



November 30, 2012

Attn: Vanessa del Toro  
Office of Financial Education  
Consumer Financial Protection Bureau  
1700 G Street, NW, Washington, DC 20552

Re: Solicitation CFP-Q-13-00004 Translation Services

Dear Ms. del Toro:

CETRA Language Solutions, a small business and an international leader in the language services industry, is pleased to submit a proposal to provide translations for CFPB under Solicitation CFP-Q-13-00004. CETRA will be able to offer a comprehensive solution to CFPB to deliver on-time, accurate translations of the documents by using expert project management, a technical human translation team with years of experience working with financial agencies, and an extensive Quality Assurance procedure.

The structure of this quote is as follows:

- Section 1: Key Personnel Technical Experience, Experience, and Past Performance
- Section 2: Quality Control and Assurance Process narrative
- Section 3: Cost Summary/Pricing
- Appendix A: Linguist Team Resumes
- Appendix B: Sample Spanish Translations
- Appendix C: SF1449
- Appendix D: SF30
- Appendix E: Certs and Reqs/ORCA data

The Contractor Point of Contact (POC) for this effort is:

Thaddeus Thaler, Director of Federal Services (202)507-1044, [thaddeus.thaler@cetrafed.com](mailto:thaddeus.thaler@cetrafed.com)

CETRA hereby confirms that all of its annual representations and certifications are current in ORCA and CCR (SAM).

CETRA can be identified by the following:

- NAICS code: 541930
- DUNS #: 019797711
- FSC Code: R608
- CAGE code: 1QRC2
- TIN: 23-2888647

Sincerely,

Thaddeus Thaler  
Director of Federal Services  
713 Pendleton Street  
Alexandria, VA 22314-1820

**Section 1: Experience and Key Personnel Technical Experience**

**Experience**

Document Translation

CETRA works in over 100 languages, accessing its global network of more than 5,000 professional linguists to assign each project to the native-speaking specialists with the appropriate experience and technical qualifications for the work. A single project manager in the CETRA office oversees all applicable processes, including consultation, editing, quality assurance procedures, glossary development and final output in the required media format. This enables on-time delivery of a quality multilingual solution that is accurate, clear, and culturally and politically sensitive to the target audience. For its 15 years in business, CETRA has been dedicated to providing its clients with peace of mind.

Through our commercial work, CETRA has translated documents for financial institutions and also through third party market research companies specializing in financial research. CETRA is the current provider to Fund Assist, an Irish-based company that supports 50 fund promoters with global support, including oversight of local regulatory for more than 40 countries in Europe, Asia, the Middle East and the Americas. Additionally, CETRA is the preferred provider for exëvo, an Indian-based research company that supports premier financial institutions worldwide. CETRA has translated into Tagalog, Korean, Mandarin, Spanish, French, Thai, Japanese, German, Italian, Portuguese, and more on subjects ranging from retail banks, customer service, IT infrastructures at global banks, wealth management and brokerage, investment banking, asset management, life insurance, and more.

(b)(4)

History and Leadership

CETRA was incorporated in 1997 under the name Central European Translations, Inc. At first it specialized in Central and East European languages and its clients were other translation agencies, but as it grew, the company broadened its focus to include corporate clients and mainstream languages. In 2001, it gained the status of preferred provider to the U.S. Federal Government and began participating in high-profile projects such as the transcription and translation of Saddam Hussein's trials. To reflect the new scope of services extending beyond the area of Central Europe, the company changed its legal name in 2002 to CETRA, Inc. From 2008-2012 CETRA was included in the Inc. 5000 list of fastest-growing companies in the United States. CETRA was included in a list of the US Chamber of Commerce's "Blue Ribbon" companies from 2009-2011, and in 2012 was named a Regional Finalist.

Dr. Jiri Stejskal, President of CETRA, earned M.A. and Ph.D. degrees in Slavic Linguistics at the University of Pennsylvania and an Executive MBA degree at Temple University. He has more than 20 years of experience as a translator, and has also taught courses in Czech and Russian as a part-time lecturer at the University of Pennsylvania. He served as Treasurer of the American Translators Association (ATA) from 2001 to 2005, as President-Elect from 2005 to 2007, and as President from 2007 to 2009. In 2008, he was elected Vice President of International Federation of Translators (FIT) and re-elected in 2011.

Past Performance Experience

(b)(4)

**Section 3: Cost Summary/Pricing**

## Base Year

Language	Estimated Number of Documents (per year)	Estimated Number of Words per Document	Estimated Number of Words (per year)	Estimated Price per Word translated	Total Estimated Price
English to Spanish	140	250	35000	(b)(4)	
English to Mandarin (simple)	40	250	10000		
English to French	30	250	7500		
English to Haitian Creole	10	250	2500		
English to Tagalog	10	250	2500		
English to Vietnamese	10	250	2500		
English to Korean	10	250	2500		
Spanish to English	90	250	22500		
Mandarin (simple) to English	10	250	2500		
French to English	5	250	1250		
Haitian Creole to English	5	250	1250		
Tagalog to English	5	250	1250		
Vietnamese to English	5	250	1250		
Korean to English	5	250	1250		
Totals	375				

## Option Year 1

Language	Estimated Number of Documents (per year)	Estimated Number of Words per Document	Estimated Number of Words (per year)	Estimated Price per Word translated	Total Estimated Price
English to Spanish	140	250	35000	(b)(4)	
English to Mandarin (simple)	40	250	10000		
English to French	30	250	7500		
English to Haitian Creole	10	250	2500		
English to Tagalog	10	250	2500		
English to Vietnamese	10	250	2500		
English to Korean	10	250	2500		
Spanish to English	90	250	22500		
Mandarin (simple) to English	10	250	2500		
French to English	5	250	1250		
Haitian Creole to English	5	250	1250		
Tagalog to English	5	250	1250		
Vietnamese to English	5	250	1250		
Korean to English	5	250	1250		
Total	375				

## Option Year 2

Language	Estimated Number of Documents (per year)	Estimated Number of Words per Document	Estimated Number of Words (per year)	Estimated Price per Word translated	Total Estimated Price
English to Spanish	140	250	35000	(b)(4)	
English to Mandarin (simple)	40	250	10000		
English to French	30	250	7500		
English to Haitian Creole	10	250	2500		
English to Tagalog	10	250	2500		
English to Vietnamese	10	250	2500		
English to Korean	10	250	2500		

Spanish to English	90	250	22500
Mandarin (simple) to English	10	250	2500
French to English	5	250	1250
Haitian Creole to English	5	250	1250
Tagalog to English	5	250	1250
Vietnamese to English	5	250	1250
Korean to English	5	250	1250
Total	375		

(b)(4)

## Option Year 3

Language	Estimated Number of Documents (per year)	Estimated Number of Words per Document	Estimated Number of Words (per year)	Estimated Price per Word translated	Total Estimated Price
English to Spanish	140	250	35000	(b)(4)	
English to Mandarin (simple)	40	250	10000		
English to French	30	250	7500		
English to Haitian Creole	10	250	2500		
English to Tagalog	10	250	2500		
English to Vietnamese	10	250	2500		
English to Korean	10	250	2500		
Spanish to English	90	250	22500		
Mandarin (simple) to English	10	250	2500		
French to English	5	250	1250		
Haitian Creole to English	5	250	1250		
Tagalog to English	5	250	1250		
Vietnamese to English	5	250	1250		
Korean to English	5	250	1250		
Total	375				

## Option Year 4

Language	Estimated Number of Documents (per year)	Estimated Number of Words per Document	Estimated Number of Words (per year)	Estimated Price per Word translated	Total Estimated Price
English to Spanish	140	250	35000	(b)(4)	
English to Mandarin (simple)	40	250	10000		
English to French	30	250	7500		
English to Haitian Creole	10	250	2500		
English to Tagalog	10	250	2500		
English to Vietnamese	10	250	2500		
English to Korean	10	250	2500		
Spanish to English	90	250	22500		
Mandarin (simple) to English	10	250	2500		
French to English	5	250	1250		
Haitian Creole to English	5	250	1250		
Tagalog to English	5	250	1250		
Vietnamese to English	5	250	1250		
Korean to English	5	250	1250		
Total	375				

(b)(4)



Subtotal: \$54,882.50  
**Final Total \$54,882.50**

- Under my management, mortgage sales increased by 31% two years in a row, from \$0.8m. to \$1.25m. monthly, Branch of Consumers Mortgage Inc., Portsmouth, N.H.
- Obtained the best Budget evaluation of all offices in Central America and the Caribbean countries for 1997, Inter American Development Bank, Panama, 1997.
- Assisted in the creation and management of more than 100 projects for rural development and small businesses, financed by the World Bank and the Agency for International Development, (\$57.Dm), Panama National Bank, 1976-79.
- I have personally trained over 200 people in sales and telemarketing, 1989-1993.
- Nominated for two consecutive years to be included in the International Publication of "Who's Who In American Women," 1987 and 1989.
- I was a guest speaker to classes on Women's Studies; topic: Women in the Workplace, Univ. of New Hampshire, USA, 1983-86.
- Member/founder of the Educational Corp. of Up With People, 1969;
- Negotiated and obtained resources for the Educational Corporation of Up With People from Govt. officials and private companies all over the US and Europe, 1968-1969.

<b>WORK EXPERIENCE</b>
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- **Freelance Translator**, Since 1990. Marketing, Financial documents, Insurance policies/forms, web sites, accounting, investment material, human resources, and more.
- **Director/Advisor, 11/2000-Present**; Director of BECA, Inc. Monitor and oversee operations. Match Seafarers and hotel staff with merchant and cruise vessels.
- **General Manager, 9/98-8/99**; Privivienda, S.A. Responsible for the Bank's daily operations, market mortgage and business loans, savings accounts, monitor daily activities, oversee all departments, hire and evaluate employees, monthly reporting to the Board, and more.
- **President/Manager**, Professional Financial Advisors, Inc., 4/98-9/98 - Panama City; Provide Consulting Services to small businesses in the areas of planning, finances, operations, marketing, sales, personnel training in customer service, productivity studies, reengineering of systems, company start-up processes, financial advise, capital needs analysis, etc.
- **Administrative Officer**, Inter American Development Bank (IADB), Dec. 1996-Apr.1998; In charge of all personnel, facility administration and operational functions of the office in Panama, which included supervision/evaluation/training of all administrative personnel, in charge of procurement and logistics of events, of vehicles and custodian of assets, preparation/administration of the budget, administrative support to professionals, consultants, and staff from Washington, payroll administration, gathering of statistical data, support in negotiating and hiring of consultants, administration of all contracts, procurement, negotiation and payments to all suppliers, disbursements to consultants, administration/coordination of scholarships & courses with Government and Educational entities, planning and organization of seminars, special events, receptions, processing of duty free items, preparation of monthly administrative and budgetary reports to Washington, responsibility of facility management, all logistics, operations, and more.
- **Professor**: Latin University, Panama City (5/96) and Florida State University; one semester; Courses: Marketing Plan and Channels of Distribution for Products and Services.
- **General Manager**, Wong & Associates, Portsmouth, N.H., USA (Jan.92-Apr.96)  
Offered Financial Planning and Investment advice on fixed and variable Investments, on Mutual Funds, on purchase of Insurance products, in charge of Sales and marketing efforts, customer relations, negotiations, interaction with the press and talk shows on Financial Planning, organized and directed Financial Seminars, responsible for managing customers' funds, and more. Customers in 1996 = 527 with an invested portfolio of \$4.3 million.
- **Division Manager**, the Keith Wood Agency (Transport Life Ins. Co.), Portsmouth, N.H., USA (Aug. 89-Jan.92); Responsible for hiring, training, and supervision of agents in my division, commission payments, reporting data, training in telemarketing, customer relations training, software utilization training, personnel evaluations, etc. Sales levels: with 16 agents, my Division, out of a total of 2D2 divisions in the USA, was number 5<sup>th</sup>. two years in a row, with annual sales of \$4.6 million in premium.
- **Branch Manager**, Consumers Mortgage, Inc., Portsmouth, N.H., USA (Aug. 1985-June 1989); Responsible for investment of funds, for hiring, training, and evaluating mortgage brokers, supervision of loan processors, secretaries, negotiations and relations with clients, lawyers, contract administration, budget preparation and administration, administration of office facilities, contracting suppliers, maintaining relations with real estate brokers, property inspectors, lawyers, etc., responsible for marketing activities, telemarketing and others. Annual sales: \$15.D million/yr. With 5 loan officers, 3 processors and 2 secretaries.
- **Project Manager**, the Merrimack Valley Regional Transit Authority, Bradford, Ma.,USA (Jan. 1983-Aug. 1985); Complete responsibility for the organization, implementation, administration and final evaluation of the project, organization of

<b>SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS</b> <i>OFFEROR TO COMPLETE BLOCKS 12, 17, 23, 24, &amp; 30</i>				1. REQUISITION NUMBER		PAGE OF 1 44		
2. CONTRACT NO.		3. AWARD EFFECTIVE DATE	4. ORDER NUMBER		5. SOLICITATION NUMBER CFP-Q-13-00004		6. SOLICITATION ISSUE DATE 11/16/2012	
7. FOR SOLICITATION INFORMATION CALL:		a. NAME VANESSA DEL TORO			b. TELEPHONE NUMBER (No collect calls)		8. OFFER DUE DATE/LOCAL TIME 11/30/2012 1600 ET	
9. ISSUED BY CONSUMER FIN PROTECTION BUREAU OFFICE OF PROCUREMENT 1700 G STREET, NW WASHINGTON DC 20552			CODE CFP	10. THIS ACQUISITION IS <input checked="" type="checkbox"/> SMALL BUSINESS <input type="checkbox"/> HUBZONE SMALL BUSINESS <input type="checkbox"/> SERVICE-DISABLED VETERAN-OWNED SMALL BUSINESS <input type="checkbox"/> UNRESTRICTED OR <input checked="" type="checkbox"/> SET ASIDE: 100.00 % FOR WOMEN-OWNED SMALL BUSINESS (WOSB) ELIGIBLE UNDER THE WOMEN-OWNED SMALL BUSINESS PROGRAM <input type="checkbox"/> EDWOSB <input type="checkbox"/> 8(A) NAICS: 541930 SIZE STANDARD: \$7.0				
11. DELIVERY FOR FOB DESTINATION UNLESS BLOCK IS MARKED <input type="checkbox"/> SEE SCHEDULE		12. DISCOUNT TERMS		<input type="checkbox"/> 13a. THIS CONTRACT IS A RATED ORDER UNDER DPAS (15 CFR 700)		13b. RATING		
15. DELIVER TO		CODE	16. ADMINISTERED BY CONSUMER FINAN PROTECTION BUREA OFFICE OF PROCUREMENT 1700 G STREET, NW WASHINGTON DC 20552				CODE CFPB	
17a. CONTRACTOR/OFFEROR		CODE	FACILITY CODE	18a. PAYMENT WILL BE MADE BY				CODE
TELEPHONE NO.				<input type="checkbox"/> 17b. CHECK IF REMITTANCE IS DIFFERENT AND PUT SUCH ADDRESS IN OFFER				18b. SUBMIT INVOICES TO ADDRESS SHOWN IN BLOCK 18a UNLESS BLOCK BELOW IS CHECKED <input type="checkbox"/> SEE ADDENDUM
19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES			21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT	
	See Section One, Subsection 2.0 for Extended Pricing Tables							
0001	Base Year - English to Spanish Translation - PER WORD rate Period of Performance: 12/17/2012 to 12/16/2013				EA			
0002	Base Year - English to Mandarin Translation - PER WORD rate Period of Performance: 12/17/2012 to 12/16/2013 Continued ... <i>(Use Reverse and/or Attach Additional Sheets as Necessary)</i>				EA			
25. ACCOUNTING AND APPROPRIATION DATA						26. TOTAL AWARD AMOUNT (For Govt. Use Only)		
<input checked="" type="checkbox"/> 27a. SOLICITATION INCORPORATES BY REFERENCE FAR 52.212-1 52.212-4. FAR 52.212-3 AND 52.212-5 ARE ATTACHED. ADDENDA				<input checked="" type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED.				
<input type="checkbox"/> 27b. CONTRACT/PURCHASE ORDER INCORPORATES BY REFERENCE FAR 52.212-4. FAR 52.212-5 IS ATTACHED. ADDENDA				<input type="checkbox"/> ARE <input type="checkbox"/> ARE NOT ATTACHED.				
<input checked="" type="checkbox"/> 28. CONTRACTOR IS REQUIRED TO SIGN THIS DOCUMENT AND RETURN 1 COPIES TO ISSUING OFFICE. CONTRACTOR AGREES TO FURNISH AND DELIVER ALL ITEMS SET FORTH OR OTHERWISE IDENTIFIED ABOVE AND ON ANY ADDITIONAL SHEETS SUBJECT TO THE TERMS AND CONDITIONS SPECIFIED.				<input type="checkbox"/> 29. AWARD OF CONTRACT; REF. _____ OFFER DATED _____ YOUR OFFER ON SOLICITATION (BLOCK 5), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITEMS.				
30a. SIGNATURE OF OFFEROR/CONTRACTOR 				31a. UNITED STATES OF AMERICA (SIGNATURE OF CONTRACTING OFFICER)				
30b. NAME AND TITLE OF SIGNER (Type or print) Nicholas R. Olson Director of Federal Services			30c. DATE SIGNED 11/27/12	31b. NAME OF CONTRACTING OFFICER (Type or print) NICHOLAS R. OLSON		31c. DATE SIGNED		

1. CONTRACT ID CODE  
 2. AMENDMENT/MODIFICATION NO. 000001  
 3. EFFECTIVE DATE 11/28/2012  
 4. REQUISITION/PURCHASE REQ. NO.  
 5. PROJECT NO. (if applicable) 1 44  
 6. ISSUED BY CODE CFP  
 7. ADMINISTERED BY (if other than item 6) CODE CFPB

CONSUMER FIN PROTECTION BUREAU  
 OFFICE OF PROCUREMENT  
 1700 G STREET, NW  
 WASHINGTON DC 20552

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)  
 9A. AMENDMENT OF SOLICITATION NO. (X) CFP-C-13-00004  
 9B. DATED (SEE ITEM 11) X 11/16/2012  
 10A. MODIFICATION OF CONTRACT/ORDER NO.  
 10B. DATED (SEE ITEM 13)  
 CODE FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS  
 The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers  is extended.  is not extended.  
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 13, and returning 1 copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGEMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (if required)

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.  
 CHECK ONE:  
 A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.  
 B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14; PURSUANT TO THE AUTHORITY OF FAR 43.103(b).  
 C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:  
 D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor  is not  is required to sign this document and return \_\_\_\_\_ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)  
 This RFQ is amended to:  
 1. Answer vendor questions (see Attachment 3);  
 2. Correct the Extended Pricing Tables template estimated words per year;  
 3. Add optional Contract Line Item Numbers (CLINs) for rush fees and desktop publishing/graphics services related to translations; and  
 4. Make minor clarifications/corrections in the solicitation (marked in red tracking mode).

FOB: Destination  
 Period of Performance: 12/17/2012 to 12/16/2017

0071 Base Year - Desktop Publishing/Graphics Services HR  
 Continued ...

Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) *Nicholas Thaler*  
 Director of Federal Services  
 15B. CONTRACTOR OFFICER  
 15C. DATE SIGNED 11/29  
 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) NICHOLAS R. OLSON  
 16B. UNITED STATES OF AMERICA  
 16C. DATE SIGNED



“Subsidiary” means an entity in which more than 50 percent of the entity is owned—

- (1) Directly by a parent corporation; or
- (2) Through another subsidiary of a parent corporation.

“Veteran-owned small business concern” means a small business concern—

- (1) Not less than 51 percent of which is owned by one or more veterans(as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and
- (2) The management and daily business operations of which are controlled by one or more veterans.

“Women-owned business concern” means a concern which is at least 51 percent owned by one or more women; or in the case of any publicly owned business, at least 51 percent of the its stock is owned by one or more women; and whose management and daily business operations are controlled by one or more women.

“Women-owned small business concern” means a small business concern --

- (1) That is at least 51 percent owned by one or more women or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and
- (2) Whose management and daily business operations are controlled by one or more women.

“Women-owned small business (WOSB) concern eligible under the WOSB Program (in accordance with 13 CFR part 127),” means a small business concern that is at least 51 percent directly and unconditionally owned by, and the management and daily business operations of which are controlled by, one or more women who are citizens of the United States.

(b)

(1) *Annual Representations and Certifications.* Any changes provided by the offeror in paragraph (b)(2) of this provision do not automatically change the representations and certifications posted on the Online Representations and Certifications Application (ORCA) website.

(2) The offeror has completed the annual representations and certifications electronically via the ORCA website accessed through <https://www.acquisition.gov> . After reviewing the ORCA database information, the offeror verifies by submission of this offer that the representation and certifications currently posted electronically at FAR 52.212-3, Offeror Representations and Certifications— Commercial Items, have been entered or updated in the last 12 months, are current, accurate, complete, and applicable to this solicitation (including the business size standard applicable to the NAICS code referenced for this solicitation), as of the date of this offer and are incorporated in this offer by reference (see FAR 4.1201), except for paragraphs \_\_\_\_\_. *[Offeror to identify the applicable paragraphs at (c) through (o) of this provision that the offeror has completed for the purposes of this solicitation only, if any. These amended representation(s) and/or certification(s) are also incorporated in this offer and are current, accurate, and complete as of the date of this offer. Any changes provided by the offeror are applicable to this solicitation only, and do not result in an update to the representations and certifications posted electronically on ORCA.]*

(c) Offerors must complete the following representations when the resulting contract is to be performed in the

United States or its outlying areas. Check all that apply.

(1) Small business concern. The offeror represents as part of its offer that it  is,  is not a small business concern.

(2) Veteran-owned small business concern. The offeror represents as part of its offer that it  is,  is not a veteran-owned small business concern.

(3) Service-disabled veteran-owned small business concern. The offeror represents as part of its offer that it  is,  is not a service-disabled veteran-owned small business concern.

(4) Small disadvantaged business concern. The offeror represents, for general statistical purposes, that it  is,  is not, a small disadvantaged business concern as defined in 13 CFR 124.1002.

(5) Women-owned small business concern. The offeror represents that it  is,  is not a women-owned small business concern.

**Note:** Complete paragraphs (c)(8) and (c)(9) only if this solicitation is expected to exceed the simplified acquisition threshold.

(6) WOSB concern eligible under the WOSB Program. The offeror represents that—

(i) It  is,  is not a WOSB concern eligible under the WOSB Program, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and

(ii) It  is,  is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(6)(i) of this provision is accurate for each WOSB concern eligible under the WOSB Program participating in the joint venture. [The offeror shall enter the name or names of the WOSB concern eligible under the WOSB Program and other small businesses that are participating in the joint venture: \_\_\_\_\_.] Each WOSB concern eligible under the WOSB Program participating in the joint venture shall submit a separate signed copy of the WOSB representation.

(7) Economically disadvantaged women-owned small business (EDWOSB) concern. The offeror represents that—

(i) It  is,  is not an EDWOSB concern, has provided all the required documents to the WOSB Repository, and no change in circumstances or adverse decisions have been issued that affects its eligibility; and

(ii) It  is,  is not a joint venture that complies with the requirements of 13 CFR part 127, and the representation in paragraph (c)(7)(i) of this provision is accurate for each EDWOSB concern participating in the joint venture. [The offeror shall enter the name or

names of the EDWOSB concern and other small businesses that are participating in the joint venture: \_\_\_\_\_.] Each EDWOSB concern participating in the joint venture shall submit a separate signed copy of the EDWOSB representation.

...

(11) HUBZone small business concern. [Complete only if the offeror represented itself as a small business concern in paragraph (c)(1) of this provision.] The offeror represents, as part of its offer, that--

(i) It  is,  is not a HUBZone small business concern listed, on the date of this representation, on the List of Qualified HUBZone Small Business Concerns maintained by the Small Business Administration, and no material changes in ownership and control, principal office, or HUBZone employee percentage have occurred since it was certified in accordance with 13 CFR part 126; and

(ii) It  is,  is not a HUBZone joint venture that complies with the requirements of 13 CFR part 126, and the representation in paragraph (c)(11)(i) of this provision is accurate for each HUBZone small business concern participating in the HUBZone joint venture. [*The offeror shall enter the names of each of the HUBZone small business concerns participating in the HUBZone joint venture: \_\_\_\_\_.*] Each HUBZone small business concern participating in the HUBZone joint venture shall submit a separate signed copy of the HUBZone representation.

(d) Representations required to implement provisions of Executive Order 11246 --

(1) Previous contracts and compliance. The offeror represents that --

(i) It  has,  has not, participated in a previous contract or subcontract subject to the Equal Opportunity clause of this solicitation; and

(ii) It  has,  has not, filed all required compliance reports.

(2) *Affirmative Action Compliance.* The offeror represents that --

(i) It  has developed and has on file,  has not developed and does not have on file, at each establishment, affirmative action programs required by rules and regulations of the Secretary of Labor (41 CFR parts 60-1 and 60-2), or

(ii) It  has not previously had contracts subject to the written affirmative action programs requirement of the rules and regulations of the Secretary of Labor.

...

(k) Certificates regarding exemptions from the application of the Service Contract Act. (Certification by the offeror as to its compliance with respect to the contract also constitutes its certification as to compliance by its subcontractor if it subcontracts out the exempt services.)

(1)  Maintenance, calibration, or repair of certain equipment as described in FAR 22.1003-4(c)(1). The offeror  does  does not certify that—

(i) The items of equipment to be serviced under this contract are used regularly for other than Governmental purposes and are sold or traded by the offeror (or subcontractor in the case of an exempt subcontract) in substantial quantities to the general public in the course of normal business operations;

(ii) The services will be furnished at prices which are, or are based on, established catalog or market prices (see FAR 22.1003-4(c)(2)(ii)) for the maintenance, calibration, or repair of such equipment; and

(iii) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract will be the same as that used for these employees and equivalent employees servicing the same equipment of commercial customers.

(2)  Certain services as described in FAR 22.1003-4(d)(1). The offeror  does  does not certify that—

(i) The services under the contract are offered and sold regularly to non-Governmental customers, and are provided by the offeror (or subcontractor in the case of an exempt subcontract) to the general public in substantial quantities in the course of normal business operations;

(ii) The contract services will be furnished at prices that are, or are based on, established catalog or market prices (see FAR 22.1003-4(d)(2)(iii));

(iii) Each service employee who will perform the services under the contract will spend only a small portion of his or her time (a monthly average of less than 20 percent of the available hours on an annualized basis, or less than 20 percent of available hours during the contract period if the contract period is less than a month) servicing the Government contract; and

(iv) The compensation (wage and fringe benefits) plan for all service employees performing work under the contract is the same as that used for these employees and equivalent employees servicing commercial customers.

(3) If paragraph (k)(1) or (k)(2) of this clause applies—

(i) If the offeror does not certify to the conditions in paragraph (k)(1) or (k)(2) and the Contracting Officer did not attach a Service Contract Act wage determination to the solicitation, the offeror shall notify the Contracting Officer as soon as possible; and

(ii) The Contracting Officer may not make an award to the offeror if the offeror fails to

execute the certification in paragraph (k)(1) or (k)(2) of this clause or to contact the Contracting Officer as required in paragraph (k)(3)(i) of this clause.

(l) *Taxpayer identification number (TIN)* (26 U.S.C. 6109, 31 U.S.C. 7701). (Not applicable as the offeror is required to provide this information to a central contractor registration database to be eligible for award.)

(m) *Restricted business operations in Sudan*. By submission of its offer, the offeror certifies that the offeror does not conduct any restricted business operations in Sudan.

(n) *Prohibition on Contracting with Inverted Domestic Corporations*—

(1) *Relation to Internal Revenue Code*. An inverted domestic corporation as herein defined does not meet the definition of an inverted domestic corporation as defined by the Internal Revenue Code 25 U.S.C. 7874.

(2) *Representation*. By submission of its offer, the offeror represents that—

- (i) It is not an inverted domestic corporation; and
- (ii) It is not a subsidiary of an inverted domestic corporation.

(o) *Sanctioned activities relating to Iran*. (1) The offeror shall email questions concerning sensitive technology to the Department of State at [CISADA106@state.gov](mailto:CISADA106@state.gov).

(2) *Representation and Certification*. Unless a waiver is granted or an exception applies as provided in paragraph (o)(3) of this provision, by submission of its offer, the offeror—

- (i) Represents, to the best of its knowledge and belief, that the offeror does not export any sensitive technology to the government of Iran or any entities or individuals owned or controlled by, or acting on behalf or at the direction of, the government of Iran; and
- (ii) Certifies that the offeror, or any person owned or controlled by the offeror, does not engage in any activities for which sanctions may be imposed under section 5 of the Iran Sanctions Act.

(3) The representation and certification requirements of paragraph (o)(2) of this provision do not apply if—

- (i) This solicitation includes a trade agreements certification (e.g., 52.212-3(g) or a comparable agency provision); and
- (ii) The offeror has certified that all the offered products to be supplied are designated country end products. (End of Provision)

## Non-Price Evaluation Report for Solicitation CFP-13-Q-00004

### Technical Review Team

Cassandra McConnell, Office of Financial Education, Chair  
Dubis Correal, Office of Financial Education  
Rhonda Johnson, Office of Minority and Women Inclusion

### Findings

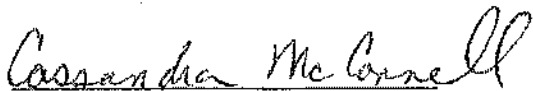
The technical review team finds that the following proposals (listed in alphabetical order) have the best technical approach:

- CETRA

(b)(4),(b)(5)

**Non-Price Evaluation Report for Solicitation CFP-13-Q-00004**

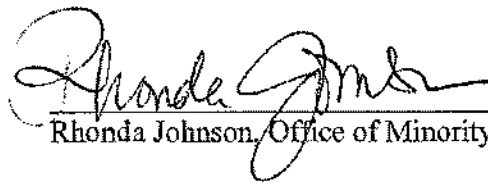
Evaluator Signature: By signing below the evaluator(s) confirms(s) the review of the proposal discussed herein without access to the price/cost portion



Cassandra McConnell, Deputy Assistant Director, Office of Financial Education



Dubis Correal, Strategic Partnership Coordinator, Office of Financial Education



Rhonda Johnson, Office of Minority and Women Inclusion