

APPENDIX B: REQUIRED REPORTS

B.1. Performance Report. The contractor shall provide a monthly performance report for all key metrics contained within the Service Delivery Summary (Para. 2.0) of the Performance Work Statement (PWS).

B.2. Volume Report. The Volume Report shall include the total number of shipments in the contractor's logistics pipeline by category (e.g., scheduled, in transit, in storage, delivered-no claim, claims in process, claim denied, etc.) along with hundred weight (CWT) of each. The contractor shall provide the ability to filter this report by all shipment data elements to include but not limited to origin and destination locations, branch of service, and on-time performance. The Volume Report shall include monthly shipment level detail for the cycle time of each component defined in the pre-move, physical move and post-move services.

B.3. Claims Report. The Claims Report shall include number of claims submitted, dollar amounts requested, number of claims, number of claims settled (wholly), and number of claims (in whole or in part) denied from customers and military claims offices (MCO); amount of MCO recovery actions placed on the contractor; amount claimed, offered, paid, and denied for each claim; total number of claims denied or denied in part, summary of reasons for denial (by line item); and total number of outstanding claims. The report shall also reflect claim response (within 60 days of submission by customer), final determination, and payment processing times.

B.4. Incident Report. The contractor shall immediately notify the Program Management Office within 24 hours of all unusual occurrences, including, but not limited to, fire (including water damage incident to a fire), flood, earthquake, tornado, hurricane, or any other similar type of occurrence, while in the care, custody or possession of contractor. In addition, the contractor shall submit a full written incident report detailing the particular facts to the Program Management Office, and customer no later than three (3) government business days after initial discovery. Also, the contractor shall submit a remediation plan which includes an initial assessment of loss and damage, steps taken for remediation, and a timeline for remediation completion to the Program Management Office, not later than seven (7) government business days after initial discovery. The contractor shall submit weekly status updates with determination of loss and damage, to include remediation efforts (with percent completed) of affected personal property, by name and Service, to the Program Management Office.

B.5. Quality Assurance Forecast Schedule Report. The contractor shall make available to the government NLT 0800 local installation time on a daily basis a report containing the schedule for all shipments for the next 30 days being packed, picked up, or delivery for the purposes of dispatch planning of Government quality assurance personnel. The report shall contain all dates and weights, and be filterable by installation, city, county, state, and country; and it must contain the address location of the origin or destination activities to be observed.

B.6. Storage-In-Transit (SIT) Delivery Report. The SIT delivery report shall include at a minimum the following details for all shipments going into and being delivered out of SIT on a monthly basis (including shipments in a converted status): Documented coordination with the

customer, First Available Delivery Date of shipment, Date shipment was placed into storage, Date the shipment was requested out of storage, Customer's requested delivery date, Date the shipment was delivered to the customer, and SIT conversion date if applicable. The report shall include other shipment details such as customer name, branch of service, and bill of lading number for tracking purposes.

B.7. Non-Temporary Storage Report. The contractor shall provide a monthly report on all shipments delivered to and picked up from a non-temporary storage (NTS) facility. The report shall include pickup date, date the shipment was requested out of storage, customer's requested delivery date, delivery date, shipment weight, origin, destination, and customer information.

B.8. Expired Storage Report/Converted Shipment Report. The Expired Storage Report shall be provided monthly and include the following information for shipments in storage 45 days or less to entitlement expiration and shipments remaining in storage beyond entitlement: customer order number, last name, service, number of days beyond entitlement, record of all notification attempts and response received, date the file was provided to the COR, and pertinent information regarding communications with customer. The Converted Shipment Report shall include total number of shipments converted from Government expense to member expense, listed by Branch of Service. This report shall include the weight of the shipment and storage amount due.

B.9. VISA, CRAF and U.S. Flag Compliance Report (Comprised of Ocean/Air Booking/Foreign Flag Waiver Reports). The contractor shall provide a quarterly "Data on Ocean/Air Shipments" report, and a similarly named annual report that summarizes international cargo shipments booked on commercial vessels/aircraft by the DoD. The report will consist of statistical data that includes the aggregate weight (or volume measure with a conversion formula to derive aggregate weight) of the cargo shipped and, if applicable, broken out by individual categories of cargo shipped solely on U.S.-flag vessels, on a combination of U.S.-flag and foreign flag vessels, or solely on foreign flag vessels. The annual report is due six months after the end of the reporting fiscal year. In addition to the summary information listed above, the "Data on Ocean/Air Shipments" reports shall also include more detailed information, as applicable, on carrier, vessel, aircraft, voyage/flight number, booking number, departure and arrival dates, port of embarkation, port of debarkation, whether U.S. flag vessel/aircraft is utilized, level of VISA preference used, and total number of unique service member shipments for each shipment. Foreign Flag Waiver Report (ocean shipments only) shall include total number of shipments on a foreign flag vessel each month IAW the PWS and shall include the following information: request date, RDD date, member's name, turn-in/pick-up date, origin, destination, Port of Embarkation (POE) / Port of Debarkation (POD), shipping instruction number, vessel priority, ocean carrier, measurement tons, ocean freight, average M/T per shipment, average cost per shipment, percent of traffic per month, and MARAD remarks.

B.10. Excess Cost Report. The Excess Cost Report shall include information for all customers that the contractor has identified as having the potential for excess cost by branch of service, the time of notification to the customer, the reason(s) the customer was identified as having the potential to incur excess costs across all shipments on a travel order, and the estimated dollar amount of excess cost. The contractor shall provide this information to the government on a

monthly basis. The contractor acknowledges that the provision of this information to the government does not constitute proper notification to individual customers on excess cost.

B.11. Weight Estimate Accuracy Report. The Weight Estimate Accuracy Report shall include a monthly summary of all actual shipment weights, categorized by whether or not they were within, below, or above the weight estimate threshold as specified in the PWS. The contractor shall identify the percentage of shipments that are either above or below the PWS thresholds including reweigh results where applicable. The contractor shall categorize and summarize the shipments that are outside of the PWS specification.

B.12. Customer Support Volume and Wait Time Report. The Customer Support Volume and Wait Time report shall contain daily call volumes as well as average, minimum, and maximum wait times on a daily basis for the previous calendar month. The report shall include the number of customer contact attempts that exceeded the maximum allowable wait time as defined in the PWS as a percentage of total contact attempts.

B.13. Transition Report: Transition reports shall be submitted to the Contracting Officer monthly commencing one month after award thru for the first six-months of transition, and twice a month for the final three months of transition. All transition reports shall detail the Contractor's progress towards accomplishing the tasks necessary to begin performance on the date specified in Appendix A, para A.1. Transition reports shall specifically address in detail progress in the following:

1. Contractor IT system and Government system interfaces
2. Contractor invoicing system and Government invoice system interfaces
3. Contractor's IT systems' ability to securely handle processing of required shipments NLT contract base period year one (1) start date
4. Channels - Channels the Contractor is ready to assume as outlined below in the phase-in plan
5. Storage services and facilities – Number of storage facilities and available storage volume
6. Customer Support – Support staff for Customer Service call lines in place to manage customer calls, schedule appointments, and respond to inquiries

B.14. Small Business Utilization Report. This report shall include a monthly cumulative summary of the total dollar amount of the domestic work awarded to small business subcontractors at the Tier 1, Tier 2, and Tier 3 for performance of the services identified in the PWS. Additionally, this report shall include a monthly cumulative summary of the total dollar amount of all domestic work performed. This report shall include a list of small business subcontractors who performed the work at the Tier 1, Tier 2, and Tier 3. For each listed small business subcontractor, Contractor shall detail the tier at which the work was performed, category of work performed (i.e. linehaul, packing, etc.), and the associated dollar amount.

B.15. Foreign Entity Vetting Report. Contractors shall submit a semi-annual report to the contracting officer for each first tier foreign transportation service provider, operating as a separate legal entity, contracting directly with contractor or its commonly owned legal affiliate which has employees who may have physical contact with Government shipments in the ordinary course of contract performance. The report shall include legal company name (in native language if known); complete address (including country); and name, phone, and email address of at least one point of contact at the company. Additionally, if commercially available in the Contractor's system, the report shall include any previous or alternate company names; fax number; website URL; International Civil Aviation Organization (ICAO) or equivalent designator; owner(s)/director(s) and email address(es); and manger(s) name(s) and email address(es). The initial report is due 30 calendar days after contract award and every 6 months thereafter.