

<https://sam.gov/workspace/contract/opp/a6c730d24324476f881e02e736db3378/view>

Federal employee benefits training

Active

Opportunity

Notice ID

52000PR260025544

Related Notice

(blank)

Contract Opportunity Type

Combined Synopsis/Solicitation

Contract Line Item Number

(blank)

Inactive Dates

Jul 13, 2026

Inactive Policy

15 days after date offers due

Date Offers Due

Jun 28, 2026 8:00 PM EDT

Published Date

Jun 17, 2026 10:55 AM EDT

Department/Ind. Agency

HOMELAND SECURITY, DEPARTMENT OF

Sub-tier

US COAST GUARD

Office

SFLC PROCUREMENT BRANCH 3(00040)

Classification

Original Set Aside

Partial Small Business Set-Aside (FAR 19.5)

Product Service Code

U008 - EDUCATION/TRAINING- TRAINING/CURRICULUM DEVELOPMENT

NAICS Code

611430 - Professional and Management Development Training

Place of Performance

(blank)

Initiative

- **None**

Description

**Professional Employee Benefits &
Financial Literacy Training**

U.S. Coast Guard, Surface Forces Logistics Center (SFLC)

Solicitation Number:

52000PR260025544 (Request For Quote – RFQ)

Agency:

U.S. Coast Guard, Surface Forces Logistics Center (SFLC)

Contract Type:

Firm Fixed Price Purchase Order

Period of Performance:

Calendar Year 2026

1. Combined Synopsis/Solicitation

This is a combined synopsis/solicitation for commercial services, prepared in accordance with the format in subpart 12.6 of the FAR and as supplemented with additional information included in this notice. This announcement constitutes the only solicitation; quotes are being requested and a separate written solicitation will not be issued.

This solicitation document and incorporated provisions and clauses are those in effect through Federal Acquisition Circular 2005-87, effective, 7 March 2016. It is anticipated that a competitive price purchase order shall be awarded as a result of this synopsis/solicitation. All responsible sources may submit a quotation, which if timely received, shall be considered by this agency.

- **Agency:** U.S. Coast Guard, Surface Forces Logistics Center (SFLC)
- **Contract Type:** Firm Fixed Price Purchase Order

- **Set-Aside Information:** Small Business
- **Evaluation Criteria:** Quotes will be evaluated based on the following factors:
- **Technical Capability:** The offeror's ability to perform the services described in the Performance Work Statement.
- **Past Performance:** The offeror's record of relevant and recent past performance.
- **Price:** Fair and reasonable pricing, (LPTA)
- **Point of Contact for Questions:** For any questions regarding this solicitation, please contact:
- **Contracting Officer:** Joshua.C.Richardson2@uscg.mil
- **Email:** Joshua.C.Richardson2@uscg.mil
- Technical Expert: Stacey Glover
- Email: Stacey.L.Glover@uscg.mil
- **Submission of Quotes:** Quotes must be submitted via email to Joshua.C.Richardson2@uscg.mil **The subject line of the email should include the solicitation number: 52000PR260025544.**

2. Performance Work Statement (PWS) / Statement of Work (SOW)

2.1 Project Overview & Objective

This Statement of Work (SOW) outlines the requirements for professional employee benefits and financial literacy training for the U.S. Coast Guard, SFLC. The objective is to provide comprehensive, in-person briefings to federal employees to enhance their understanding of their benefits and support financial literacy, as required by the Office of Personnel Management (OPM).

2.2 Scope of Work

The Contractor shall provide all personnel, equipment, supplies, transportation, tools, materials, supervision, and other items and non-personal services necessary to perform professional employee benefits and financial literacy training as defined in this SOW.

The Contractor shall deliver training sessions at three (3) distinct locations to be specified by the Government. The scope for each location includes:

- **Full-Day "Federal Retirement Benefits" Briefing:** An in-person session from 08:00 AM to 04:00 PM covering Federal Employees Retirement Benefits to include TSP, VCP, FEGLI, FEHB (Medicare) and DISABILITY INSURANCE.
- **CSRS Training:** Covering the Civil Service Retirement System.
- **Half-Day "Financial Literacy" Briefing:** An in-person session from 08:00 AM to 12:30 PM, to include basic budgeting, Risk Management, Investing, Retirement Estate Planning, etc.

Each briefing should have no more than 50 participants.

2.3 Deliverable Schedule

The Contractor shall provide the following deliverables to the Contracting Officer's Representative (COR) in accordance with the schedule below. All documents shall be submitted in electronic format (e.g., PDF, standard Microsoft Office formats).

Deliverable Name

Description

Due Date

Draft Training Materials

Slide decks, handouts, and syllabus for Government review.

15 calendar days prior to the first scheduled training session.

Final Training Materials

Finalized materials incorporating Government feedback.

5 calendar days prior to the first scheduled training session.

2.4 Place of Performance

Services shall be performed at the following Government-provided locations:

- Location 1: Baltimore
- Location 2: Norfolk
- Location 3: Alameda

2.5 Period of Performance

The period of performance shall be within the Calendar Year 2026. Specific dates are to be determined after award. Work shall be performed between the core hours of 0800 and 1700, Monday through Friday, excluding federal holidays, unless otherwise specified for specific training sessions.

2.6 Key Personnel (Instructor Qualifications)

The Contractor shall provide highly qualified personnel to execute the requirements of this SOW. The Lead Instructor is designated as Key Personnel. The Government reserves the right to review the resumes of proposed Key Personnel. The Lead Instructor must meet the following minimum qualifications:

- A minimum of five years of demonstrated experience presenting and training on the Federal Employees Retirement System (FERS), Civil Service Retirement System (CSRS), and the Thrift Savings Plan (TSP).
- Possess a recognized financial planning credential or equivalent professional certification.

2.7 Quality Assurance and Acceptable Quality Levels (AQL)

The Government will evaluate the Contractor's performance under this contract in accordance with the Quality Assurance Surveillance Plan (QASP). The Contractor shall maintain a standard of excellence for all training sessions.

Performance Objective

Performance Standard (AQL)

Method of Surveillance

Training Delivery

90% of attendee evaluations rate the training as “Satisfactory” or higher.

Review of post-training participant evaluation forms.

Material Accuracy

Training materials contain zero regulatory or factual errors regarding federal benefits.

Government review of deliverables.

2.8 Security and Clearance Requirements

This contract requires access to federal facilities and interaction with federal personnel. All Contractor personnel performing under this SOW must be U.S. Citizens and have a proper government ID.

- **Handling of Controlled Unclassified Information (CUI):** While delivering training, the Contractor may be exposed to or handle CUI or standard business data. The Contractor shall safeguard all government data in accordance with DoD and federal regulations. The Contractor shall not retain, reproduce, or disseminate any federal employee rosters or identifying information outside the scope of this contract.

2.9 Client Responsibilities

The Government will be responsible for:

- Coordinating and securing the training venues.
- Providing a meeting room with a projector, microphone, and whiteboard/flipchart.
- Managing participant communication and registration.
- Providing the Contractor with a final participant headcount at least two weeks prior to the session date.
- Arranging for instructor access to the training facilities (e.g., base access pass).

3. Invoicing

Invoicing in IPP: It is now a requirement that all invoicing for Purchase Orders will now be entered and processed through <https://www.ipp.gov>.

4. FAR Clauses

This order is subject to but is not limited to the following Federal Acquisition Regulations:

- 52.204-24 Representation Regarding Certain Telecommunications and Video Surveillance Services or Equipment.
- 52.204-26 Covered Telecommunications Equipment or Services–Representation.

- 52.212-1 Instructions to Offerors—Commercial Products and Commercial Services.
- 52.212-3 Offeror Representations and Certifications—Commercial Products and Commercial Services.
- 52.212-4 Contract Terms and Conditions—Commercial Products and Commercial Services.
- 52.212-5 Contract Terms and Conditions Required To Implement Statutes or Executive Orders—Commercial Products and Commercial Services.
- 52.204-23 Prohibition on Contracting for Hardware, Software, and Services Developed or Provided by Kaspersky Lab Covered Entities.
- 52.204-25 Prohibition on Contracting for Certain Telecommunications and Video Surveillance Services or Equipment.

4.1 Service-Specific Clauses

- 52.222-41 Service Contract Labor Standards (formerly Service Contract Act). (Required for service contracts over \$2,500).
- 52.222-42 Statement of Equivalent Rates for Federal Hires.
- 52.222-43 Fair Labor Standards Act and Service Contract Labor Standards—Price Adjustment (Multiple Year and Option Contracts).
- 52.223-72 Protection of Government Buildings, Equipment, and Vegetation.

4.2 Small Business Specific Clauses

- FAR 52.219-6: Notice of Total Small Business Set-Aside
- FAR 52.219-8: Utilization of Small Business Concerns
- FAR 52.219-9: Small Business Subcontracting Plan (required for contracts > \$750,000, or \$1.5M for construction)
- FAR 52.219-14: Limitations on Subcontracting
- FAR 52.219-28: Post-Award Small Business Program Rerepresentation
- FAR 52.204-10: Reporting Executive Compensation and First-Tier Subcontract Awards
- FAR 52.222-35/36/37: Equal Opportunity and related clauses

Contact Information

Primary Point of Contact

Joshua Richardson

Email

joshua.c.richardson2@uscg.mil

Phone Number

(blank)

Alternative Point of Contact

(blank)

Email

(blank)

Phone Number

(blank)

Contracting Office Address

2401 HAWKINS PT RD. BLDG 31 MS 26

(No Street Address 2)

BALTIMORE, MD 21226 USA

Attachments/Links

Links

No links have been added to this opportunity.

Attachments

Download AllRequest Access

Document	File Size	Access
statement of work.docx	30.62 KB	Public