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List of Acronyms

Acronym	Definition
LAO	Los Alamos Operations at Los Alamos, NM
LO	Livermore Operations at Livermore, CA
NLV	North Las Vegas Facility
NNSA	National Nuclear Security Administration
NNSS	Nevada National Security Site
RSLA	Remote Sensing Lab at Andrews AFB, Maryland
RSLN	Remote Sensing Lab at Nellis AFB, North Las Vegas, NV
STL	Special Technologies Lab at Santa Barbara, CA
STR	Subcontract Technical Representative

B-1 SCOPE AND BACKGROUND

1. Background

The Nevada National Security Sites (NNSS) is a U.S. Department of Energy, National Nuclear Security Administration (NNSA) installation, operated by Mission Support and Test Services, LLC (MSTS or CONTRACTOR), comprising approximately 3,561 square kilometers (1,375 square miles) of federally owned land located in southeastern Nye County, Nevada. Located approximately 105 kilometers (65 miles) northwest of Las Vegas, Nevada, the NNSS is accessed from U.S. Highway 95, which roughly forms the southern boundary of the site.

The MSTS also operates the North Las Vegas Facility (NLV); the Remote Sensing Lab at Nellis AFB, North Las Vegas, NV (RSLN); the Remote Sensing Lab at Andrews AFB, Maryland (RSLA); Special Technologies Lab at Santa Barbara, CA (STL); Livermore Operations at Livermore, CA (LO); and Los Alamos Operations at Los Alamos, NM (LAO).

1. PROJECT BACKGROUND – Effective December 1, 2017, CONTRACTOR was awarded the Department of Energy (DOE) National Nuclear Security Administration (NNSA) prime contract to manage the Nevada National Security Site (NNSS) contract. CONTRACTOR assumed sponsorship of the National Security Technologies, LLC (prior Contractor) defined benefit and defined contribution plans. On June 19, 2023 NNSS assumed sponsorship of two additional defined benefit plans.
 - 1.1. CONTRACTOR'S Employee Retirement Plan. The most recent Actuarial Valuation Report for the CONTRACTOR's Employee Retirement Plan shows there are 2,366 active plan participants, 991 term vested participants, and 3,624 participants currently receiving a benefit. There are currently eight active equity managers and seven fixed income or alternative investment managers managing assets in the CONTRACTOR's Employee Retirement Plan and the market value of assets exceed \$557M. The Plan added a Variable Annuity formula for employees hired or rehired on or after July 1, 2009. The Fixed Benefit formula was frozen on December 31, 2013 and all employees were moved into the Variable Annuity formula effective January 1, 2014.
 - 1.2. CONTRACTOR'S NNSS IGAN Pension Plan. The most recent Actuarial Valuation Report for the CONTRACTOR's NNSS IGAN Pension Plan shows there are 65 active plan participants, 137 term vested participants, and 238 participants currently receiving a benefit. There are currently three active equity managers and five fixed income or alternative investment managers managing assets in the CONTRACTOR's NNSS IGAN Pension Plan and the market value assets exceed \$41M. The Plan uses a monthly retirement income amount for each year and partial year of pension credit accrued that gradually increases per pension credit per year covered under the collective bargaining agreement between the CONTRACTOR'S Union and CONTRACTOR. Effective January 1, 2011, Plan participation was frozen. Each employee who was a participant of the Plan as of December 31, 2010 will continue to participate in the Plan. Inactive participants who resume covered employment after January 1, 2011 will accrue only vesting service and not pension credits.
 - 1.3. CONTRACTOR'S NNSS Staff Pension Plan. The most recent Actuarial Valuation Report for the CONTRACTOR's NNSS Staff Pension Plan shows there are 13 active plan participants, 117 term vested participants, and 181 participants currently receiving a benefit. There are currently three active equity managers and five fixed income or alternative investment

managers managing assets in the CONTRACTOR's NNSS Staff Pension Plan and the market value of assets exceed \$30M. The Plan uses a Final Average Pay (FAP) formula and allows up to a maximum of 30 years of service under the FAP formula. Effective January 1, 2012, Plan participation was frozen. Each employee who was a participant of the Plan as of December 31, 2011, will continue to participate in the Plan. Inactive participants who resume covered employment after January 1, 2012, will accrue only vesting service and not pension credits.

- 1.4. CONTRACTOR'S Employee 401(k) Plan and CONTRACTOR'S Represented Employee 401(k) Plan. The Plans were restated effective December 1, 2017, to incorporate all previously adopted amendments. The CONTRACTOR'S Employee 401(k) Plan includes an auto-enrollment provision whereby all newly eligible employees are automatically enrolled in the Plan unless they affirmatively elect not to participate in the Plan. The participation level in the CONTRACTOR'S Employee 401(k) Plan is currently 98%; participation in the CONTRACTOR'S Represented 401(k) Plan is 85%. Assets in the two defined contribution plans exceed \$571M.
- 1.5. The Summary Plan Descriptions for the CONTRACTOR's Employee Retirement Plan, CONTRACTOR'S NNSS IGAN Pension Plan, CONTRACTOR'S NNSS Staff Pension Plan, CONTRACTOR's Employee 401(k) Plan and CONTRACTOR's Represented Employee 401(k) Plan provide detailed information on these plans and are available on request.

2. Objective

MSTS requires the services of an experienced SUBCONTRACTOR to provide that the CONTRACTOR administers its defined benefit and defined contribution plans in accordance with its contract with DOE and all other applicable laws and regulations, utilizes best practices, and meets its fiduciary obligations, CONTRACTOR requires expert SUBCONTRACTOR assistance..

3. Description of Work

The SUBCONTRACTOR shall provide technically qualified resources that work as a part of a team under the direct oversight of MSTS. SUBCONTRACTOR resources shall be responsible for independently planning, organizing, and performing a wide variety of non-hazardous specialized administrative/technical duties in support of the successful completion of goals and deliverables. Additionally, the SUBCONTRACTOR shall furnish all necessary labor, technical and professional services, supervision, materials, tools, equipment, consumables, and payment of any applicable taxes to perform all operations necessary and required to perform the scope as directed by MSTS.

Unless otherwise approved, the SUBCONTRACTOR shall work in accordance with MSTS subcontract requirements.

Specifically, MSTS requires a SUBCONTRACTOR to provide:

- ERISA Section 103(a)(3)(c) audit Audits Services for Defined Benefit Plans and Defined Contribution Plans for Plan years 2025, 2026, 2028 and 2029, and Non-ERISA 103(a)(3)(c) for Plan year 2027. All audits will be performed in accordance with accounting principles generally accepted in the United States of America (US GAAP)
- All audits will be performed in accordance with accounting principles generally accepted in the United States of America (US GAAP)
- CONTRACTOR's Human Resources Department will assist, as required.

All required services, as listed below:

Plan Name	Period 1 ERISA Sec 103(a)(3)(c) 2025 Plan Year filing	Period 2 ERISA Sec 103(a)(3)(c) 2026 Plan Year filing	Period 3 Non-ERISA 103(a)(3)(c) 2027 Plan Year filing	Period 4 ERISA Sec 103(a)(3)(c) 2028 Plan Year filing	Period 5 ERISA Sec 103(a)(3)(c) 2029 Plan Year filing
MSTS Employee Retirement Plan					
NNSS IGAN Pension Plan					
NNSS Staff Pension Plan					
MSTS Employee 401(k) Plan					
MSTS Represented Employee 401(k) Plan					
Assist with preparation of the Financial Statements for All Plans Audited					
Preparation of Form 5500 with all attachments for all plans					
Preparation of Form 8955-SSA for all plans					

3.1. Task(s)

N/A

3.2. Sequencing

N/A

3.3. Acceptance Criteria

SUBCONTRACTOR shall be required to provide Audit Reports, Financial Statements, Form 8955-SSA, and Form 5500 with Schedules for each plan by July 1st of each performance period (unless an extension request has been granted by the Procurement Specialist. The period of performance will be from date of award through December 31, 2030.

B-2 TECHNICAL SPECIFICATIONS

SPEC NUMBER	TITLE	REV	PAGES
N/A	Title of Specification		

B-3 DRAWINGS

DRAWING NUMBER	TITLE	REV	PAGES
N/A	Title of Drawing		

B-4 PLACE OF PERFORMANCE

1. Delivery Location

Delivery location will be North Las Vegas Facility 316 Atlas Dr., A2 Warehouse N. Las Vegas, NV 89030-4199.

2. Work Location:

Work will be performed at Offsite Work. For any work performed on the NNSS site or in an MSTS controlled facility, the provision of the On-Site services shall apply to this subcontract.

3. Site Access and Work Hours

The standard work week for this SUBCONTRACT will be Monday – Thursday 7 am – 5:30 pm, PST with one-half hour designated for unpaid period for lunch.

Work performed outside normal operating hours shall be coordinated and/or approved through the STR and/or the Procurement Representative prior to performing work.

4. Badging

For any on-site work will be coordinated with the STR for SOW and site-specific training requirements. The SUBCONTRACTOR shall wear a MSTS issued security badge identifying themselves. A minimum of two working days advance notice is needed for site badging. SUBCONTRACTOR employees will be required to submit to vehicle searches and not personally carry or transport certain prohibited articles.

B-5 CLEARANCE REQUIREMENTS

The following access authorization or clearance requirements are required.

1) Check all that apply:

- ☒ No security clearance; unclassified work
- ☐ DOE L

- ☐ DOE Q
- ☐ HSPD-12 PIV Credential

2) If applicable, add any or all parts of the following statement security qualifications:

- ☐ The SUBCONTRACTOR shall have the ability to obtain a U.S. Department of Energy (DOE) facility security clearance and have personnel capable of obtaining a Q-type or L-type security clearance.
- ☐ Q- or L-type security clearance is required for all SUBCONTRACTOR personnel having access to classified information or special nuclear material when performing such work.
- ☐ A corresponding level of security clearance from another federal agency may be applicable if approved by the MSTS and DOE.
- ☒ N/A

B-6 SPECIAL REQUIREMENTS

1. Qualifications, Licensing, Certifications

In order to determine the SUBCONTRACTOR qualified to perform the scope of work as outlined, the SUBCONTRACTOR must meet the below minimum qualifications:

1. Experience - SUBCONTRACTOR shall have the following job experience
 - 1.1. SUBCONTRACTOR shall have minimum 10 years of experience in defined benefit and defined contribution plan audits.
 - 1.2. SUBCONTRACTOR shall have appropriate systems, processes, and procedures in place to ensure best-in-class deliverables.
2. Licenses – SUBCONTRACTOR shall have the following job-specific licenses:
 - 2.1. N/A
3. Certifications – SUBCONTRACTOR shall have the following job-specific certifications:
 - 3.1. N/A

In addition to the above, the SUBCONTRACTOR shall provide qualified personnel throughout the period of performance of the Subcontract. SUBCONTRACTOR shall be responsible for ensuring its personnel meet and/or maintain current and valid training requirements, certifications and are fully capable to complete the duties described through the entirety of the Subcontract period of performance.

2. MSTS Provided Training

The SUBCONTRACTOR and its personnel will be required to attend the following site-specific training in the course of this work scope. NOTE site access maybe delayed until training is complete or renewed the SUBCONTRACTOR shall contact the STR to coordinate scheduling of training. See Section B-4, paragraph 5 Badging.

DESCRIPTION	DURATION	FREQUENCY
N/A		

3. Government Assets

3.1. Use of Government Vehicles

- | | |
|-------------------------------------|--|
| ☒ | There is NO anticipated need for any SUBCONTRACTOR employees to use a Government-furnished vehicle in the performance of this SOW. The SUBCONTRACTOR's employees, therefore, are specifically prohibited from driving any Government-furnished vehicles under the performance of this SOW unless this SOW is formally so modified by the parties and the employee(s) will present a valid driver's license to the STR for review. |
| ☐ | One or more SUBCONTRACTOR employees will have access to Government-furnished vehicles while performing this SOW. |

3.2. Government Property

- | | |
|-------------------------------------|---|
| ☒ | Government Property NOT anticipated to be furnished to or acquired by the SUBCONTRACTOR under this SOW. |
| ☐ | Pursuant to Federal Acquisition Regulation (FAR) 52.245.1 – Government Property, the following Government-owned property will be furnished to the SUBCONTRACTOR. The SUBCONTRACTOR shall be responsible for managing the Government-Furnished Property (GFP) below and/or Contractor-Acquired Property (CAP) as required in accordance with FAR 52.245-1. A list of the property to be furnished to the SUBCONTRACTOR can be found in Appendix Choose an item, along with any special technical and/or handling instructions. |

4. Quality Assurance (QA)

The work as described has been identified to be.

- | | |
|--------------------------|---|
| ☐ | <p>SAFETY CLASS/SAFETY SIGNIFICANT SERVICES AND/OR COMMODITIES (NUCLEAR/RADIOLOGICAL)</p> <p>This PO is related to items or services used in support of the nuclear and/or radiological mission(s) of the Nevada National Security Site, therefore:</p> <p>The SUBCONTRACTOR shall implement and maintain a Quality Assurance (QA) program in accordance with at least one the following quality assurance criteria and requirements:</p> <ul style="list-style-type: none"> ASME NQA-1 (2015) quality assurance requirements for nuclear facility applications ASME NQA-1 (2008 with 2009 addenda) quality assurance requirements for nuclear facility applications Equivalent program authorized in writing by the contractor's quality assurance organization <p>In addition, the subcontractor shall be responsible for:</p> <p>Price Anderson Amendments Act (PAAA)</p> <p>The item or service identified in the purchase order agreement is being procured by a contractor to the Department of Energy (DOE)/National Nuclear Security Administration (NNSA). This item or service is intended to be used in the performance of activities that (1) prevent or mitigate radiological or harm to the worker, the public or the environment or (2) provide a healthful and safe workplace for DOE/NNSA contractor personnel. Therefore, the SUBCONTRACTOR is responsible for assuring that the items or services provided under this purchase agreement meet the stated requirements.</p> |
|--------------------------|---|

	SUSPECT/COUNTERFEIT ITEMS The SUBCONTRACTOR will take positive measures to ensure that only new, unused equipment/material from acceptable sources is provided under this subcontract. Notwithstanding, any other provisions of this subcontract, should any suspect/counterfeit items or components be found within or on this equipment during contractor receipt inspection, subcontractor shall, at its expense, promptly replace such items or components.
☒	<u>GENERAL SERVICES AND/OR COMMODITIES</u> This PO is for items or services that support the mission(s) of the Nevada National Security Site, therefore: SUSPECT/COUNTERFEIT ITEMS REQUIREMENTS: The SUBCONTRACTOR will take positive measures to ensure that only new, unused equipment/material from acceptable sources is provided under this subcontract. Notwithstanding, any other provisions of this subcontract, should any suspect/counterfeit items or components be found within or on this equipment during contractor receipt inspection, subcontractor shall, at its expense, promptly replace such items or components. These requirements shall be flowed down to all levels of subcontractors as it pertains to this procurement activity.

B-7 ENVIRONMENTALLY PREFERABLE PRODUCTS

MSTS is required by the U.S. Department of Energy to purchase Environmentally Preferable Products (EPP) (also known as green or sustainable purchasing) and are also required to flow those procurement requirements to their SUBCONTRACTOR. When designing materials and/or supplying materials to be used onsite as part of a subcontract SOW, those materials must meet these same requirements.

The following is a list of EPP types that must be used if they are available:

- **Products with Recycled Content.** MSTS supports efforts that reduce or eliminate environmental hazards, conserve environmental resources, minimize life-cycle cost and liabilities. Towards the end, the acquisition cycle is viewed as an important key in understanding what is brought onto the Site as well as identifying what can be reused/recycled. Focus is directed on recycled-content, biobased-content, ozone-depleting substances, and other environmental impacts. Specific additional clauses are included in this solicitation that address potential requirements and preferences based on the nature of the item being considered for purchase.
- **Water Efficient Plumbing Products.** When purchasing commercially available, off-the-shelf water consuming products, products must meet EPA's WaterSense standards (<http://www.epa.gov/watersense>).
- **Non-Toxic or Less Toxic Alternatives**
- **Green Certified Products.** (e.g., Design for Environment, Green Seal)
- **Bio-Based Products.** MSTS will give preference to acquiring Department of Agriculture designated biobased products. For more information to this program, see www.biopreferred.gov.
- **Energy Efficient Products.**
 - EPA Energy Star® When purchasing commercially available, off-the-shelf energy-consuming

- products, products must be Energy Star rated (www.energystar.gov).
- Federal Energy Management Program designated products When purchasing commercially available, off-the-shelf energy-consuming products, products must use no more than one watt of standby power as defined and measured by International Electrotechnical Commission (IEC) code 62301 or otherwise met [FEMP specifications](#) for low standby power consumption. If FEMP has not specified a standby power level for a product category, the item shall be the lowest standby power consumption available.
 - **Energy Efficient Electronics.** When purchasing the following products, EPEAT ratings will apply:
 - Desktop and Notebook Computers – must meet the EPEAT silver rating or higher
 - Displays, Monitors, Integrated Desktop Computers, Workstation Desktops, Thin Client, Workstation Notebooks, and/or Tablet Notebooks – must meet the EPEAT silver rating or higher
 - Fax Machines, Multifunction Devices, and Printers – must meet the EPEAT bronze rating or higher
 - Copiers and Digital Duplicators – must meet the EPEAT silver rating or higher
 - **Reuse of Leased IT Electronic Equipment** In accordance with DOE Order 436.1, Departmental Sustainability, MSTS is striving to reduce or eliminate environmental hazards, conserve environmental resources, minimize life-cycle cost and maximize operational sustainability through the incorporation of electronics stewardship practices thereby minimizing the economic and environmental impacts of managing toxic by-products and hazardous wastes generated in the conduct of site activities. Therefore, MSTS requires that at the end of the lease period, the equipment is to be reused, refurbished, donated, or recycled using environmentally sound management practices.

B-8 MEETINGS

After subcontract award, a Subcontract Kickoff Meeting, maybe requested, which may be a conference call, an internet meeting, or a meeting to be held at MSTS. The time, date, and agenda for the meeting will be provided to the SUBCONTRACTOR by MSTS.

The SUBCONTRACTOR shall interface with various MSTS (and other) organizations through MSTS' Procurement Representative (or designated Subcontract Technical Representative (STR) for in-scope work), as required, or at points and frequency determined by the Procurement Representative.

MSTS will issue meeting notices and prepare an agenda and minutes for each meeting addressed in this Section. When applicable, minutes will identify action items, assigned actioner, and due dates. The purpose of the meetings is the exchange of work-related information. The person or persons designated by the SUBCONTRACTOR to attend all meetings shall have all required authority to make decisions and commit SUBCONTRACTOR to technical decisions made during meetings.

FREQUENCY	DURATION	TITLE	DESCRIPTION / PURPOSE
Yearly	1 hour	Kick-Off	Establish expectations and timelines
Yearly	1 hour	Close-Out	Report to Benefits Committee
Weekly	1 hour	Status Meetings	Review of deliverables during the audits

B-9 SUBMITTALS

Appendix A , *Submittal Register*, identifies deliverables due during the execution of this subcontract and the recipient.

B-10 APPENDIX

APPENDIX NUMBER	TITLE	REV	PAGES
Appendix A	Submittal Register	N/A	1

Submittal Register:

The SUBCONTRACTOR shall meet the required schedule and provide the documents specified in accordance with the following submittals.

**APPENDIX INSERT APPENDIX A
SUBMITTAL REGISTER**

Section A: Purchase Order/Subcontract Information

Subcontractor Name: <i>TBD</i>	Project Title <i>Audit Services</i>
Purchase Order and Release Number: <i>TBD</i>	Requisition Number: <i>0010138</i>

Section B: Submittal Delivery Requirement

Submittals shall be electronically, unless otherwise noted, to: Subcontract Technical Representative, Jana Halas; halasjl@nv.doe.gov

Section C: Submittal Requirement Details

NO.	TITLE	REFERENCE	DUE DATE / FREQUENCY	REVIEWED BY	COMMENTS
001.	Audit Report for each Plan	<i>B-1, Para. 3</i>	Due upon completion of the audit	STR	
002.	Form 5500 with Schedules for each Plan	<i>B-1, Para. 3</i>	Due prior to filing deadline with the Department of Labor	STR	
003.	From 8955-SSA	<i>B-1, Para. 3</i>	Due prior to filing deadline with the IRS	STR	

NLT = No Later Than

NTP = Notice to Proceed

TLO = Transmittal Letter Only