiating and developing local promotions. Based on previous requests/interactions, the Contractor shall submit a brief (one (1) page) strategy recommending which stakeholders to work with in the event that none request help. The Contractor shall respond to Helpline requests from these interested communities (assume three (3) to five (5) communities) to support the development of local programs and campaigns. Responses may include developing tools to assist in media outreach including Q&As, articles, press releases etc. Responses shall also include, but are not limited to: strategy development, community tools, logistics support for one (1)

to two (2) outreach/media events, one half-day workshop for partners, and one (1) public announcement per promotional community. Logistical support for the workshops may include developing agendas, power point presentations, and other materials to support the meeting. The Contractor may be asked to participate in the workshop, and if so may be asked to take notes and provide a meeting summary to the EPA TM within one (1) month of the workshop. The Contractor may be asked to set up and/or participate in the call or webinar per technical direction from the WACOR.

If required, the contractor shall secure meeting space for WaterSense New Homes meetings as directed by the WACOR. If required, all conditions of Section V.D (below) must be met before any related expenses occur. Meeting space shall include but is not limited to the rental of a room, audio-visual equipment, and sound equipment.

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, shall be obtained by the EPA WACOR and contract level COR as needed and provided to the Contracting Officer. Work under conference related activities and expenses shall not occur until this approval is obtained and provided to the CO. Conference related purchases are not expected to exceed $20,000 under this contract. OWM will provide an executed EPA Form 5170. All additional costs must be approved by the Contracting Officer before they are incurred.

b. Based on the recent momentum from ongoing collaborations with ENERGY STAR, Indoor airPLUS (IAP) and Habitat for Humanity Metro Denver, WaterSense would like to continue the targeted recruitment of other Habitat affiliates and other affordable housing builders, providers and agencies/stakeholders. The contractor shall propose and then develop tools and materials to support the recruitment of affordable builders as well as recommendations for coordinating with Habitat for Humanity at the local, regional and national levels. These tools may include, but are not limited to: community tools, regional case studies, webinars, fact sheets, Q&As, blog or article templates etc. The contractor shall plan on developing no more than three (3) – five (5) tools under this section.

Subtask 2.6 – Update New Homes Content on the Public Website

The Contractor shall develop content for the WaterSense website as provided in technical direction from the WACOR. Web content development for updates will likely be needed to update the pages relating to new homes that are geared towards the consumer, builder/provider partners and other stakeholders that can't partner with WaterSense (i.e. inspectors and realtors.) The content is anticipated to consist of updates of current text on pages and the creation of entirely new pages. All web content shall comply with section 508 and other EPA's Office of External Affairs and Environmental Education (OEAEE) guidelines. The Contractor shall develop text for approximately one (1) major, and possibly two (2) – three (3) minor web updates/postings of one (1) to two (2) web pages each throughout the period of performance.

Task 3: Outdoor Sector Support

All activities listed in this task are contingent upon direction from the WACOR. The objective of this task is to provide support for the Outdoor Sector of the WaterSense program. This task involves: strategic planning for the outdoor sector (sub-task 3.1), support and specification development for the professional certification organization (PCO) labeling program (sub-task 3.2), support for outreach on outdoor water-efficiency (sub-task 3.3), and conference travel (sub-task 3.4).

Sub-Task 3.1: Strategic planning for the Outdoor sector

The contractor shall continue to build upon the strategic plan, developed under Contract No. EP-C-14-014, Work Assignment No. B-03, subtask 3.1, to guide the future direction of WaterSense's outdoor sector. In coordination with the WACOR, the contractor shall revisit the existing programmatic goals and identify any changes or additions needed. Then, the WACOR and contractor shall identify short and mid- term activities to achieve the goals. Planning should encompass all areas of the outdoor sector, including but not limited to, labeled product, programs and new homes support, professional certifications, and changing consumer perceptions. For planning purposes, the final plan should be no more than five (5) pages long.

Sub-Task 3.2: Support and Specification Development for the Professional Certification Labeling Program

The WaterSense program requires a set of competent professionals to install and promote WaterSense services and labeled products in the marketplace. At this time, the WaterSense program has released a WaterSense Professional Certification Program Labeling System and three (3) specifications to label programs in the irrigation field. The Contractor shall provide support to review applications, support Professional Certifying Organization (PCO) partners, and administer the program. Additionally, the Contractor shall provide support to the WaterSense program to develop a specification to label a new professional certification program. The Contractor shall update the existing *Professional Certification Program Research Report* to assist in identifying certification programs of interest and shall develop a Notification of Intent (NOI) to announce WaterSense's intent to label an additional professional certification program. See below for details:

a. Review applications for PCO approval and labeling programs: The Contractor shall process and review professional certifying organization (PCO) applications according to protocols developed under Contract No. EP-C-14-014, Work Assignment No. B-03, subtask 3.2a. This shall include: answering questions from the applicant while they are preparing the application, acknowledging receipt of the application, reviewing the application based on the requirements outlined in the WaterSense Professional Certification Program Labeling System and appropriate specification, communicating with the applicant about any areas that need additional information, and providing a summary of the strengths and deficiencies of the application to the WACOR. The Contractor shall then submit this summary to the WACOR for approval or disapproval. Upon WACOR approval or disapproval of an application, the Contractor shall notify the applicant of the decision. The Contractor can expect four (4) – six (6) applications for PCO approval, ten (10) – fourteen (14) applications for adopting PCO approval, and six (6) – eight (8) applications to label programs. The Contractor shall keep the WACOR informed of all new applicants and the progress of the application review.

b. PCO Partner Support: The Contractor shall provide support to newly approved and existing PCO partners. This support shall include on-boarding newly approved PCOs and quarterly communication to existing PCOs. The Contractor shall communicate with new PCO partners to properly acclimate these organizations to their newly acquired role. Communication shall include, but not be limited to, an

explanation of proper label use, the WaterSense Partner Resource website and the relevant resources available, expectations for sending program information to certified professionals, the quarterly and annual reporting requirements, and soliciting feedback on support needed from WaterSense. For planning purposes, the Contractor can expect four (4) – six (6) new PCOs and ten (10) – fourteen (14) new adopting PCOs. In addition, on a quarterly basis, the contractor shall coordinate communication with the PCO partners to solicit feedback on ways WaterSense can best provide partner support and the dissemination of WaterSense outdoor water use and irrigation information to all PCO partners. During these quarterly communications, the contractor shall also communicate pertinent program activities, such as the outdoor requirements in the new homes specification, collecting feedback on campaign materials, encouraging participation in outdoor related campaigns, and coordinating to disseminate information to certified professionals.

c. Implement Directory of Certified Professionals: As specified in the WaterSense Professional Certification Program Labeling System, of which the contractor is in possession, EPA will collect a list of certified professionals from each PCO quarterly and publish that list in a consolidated directory of certified professionals. Continuing work initiated under Contract No. EP-C-14-014, Work Assignment No. B-03, subtask 3.2c, at the direction of the WACOR, the contractor shall populate the directory with new data provided by PCO partners and launch the directory on the WaterSense public website. After the launch, the contractor shall update the data quarterly.

The contractor shall communicate with each PCO on a quarterly basis to request the submittal of data. Once all quarterly data is submitted, the contractor shall then use the submitted data to update the directory. The contractor shall provide support to and answer questions from PCOs regarding data submittal. The contractor shall continue developing standard operating procedures for the collection of data from the PCO partners and the updating and publishing of data in the directory.

d. Specification Development for Professional Certification Program: In July 2014, WaterSense released the *WaterSense Professional Certification Program Labeling System* and finalized revisions to its three specifications to label irrigation certification programs. With the finalization of the Labeling System, WaterSense will pursue creating additional specifications to label different types of professional certification programs.

1. Update Existing Research – Under EP-C-09-008 WA 3-13 Subtask 3.4, the Contractor produced a research report titled *Professional Certification Program Research Report* that advised the WaterSense program on new professional certification programs to label. The Contractor shall review and update the Research Report to capture any changes in the industry since the report was finalized. EPA will use the report to decide on one (1) certification program type for which to develop a specification. Once EPA has decided on the certification program type to label (under consideration are landscape designers, landscape architects, irrigation water managers, architects, and plumbers), EPA will inform the Contractor. At that time, the Contractor shall begin to research the certification programs available within that program type to understand program structures to guide EPA in specification development. The research report shall include, but not be limited to: the number of existing programs in the market, the number of professionals certified through the programs, the exam content requirements for the certification test. The Contractor shall provide a report summarizing their findings. For planning purposes the Contractor shall assume the report to be under 20 pages in length. The Contractor

shall keep the WACOR abreast of research findings on a regular basis as determined and communicated by the WACOR at the initiation of the research.

2. Notification of Intent (NOI)– This is the process by which WaterSense formally declares its intent with respect to developing a new specification for professional certifying organizations. The NOI summarizes information gathered during the technical and market research conducted under Subtask 3.2d.1 in this work assignment and Subtask 3.4a in EP-C-09-008 WA 3-13. The NOI outlines gaps in research and information needed to proceed. The main objective of this process is to engage the stakeholder community and obtain information needed to fully develop a specification or other WaterSense output document. This process shall also include review and analysis of any comments received, development of a plan for conducting any further research needed to complete the draft specification.

During the NOI development process, the Contractor shall work with EPA to engage a broad spectrum of stakeholders including: non-government organizations (NGO), trade and professional associations, certification programs, conformance assessment bodies, standard setting bodies and utilities. Input from stakeholders can be obtained from a range of mechanisms from simple conference calls to formal meetings, as appropriate. The Contractor shall have a system in place for tracking and managing input from stakeholders and the general public. This process is highly dependent on the industry and complexity of the technology, but should follow the instructions outlined in the WaterSense Specification Development Guidelines (Guidelines), of which the Contractor is in the possession. Detailed information on the development of the NOI is included in the Guidelines. The Contractor shall also develop tracking material for each task as necessary.

The Contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The Contractor can expect to attend 1-2 meetings of 1 day each as part of this task. For planning purposes, the contractor shall assume two (2), one (1) – two (2) day trips for this work assignment. The WACOR will provide at least two weeks notice for any meeting.

Sub-Task 3.3: Support for Outreach on Outdoor Water Efficiency

a. Outdoor Marketing and Outreach: Addressing outdoor water use presents a substantial opportunity for water savings. Under this subtask, the Contractor shall develop five (5) – seven (7) new materials and revise two (2) – four (4) existing materials to help WaterSense spread a message of outdoor water efficiency. Developed messaging shall focus especially on WaterSense's top four (4) outdoor messages:

(1) Use certified irrigation professionals
(2) Design the landscape for water efficiency
(3) Use the right amount of water in the landscape
(4) Replace standard controllers with weather-based irrigation controllers.

Developed materials may include, but are not limited to, a campaign to encourage hiring certified professionals; a webinar series to promote irrigation professionals and smart outdoor practices;

materials for PCOs to help engage irrigation professionals with WaterSense; materials to effectively promote labeled controllers; brochures on water-efficient landscaping; new content for the Smart Outdoor Practices section of the WaterSense website; materials to promote the new directory of certified professionals; new tools or graphics to promote Sprinkler Spruce-Up; adapting existing outdoor or irrigation content to incorporate systems level approaches; messaging in the form of web banners and other items for WaterSense social media outlets to garner attention to WaterSense outdoor campaigns; and briefings, presentations, and other outdoor sector materials (e.g., graphics, briefing slides, talking points, fact sheets) for use within and outside of the Agency in consultation with EPA personnel.

For the development of new content or revision to existing content, the Contractor shall submit draft versions for EPA approval. The Contractor shall make EPA-approved revisions and provide final versions of the materials, incorporating any revisions. The Contractor shall make final versions of the materials available on the WaterSense Partner Resources website or WaterSense public website, as directed by the WACOR.

b. Partner Event to Promote Labeled Controllers: The contractor shall continue the work initiated under Contract No. EP-C-14-014, Work Assignment No. B-03, subtask 3.3b, to support planning for a partner event to promote the use of labeled controllers to be held spring and summer 2015. The contractor shall continue to coordinate planning the event, including but not limited to, supporting host and supporting partners communication, identifying and creating materials needed, identifying media and promotional opportunities, and creating promotional materials (e.g. social media posts, targeted emails).

c. Develop Targeted Marketing Strategy for Labeled Controllers: WaterSense began labeling weather based irrigation controllers (WBICs) in 2012 and has seen low market penetration for this product. In coordination with the WACOR, the contractor shall develop a targeted plan to enhance marketing for WBICs. The contractor shall interview appropriate WaterSense partners and industry professionals to inform strategy development. For planning purposes, the contractor shall assume interviewing between seven (7) and nine (9) individuals. Using information obtained from the interviews, the contractor shall develop a proposal for two (2) to three (3) targeted marketing strategies for the WACOR's consideration. For planning purposes, the Contractor shall assume the proposal to be under five (5) pages. The WACOR will choose one strategy to pursue from the proposal. Following direction from the WACOR, the Contractor shall develop a marketing plan to pursue the chosen strategy. The marketing plan shall include, but not be limited to, identifying goals and activities, a timeline to achieve the identified goals, and identifying potential partners to support the strategy.

Sub-Task 3.4: Conference Travel

For planning purposes, the Contractor shall assume one (1), four (4) -day trip will be required to support WaterSense activities related to irrigation professional certification and outdoor water efficiency outreach. The Contractor can expect to attend one Irrigation or Outdoor Conference, location and date TBD.

Based on WaterSense's needs at the conference, the Contractor may be tasked with developing the following: technical session presentations, facilitate or attend technical sessions, and/or develop and

disseminate conference specific promotional materials. Details of the extent of support will be provided by the EPA WACOR to the Contractor through written technical direction.

Following the conference, the Contractor shall prepare and submit a brief (two (2) – three (3) page) report summarizing relevant conference highlights to the EPA WACOR.. Based on the type of support provided, the report should include such information as attendance at the WaterSense exhibit, types of questions asked by the attendees, feedback on WaterSense or WaterSense labeled products and services, names of WaterSense partners exhibiting, number of attendees and comments/questions at pertinent technical sessions, promising contacts, potential partners, and media questions/inquiries.

IV. DELIVERABLES

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. The Contractor shall be familiar with EPA's Office of External Affairs and Environmental Education (OEAEE) guidelines, standards, best practices, technical requirements for web site design and publications and all deliverables shall comply with those requirements. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than 15 calendar days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

Task	Task Title	Subtask	Deliverable	Due Date
1	Work Plan and Budget	1.1	Work Plan	Per contract requirements
		1.1	Monthly Progress Report	Monthly
		1.2	Conference calls with WACOR and TM	Bi-weekly or as needed
2	New Homes Partner Support			
	Sector Specific Market Research	2.1	Sector-Specific Market Research Report	Within three (3) weeks of WACOR direction
	Strategic Planning	2.2	Annual Outreach Work Plan for New Homes Partners	January 2015
	New Homes Materials & Partner Tools	2.3	New Homes Partner Toolkit Recommendations	Semi-annually
		2.3 a	Draft Partner Tool/Revisions to Tools	Within three (3) weeks of WACOR direction
		2.3 a	Final Partner Tools	Within two (2) weeks of TM comments
		2.3 b	Draft Partner Support Materials	Within three (3) weeks of WACOR direction
		2.3 b	Final Partner Support Materials	Within two (2) weeks of TM/ WACOR comments
	New Homes Partner Webinars	2.4	Draft presentation	Within two (2) weeks of WACOR direction
		2.4	Final presentation	Within one (1) week of receipt of TM comments
	Recruitment & Support of Local Promotional Efforts	2.5	Develop Recruitment Rollout Plan	Within three (3) weeks of WACOR direction; to be completed by end of November 2014
		2.5 a,b	Draft Materials for call/webinar w/ interested stakeholders/partners	Within three (3) weeks of WACOR direction
		2.5 a,b	Finalize Materials for call/webinar w/ interested stakeholders/partners	Within two (2) weeks of TM comments
		2.5 b	Local Promotional efforts – strategy	Within three (3) weeks of WACOR direction; to be completed by end of November 2014
		2.5 b	Local Promotional efforts – implementation	As outlined in TM-approved strategy; to be completed by end of January 2015

		2.5 c	Affordable Housing Recruitment - strategy	Within three (3) weeks of WACOR direction; to be completed by November 2014
		2.5 c	Affordable Housing Recruitment – implementation	As outlined in TM-approved strategy; to be completed by the end of January 2015
		2.5 d	Draft materials for affordable housing recruitment	Within three (3) weeks of WACOR direction
		2.5 d	Finalize materials for affordable housing recruitment	Within two (2) weeks of TM comments
	Update New Homes Content on Public Website	2.6	Develop text for web updates/postings	Within two (2) weeks of WACOR direction
		2.6	Finalize text for web updates/postings	Within one (1) week of receipt of TM comments
Task	Task Title	Subtask	Deliverable	Due Date
3	Outdoor			
3	Strategic Planning	3.1	Draft strategic plan for the outdoor sector	Within three (3) weeks of communication from WACOR
			Final strategic plan for the outdoor sector	Within two (2) weeks of receipt of comments from WACOR
3	Professional Certification Labeling Program	3.2 a	Summary report on application	Within three (3) weeks of receipt of application from potential PCO
			Follow-up with applicant	Within one (1) week of decision by WACOR
		3.2 b	Schedule call with newly labeled PCO	Within two (2) weeks of program labeling
			Send welcome materials to newly labeled PCO	Within one (1) week of program labeling
			Communicate program news to existing PCOs	Quarterly
		3.2 c	Launch of directory of certified professionals	Within three (3) weeks of communication from WACOR
			Collect data and update directory	Quarterly
			Standard operating procedures for the directory	Within three (3) weeks of the launch of the directory
		3.2 d.1	Draft revised *Professional Certification Program Research Report*	Within 6 weeks of communication from WACOR

			Final revised *Professional Certification Program Research Report*	Within 2 weeks of receipt of comments from WACOR
			Draft technical market research report	Within 6 weeks of communication from WACOR
			Final technical market research report	Within 2 weeks of receipt of comments from WACOR
		3.2 d.2	Draft Notification of Intent	Within three weeks of receipt of details on the NOI from the WACOR
			Final NOI and web content	Within two weeks of receipt of EPA comments
			NOI Public meeting summary	Within two weeks of public meeting.
3	Outreach on Outdoor Water Efficiency	3.3 a	Draft outdoor marketing and outreach materials	Within three (3) weeks of communication from WACOR
			Final outdoor marketing and outreach materials	Within two (2) weeks of receipt of comments from WACOR
		3.3 b	Draft materials	Within three (3) weeks of communication with WACOR
			Final materials	Within two (2) weeks of receipt of comments from WACOR
		3.3 c	Marketing proposal	Within four (4) weeks of communication with WACOR
			Marketing plan	Within two (2) weeks of communication from WACOR
3	Conference Travel	3.4	Attend conference	TBD
			Conference report	Within two (2) weeks of end of conference

V. MISCELLANEOUS

A. Software Applications and Accessibility:

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to

accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel

Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume three (3), one (1) – four (4) day trips, will be required over the course of this Work Assignment. Any specific travel proposed for completion of this work assignment must be approved in writing by the EPA contract level COR in advance.

C. Release of Data and Information

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

F. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.
The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VI. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-03

☐ Other ☒ Amendment Number: 000001

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2016 Base Option Period Number 1	Indoor residential

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
The purpose of this amendment is to appoint Jonah Schein as the WACOR and Stephanie Tanner as the ALT WACOR and to raise NTE to $280,000.00.

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2016 Cost/Fee: LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: Cost/Fee: LOE:

Cumulative Approved: Cost/Fee: LOE:

Work Assignment Manager Name Amber Lefstead (Signature) (Date)	Branch/Mail Code: Phone Number 202-564-2906 FAX Number:
Project Officer Name Robin Danesi (Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name (Signature) (Date)	Branch/Mail Code: Phone Number: FAX Number:
Contracting Official Name Courtney Stallworth (Signature) (Date)	Branch/Mail Code: Phone Number: 513-487-2002 FAX Number:

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-04

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	WaterSense Web Support

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
WaterSense Web Support

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		1,166
Total:		1,166

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name Jonah Schein	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-2720 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Noelle Mills	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

PERFORMANCE WORK STATEMENT
Technical Evaluation and Market Assessment Support for the Water Efficiency Program
Contract No. EP-C-14-014
Work Assignment No. 1-04

I. ADMINISTRATIVE (PWS Area 3.2.4)

A. Title: WaterSense® Program General Web Support and Maintenance

B. Work Assignment Contracting Officer Representative (WACOR):

Jonah Schein
US EPA (MC: 4204M)
1200 Pennsylvania Ave., N.W.
Washington, DC 20460
(202) 564-8836, FAX: (202) 501-2396

C. Quality Assurance:

The requirements of this work assignment do not include the collection of primary or secondary environmental data; therefore, a programmatic quality assurance project plan (PQAPP) is not required.

Background: WaterSense, an EPA partnership program, seeks to enhance the market for water-efficient products and practices. The program aims to provide information to residential and commercial/institutional consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

II. OBJECTIVE:

The objective of this work assignment is to provide support for website evaluation and ongoing maintenance updates for the WaterSense program. This work assignment applies to all websites maintained by WaterSense (currently these consist of the public website and the password protected partner website). EPA seeks to continually improve the user experience and to more effectively communicate the WaterSense message through its program website. For each of the following tasks, EPA will make results of previous research and program development materials available to the Contractor as necessary. For all tasks, The Contractor shall provide all source files and content to EPA with final deliverables. In order for the Contractor to fulfill the requirements of the tasks specified in this work assignment, it will require information, reports, analysis, etc. from other WAs under this contract; however, no work will be duplicated on any two (2) WAs. The Contractor shall maintain comprehensive knowledge of EPA's Office of External

Affairs and Environmental Education (OEAEE) and Office of Environmental Information (OEI) guidelines, standards, best practices, and technical requirements for website design and publications as well as OEAEE partnership program requirements. See (www2.epa.gov/webguide). All deliverables shall comply with these requirements.

III. TASK DETAIL:

The Contractor shall perform the following tasks:

Task 0 - Work Plan and Budget Development

The Contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70)

Task 1 Maintain Accuracy and Timeliness of the WaterSense Website. The WaterSense website will continue to be "the place to go" on EPA's website for information about water efficiency. The site shall include up to date information on the need for water efficiency and the related benefits, both environmental and economic as well as programmatic information related to campaigns, specifications, and program implementation. It will provide free, unbiased information and technical support on water efficiency. The Contractor shall provide support to EPA staff to ensure the timely updating of the WaterSense website.

Task 1.1 Website Maintenance: Maintaining the WaterSense website will require ongoing (daily) monitoring; frequent (weekly) changes, and updating of documents. The contactor shall perform maintenance at the intervals defined in Task 2 in order to ensure proper functioning of the site. Maintenance shall include weekly review of the site's content for accuracy, scans for broken links, and other methods as determined in conjunction with the EPA WACOR.

Task 1.2 Ensure the Accuracy of Site Content: The Contractor shall ensure the accuracy of all data included on the WaterSense website on web pages as well as in PDFs and other posted files, by clearing the content with EPA WACOR prior to development. The Contractor shall also ensure, both on web pages and in posted files, the accuracy of all WaterSense program marks and the coherence of all website messaging vis-à-vis WaterSense guidance documents such as the Program Guidelines, Graphics Standards and Style Guide, and Label and Logo Use Guidelines. These guidance documents are contained in the WaterSense Brand manual that is supplied to the contractor.

Task 1.3 Maintain Site: The Contractor shall ensure that the site services current program needs, by effectively communicating information about the program to partners and to the public. Maintaining the WaterSense website will require frequent changes to existing pages, documents (such as PDFs), and sections as well as their creation. Web planning and development should be done with anticipation that the list of 'likely visitors' will grow as the program grows. Strategies to accommodate the growth of the program should be presented to the WACOR.

Task 1.4 Provide Ongoing Technical Recommendations: The Contractor shall make unsolicited recommendations aimed at improving the ease with which users access, navigate, and learn from the WaterSense website. The Contractor shall also make recommendations as to how best maintain the WaterSense website given anticipated changes to EPA web policy or hosting environment. Recommendations should not be implemented without approval from the EPA WACOR.

Task 2 Follow Website Update Protocol. Due to the frequent nature of programmatic developments and additional content needed to be posted to the WaterSense Web site, updates shall be scheduled by EPA at periodic intervals. Such updates can apply to any of the web sites maintained by WaterSense. For planning purposes, the Contractor shall anticipate two (2) updates each month. The Contractor will be notified of needed changes no later than five (5)business days prior to the live posting date.

Task 2.1 The Contractor Shall Maintain a List of Items and Files Required: The contractor shall review the list (provided to the Contractor by EPA WACOR in excel format via email prior to the scheduled update) of necessary files, text, and web pages required for regular site updates. This information will be provided approximately five (5) days before the scheduled update. It will be the responsibility of the Contractor to alert EPA WACOR at least four (4) business days prior to the scheduled update regarding missing elements (files, links, or pages) critical to the functioning of the website.

Task 2.2 The Contractor Shall Perform Regular Updates: As a partnership program, WaterSense requires that certain items receive regularly scheduled updates. Updates will consist of the edits and changes contained in the update list provided to the Contractor in task 2.1. More in depth updates will also occur on periodic basis. In the event of larger updates, EPA WACOR will work in conjunction with the Contractor to ensure that adequate notice is given. For planning purposes, the Contractor shall assume four to eight (4-8) new pages will need to be either posted, updated or removed from the site completely during each update.

Task 2.3 The Contractor Shall Adhere to Update Review Process: The Update Review Process shall consist of three (3) steps, and EPA WACOR may request edits to the update at any time. In Step 1, the EPA WACOR will provide

to the Contractor, a list in excel format via email of anticipated updates five (5) business days prior to the scheduled update and the Contractor shall maintain a list of items and files. Step 2, upon receipt of the list in Task 2.1, the Contractor shall post the proposed update materials in EPA's test environment. Step 3, after the materials in the test environment have been approved by the EPA WACOR, The Contractor shall post the materials for public access on the EPA server. In the event that the EPA server environment should change (for instance the launch of a content management system replacing EPA's current UNIX servers), then the comparable password protected environment and public environments will take the place of the test and public directories respectively.

Task 2.4 The Contractor Shall Perform Additional Updates as Needed: From time to time, EPA will require updates to be rescheduled, added, or eliminated based on pressing and time sensitive program developments. Such incidents will occur at the discretion of the EPA WACOR. In such cases, EPA WACOR will alert the Contractor to these needs no later than one (1) business day prior to the update. Contractor should expect such updates to occur two (2) times per quarter.

TASK 3: Configure and Produce Code to Connect the WaterSense Website with the WaterSense CRM Data. The Contractor shall configure and maintain the WaterSense Customer Relationship Management software (SalesForce) to directly feed the WaterSense website information regarding WaterSense labeled products, partners, and additional information stored in SalesForce. SalesForce data (and other sources as deemed necessary by the EPA WACOR) shall continue to be maintained such that its contents can be dynamically queried by the WaterSense website and accessed utilizing AJAX and JavaScript techniques, allowing for the creation of dynamic and searchable pages without the need for flash plug-ins or maintenance of additional databases. The Contractor shall configure additional information entered into SalesForce such that it is also accessible in this manner as additional product and partner categories are added to the program. Information shall be accessible on the WaterSense website regardless of hosting environment.

Task 3.1: The Contractor shall configure SalesForce output: The Contractor shall be responsible for maintaining the SalesForce output (and output for additional sources) configuration and ensuring the appropriate data is accessible on the WaterSense website. The available data fields will be governed by information currently stored in SalesForce and/or the source data.

Task 3.2: The Contractor shall configure SalesForce output to support additional functionality: The Contractor shall be responsible both for incorporating new product data into the SalesForce output and ensuring the appropriate data is accessible on the WaterSense website as well as adding fields required to support greater search functionality. For planning purposes, the Contractor should assume 1 new product categories per year, and one additional feature or other change per quarter. The Contractor shall have information on

new product categories prepared twenty (20) business days after receipt of the first labeled products in said category.

Task 3.3: Develop and record standard operating procedures for managing SalesForce Output and making it available on the website: The Contractor shall produce standard operating procedures for this process. These procedures will serve as a reference for recreating a comparable level of accessibility and functionality should changes occur on either side of the flow of information (i.e. should changes occur in the CRM or should they occur on EPA's website and technical stack).

Task 4 Provide Web Statistics and Analytics. The Contractor shall provide relevant information to EPA regarding the traffic and use of resources on the WaterSense website. In order to gain reliable feedback on the performance of the website, EPA requires regular data on website usage. The Contractor shall provide EPA with monthly statistics regarding website traffic, resources accessed, and other activity on a monthly basis. Monthly reports do not need to include a written analysis or recommendations. Reports should be conveyed using the standard WebTrends format. If needed, and only after approval from the EPA WACOR, the Contractor can change from WebTrends to an alternate application (such as Quick Tracks) if such a change would provide additional efficiency or information.

Task 4.1: Prepare a report summarizing web statistics on the WaterSense website since its inception: The Contractor shall produce a report summarizing the statistics and analytics on the WaterSense website since it first went online. EPA will make available to the contractor all necessary data points and log files for this purpose. The report shall focus on common themes in frequently accessed resources, degrees of responsiveness (in terms of traffic) to other internal and external factors, and recommendations for best management practices moving forward.

Task 5 Comply with and Monitor EPA Web Requirements. The WaterSense website needs to conform to all applicable EPA standards, requirements, and policies.

Task 5.1 Comply with EPA Web Guide: The Contractor shall maintain compliance of the WaterSense website with regard to the EPA Web Guide and inform EPA staff of important aspects of the Guide as they are encountered in the course of web maintenance and development as soon as they are encountered. The Contractor shall also inform EPA when notable changes occur in the Guide when web postings are likely to be affected by said changes a minimum of ten (10) business days before the affected posting.

Task 5.2 Ensure Security Standards on EPA Servers: The Contractor shall conform to all security measures related to directly accessing EPA's Web servers as defined by EPA's web guide. Doing so includes promptly resetting server access (TSSMS) passwords prior to their expiration every ninety (90) business

days. In addition, The Contractor shall take steps to ensure that, in the event of circumstances beyond the Contractor's control, such as power outages or natural disasters, back-up systems are available to safeguard the Contractor's ability to access EPA servers. The Contractor shall provide these steps to EPA WACOR. In the event of back-up system failure, The Contractor shall be prepared to work, under technical direction provided by the WACOR, with IT staff at EPA to maintain the accessibility of the program website.

Task 5.3 Monitor Developments in EPA Web Policy: The Contractor shall monitor, with the assistance of EPA staff, the progress of any and all initiatives within the Office of Water, Office of Environmental Information and the Office of External Affairs and Environmental Education as well as other offices aimed at making changes to the technical requirements related to the maintenance of an EPA website. Such requirements may include but are not limited to content management systems (CMS), cascading style sheets (CSS), and special guidelines developed for use by partnership programs only. Accordingly, the Contractor shall take all such initiatives into account when maintaining the existing website or making plans for future development. The Contractor shall notify the WACOR in writing of any such changes likely to impact the WaterSense site within fifteen (15) business days.

Task 6 Work Assignment Management.

The Contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone as needed. For planning purposes, the Contractor should assume that such meeting will consume approximately two hours per month. The Contractor shall provide a status update for tasks via email two days before each meeting. The Contractor shall meet with the WACOR on specific issues related to proper functioning of the site and the servicing of the audiences' needs more frequently as directed by the WACOR. Contractor should plan on one such meeting per quarter.

IV. DELIVERABLE SCHEDULE:

Task	Subtask	Deliverable	Due Date
0		Work plan	Per contract requirements
1	1.1	Website Maintenance	Ongoing
	1.2	Ensure the Accuracy of Site Content	Ongoing
	1.3	Maintain and Expand Site	Ongoing
	1.4	Ongoing Technical Recommendations	Ongoing
2	2.1	Maintain List of Items and Files Required	Immediately upon receipt of update list
	2.2	Perform Regular Website Updates	5 business days after receipt of update list

	2.3	Adhere to Update Review Process	5 business days after receipt of update list
	2.4	Perform Additional Updates as Needed	1 business day after receipt of comments from WACOR
3	3.1	Connect WaterSense CRM to Public Site	Ongoing
	3.3	Develop SOP for SalesForce Output	End of period of performance
4		Provide Monthly Website Statistics	Within 10 business days of the end of the month
	4.1	Provide a report summarizing website activity	End of period of performance
5	5.1	Comply with EPA Web Guide	Ongoing
	5.2	Ensure Security Standards on EPA Servers	Ongoing
	5.3	Monitor Developments in EPA Web Policy	Ongoing
6		Work Assignment Management	Bi-monthly

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the Contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the Contractor in advance. The Contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

The Contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than fifteen (15) business days after the Contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the Contractor will be notified that no revisions are required.

V. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 8.0

B. Travel.
Travel will not be required in completion of this work assignment.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations:
All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-05

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	Product Technical Support

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
Product Technical Support

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		7,135
Total:		7,135

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name Stephanie Tanner	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-2660 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Noelle Mills	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

PERFORMANCE WORK STATEMENT
Contract # EP-C-14-014
Work Assignment No. 1-05

I. ADMINISTRATVE

A. Title: WaterSense® Product Development and Technical Support
B. Period of Performance: 2/14/15-2/13/16

C. Work Assignment Contracting Officer Representative (WACOR)

Work Assignment Contracting Officer Representative **Stephanie Tanner** **1200 Pennsylvania Ave, NW** **MC 4204-M** **Washington, DC 20460** **202-564-2660 Phone** **202-501-2396 Fax**	**Alternate WACOR** **Jonah Schein** **1200 Pennsylvania Ave, NW** **MC 4204-M** **Washington, DC 20460** **202-564-2720 Phone** **202-501-2396 Fax**

D. Quality Assurance
The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The Contractor created a PQAPP for data and information collected under both WA B-01 and WA B-05. This PQAPP will be acceptable to meet the requirements under this WA.

E. Background
The WaterSense program is a voluntary partnership program to enhance the market for water-efficient products and practices. The program seeks to provide information to residential and commercial consumers to help them select water-efficient products and adopt water-efficient practices; encourage manufacturers and service providers to increase the water-efficiency of their offerings; provide a turn-key approach to promoting water efficiency for local officials and organizations to use in their efforts; and inform the public about the importance of using water resources efficiently.

II. OBJECTIVE
The objective of this work assignment is to obtain technical support in the evaluation of water-using products, systems, services and activities for their potential inclusion in the WaterSense program. EPA requires an in-depth understanding of both the technology, system or service and the market place in order to make decisions about market enhancement. This work assignment will

provide research on products and services, development of specifications, conformity assessment and assistance with technical outreach to stakeholders.

For each of the following tasks EPA will make results of previous research and program development materials available as necessary. For all tasks, the contractor shall provide all source files and content to EPA with final deliverables. For each of the following tasks the contractor shall be responsible for coordinating certain activities with other EPA offices or other organizations outside of the EPA. When the contractor is responsible for coordinating activities with the EPA or other outside organizations, the contractor should be certain to communicate that they are working as an EPA Contractor. The contractor must be familiar with EPA's Office of Public Affairs guidelines, standards, best practices, technical requirements for Web site design and publications and all deliverables should comply with those requirements.

III. TASK DETAILS

The contractor shall perform the following tasks:

Task 1 - Work Plan, Program Planning, Funds Tracking and Management

Task 1.1 Work Plan – The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables.

Task 1.2 Funds Tracking and Management – This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70).The budget for this work assignment shall be tracked at the task level. The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two hours per month to discuss work assignment planning issues. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for a maximum of twelve (12) times. The contractor shall also maintain a milestone chart or other tracking system for projects underway as part of this WA.

Task 1.3 Program Planning – The contractor shall assist the WaterSense program in developing a five (5) year plan for the technical program. The task will include organizing meetings with ten to fifteen (10-15) stakeholders to obtain feedback on program successes and future direction. The contractor shall develop meeting agendas, summarize findings and work with EPA to refine feedback into a plan that may include a framework for screening projects, goals for products, systems and services and other activities to be undertaken by the

program. The technical plan should complement the overall program plan, goals and objectives.

Task 2 – Product Screening and Research
Under this task the contractor shall conduct research on products and services for inclusion in the WaterSense program. This research will be the basis for determining if development of a specification is necessary under Task 3. Under this task area the contractor shall complete the preliminary screenings and detailed assessments described below. For each product or service, a draft and final report shall be completed.

Task 2.1 Product Screening and Pipeline Management – The contractor shall update and maintain the WaterSense product screening tool. The product screening tool is a spreadsheet used by the WaterSense program to prioritize products for detailed research and possible specification development. The contractor shall collect information on new water efficient product for consideration by the WaterSense program. New products can be identified from a number of sources including, but not limited to, conferences, trade shows, helpline inquiries, and technology magazines. On an annual basis the contractor shall update the tools to ensure that product information is current. The screening shall look at the overall technical and market situation of products and be based on easily available information including, water use, water saving, payback periods, national sales figures, status of standards and testing protocols. The contractor shall meet with the WACOR to review the revised tool and discuss new program priorities. This meeting should be held within one (1) month of the tool revision. The contractor shall expect to update the screening tool once as part of this work assignment.

Task 2.2 Technical Assessments and Market Research Report – The contractor shall complete research that provides a broad understanding of identified product categories and specific products. This information should build on information gathered during the preliminary screening. Information developed at this level should inform the specification development and conformance assessment process. This assessment shall be used to determine which products will actually be included in the WaterSense program and what the appropriate market mechanism will be. This phase of the research should conclude with a research report for the program. The research should cover the topics outlined in the WaterSense Specification Development Guidelines (Guidelines).[1]

The contractor shall complete one (1) draft report and one (1) final report as part of this work assignment. The contractor shall attend and participate in 4-5 meetings taking place locally or via conference call or webinar. The EPA WACOR will give the contractor at least two (2) weeks' notice of expected meeting dates and times.

[1] ERG is already in possession of the Specification Development Guidelines

Task 3 - Product Development and Management
The EPA has selected a number of products for further development based on work completed under Contract EP-C-09-008. The contractor shall work with EPA to engage a broad spectrum of stakeholders including: (non-government organizations) NGOs, trade and professional associations, products manufacturers, service providers, conformance assessment bodies, standard setting bodies and utilities. Input from stakeholders can be obtained from a range of mechanisms as appropriate. These mechanisms can range from simple conference calls to formal meetings. The contractor shall have a system in place for tracking and managing input from stakeholders and the general public. This process is highly dependent on the industry and complexity of the technology, but should follow the instructions outlined in the Guidelines supplied to the contractor under Task 2 (WaterSense Specification Development Guidelines) Detailed information on the development of the documents in this section is included in the Guidelines. The contractor should also develop tracking material for each task as necessary. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend three to five (3-5) meetings of one to two (1-2) days each as part of this task. The WACOR will provide at least two (2) weeks notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings.

Task 3.1 Notice of Intent (NOI) – This is the process by which WaterSense formally declares its intent with respect to products. Where a NOI was issued under a prior work assignment, the contractor shall continue the NOI process for this product. The main objective of this process is to engage the stakeholder community and obtain information needed to fully develop a specification or another WaterSense output document. The contractor can expect to work on two (2) NOIs as part of this WA. It is also possible that one (1) of these products may not be completed due to technical issues; in that event the WACOR will inform the contractor on a replacement product or task consistent with this WA via a contract amendment.

Task 3.2 Draft Specifications – Once WaterSense has answered the outstanding questions in the NOI, the specification development process can begin. When directed by the WACOR, the contractor shall develop the draft specification in accordance with the Guidelines supplied to the contractor under Task 2 (WaterSense Specification Development Guidelines) and based on information developed during the research and NOI phases. This process shall require the contractor to coordinate up to three public meetings of two to three (2-3) hours, as appropriate to handle comments from the stakeholder community. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings. In addition the contractor shall prepare the Supporting Statement which summarizes the intent of the specification, research and cost effectiveness of the proposed specification

and other documents as described in the Guidelines. The contractor can expect to complete up to three (3) Draft Specifications for products as part of this work assignment.

a. *Irrigation Devices* – At the direction of the WACOR the contractor shall begin developing a draft specification for outdoor irrigation devices where sufficient information was gathered under task 3.1 above. The contractor shall work with any relevant industry or standard development organization as directed on these products. The contractor can expect to complete one to two (1-2) draft specifications under this work assignment.

Task 3.3 Final Specifications – At the conclusion of the draft specification comment period the contractor shall begin development of a final specification. The contractor shall develop the final specification in accordance with the Guidelines supplied to the contractor under Task 2 (WaterSense Specification Development Guidelines) and based on additional information gathered or any further research identified during the comment period. This process shall generally include review and adjudication of all comments received, development of a plan for and conducting any further research needed to complete the specification. The contractor can expect to complete up to two (2) Final Specification for products as part of this work assignment.

Task 3.4 Technology Assessment Guide – If WaterSense determines that a specification is not appropriate for a product, then the contractor shall develop a Technology Assessment Guide for use by Water efficiency practitioner. The Guide shall be a useful summary of the research obtained and provide information to building managers and utilities on appropriate uses of the technology, installation guidance as appropriate and cost effectiveness information. The contractor can expect to complete one (1) Technology Assessment guide as part of this work assignment.

Task 3.5 Specification Updates – Due to technological changes in existing standards and other market factors some minor adjustment to the language of a number of existing specifications needs to be made. The contractor shall work with manufacturers, utilities and other stakeholders to update the existing specifications as determined by the WACOR. Where appropriate the contractor shall also work with the ASME standards committees and DOE on adjustments to the language. The contractor can expect to update the specifications listed for showerheads and possibly 2-3 others, which may require up to two (2) meetings each via webinar.

Task 3.6 Standards Development Committee Participation – The contractor shall continue to participate in standards committees relevant to WaterSense specification or activities. In this capacity, the contractor shall work with the committee to develop a schedule for developing specifications, coordinate with committee members, analyze data relevant to WaterSense, and review materials developed by the committee. Standards Committee may include:

- ASME/CSA (Canadian Standards Association) Joint Harmonization Task Group or other committees for plumbing fixtures and fittings as needed by specification development and management tasks.
- ASABE committee on landscape irrigation emission devices and committee on smart irrigation controllers

As part of this work assignment it is expected that the contractor will participate in product standard setting committees for up to three (3) products. The contractor shall participate in three- five (3-5) total meetings in person or via conference call or webinar. The EPA WACOR will give the contractor at least two (2) weeks' notice of expected meeting dates and times. Many of these meetings can be combined with meetings identified in other sub tasks at the direction of the WACOR.

Task 4 - Product Certification
In order to ensure that products and services bearing the WaterSense label meet the specification criteria, WaterSense requires third party certification of products. To support this process WaterSense has developed and published the WaterSense Product Certification System. The system provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

Task 4.1 Certification Scheme Management– The contractor shall maintain and revise as necessary the controlling documents for the Certification Scheme including, licensing agreements, ad hoc guidance to accreditation organizations and certification bodies, Product Notification Templates and the website. The contractor can expect to maintain up to twenty (20) certification documents as part of this work assignment.

Task 4.2 Certification Audit – The contractor shall continue the audit of the certifications system begun under EP-C-14-014 WA 0-05, by developing a report summarizing the finding of that audit. The contractor shall then develop a plan for further auditing the certification program based on the findings in the first audit report the plan should indicate whether on site visits will be required. This audit will include up to six (6) Licensed Certification Bodies (LCB) and two to three (2-3) products categories. The contractor shall work with the selected LCBs, collected and review the necessary information and prepare a report summarizing the findings. The contractor shall make recommendation for changes to procedures or additional training necessary to correct any deficiencies found in the audit. If on-site audit are required, the contractor should plan for three (3) trips of two (2) days to travel to audit of the LCB in person.

Task 5 - Technical Product Support and Outreach
The objective of this task is to support products launched under the WaterSense program. Items identified here are potential areas for support; actual activities

under this task will be based on the needs of the WaterSense program as they develop. The contractor may need to attend non-local meetings with relevant stakeholders for information gathering purposes as part of this task. The contractor can expect to attend one to two (1-2) meetings of one to two (1-2) days each as part of this task. The WACOR will provide at least two weeks' notice of any meeting. These meetings will take place via webinar or at another industry event so that contractor will not need to rent or locate space for the meetings.

Task 5.1 Green buildings – EPA is working with a number of organizations to include water efficiency in the requirements for high-performing new and existing buildings. The contractor shall provide support such as reviewing other green building standards and codes as needed for this effort. The contractor can expect up to five (5) requests for support throughout the year.

Task 5.2 Marketing and technical outreach – the contractor's technical team staff will coordinate with marketing team staff to develop outreach strategy and materials for technical professional and trade audiences such as architects, engineers, plumbers, or landscapers. The contractor shall develop outreach materials and activities that correctly reflect the technical aspects of the program and meets the needs of the chosen target audience. This can include media information requests, web content, webinar content and support, presentations and conference papers. The contractor may also be required to attend conferences, tradeshows or other meetings to educate stakeholders on WaterSense. The contractor can expect up to ten (10) requests for support throughout the year. Webinars and presentation will be no longer than one (1) hour.

Task 5.3 Miscellaneous technical support – From time to time questions from stakeholders arise about WaterSense products, other water efficiency products and services and other technical issues. The contractor can expect up to ten (10) requests for support to answer questions throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required.

Task 5.4 Energy Star Program Coordination – The contractor shall work as needed with Energy Star to develop water criteria for energy and water using products. Activities may include, attending stakeholder workshops, review of products reports and proposed criteria and developing recommendations for new water efficiency criteria. The contractor can expect two to four (2-4) requests for support throughout the year. It is expected that attending the workshops will not require any non-local travel on the part of the contractor.

Task 5.5 Life-cycle Analysis – The contractor shall perform life-cycle analyses on potential WaterSense products. The analysis shall conform to either ISO 14040 series and/or ASTM D7075 standards, as appropriate. The contractor can expect

up to two (2) requests for support throughout the period of performance of this work assignment.

Task 5.6 Metrics and Modeling – The contractor shall continue to maintain and update the factoid catalog developed under EP-C-09-008 WA 4-05. Support for this task shall include addition of new facts as directed by the WACOR and revision of the data set with new price or water metric data if available. The contractor should coordinate with the marketing staff to finalize factoid language and generate messaging for outreach materials such as media, presentations and articles. The contractor may expect development of five to six (5-6) new facts for the catalog during the performance period.

Task 5.7 Product Deployment Strategy and Implementation – WaterSense develops strategies and methods to deploy each of its labeled product categories. To help ensure the successful launch of WaterSense's commercial products, the Contractor shall develop a short strategy to most effectively deploy CI products. For purposes of estimation, the contractor shall expect to develop 2-3 strategies of approximately five (5) pages each. The strategy shall include target decision-makers and audiences in the commercial product procurement chain, The Energy Star programs CI efforts and relevant trade publications, and other market factors that would affect the launch of these WaterSense labeled products. After the approval of the strategy, the contractor shall implement the strategy as directed by the WACOR. In addition, the contractor shall continue to implement the deployment strategy for flushing urinals and Pre-Rinse Spray Valves that were developed and approved under the previous contract EP-C-09-008 and WA B-05 under this contract.

Task 6 – New Homes Specification and Certification System Management
For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR.

The objective of this task is to support the New Homes Program launched under the WaterSense program. Items identified here are potential areas for support; actual activities under this task will be based on the needs of the WaterSense New Homes program as it develops. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. Possible areas of support include:

Task 6.1 New Homes Specification Management – From time to time questions from stakeholders arise about WaterSense specifications, other water efficiency

products and services and other technical issues. Occasionally, these will result in the need for modifications or clarifications to the New Homes Specification documents. The contractor can expect up to twenty (20) requests for support to answer questions throughout the period of performance and one – two (1-2) modifications/clarifications to the specification documents throughout the period of performance. The contractor and the WACOR shall agree on an appropriate response time based on the complexity of the support required. The contractor will also compile a summary of these activities prior to the end of the period of performance.

Task 6.2 New Homes Certification System – To ensure that new homes bearing the WaterSense label meet the specification criteria; WaterSense requires third party certification of homes. To support this process WaterSense has developed and published the WaterSense New Homes Certification System. The system provides a rigorous protocol for determining directly or indirectly that relevant requirements in WaterSense specifications are fulfilled.

a. Certification System Document – The contractor shall maintain and revise as necessary the controlling documents for the Certification system including, licensing agreements, ad hoc guidance to administrators, Certification providers and auditors. The contractor can expect to maintain up to twenty-five (25) certification documents as part of this work assignment.

b. Periodic Reports – The contractor shall review and analyze Certification Provider Quarterly reporters and Builder annual reports for use by EPA in managing the system and informing future decisions. Based on information in the reports and guidance from the WACOR the contractor shall prepare a recommendation for any changes to the Certification system needed to improve management of the program. The contractor shall also prepare a summary of issues identified by the helpline or other stakeholders to provide to Program administrators as part of their assessment process.

c. Training – The contractor shall provide training as necessary to Certification Program Administrators and providers on the new homes certification systems. They shall use the presentations and other materials developed under the Work Assignment 3-05, 4-05, and 5-05 of EP-C-09-008.

Task 6.3 New Home Builder Resource Manual & Training Materials– The contractor shall maintain the timeliness and accuracy of the Builder Resource Manual completed under WA 1-02, EP-C-09-008 as well as supplemental training materials.

a. Builder Resource Manual – The manual shall be updated to reflect any changes made to the New Homes specification under task 6.2 or 6.3. The

contractor shall receive technical direction from the WACOR when changes are deemed substantial enough to warrant updating the resource manual and the contractor and WACOR shall agree on appropriate response time in these instances.

b. Training Materials – The contractor shall prepare additional technical training materials to support the adoption of WaterSense Labeled Homes and water-efficient building practices throughout the residential construction industry. The contractor shall receive technical direction from the WACOR when such materials become necessary. The contractor shall also identify opportunities to educate builders and associated trade professionals at existing forums and venues where the target audience is known to attend. The contractor and WACOR will agree on appropriate venues as well as appropriate deadline for the related material.

Task 7 – H2OTEL Challenge

The WaterSense Program will provide information and guidance to the CI sector on water efficiency and management. For this task, the Task Manager is Tara O'Hare, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including, but not limited to, citation of data sources and an explanation of calculations and terms. In order to support this, the Contractor shall complete the following tasks:

Task 7.1 General CI Materials – The Contractor shall revise and modify existing materials on water efficiency in the CI sector for use in association with the WaterSense program. Specifically the contractor shall continue to implement the WaterSense H2Otel Challenge that was developed and launched under contract EP-C-009-008 and WA B-05. The H2Otel Challenge will be the main CI outreach priority during the period of performance including the wrap up of 2014 activities and the continuation of a Challenge in 2015. All existing materials will be provided by the WACOR. The Contractor shall also develop new materials to assist specific stakeholders such as building owners, architect and engineering firms, and facility managers to implement water efficiency in hospitality facilities and other CI buildings. This shall include the revision and creation of approximately ten- fifteen (10-15) materials such as factsheets, frequently asked questions, case studies, talking points, web content, presentation slides, key messages, e-mails to partners, program announcements, and press releases among other pieces during the period of performance. When applicable, final materials shall be delivered in print ready format and a format ready to be coded

for placement on the WaterSense website. The Contractor shall use the materials developed in this task to assist the WaterSense program in conducting outreach to CI buildings via emails, trade articles, webinars, or press releases. In addition, the Contractor shall assist EPA in incorporating WaterSense information into materials for ENERGY STAR Commercial and Institutional building partners. For purposes of estimation, 20-25 outreach activities are expected during this period of performance.

Task 7.2 CI Tools and Information Collection – The Contractor shall provide support to the WaterSense team in collecting tools and information from established CI programs and other relevant stakeholders across the country and combining it with tools and materials created as part of the H2Otel Challenge. The support shall be limited to compiling the information submitted to the WaterSense Program under the previous WAs and reorganizing existing tools and materials created under the H2Otel Challenge into a useable format to be placed in a centralized location on the WaterSense website. Most of the information used in this effort has already been received or developed, so minimal research will be required. The Contractor shall suggest an appropriate format in an outline or web page schematic based on the information received. Once the formatting is approved, the Contractor shall create the web pages. The web pages will be posted under the Web Support WA 1-04, not this work assignment. A written summary report will not be required for this task.

Task 7.3 Commercial Water Use Savings and Evaluation Tool – The Contractor began developing an excel-based tool under WA B-05 to assist facility managers, owners and other stakeholders in tracking their water use and calculating their potential savings and payback. The first version released under WA 5-05 was specifically focused on hotel and hospitality facilities. Under this WA, the contractor shall assist EPA in improving the tool based on user feedback and finalizing this content as the revised version 1.0.

Task 7.4 H2Otel Challenge Best Management Practice Webinars – The contractor shall develop a series of webinars based on the content developed in the WaterSense at Work: Best Management Practices for CI Facilities and the H2Otel Challenge webinars created under WA B-05 this contract. The contractor shall create and outline, draft presentation, and final presentation for each webinar that will include content for a specific portion of the Challenge and a case study from a facility that has completed water efficiency projects in those areas. Most of the content for the webinars was already developed under WA B-05 and will be reorganized to provide a more concise summary of the actions required for participants to take in the Challenge. Each webinar will be approximately 1.5 hours in length. The contractor shall complete all logistics for the webinar including registration, presentation development, and delivery, recording and editing. The final deliverables shall be a 508-compliant, multi-media file in a format determined by the WACOR that can be placed on the WaterSense public website for stakeholders to listen to in the future. The

development of approximately four (4) webinars will be required during the period of performance.

Task 7.5 H2Otel Challenge Workshop and Audit – The contractor shall provide a one day workshop on water-efficiency and water assessments for a group of hotel participants of the H2Otel Challenge and a water audit for one (1) participating hotel. This will require travel for one person to a location in the continental US for approximately two to three (2-3) days. This workshop and audit will be hosted by one of the participants in the workshop so that contractor will not need to rent or locate space for the meetings.

The content of the workshop shall be drawn from the technical tools and materials already created under WA B-05. The contractor shall work with the Task Manager to develop the agenda and content for the workshop including presentations and other materials, the contractor shall complete all logistics for the workshop including registration, presentation development and delivery of all or part of the workshop. The deliverable for this workshop will be final versions of the agenda, presentation, and materials used in the workshop.

In addition, the contractor shall also provide a water audit for one participating hotel using the WaterUSE Tool developed under task 7.3, the deliverable for this audit is a completed version of the Tool using the hotel's specific data including a prioritized list of projects and a water balance for the hotel's facility. No additional report will be required.

Task 8 – Benchmarking and whole building analysis

The WaterSense Program will provide technical support to the CI sector on water efficiency and management. For this task, the Task Manager is Jonah Schein, a member of the WaterSense team. A task manager will be the primary technical contact for the specified task and participate in technical communication with the contractor. However, any technical direction will still come from the EPA WACOR. At the conclusion of the performance period, the contractor shall prepare a final annotated version of any documents or tools for delivery to the WACOR. The annotated version shall include any information necessary to continue use of the materials after the contract has ended including but not limited to citation of data sources and an explanation of calculations and terms. The Contractor shall support this portion of the program by completing the following tasks:

Task 8.1 ENERGY STAR Portfolio Manager Revisions – The ENERGY STAR program is currently revising, expanding, and enhancing their Portfolio Manager tool used by all types of buildings. The Contractor shall continue to assist the WaterSense team in recommending changes and additions to the Portfolio Manager specific to WaterSense and water efficiency in CI buildings. As directed by the WACOR, the Contractor shall develop a list of recommended changes to be submitted to ENERGY STAR. The Contractor shall also provide technical

support to the WaterSense team as the changes are implemented by answering questions and providing clarifications when needed within one week of receipt from WACOR.

Task 8.2 Development of a Water Efficiency Benchmark Pilot Program –The objective of this task is to evaluate the feasibility of developing a water efficiency benchmark for water efficiency in multi-family, commercial and institutional buildings. The benchmark would be compatible with the Energy Star energy efficiency benchmark and based on data from its Portfolio Manager program. The evaluation would consider whether data being collected from the Energy Information Administration, Fannie Mae or other sources would be useful, from the 2007 Commercial Buildings Energy Consumption Survey provided under EP-C-09-008 WA 3-05 or the Fannie Mae survey of Multifamily buildings provided under WA 5-05.

IV. DELIVERABLE SCHEDULE (by tasks/subtask and due date)

The deliverables for this task are highly dependent on the progress and coordination of work with outside stakeholders. All activities shall begin based on WACOR direction unless otherwise noted. Due dates for draft documents are identified in the tables below. The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA WACOR no later than fifteen (15) business days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this Work Assignment.

Task 1 – Work Plan, Funds Tracking and Work Assignment Management[2]

Subtask	*Deliverable*	*Due Date*
1.1	Work Plan and PQAPP	Per contract requirements.

[2] This WA contains number of activities based on EPA research and work with other committees. Since EPA has little to no control over the committee schedules, deadlines are set based on information at the time. This flexibility has worked extremely well for both the contractor and the WACOR under EP-C-14-014.

1.2	Funds Tracking and WA Management	Monthly
1.3	Program Planning	Meetings within 1 week of WACOR direction

Task 2 - Product and Service Research

Subtask	***Deliverable***	***Due Date***
2.1	Product Screening Tool	Within 20 business days of WACOR direction
2.2	Technical Assessment and Market Research	Within 60 calendar days of WACOR direction

Task 3 - Product Development and Management

Subtask	***Deliverable***	***Due Date***
3.1	Notice of Intent	Within 30 business days of WACOR direction
3.2	Draft Specification material	Within 60 business days of WACOR direction
3.3	Final Specification material	Within 60 business days of WACOR direction
3.4	Technology Guide	Within 45 businessdays of WACOR direction
3.5	Specification Updates	Within 30 businessdays of WACOR direction
3.6	Standards Development Committees	Ongoing

Task 4 – Product Certification

Subtask	***Deliverable***	***Due Date***
4.1	Certification document management	Within 20 businessdays of WACOR direction

4.2	Certification Audit	Within 20 businessdays of WACOR direction

Task 5 – Technical Product Support and Outreach

Subtask	***Deliverable***	***Due Date***
5.1	Green building program support	As directed by the WACOR
5.2	Marketing and outreach	As directed by the WACOR
5.3	Miscellaneous technical support	As directed by the WACOR
5.4	Energy Star program coordination	As directed by the WACOR
5.5	Life-cycle analysis	As directed by the WACOR
5.6	Factoid Catalog updates	As directed by the WACOR
5.7	Product deployment strategy and implementation	As directed by the WACOR

Task 6 – New Homes

Subtask	***Deliverable***	***Due Date***
6.1	Specification Management	As directed by the WACOR
6.2	New homes certification system management	As directed by the WACOR
6.3	Builder resource manual and training	Within 60 businessdays of WACOR direction or as agreed to as reasonable by contractor and WACOR

Task 7 – H2OTel Challenge

Subtask	***Deliverable***	***Due Date***
7.1	General CI materials	Within 3 weeks of WACOR direction
7.2	CI Tools	Within 3 weeks of WACOR direction

7.3	Water Use Savings and Evaluation Tool	Within 5 weeks of WACOR direction
7.4	Outline of Content for Webinar Draft Presentation Final presentation Recorded presentation files	Within 3 weeks of WACOR direction Within 4 weeks of WACOR direction Within 2 weeks of WACOR direction Within 4 weeks of Webinar
7.5	Outline of content for workshop Draft presentation and materials Final presentation and materials Draft water audit results Final water audit results from WaterUSE Tool	Within 3 weeks of WACOR direction Within 4 weeks of WACOR direction Within 2 weeks of WACOR direction Within 2 weeks of water audit Within 3 weeks of water audit

Task 8 – Benchmarking and Whole-Building Analysis

Subtask	***Deliverable***	***Due Date***
8.1	Energy Star Portfolio Manager revision	As directed by the WACOR
8.2	Evaluation of benchmark	As directed by the WACOR

V. MISCELLANEOUS

A. Software Applications and Accessibility

Files delivered to the Government shall be Microsoft Office 2013 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word,
- Preferred presentation format: Power Point
- Preferred graphics format: Each graphic is an individual JPEG or GIF file

- Preferred portable format: Adobe Acrobat, Version X
- Preferred tracking format: MS project or excel

B. Travel. Travel is expected for this work assignment. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place. . The WACOR will provide at least a two week notice of any non-local travel. For planning purposes, the contractor shall assume 4 (four) -6 (six); 2 (two) -3 (three) day trips will be required over the course of this Work Assignment as described in Task 3 and 5 above. One to two contractors shall attend each conference under this work assignment (though other WACORs may request additional support under their own work assignments).

C. Release of Data and Information.
All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the Contracting Officer. Information from this task shall be included in the program database (Salesforce), as appropriate. Updates to the database shall include communications with Stakeholders such as e-mails and meeting summaries.

D. **Conference/Meeting Guidelines and Limitations:**
All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VI. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment. The requirements do include environmental measurements, etc., therefore a supplement programmatic quality assurance project plan (PQAPP) is required. The Contractor created one PQAPP for data and information collected under both WA B-01 and WA B-05. This PQAPP will be acceptable to meet the requirements under this WA.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-05

☐ Other ☒ Amendment Number: 000001

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/17/2014 To 02/13/2016 Base Option Period Number 1	Technical support

Contractor	Specify Section and paragraph of Contract SOW
EASTERN RESEARCH GROUP, INC.	3.3

Purpose:
- ☐ Work Assignment
- ☒ Work Assignment Amendment
- ☐ Work Plan Approval
- ☐ Work Assignment Close-Out
- ☐ Incremental Funding

Period of Performance: From 02/14/2015 To 02/13/2016

Comments:
The purpose of this amendment is to raise the NTE ceiling to $600,000.00

☐ Superfund — Accounting and Appropriations Data — ☒ Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

Contract Period: 07/17/2014 To 02/13/2016 Cost/Fee: LOE:

This Action:

Total:

Work Plan / Cost Estimate Approvals

Contractor WP Dated: Cost/Fee: LOE:

Cumulative Approved: Cost/Fee: LOE:

Work Assignment Manager Name Stephanie Tanner (Signature) (Date)	Branch/Mail Code: Phone Number 202-564-2660 FAX Number:
Project Officer Name Robin Danesi (Signature) (Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name (Signature) (Date)	Branch/Mail Code: Phone Number: FAX Number:
Contracting Official Name Courtney Stallworth (Signature) (Date)	Branch/Mail Code: Phone Number: 513-487-2002 FAX Number:

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-6

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	Net Zero

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 07/24/2015 To 02/13/2016

Comments:

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		264
Total:		264

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name Michael Nye	(Signature)	(Date)	Branch/Mail Code: Phone Number 703-347-0238 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Noelle Mills	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2171 FAX Number:

PERFORMANCE WORK STATEMENT
TECHNICAL EVALUATION AND MARKET ASSESSMENT SUPPORT FOR THE WATER EFFICIENCY PROGRAM
(Contract # EP-C-14-014)
Work Assignment No. 1-06

I. ADMINISTRATIVE (PWS Area 3.2.7~~3~~)

A. Title: Net Zero Water Education and Outreach Support

B. Work Assignment Contracting Officer's Representative ( ):

Michael Nye
US EPA
Office of Research and Development
Nye.michael@epa.gov
(202) 564-5016

C. Quality Assurance:

This work assignment does not involve the collection of environmental measurement; therefore, a supplemental programmatic quality assurance project plan (PQAPP) is not required.

D. Background:
The Army's 'Net Zero' program seeks to 'zero' the balance for Army installations in three primary areas: water, waste and energy. EPA-ORD and the Army are collaborating on the Army's Net Zero Program to develop and demonstrate new applications and technologies for use on installations striving toward Net Zero goals. EPA's Net Zero work at Fort Riley focuses on improving water quality and treatment, water reuse and sewer mining, and demand reduction via targeted interventions and outreach.

II. OBJECTIVE

The contractor shall support a group of US Army and EPA partners in the development of a successful targeted communications campaign to promote water saving behavior in living and working areas on Fort Riley Kansas, a US Army Installation. The evidence base for message development shall consist of previously produced reports and associated datasets on residential water use and personnel attitudes towards water conservation delivered electronically to the contractor by EPA in MS word format. The contractor shall prepare a detailed report that specifies the messaging strategy and incorporates material from prior

reports completed by EPA and Kansas State University ~~under Contract EP-C-09-008/WA~~ that will be provided to the contractor.

III. TASK DETAIL

The contractor shall perform the following tasks:

Task 1: Review previously produced reports (Demand Report and Survey Report) and underlying datasets

The first phase of work for this project consisted of developing and implementing a Community-Based Social Marketing (CBSM) campaign focused on water conservation behaviors and measuring household water use for residents of Family Housing neighborhoods on Fort Riley. A separate, but aligned effort surveyed personnel working on Ft Riley about attitudes to water conservation and water use behaviors. The results of these studies are described in two separate reports referred to here as the Demand Report and the Survey Report (available electronically from EPA in MS Word format)~~).~~ The contractor shall review these existing reports and the underlying datasets and other relevant Net Zero materials to better understand residential water use profiles, water use/ conservation attitudes and behaviors on Fort Riley, and the Net Zero Program.

1.1. Synthesize the content and findings from the Demand and Survey reports into a single document.

The contractor shall synthesize the background text and findings from the Demand and Survey reports into a single, thirty to forty (30-40) page ~~commonly-formated~~ document to be used as the basis for the Final Report described in Task ~~b~~3 of this WA (see Page 3 of this WA). The synthesis exercise should result in a shorter document than would be produced if the two (2) reports were simply combined, but the text shall be drawn from the existing reports where possible to save time.

Task 2: Provide guidance on development of effective messaging strategies for promoting water conservation based on review of the reports and datasets:

The contractor shall produce a short report (Options report) summarizing good practice for effective conservation messaging and presenting a set of preliminary options for messaging strategies based on good practice guidance and review of the Demand and Survey Reports .

2.1. Solicit feedback from Army personnel and Ft Riley staff on messaging options

The contractor shall conduct three to five (3-5) phone interviews with Fort Riley staff to review messaging options presented in the Options report and identify opportunities for tailoring messaging to the culture of the Army. Fort Riley Department of Public Works ~~(DPW)~~ staff will facilitate the selection of interviewees.

2.2. Produce Options Report

The contractor shall produce a short ten to fifteen (10-15) page Options Report containing a set of preliminary messaging strategy and delivery options based on the outputs of Tasks 1-2.1.

2.3 Plan and facilitate a webinar to further review options and facilitate messaging strategy selection and development

The contractor shall plan and facilitate a webinar (including relevant background materials) in July of 2015 to present good practice guidance and refined options for messaging strategies to EPA and ARMY staff. The contractor shall take detailed notes of the proceedings and provide a summary report to the Army/ EPA partners covering outcomes/ key points and recommendations for proceeding.

Task 3: Refine messaging strategy and produce a detailed guidance and synthesized Final Report for an effective water conservation messaging campaign for Fort Riley and other installations.

Based on the outcomes of Tasks 1-2.3, the contractor shall produce a detailed Final Report specifying the logistics and format of a water conservation messaging campaign for Fort Riley that:

A) Is evidence based (including Demand and Survey report findings as well as other relevant scientific research)
B) Includes the text of the Synthesis Report produced in Task 1.1
C) Incorporates feedback from the webinar and options review in Task 2-2.3
D) Aligns to Net Zero program goals, and
E) Is sensitive, and adaptive to, the unique culture of the Army.

It is expected that the contractor shall produce a range of written slogans and textual materials that could be used in different formats and media. The report shall contain at a minimum the following specific elements:

A) Recommendations on message format and delivery media for reaching different groups on the installation.

B) Written text, slogans, or scripts containing effective messages for different sources of water demand that are clearly linked to specific format and delivery options. ~~(specified in A).~~

IV.WORK ASSIGNMENT MANAGEMENT

The Contractor shall meet with the and/or the Alternate either in person or via telephone as needed. For planning purposes Contractor should assume that such meeting will consume approximately two hours per month. The Contractor shall provide a status update for tasks via email two days before each meeting. The Contractor shall meet with the on specific issues related to proper functioning of the site and the servicing of the audiences' needs more frequently as directed by the . Contractor should plan on one such meeting per quarter.

V. DELIVERABLES

Unless specified above, due dates for deliverables are outlined in the chart below. The deliverables of these tasks are highly dependent on the progress and coordination of work with outside stakeholders, as well as other EPA and NetZero research activities.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office 2013 Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this work assignment.

The contractor shall discuss any disagreements with or questions on EPA-provided comments prior to submission of a final document. All deliverable revisions will be due back to the EPA no later than fifteen (15) days after the contractor receives EPA feedback unless otherwise specified by the . If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Deliverable Schedule:

Task	Subtask	Deliverable	Due Date
O		Workplan	contract requirements

1		One (1) two hour introductory kick-off phone call with Army/EPA staff to discuss project aims and logistics of the	TBD (Within 1 week of start of contract)
1	1.1	One synthesis document that combines the Demand and Survey reports into a single, streamlined document to be used as the basis for the Final Report.	TBD
2	2.1	Interviews for refinement of options and identifying opportunities for cultural adaptation	TBD
2	2.2	One (1) Options report providing a summary of good practice for effective conservation messaging and presenting a set of preliminary options for messaging	TBD (One week prior to webinar)
2	2.3	Facilitation and delivery of a two to three (2-3) hour webinar to review options and refine messaging strategies for different groups and different sources of demand..	TBD
3		A final report that includes the synthesis report and additional logistical guidance and textual materials for an effective water conservation messaging at Fort Riley.	September

VI. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel.
No travel is required for completion of this work assignment.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations:
All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VII. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

VIII. RELEASE OF DATA AND INFORMATION

All information collected and developed under this Agreement is the property of the U.S. EPA and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-7

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	Communications support

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.3

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 09/29/2015 To 02/13/2016

Comments:

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		116
Total:		116

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-1846 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Sandra Stargardt-Licis	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2006 FAX Number:

PERFORMANCE WORK STATEMENT
Communications Support for Office of Water Programs
Work Assignment No. 1-7

I. ADMINISTRATIVE (PWS Area 3.3)

A. Title: Communications Support for Office of Wastewater Management Programs

B. Period of Performance: Date of issuance to February 14, 2016

C. Work Assignment Contracting Officer's Representative (WACOR):

Robin Danesi
US EPA, Office of Water
1200 Pennsylvania Ave Washington, DC 20460
(202) 564-1846
Danesi.robin@epa.gov

D. Quality Assurance:

This work assignment does not involve the collection of environmental measurement; therefore, a supplemental programmatic quality assurance project plan (PQAPP) is not required.

II. OBJECTIVE

The objective of this work assignment (WA) is to support the communications efforts of the Office of Water (OW) programs for the period of performance. Support under this work assignment will assist OWM in communicating to internal and external stakeholders' information on our programs.

III. TASK DETAIL

The contractor shall perform the following tasks:

Task 0 - Work Plan, Budget Development and Management

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the clause Work Assignments (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.3 MONTHLY PROGRESS REPORT (EPAAR 1552.210-72) (JUN 1996).

The contractor shall meet with the WACOR either in person or via telephone periodically to

discuss work assignment planning issues. The contractor shall meet with the WACOR on specific topics when necessary as directed by the WACOR, not to exceed six (6) hours of meetings for this period of performance.

Task 1— Development of Materials for Office of Water Programs

As requested by EPA, ERG will develop traditional print and non-traditional materials for EPA water programs. For the purpose of this cost estimate, ERG will assume development of up to three infographics and one email newsletter template. For the purposes of this cost estimate, we will assume three WACOR reviews and ensure products meet EPA and, if applicable, Government Printing Office specifications.

IV. DELIVERABLES

Unless specified above, due dates for deliverables are outlined in the chart below. The deliverables of these tasks are highly dependent on the progress and coordination of work with the EPA WACOR.

Documents prepared under this contract shall be provided in electronic format, compatible with the MS Office 2013 Suite. All documents shall be provided first as drafts. EPA may provide comments for the contractor to incorporate into the final documents. The final document format will be agreed upon by the EPA WACOR and the contractor in advance. The contractor shall also provide electronic copies of any data files developed in the course of this work assignment.

All deliverable revisions will be due back to the EPA WAM no later than 15 days after the contractor receives EPA feedback unless otherwise specified by the WACOR. If EPA chooses not to provide comments, the draft document will be accepted as final, and the contractor will be notified that no revisions are required.

Deliverable Schedule:

Task	Subtask	Deliverable	Due Date
0		Workplan	Fifteen (15) calendar days after the contractor receives the work assignment.
1		One (1) introductory kick-off phone call with EPA staff to discuss project aims and logistics	TBD (Within 1 week of start of work assignment)
1		Development of three inforgraphics.	TBD
1		Development of one newsletter template	TBD

V. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, §1194.21 Software applications and operating systems and §1194.22 Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2003 or higher)
- Preferred presentation format: Power Point, Office 2003 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel.

No travel is expected for this work assignment.

C. Release of Data and Information.

All information collected and developed under this Agreement is the property of the U.S. EPA and shall not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

D. Conference/Meeting Guidelines and Limitations:

All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR. Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

E. Contractor identification

Contractor personnel shall always identify themselves as Contractor employees by name and organization and physically display that information through an identification badge. Contractor personnel are prohibited from acting as the Agency's official representative.

The Contractor shall refer any questions relating to the interpretation of EPA policy, guidance, or regulation to the Work Assignment Contracting Officer Representative.

F. Technical Direction

The Contract level COR or an authorized individual is permitted to provide technical direction. Technical direction must be within the statement of work of the contract and includes: (1) Direction to the contractor

which assists the contractor in accomplishing the Statement of Work, (2) Comments on and approval of reports or other deliverables. Technical direction will be issued in writing or confirmed in writing within five (5) calendar days after verbal issuance. One copy of the technical direction memorandum will be forwarded to the Contracting Officer and the Contract Level Contracting Officer Representative.

G. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

VII. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

VIII. RELEASE OF DATA AND INFORMATION

All information collected and developed under this Agreement is the property of the U.S. EPA and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.

EPA

United States Environmental Protection Agency
Washington, DC 20460

Work Assignment

Work Assignment Number: 1-08

☐ Other ☐ Amendment Number:

Contract Number	Contract Period	Title of Work Assignment/SF Site Name
EP-C-14-014	07/18/2014 To 02/13/2016 Base Option Period Number 1	NPDES Application

Contractor: EASTERN RESEARCH GROUP, INC.

Specify Section and paragraph of Contract SOW: 3.4

Purpose:
- [X] Work Assignment
- [ ] Work Assignment Amendment
- [ ] Work Plan Approval
- [ ] Work Assignment Close-Out
- [ ] Incremental Funding

Period of Performance: From 11/18/2015 To 02/13/2016

Comments:
NPDES Application form and Program Updates

☐ Superfund — Accounting and Appropriations Data — [X] Non-Superfund

Note: To report additional accounting and appropriations date use EPA Form 1900-69A.

SFO (*Max 2*) ☐

Line	DCN (Max 6)	Budget/FY (Max 4)	Appropriation Code (Max 6)	Budget Org/Code (Max 7)	Program Element (Max 9)	Object Class (Max 4)	Amount (Dollars)	(Cents)	Site/Project (Max 8)	Cost Org/Code (Max 7)
1										
2										
3										
4										
5										

Authorized Work Assignment Ceiling

	Cost/Fee:	LOE:
Contract Period: 07/18/2014 To 02/13/2016		0
This Action:		655
Total:		655

Work Plan / Cost Estimate Approvals

	Cost/Fee:	LOE:
Contractor WP Dated:		
Cumulative Approved:		

Work Assignment Manager Name David Hair	(Signature)	(Date)	Branch/Mail Code: Phone Number 202-564-2287 FAX Number:
Project Officer Name Robin Danesi	(Signature)	(Date)	Branch/Mail Code: Phone Number: 202-564-1846 FAX Number:
Other Agency Official Name Kathleen Rechenberg	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2853 FAX Number:
Contracting Official Name Tammy Adams	(Signature)	(Date)	Branch/Mail Code: Phone Number: 513-487-2030 FAX Number: 513-487-2545

PERFORMANCE WORK STATEMENT
CONTRACT EP-C-14-014
WORK ASSIGNMENT # 1-8

1. ADMINISTRATIVE (PWS Area 3.4)

A. TITLE: UPDATE OF NPDES PERMIT APPLICATION FORMS AND PROGRAM

B. ESTIMATED PERIOD OF PERFORMANCE:

From Issuance through February 13, 2016

C. EPA WORK ASSIGNMENT

Work Assignment Contracting Officer Representative (WACOR):

David Hair Phone: (202) 564-2287 Fax (202) 564-6392 Hair.David@epa.gov	**USPS Mailing Address** Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	**Courier Address** EPA East Building 1201 Constitution Ave., NW Room 7126A Washington, DC 20004

Alternate Work Assignment Contracting Officer Representative (Alt WACOR):

Sharmin Syed Phone: (202) 564-3052 Fax (202) 564-6392	**USPS Mailing Address** Water Permits Division 1200 Pennsylvania Ave., NW Mail Code 4203M Washington, DC 20460	**Courier Address** EPA East Building 1201 Constitution Ave., NW Room 7135F Washington, DC 20004

D. Level of Effort

EPA estimates 655 hours will be required to support the activities outlined below.

E. Background/Objective

The proposed Clean Water Act's (CWA) National Pollution Discharge Elimination System (NPDES) Permit Applications and Program Updates rule seeks be in compliance with the data and information requirements in the EPA's newly promulgated Electronic Reporting rule (September 2015). This action will ensure that waste water utilities as well as other sources of wastewater will be in compliance with these new data requirements when they issue permits that restrict pollutants into water used by a variety of WaterSense products such as high-efficiency toilets and other water conservation devices. Under the NPDES program, the EPA has developed eight individual permit application forms. The different individual permit application forms correspond to the different categories of dischargers, including

waste water utilities, subject to permitting. Commenters will have the opportunity to comment on 15 provisions in the proposed rulemaking to enhance the NPDES program and one additional area where the rulemaking is simply taking comment. In summary, the NPDES Permit Applications and Program Updates rule will eliminate NPDES application and program inconsistencies, improve permit documentation, transparency and oversight and delete outdated provisions.

II. TASK DETAIL:

The contractor shall perform the following tasks:

Task 0 - Work Assignment Management

The contractor shall prepare a detailed work plan and budget for the accomplishment of the indicated tasks in accordance with the Work Assignment clause (EPAAR 1552.211-74). The work plan shall include a description of: (a) proposed staff; (b) an estimate of hours to be spent on each task by each staff person (prime and subcontractors); and (c) a list of deliverables, with due dates and schedule for deliverables. This task also includes monthly progress and financial reports which shall conform to the requirements particularized to the clause, F.2 REPORTS OF WORK (EPAAR 1552.211-70). The PQAPP submitted for WA B-01 and B-05 is applicable and acceptable for this work assignment.

The contractor shall meet with the WACOR and/or the Alternate WACOR either in person or via telephone approximately two (2) hours per month to discuss work assignment issues. The contractor shall provide a status update for tasks via email before each meeting and an update of expenditures. The contractor shall meet with the WACOR on specific issues more frequently as directed by the WACOR for approximately three (3) meetings per month.

Task 1: Updating the NPDES application forms to be in compliance with the new Electronic Reporting rule promulgated on September 24, 2015

A. *Revise all existing individual NPDES application forms to ensure that they are consistent with the Agency's NPDES Electronic Reporting rule*

1. Based on the draft of the revised forms previously developed by the contractor, the contractor will update information and data requirements in draft and final application forms and instructions to incorporate revisions to remove and correct the inconsistencies between the individual application forms, instructions, and the permit regulations. This effort will assist water utilities and other facilities in management and handling of program implementation data. The contractor will incorporate the minor changes (outlined below):

1. Multiple Forms: Basic Permit and Facility Data

a. _"Facility Name"

i. On all forms where this exists, make this "Facility Site Name"

b. "Email Address (if available)"

i. Remove "if available" from this data field title on all forms where this exists and in the regs, and add to the instructions that if an email address (or phone number) is not available to enter "N/A"

2. **Form 2A: Pretreatment**

a. NSCIU should be changed to CIU on Form 2A (Table F and Section 4 and any instruction text)

3. **Form 2B: CAFOs**

a. Manure, Litter, and/or Wastewater Production and use

i. Use a chart or other format to allow separate numbers for each type of waste (mature, litter, and wastewater) wherever amounts of these waste types are requested on form 2B

b. Fix typo in 1.2 on form 2B – both choices say "Existing Facility"

4. **Construction Stormwater, MS4s, and Cooling Water Intake Structures/Thermal Variances**

a. Note - there are no specific application forms for these program areas.

b. Update Form 1 to include references to the regulatory text outlining the requirement for submission in addition to the requirements on Form 1 for all applicants other than POTWs and TWTDS.

5. **Other Possible Form Changes**

a. Form 2S: Sludge

i. No suggested form changes at this time, although the form does not match Appendix A and edits may be needed.

ii. Form 2S may be missing the instructions for each section (1.1, 1.2, etc), which was included in front of other forms

b. Other unanticipated changes, all expected to be fairly minor

2. Upon written technical direction from the EPA WACOR the contractor shall develop reorganized draft forms to address issues identified in A(1) and eliminate the inconsistent look and feel of the various forms. The result of this effort will be an application form "package" that includes all current and new forms and instructs the applicant on how to select and use the appropriate forms.

Deliverables:

- Revise forms and instructions to address Item A(1-5) within four (4) weeks of technical direction from EPA WACOR

- Final draft of forms and instructions to incorporate all changes approved by EPA WACOR within four (4) weeks of receipt of technical direction from EPA WACOR.

Task 2: Supporting the assessment of comments on the proposed Permit Applications and Program Updates rule

A. *Support EPA in developing materials to support NPDES regulatory revisions associated with the application forms and other program changes*

1. The contractor shall also support EPA by assembling and cataloguing comments made during the comment period for EPA response. Where possible, the contractor shall modify and use a previously developed comment Access data base application. For planning purposes, the contractor should assume that we will receive approximately five hundred to two thousand (500 – 2,000) comments on the rulemaking and use the database to catalogue the comments.

Deliverables:

- The contractor shall also assemble and catalogue comments made during the comment period for EPA response.
- A final version of the catalogued comments will be provided to EPA within one (1) week of the close of the comment period.

III. MISCELLANEOUS

A. Software Applications and Accessibility.

Word processing files delivered to the Government shall be Microsoft Word, 8.0 or higher. All software and electronic information technology shall conform to the requirements relating to accessibility as detailed to the 1998 amendments to the Rehabilitation Act, particularly, but not limited to, § 1194.21 Software applications and operating systems and § 1194.22 Files that are available on the website will be delivered to the contractor. Web-based intranet and internet information and applications. See: http://www.section508.gov.

- Preferred text format: MS Word, 8.0 or higher (MS Office 2007 or higher)
- Preferred presentation format: Power Point, Office 2007 or higher
- Preferred graphics format: Each graphic is an individual GIF file
- Preferred portable format: Adobe Acrobat, Version 6.0

B. Travel.

Local travel is expected for this work assignment for contractors to attend workgroup meetings at EPA. Any travel chargeable to this work assignment shall be allowable only in accordance with the limitation of FAR 31.205-43 and FAR 31.205-46, and must be approved by the EPA Contracting Officer Representative (COR) prior to travel taking place.

C. Conference/Meeting Guidelines and Limitations:
All appropriate clearances and approvals required by Agency policy in support of any and all conference related activities and expenses, including support of meetings, conferences, training events, award ceremonies and receptions, including the form 5170 for all meetings costing more than $20,000, shall be obtained by the EPA Contract Level COR as needed and provided to the Contracting Officer (CO). Work under conference related activities and expenses shall not occur until this approval is obtained and provided by the EPA Contract Level COR.
Conference expenses are all direct and indirect costs paid by the government and include any associated authorized travel and per diem expenses, room charges for official business, audiovisual use, light refreshments, registration fees, ground transportation and other expenses as defined by the Federal Travel Regulations. All outlays for conference preparation should be included, but the federal employee time for conference preparation should not be included. After notifying EPA of the potential to reach this threshold, the Contractor shall not proceed with the task(s) until authorized to do so by the Contracting Officer.

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F. Management Controls

All printing shall be in accordance with clause H.2 (Printing) of the contract.

G. Reporting Requirements

Reports shall be submitted in accordance with the reporting requirements of the contract. In addition, the contractor shall maintain telephone contact with the EPA WACOR to advise of progress and problems as needed. All documents shall be delivered in Microsoft software applications in accordance with III. A.

The contractor shall be prepared to submit for inspection copies of all work in progress any time as directed by the WACOR. Wherever practicable, all written materials submitted to EPA must be doubled-sided and on recycled paper. All computer disks submitted to the EPA WACOR shall be scanned for, and identified as free from viruses.

The contractor shall submit drafts and final products in electronic and/or hard copy as well as on the appropriate size disk in a format compatible with Office of Wastewater Management hardware.

VII. QUALITY ASSURANCE SURVEILLANCE PLAN

All tasks are to be completed on or ahead of schedule unless EPA and the contractor mutually agree to a schedule change.

The contract level QASP applies to this work assignment.

VIII. RELEASE OF DATA AND INFORMATION

All information collected and developed under this Agreement is the property of the U.S. EPA and may not be released to the public or used for other work or projects, including EPA or other federal work, without written authorization of the CO.