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of the Freedom of Information and Privacy Act
Taking others off. Long talk with today. I don’t have enough understanding of what and how you are doing things to represent your efforts as well as I would like by far.

Not looking to butt in, but I’d like to try and get this resolved and out of your way.

Regards,

S&T / DHS

We have indeed ceased any active work. The data and storage are expenses so we need to resolve ASAP,

Get Outlook for iOS

Hi

DHS-001-10083-002053
Thank you for the clarification. Very much appreciated!

Regards,

S&T / DHS

From: S&T / DHS
Sent: Wednesday, June 19, 2019 3:51 PM
To: S&T / DHS
Cc: S&T / DHS
Cc: S&T / DHS

Subject: Re: Venntel/Project Alexander

Hi,

I do not believe there are any active projects currently using that data. (b)(6) can confirm and fill in with more details.

VR,

S&T / DHS

Science and Technology Directorate
Department of Homeland Security

From: S&T / DHS
Sent: Wednesday, June 19, 2019 3:12:36 PM
To: S&T / DHS
Cc: S&T / DHS
Cc: S&T / DHS

Subject: RE: Venntel/Project Alexander

Hi (b)(6)

I had a brief talk with (b)(6). Could you:

1. Confirm that you have stopped all projects involving Venntel data.
2. Standby to provide requested data asap.

Thanks. We’d like to get this sorted as soon as possible to limit the impact on your support to the mission.

Regards,

S&T / DHS

From: [Redacted]
Sent: Wednesday, June 19, 2019 12:44 PM
To: [Redacted]
Cc: [Redacted]

Subject: FW: Venntel/Project Alexander
Importance: High

Please see the email chain below. I’m already engaging with [Redacted] to answer HQ Privacy questions around the legal analysis. S&T will engage with ICE and CBP legal for their legal interpretation along with the respective Privacy offices.

At this time, due to the unanswered Privacy and legal concerns that have been raised please stop all projects involving Venntel data.

We will follow up with additional information as we move forward.

Privacy Officer (Acting)
Science and Technology Directorate
Department of Homeland Security

From: [Redacted]
Sent: Wednesday, June 19, 2019 11:52 AM
To: [Redacted]
I hope this finds you well. Please take a look at the below email from HQ Privacy. I wanted to ping you as this legal analysis would have occurred before my time. Can you please confirm DATC legally acquired the Venntel data they have. I have attached the previous emails that Chris had sent to DATC on the risks of acquiring Venntel data.

They are asking if OGC conducted an analysis under the Carpenter case to ensure that we were able to legally acquire this data.  

DATC is under heightened scrutiny as part of the Privacy Audit and HQ Privacy is digging deeper into what DATC is doing to ensure everything is being done properly.

Please advise if these issues were addressed and signed off on by OGC. Thank you for your time and review.

Hi

I understand that S&T has purchased information from Venntel as part of Project Alexander. The PTA was never approved because we had and continue to have significant concerns with this technology. Prior to receiving the information, did OGC conduct an analysis under the Carpenter case to ensure that we are able to legally acquire it?

Thanks,
Spreadsheet updated and current as of this morning (changes in blue).

R/

Office: (b)(6)
Mobile: (b)(6)

-----Original Appointment-----
From: (b)(6) On Behalf Of (b)(6)
Sent: Monday, May 6, 2019 12:25 PM
To: (b)(6)
(b)(6)
(b)(6)
Cc: (b)(6)
(b)(6)

Subject: Tech Centers Division, OPO STAD CO Dial-in:
When: Tuesday, July 2, 2019 11:00 AM-12:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: 8-202

Recurring meetings will be held to discuss status of contract actions.
<table>
<thead>
<tr>
<th>Code</th>
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<td>0869-001-003</td>
<td>DJ RESEARCH DEVELOPMENT</td>
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<td>0869-001-004</td>
<td>DJ FINANCE</td>
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<td>0869-001-005</td>
<td>DJ ANALYTICS</td>
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<tr>
<td>0869-001-030</td>
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(b)(4)
Good morning! In prep for our meeting tomorrow, I'm attaching our spreadsheet of Tech Centers PRs. There are 3 tabs: (1) PRs in OPO, (2) PRs In FBD, and (3) PRs that have been Obligated. Looking forward to our discussion.

Kind Regards,

...Original Appointment...

Recurring meetings will be held to discuss status of contract actions.
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<td>04010050</td>
<td>Item 5</td>
<td>Description 5</td>
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</tbody>
</table>

(b)(4)
Hi,

I hope all is well. Please review the comments from John in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.

Please see final review comments in the attached documents. The market research report will require some work form the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.
Happy to discuss if needed. Thanks.

Respectfully,

Contracting Officer

From: [Redacted]
Sent: Friday, June 14, 2019 3:55 PM
To: [Redacted]
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi [Redacted],

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:

Let me know your thoughts and I'll reach out to Stephen and his team.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email [Redacted]
Phone [Redacted]
Hi,

(b)(6) will be the CO.

Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)

Hi,

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)
Hi, (b)(6)

I believe so, but please confirm with (b)(6)

Respectfully,

Contracting Officer

Hi, (b)(6)

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)
Checklist for Sensitive Information

Procurement Title: Venntel Marketing Data  
Requisition #: RSTC-19-00057

The requiring office shall complete this checklist for **all acquisitions** when a written acquisition plan is not required (see the Acquisition Plan Matrix at HSAM 3007.103(e)(4) for details on when an acquisition plan is/is not required). If the requiring official determines that a contractor will have access to sensitive information and/or information systems will be used to input, store, process, output and/or transmit sensitive information, the requiring official shall ensure the Statement of Work, Statement of Objective, Performance Work Statement or specification is reviewed by the organizations identified at HSAM 3004-470(b) and obtain signatures, as applicable, on this checklist. The requiring office shall submit the completed checklist as part of the procurement request package in accordance with HSAM 3004.7101. The Contracting Office will route the checklist to the Head of Contracting Activity or designee for signature.

A. Sensitive Information and Access Requirements (completed by the requiring office):

1. Will the contractor have access to any of the types of the sensitive information listed below during the acquisition?

   - Yes  
   - No

   | Chemical-terrorism Vulnerability Information (CVI) | Yes |
   | For Official Use Only (FOUO) | No |
   | Law Enforcement Sensitive Information | No |
   | Protected Critical Infrastructure Information (PCII) | No |
   | Personally Identifiable Information (PII) | Yes |
   | Sensitive PII (SPII) | No |
   | Sensitive Security Information (SSI) | No |
   | Other type of sensitive information | Confidential, Secret, or Top Secret |

2. Will contractor employees have access to DHS information systems?  
   - Yes  
   - No

3. Will contractor employees require recurring access to Government facilities?  
   - Yes  
   - No

   **Note:** If the answer is “No” to questions 1 through 3 above, proceed to the Signatures section of the checklist.

4. If the answer is “Yes” to either of questions 1 through 3 above, have information security, personnel security, and/or privacy provisions been identified and coordinated with the following, as applicable (see HSAM 3004.470(b) for coordination requirements).

   **Information security provisions** include the development of the Requirements Traceability Matrix, identification of incident reporting and response requirements, and requests for the contractor to: provide security authorization documentation, obtain an independent assessment, perform continuous monitoring, provide the Government with...
necessary access to perform security reviews, comply with federal reporting requirements.

**Personnel security provisions** include reviewing fitness requirements and other security matters related to access to sensitive but unclassified information and recurring access of contractor employees to Government facilities, information systems, security items or products.

**Privacy provisions** include requirements for handling PII and/or SPII, incident reporting, notification and credit monitoring.

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<tbody>
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<td>Component Chief Information Officer (CIO) or designee</td>
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<tr>
<td>Component Chief Security Officer (CSO) or designee</td>
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<tr>
<td>No</td>
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<td>Component Privacy Officer</td>
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<td>TSA SSI Program Office</td>
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<tr>
<td>Yes</td>
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<td>N/A</td>
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<tr>
<td>National Protection and Programs Directorate (NPPD) CVI Program Office</td>
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<tr>
<td>NPPD PCII Program Office</td>
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</tbody>
</table>

Note: For Components and offices that do not have a Component level CIO, CSO, or Privacy Officer, the acquisition planner shall coordinate with the DHS Headquarters CIO or designee, CSO and Chief Privacy Officer. (See HSAM 3007.103(j)(1)(ii))

5. Has the Component CIO, CSO, Privacy Officer, HCA (or designee for each) and program manager determined that this effort will have a “high risk” of unauthorized access to or disclosure of sensitive information in accordance with the requirements of HSAR Deviation 15-01, Safeguarding of Sensitive Information, applicable to this acquisition?

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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</table>

Note: If the answer to this question is “Yes” special clauses Safeguarding of Sensitive Information (MAR 2015), Information Technology Security and Privacy Training (MAR 2015) and HSAR clause 3052.204-71 Contractor Employee Access shall be included without revision in the solicitation and subsequent contract (as defined in FAR 2.101).

6. If the answer is “Yes” to any of the preceding questions, identify and describe the information security, personnel security, and privacy provisions to be included in the solicitation including the special clauses from HSAR Class Deviation 15-01, Safeguarding of Sensitive Information if applicable.

   Clauses are in the security section of the DR.

7. If foreign end products or services are allowed under the contract, what additional security provisions are to be included in the solicitation to protect sensitive information and facilities from unauthorized access and disclosure?

   N/A
B. Authority to Operate (ATO) (completed by requiring office in coordination with Component CIO or designee):

1. Will contractor IT systems be used to input, store, process, output, and/or transmit sensitive information? □ Yes □ No

2. If “Yes”, has a Requirements Traceability Matrix (RTM) been developed by the Component CIO or designee for inclusion in the solicitation? □ Yes □ N/A

3. If “Yes” to #1, will the solicitation require the submission of a draft security plan and instructions on how the draft security plan will be evaluated? □ Yes □ N/A

Note: When a contractor IT system will be used to input, store, process, output, and/or transmit sensitive information, the RTM shall be included in the solicitation. The RTM is prepared by the Component CIO or designee in coordination with the program office and is provided as an attachment to the requirements document (i.e., Statement of Work, Statement of Objectives, Performance Work Statement). Vendors shall submit a draft security plan with their proposal/quotation as their response to the RTM. Instructions on how the draft security plan will be evaluated shall be included in the solicitation.

C. Continuous Monitoring Data Requirements (completed by requiring office in coordination with Component CIO or designee):

1. Will a contractor-operated information system(s) be used to input, store, process, output, and/or transmit sensitive information? □ Yes □ No

2. If “Yes”, does the requirements document identify how the contractor should submit monthly continuous monitoring data to the Government? □ Yes □ N/A

3. If “Yes”, identify and describe the continuous monitoring data requirements to be included in the solicitation.

D. Data Retention Requirements (completed by requiring office):

1. Will the contractor be required to retain sensitive information for the Government? □ Yes □ No

2. If “Yes”, does the requirements document identify (a) retention requirements (e.g., length of time data must be retained before return and/or destruction) and (b) security requirements for the protection of retained data? □ Yes □ N/A
3. If “Yes”, identify and describe the retention and security requirements to be included in the solicitation.

4. Does the Government have a plan to monitor and/or ensure contractor compliance with the retention and security requirements identified? □ Yes □ N/A

5. If “Yes”, describe the Government’s plan to monitor and/or ensure contractor compliance with the retention and security requirements identified in the acquisition.

E. Additional Privacy Considerations (completed by requiring office in coordination with Component Privacy Officer or designee):

1. If the contractor will have access to PII or SPII, is contractor support needed to complete privacy compliance documentation (Privacy Threshold Analysis, Privacy Impact Assessment, and/or System of Record Notice, as appropriate)? □ Yes □ No □ N/A

2. If contractor support is needed to complete the privacy compliance documentation, does the requirements document identify the activities and level of contractor support needed? □ Yes □ N/A

3. If “Yes”, identify and describe the activities and level of contractor support needed to complete the privacy compliance documentation.

Signatures:

Data Analytics Technology Center
DHS Science & Technology Directorate

Component Chief Information Officer (CIO) or designee
DHS Science & Technology Directorate - Chief Information Office

Component Chief Security Officer (CSO) or designee
DHS Science & Technology Directorate - Security, Preparedness, & Continuity Office

(Enter Telephone Number)
Name
Component Privacy Officer or designee
DHS Science & Technology Directorate - Privacy Office
(Enter Telephone Number)

Name
TSA SSI Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
National Protection and Programs Directorate (NPPD) CVI Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
NPPD PCII Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
Head of Contracting Activity or designee
(DHS Component and Organization)
(Enter Telephone Number)
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of the Freedom of Information and Privacy Act
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of the Freedom of Information and Privacy Act
Market Research Report Template

A market research report documents market research in a manner appropriate to the size, complexity, and urgency of an acquisition. In accordance with the Homeland Security Acquisition Manual (HSAM) 3010.001(f), requirement-specific market research efforts and results are required prior to issuance of the solicitation and shall be clearly documented and included in the contract file. A market research report is required for contract actions awarded above the simplified acquisition threshold (SAT). In consultation with the Contracting Officer, the following template can be tailored to a requirement’s market research needs. Use only those sections applicable to your requirement. If a section is not applicable, it should be so identified and supported by a brief explanation.

I. Authority

Market research is required in accordance with:
- FAR 7.102, Acquisition Planning Policy
- FAR 10.001, Market Research Policy

II. Background Information

Describe the background of the procurement and circumstances/events leading up to the requirement. Include:
- Program Office
- Other stakeholders
- Program Office Point of Contact
- Type of acquisition (service or supply, including NAICS/PSC code)
- Expected dollar value of requirement
- Acquisition Team/IPT members, if applicable, and the responsibilities of the team members:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Office</th>
<th>Telephone</th>
<th>E-mail Address</th>
</tr>
</thead>
</table>

- Time frame in which the market research was conducted

III. Initial Requirements (as identified by the program office)

- Describe the Government’s requirement in terms of:
  - Functions to be performed
  - Performance required
  - Essential physical characteristics
- Discuss any cost effectiveness issues associated with the requirements:
Any potential cost drivers? (e.g., additional costs from some other activity that may influence the cost of the requirement)

Any cost/performance tradeoffs? (e.g., an analysis of the value added relating to costs and performance levels)

- Describe schedule requirements (e.g., performance periods and/or delivery due dates)
- Identify DHS Acquisition Plan including AAP number, when plan was published to the public, and whether it is included in the DHS Forecast of Small Business Opportunities

IV. Participants in Market Research

Describe the involvement of the individual Acquisition Team/IPT members and any other participants in the market research effort. (The titles listed in the table below are examples.)

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<thead>
<tr>
<th>Name</th>
<th>Title</th>
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<th>Telephone</th>
<th>E-Mail Address</th>
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<td>Contract Specialist</td>
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<tr>
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<tr>
<td>Strategic Sourcing Specialist</td>
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V. Market Research Methods and Sources

Describe methods and sources used during market research. The following table may help structure and summarize the methods used in the market research effort.

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<tr>
<th>Check if part of research</th>
<th>Sources Used in Market Research</th>
<th>Details of Research/Comments</th>
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<td>Participated in DHS small business vendor outreach sessions</td>
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<td>Reviewed existing DHS-wide and Multi-Component Contract Vehicles with DHS Strategic Sourcing Program Office and/or on DHS Enterprise-wide Contract Vehicle Portal</td>
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<th>Check if part of research</th>
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<td>Supplies: Agency inventories</td>
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<td>Supplies: Excess from other agencies</td>
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<td>Supplies: Procurement list maintained by the Committee for Purchase from People who are Blind or Severely Disabled (AbilityOne) (formerly Javits-Wagner-O’Day (JWOD) Program at: <a href="http://www.AbilityOne.gov">http://www.AbilityOne.gov</a>)</td>
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<td>Supplies: Wholesale supply sources (e.g., GSA)</td>
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<td>Supplies: Commercial sources (includes educational and non-profit institutions)</td>
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<td>Services: Procurement list maintained by the Committee for Purchase from People who are Blind or Severely Disabled (AbilityOne) (formerly Javits-Wagner-O’Day (JWOD) Program at: <a href="http://www.AbilityOne.gov">http://www.AbilityOne.gov</a>)</td>
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<td>Services: Federal Supply Schedules</td>
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<td>Services: Federal Prison Industries</td>
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<td>Mandatory sources reviewed (per FAR Part 8) if applicable for:</td>
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<td>- Public utility services</td>
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<td>- Printing and related supplies</td>
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<td>- Leased motor vehicles</td>
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<td>- Helium</td>
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<td>- Strategic and critical materials from inventories exceeding Defense National Stockpile Requirements</td>
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<td>Services: Commercial sources (includes educational and non-profit institutions)</td>
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DHS-001-10083-002086
VI. Identify Product/Services and Sources Able to Meet the Requirement

- Identify or describe:
  - Product/Service, include any brand name product information
  - Product/Service characteristics and/or capabilities
  - Company information (e.g., name, POCs, address, telephone number, e-mail address, website)
  - Company characteristics, past performance, and business category

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<thead>
<tr>
<th>Business Category</th>
<th>Name of Potential Source(s)/Other POC Information</th>
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<td>Large Business</td>
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<tr>
<td>Small Business</td>
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<tr>
<td>Small Disadvantaged Business</td>
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</tbody>
</table>
Section 8(a) Business
Woman-Owned Business
HUBZone Small Business
Veteran-Owned Small Business
Service-Disabled Veteran-Owned Small Business

➢ If sole source, describe efforts to locate additional sources

VII. Description of the Commercial Marketplace

➢ Describe marketplace
➢ Assess Government’s leverage in marketplace, e.g., describe the Government’s negotiation strengths and/or weaknesses in the market
➢ Describe nature of other market participants, e.g., other Governments (foreign, state/local), commercial firms, etc., and discuss how other buyers for the same product or service may affect your purchase
➢ Identify availability of commercial or non-developmental items that satisfy requirements (value or shortcomings of each) and sub-components

VIII. Prevalent Business Practices

➢ Identify standard/customary terms and conditions and industry business practices (include information on payment, freight delivery, acceptance, and warranties)
➢ Describe generally accepted business practices that differ from standard Government practices
➢ Discuss if contract financing is applicable. If so, ensure compliance with FAR 32.202-3, Conducting Market Research About Financing Terms
➢ Discuss any laws and regulations unique to the requirement

IX. Pricing and Market Issues

➢ Identify price sources (e.g., market price, catalog, GSA, etc.), price ranges, and price variations
➢ Describe market trends for product or service, e.g., technical, business, and pricing
➢ Describe how the application of cost or pricing market information collected from market research will be used in the development of the Independent Government Cost Estimate for the requirement

X. Other Considerations

➢ Identify other considerations gathered from market research, e.g., opportunities to “unbundle” requirements to enable more contracts or subcontracts to small, small disadvantaged and other socio-economic procurement categories
➢ Discuss qualifying factors, including such issues as past performance, references, product testing or evaluation, customer satisfaction, warranties, and quality problems
- Describe consideration of environmentally preferable products and services. Include discussion of energy efficiency standards of market products, if applicable
- Describe SAFETY Act applicability
- Discuss Buy American Act applicability
- Discuss Trade Agreements Act applicability
- Discuss Section 508 applicability for Electronic and Information Technology

XI. Market Analysis Summary

- Summarize the market research methods and resources used in the market research.
  - Identify:
    - Products/Services available
    - If Commercial/Non-Developmental/Developmental Product/Service
    - Sources (companies, etc.)
    - Types of Businesses (large, small, etc.)
    - Pricing
  - Summarize:
    - Market conditions (commercial marketplace)
    - Customary commercial practices
    - Other considerations
- Identify the timeframes when staff used the market research methods
- Provide the outcome and conclusion of the market research identifying potential sources, an analysis of the capabilities of potential sources and findings that impact the procurement, e.g., any actions taken as a result of the market research such as re-evaluation of the requirement to determine whether the need can be restated to permit commercial or non-developmental items to satisfy the agency’s needs; and solicitation and award of resultant contract using policies and procedures in FAR Part 12 - Acquisition of Commercial Items. (See FAR 10.002(c) and (d.).)
- Document the decision and rationale to satisfy the agency’s need with a commercial item/service, if market research so warrants
- Document the decision and rationale if the agency’s need cannot be satisfied with a commercial item/service
- Provide supporting documents, as appropriate

The following table provides a checklist for Market Analysis Summary information:

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
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<tbody>
<tr>
<td><strong>Market Analysis Summary</strong></td>
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<tr>
<td>Are there products/services and sources capable of satisfying the Government’s requirements?</td>
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<tr>
<td>Are commercial items available to meet requirements?</td>
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<tr>
<td>Are commercial items available that could be modified to meet requirements?</td>
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<tr>
<td>Are commercial items available that could meet requirements if the requirements are modified to a reasonable extent?</td>
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<tr>
<td>Are available items used exclusively for Governmental purposes?</td>
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<tr>
<td>If commercial items are not available, are non-developmental items available to meet requirements?</td>
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<td>Question</td>
<td>Answer</td>
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<td>If commercial items are not available, are non-developmental items available that could be modified to meet requirements?</td>
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<tr>
<td>If commercial items are not available, are non-developmental items available that could be modified to meet requirements if the requirements are modified to a reasonable extent?</td>
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<tr>
<td>Could commercial items or non-developmental items be incorporated at the Component level?</td>
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<tr>
<td>Provided: Customary industry terms and conditions including warranties, buyer financing, discounts</td>
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<td>Provided: Requirements of any laws and regulations unique to the item being acquired</td>
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<td>Provided: Extent of competitive environment</td>
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<td>Provided: Environmental considerations and concerns</td>
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<td>Provided: SAFETY Act consideration/applicability</td>
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<tr>
<td>Provided: Section 508 Applicability for Electronic and Information Technology</td>
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<tr>
<td>Provided: Distribution and support capabilities of potential vendors, including alternative arrangements and cost estimates</td>
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<tr>
<td>Provided: Size and status of potential sources (including small business status and if use of source is required by FAR Part 8)</td>
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<tr>
<td>Provided: Identify available commercial items and describe the respective merits and shortcomings of each</td>
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<tr>
<td>Provided: Description of any market conditions that may be time sensitive or changes in supply or demand, technology, laws, and supplier costs, etc.</td>
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<tr>
<td>Provided: Identification of potential sources. Description of capabilities of individual vendors, pricing information; delivery schedules, and standard terms and conditions, such as incentives and warranties</td>
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<tr>
<td>Provided: Any market surveys developed by industry or other Federal agencies</td>
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<tr>
<td>Provided: Pricing issues, price ranges, and price variations</td>
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</tr>
<tr>
<td>Provided: Description of industry/market trends – technical/pricing/business, etc.</td>
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<tr>
<td>Provided: Buy American Act Consideration</td>
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<td>Provided: Trade Agreements Act Consideration</td>
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<tr>
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<td>Provided: Other: Specify</td>
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Page 053

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Withheld pursuant to exemption (b)(5) of the Freedom of Information and Privacy Act
Page 056

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Hi,

I omitted to include the revised Delivery Requirements document.

Regards,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email:
Phone:

Hi,

I hope all is well. Please review the comments from John in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.
Please see final review comments in the attached documents. The market research report will require some work from the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.

Per our previous emails, Happy to discuss if needed. Thanks.

Respectfully,
Contracting Officer

Hi,

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:
Let me know your thoughts and I’ll reach out to [redacted] and his team.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [redacted]
Phone: [redacted]

From: [redacted]
Sent: Monday, June 10, 2019 12:50 PM
To: [redacted]
Cc: [redacted]
Subject: RE: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi [redacted],

[redacted] will be the CO.

Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [redacted]
Phone: [redacted]
Hi.

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

Hi,

I believe so, but please confirm with Duane.

Respectfully,

Contracting Officer

Hi,

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)
Page 063

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Withheld pursuant to exemption (b)(5) of the Freedom of Information and Privacy Act.
Page 065

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 066

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Good afternoon All,

It was a pleasure speaking with you at this morning’s meeting regarding the DATC Lab and the ATO process moving forward. Attached are the meeting minutes for your review. Please distribute to all your team members that I may have not included.

We appreciate everyone’s time and efforts and are all collectively looking forward to working together. \(\text{(b)(6)}\) will be running the next meeting with Privacy and CIO next Wednesday, July 10 at 11:00 AM.

Thank you and enjoy the holiday tomorrow.

\(\text{(b)(6)}\)

Privacy Officer (Acting)
Science and Technology Directorate
Department of Homeland Security
Joint Privacy/OCIO Discussion on DATC ATO

July 3, 2019

Attendance:

- **CIO**
  - (b)(6)

- **Technology Centers**
  - (b)(6)

- **S&T Privacy Office**
  - (b)(6)

Notes:

- (b)(5)
Moving Forward:

- (b)(5)
Good morning all—
Our next S&T Tech Centers / OPO STAD tag up is scheduled for next Tuesday, July 23. Attached our updated spreadsheet for everyone’s awareness on status. Please send back any additional information or corrections to [(b)(6)] Thanks very much!

R/
[(b)(6)]

-----Original Appointment-----
From: [(b)(6)]
On Behalf Of: [(b)(6)]
Sent: Monday, May 6, 2019 12:25 PM
To: [(b)(6)]

Subject: Tech Centers Division, OPO STAD CO Dial-in: [(b)(6)]
When: Tuesday, July 23, 2019 11:00 AM-12:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: 8-202

Recurring meetings will be held to discuss status of contract actions.
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DHS-001-10083-002111
Hi

Please advise when we can expect the revisions requested.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

From: (b)(6)
Sent: Wednesday, July 3, 2019 12:35 AM
To: (b)(6)
Cc: (b)(6)
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

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S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email:
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Let me know your thoughts and I'll reach out to [b](6) and his team.

Thanks,

[b](6)
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [b](6)
Phone: [b](6)

[b](6)
Hi [b](6)

[b](6) will be the CO.

[b](6)
Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [b](6)
Phone: [b](6)
Hi,

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist

S&T Acquisitions Division

Office of Procurement Operations

Department of Homeland Security

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Hi,

I believe so, but please confirm with

Respectfully,

Contracting Officer

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?
Thanks,

[b](b)(6)

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [b](b)(6)
Phone: [b](b)(6)
Checklist for Sensitive Information

Procurement Title: Venntel Marketing Data
Requisition #: RSTC-19-00057

The requiring office shall complete this checklist for all acquisitions when a written acquisition plan is not required (see the Acquisition Plan Matrix at HSAM 3007.103(e)(4) for details on when an acquisition plan is/is not required). If the requiring official determines that a contractor will have access to sensitive information and/or information systems will be used to input, store, process, output and/or transmit sensitive information, the requiring official shall ensure the Statement of Work, Statement of Objective, Performance Work Statement or specification is reviewed by the organizations identified at HSAM 3004-470(b) and obtain signatures, as applicable, on this checklist. The requiring office shall submit the completed checklist as part of the procurement request package in accordance with HSAM 3004.7101. The Contracting Office will route the checklist to the Head of Contracting Activity or designee for signature.

A. Sensitive Information and Access Requirements (completed by the requiring office):

1. Will the contractor have access to any of the types of the sensitive information listed below during the acquisition?

   □ Yes  □ No  Chemical-terrorism Vulnerability Information (CVI)
   □ Yes  □ No  For Official Use Only (FOUO)
   □ Yes  □ No  Law Enforcement Sensitive Information
   □ Yes  □ No  Protected Critical Infrastructure Information (PCII)
   □ Yes  □ No  Personally Identifiable Information (PII)
   □ Yes  □ No  Sensitive PII (SPII)
   □ Yes  □ No  Sensitive Security Information (SSI)
   □ Other type of sensitive information: Confidential, Secret, or Top Secret

2. Will contractor employees have access to DHS information systems?  □ Yes  □ No

3. Will contractor employees require recurring access to Government facilities?
   □ Yes  □ No

   Note: If the answer is “No” to questions 1 through 3 above, proceed to the Signatures section of the checklist.

4. If the answer is “Yes” to either of questions 1 through 3 above, have information security, personnel security, and/or privacy provisions been identified and coordinated with the following, as applicable (see HSAM 3004.470(b) for coordination requirements).

   Information security provisions include the development of the Requirements Traceability Matrix, identification of incident reporting and response requirements, and requests for the contractor to: provide security authorization documentation, obtain an independent assessment, perform continuous monitoring, provide the Government with...
necessary access to perform security reviews, comply with federal reporting requirements.

**Personnel security provisions** include reviewing fitness requirements and other security matters related to access to sensitive but unclassified information and recurring access of contractor employees to Government facilities, information systems, security items or products.

**Privacy provisions** include requirements for handling PII and/or SPII, incident reporting, notification and credit monitoring.

<table>
<thead>
<tr>
<th>Component</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>CIO or designee</td>
<td>Y</td>
<td>N</td>
<td>N/A</td>
</tr>
<tr>
<td>CSO or designee</td>
<td>Y</td>
<td>N</td>
<td>N/A</td>
</tr>
<tr>
<td>Privacy Officer</td>
<td>Y</td>
<td>N</td>
<td>N/A</td>
</tr>
<tr>
<td>TSA SSI Program Office</td>
<td>Y</td>
<td>N</td>
<td>N/A</td>
</tr>
<tr>
<td>NPPD CVI Program Office</td>
<td>Y</td>
<td>N</td>
<td>N/A</td>
</tr>
<tr>
<td>NPPD PCII Program Office</td>
<td>Y</td>
<td>N</td>
<td>N/A</td>
</tr>
</tbody>
</table>

Note: For Components and offices that do not have a Component level CIO, CSO, or Privacy Officer, the acquisition planner shall coordinate with the DHS Headquarters CIO or designee, CSO and Chief Privacy Officer. (See HSAM 3007.103(j)(1)(ii))

5. Has the Component CIO, CSO, Privacy Officer, HCA (or designee for each) and program manager determined that this effort will have a “high risk” of unauthorized access to or disclosure of sensitive information in accordance with the requirements of HSAR Deviation 15-01, Safeguarding of Sensitive Information, applicable to this acquisition?

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Note: If the answer to this question is “Yes” special clauses Safeguarding of Sensitive Information (MAR 2015), Information Technology Security and Privacy Training (MAR 2015) and HSAR clause 3052.204-71 Contractor Employee Access shall be included without revision in the solicitation and subsequent contract (as defined in FAR 2.101).

6. If the answer is “Yes” to any of the preceding questions, identify and describe the information security, personnel security, and privacy provisions to be included in the solicitation including the special clauses from HSAR Class Deviation 15-01, Safeguarding of Sensitive Information if applicable.

7. If foreign end products or services are allowed under the contract, what additional security provisions are to be included in the solicitation to protect sensitive information and facilities from unauthorized access and disclosure?

N/A

DHS-001-10083-002119
B. Authority to Operate (ATO) (completed by requiring office in coordination with Component CIO or designee):

1. Will contractor IT systems be used to input, store, process, output, and/or transmit sensitive information? □ Yes □ No

2. If “Yes”, has a Requirements Traceability Matrix (RTM) been developed by the Component CIO or designee for inclusion in the solicitation? □ Yes □ N/A

3. If “Yes” to #1, will the solicitation require the submission of a draft security plan and instructions on how the draft security plan will be evaluated? □ Yes □ N/A

Note: When a contractor IT system will be used to input, store, process, output, and/or transmit sensitive information, the RTM shall be included in the solicitation. The RTM is prepared by the Component CIO or designee in coordination with the program office and is provided as an attachment to the requirements document (i.e., Statement of Work, Statement of Objectives, Performance Work Statement). Vendors shall submit a draft security plan with their proposal/quotation as their response to the RTM. Instructions on how the draft security plan will be evaluated shall be included in the solicitation.

C. Continuous Monitoring Data Requirements (completed by requiring office in coordination with Component CIO or designee):

1. Will a contractor-operated information system(s) be used to input, store, process, output, and/or transmit sensitive information? □ Yes □ No

2. If “Yes”, does the requirements document identify how the contractor should submit monthly continuous monitoring data to the Government? □ Yes □ N/A

3. If “Yes”, identify and describe the continuous monitoring data requirements to be included in the solicitation.

D. Data Retention Requirements (completed by requiring office):

1. Will the contractor be required to retain sensitive information for the Government? □ Yes □ No

2. If “Yes”, does the requirements document identify (a) retention requirements (e.g., length of time data must be retained before return and/or destruction) and (b) security requirements for the protection of retained data? □ Yes □ N/A
3. If “Yes”, identify and describe the retention and security requirements to be included in the solicitation.

4. Does the Government have a plan to monitor and/or ensure contractor compliance with the retention and security requirements identified? □ Yes □ N/A

5. If “Yes”, describe the Government’s plan to monitor and/or ensure contractor compliance with the retention and security requirements identified in the acquisition.

E. Additional Privacy Considerations (completed by requiring office in coordination with Component Privacy Officer or designee):

1. If the contractor will have access to PII or SPII, is contractor support needed to complete privacy compliance documentation (Privacy Threshold Analysis, Privacy Impact Assessment, and/or System of Record Notice, as appropriate)? □ Yes □ No □ N/A

2. If contractor support is needed to complete the privacy compliance documentation, does the requirements document identify the activities and level of contractor support needed? □ Yes □ N/A

3. If “Yes”, identify and describe the activities and level of contractor support needed to complete the privacy compliance documentation.

Signatures:

Data Analytics Technology Center
DHS Science & Technology Directorate

Component Chief Information Officer (CIO) or designee
DHS Science & Technology Directorate - Chief Information Office
(202) 254-8221

Component Chief Security Officer (CSO) or designee
DHS Science & Technology Directorate - Security, Preparedness, & Continuity Office
(Enter Telephone Number)
Name
Component Privacy Officer or designee
DHS Science & Technology Directorate - Privacy Office
(Enter Telephone Number)

Name
TSA SSI Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
National Protection and Programs Directorate (NPPD) CVI Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
NPPD PCII Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
Head of Contracting Activity or designee
(DHS Component and Organization)
(Enter Telephone Number)
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Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 086

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 087

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Withheld pursuant to exemption
(b)(5)
of the Freedom of Information and Privacy Act
Page 089

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 090

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 091

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 092

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Market Research Report Template

A market research report documents market research in a manner appropriate to the size, complexity, and urgency of an acquisition. In accordance with the Homeland Security Acquisition Manual (HSAM) 3010.001(f), requirement-specific market research efforts and results are required prior to issuance of the solicitation and shall be clearly documented and included in the contract file. A market research report is required for contract actions awarded above the simplified acquisition threshold (SAT). In consultation with the Contracting Officer, the following template can be tailored to a requirement’s market research needs. Use only those sections applicable to your requirement. If a section is not applicable, it should be so identified and supported by a brief explanation.

I. Authority

Market research is required in accordance with:
- FAR 7.102, Acquisition Planning Policy
- FAR 10.001, Market Research Policy

II. Background Information

Describe the background of the procurement and circumstances/events leading up to the requirement. Include:
- Program Office
- Other stakeholders
- Program Office Point of Contact
- Type of acquisition (service or supply, including NAICS/PSC code)
- Expected dollar value of requirement
- Acquisition Team/IPT members, if applicable, and the responsibilities of the team members:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Office</th>
<th>Telephone</th>
<th>E-mail Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

- Time frame in which the market research was conducted

III. Initial Requirements (as identified by the program office)

- Describe the Government’s requirement in terms of:
  - Functions to be performed
  - Performance required
  - Essential physical characteristics
- Discuss any cost effectiveness issues associated with the requirements:
o Any potential cost drivers? (e.g., additional costs from some other activity that may influence the cost of the requirement)
o Any cost/performance tradeoffs? (e.g., an analysis of the value added relating to costs and performance levels)

- Describe schedule requirements (e.g., performance periods and/or delivery due dates)
- Identify DHS Acquisition Plan including AAP number, when plan was published to the public, and whether it is included in the DHS Forecast of Small Business Opportunities

IV. Participants in Market Research

Describe the involvement of the individual Acquisition Team/IPT members and any other participants in the market research effort. (The titles listed in the table below are examples.)

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Office</th>
<th>Telephone</th>
<th>E-Mail Address</th>
<th>Role/Responsibility in Market Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Official</td>
<td></td>
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</tr>
<tr>
<td>Contracting Officer</td>
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<tr>
<td>Contract Specialist</td>
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<tr>
<td>Small Business Specialist</td>
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<tr>
<td>Strategic Sourcing Specialist</td>
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</tbody>
</table>

V. Market Research Methods and Sources

Describe methods and sources used during market research. The following table may help structure and summarize the methods used in the market research effort.

<table>
<thead>
<tr>
<th>Check if part of research</th>
<th>Sources Used in Market Research</th>
<th>Details of Research/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>DHS advance acquisition plan reviewed</td>
<td></td>
<td></td>
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<tr>
<td>Acquisition history reviewed</td>
<td></td>
<td></td>
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<tr>
<td>Other recent market research reviewed</td>
<td></td>
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<tr>
<td>Interviewed knowledgeable individuals in industry</td>
<td></td>
<td></td>
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<tr>
<td>Interviewed knowledgeable individuals in Government</td>
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<tr>
<td>Government databases reviewed</td>
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<tr>
<td>Commercial databases reviewed</td>
<td></td>
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<tr>
<td>Participated/attended tradeshows and industry conferences</td>
<td></td>
<td></td>
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<tr>
<td>Professional journals reviewed</td>
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<td></td>
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<tr>
<td>Source lists of DHS and other Government agencies reviewed</td>
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<td></td>
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<tr>
<td>Catalog and product literature reviewed</td>
<td></td>
<td></td>
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<tr>
<td>Participated in DHS small business vendor outreach sessions</td>
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<tr>
<td>Reviewed requirements with Small Business Specialist</td>
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<tr>
<td>Reviewed existing DHS-wide and Multi-Component Contract Vehicles with DHS Strategic Sourcing Program Office and/or on DHS Enterprise-wide Contract Vehicle Portal</td>
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<tr>
<td>Other</td>
<td></td>
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</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Check if part of research</th>
<th>Sources Used in Market Research</th>
<th>Details of Research/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Priority Sources Reviewed</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies: Agency inventories</td>
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<td></td>
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<tr>
<td>Supplies: Excess from other agencies</td>
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<td></td>
</tr>
<tr>
<td>Supplies: Procurement list maintained by the Committee for Purchase from People who are Blind or Severely Disabled (AbilityOne) (formerly Javits-Wagner-O’Day (JWOD) Program at: <a href="http://www.AbilityOne.gov">http://www.AbilityOne.gov</a></td>
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<tr>
<td>Supplies: Wholesale supply sources (e.g., GSA)</td>
<td></td>
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</tr>
<tr>
<td>Supplies: Commercial sources (includes educational and non-profit institutions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Procurement list maintained by the Committee for Purchase from People who are Blind or Severely Disabled (AbilityOne) (formerly Javits-Wagner-O’Day (JWOD) Program at: <a href="http://www.AbilityOne.gov">http://www.AbilityOne.gov</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Federal Supply Schedules</td>
<td></td>
<td></td>
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<tr>
<td>Services: Federal Prison Industries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mandatory sources reviewed (per FAR Part 8) if applicable for:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Public utility services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Printing and related supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Leased motor vehicles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Helium</td>
<td></td>
<td></td>
</tr>
<tr>
<td>➢ Strategic and critical materials from inventories exceeding Defense National Stockpile Requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Commercial sources (includes educational and</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
non-profit institutions)

Other:

**References/Sources Checked**
Existing intra-/inter-agency contract vehicles, e.g.
Interagency Contract Directory at:
https://www.contractdirectory.gov/contractdirectory/ and
DHS’s Enterprise-wide Contract Vehicle Portal at:
http://dhsconnect.dhs.gov/org/comp/mgmt/comp/oss/Pages/
StrategicSourcing.aspx

System for Award Management (SAM) at:
https://www.sam.gov/portal/public/SAM/

Department of Labor Service Contract Act (SCA) and
Davis-Bacon Act (DBA) wage determination information
at: www.wdol.gov

Past Performance Information Retrieval System (PIIRS)
at: www.ppirs.gov or Contractor Performance
Assessment Reporting System (CPARS) at
http://www.cparscsd.disa.mil/cparssmain.htm

Other:

**Contracting Officer-led Activities**
Sources Sought Notices: Requests for Information (RFI)
Sources Sought Notices: RFI published in an industry or
association publication
Sources Sought Notices: FedBizOpps at
www.fedbizopps.gov
Pre-solicitation engagement
Pre-proposal engagement
Site visits
One-on-one vendor discussions

Other:

VI. Identify Product/Services and Sources Able to Meet the Requirement

- Identify or describe:
  - Product/Service, include any brand name product information
  - Product/Service characteristics and/or capabilities
  - Company information (e.g., name, POCs, address, telephone number, e-mail
    address, website)
  - Company characteristics, past performance, and business category

<table>
<thead>
<tr>
<th>Business Category</th>
<th>Name of Potential Source(s)/Other POC Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Business</td>
<td></td>
</tr>
<tr>
<td>Small Business</td>
<td></td>
</tr>
<tr>
<td>Small Disadvantaged Business</td>
<td></td>
</tr>
</tbody>
</table>
Section 8(a) Business
Woman-Owned Business
HUBZone Small Business
Veteran-Owned Small Business
Service-Disabled Veteran-Owned Small Business

- If sole source, describe efforts to locate additional sources

VII. Description of the Commercial Marketplace

- Describe marketplace
- Assess Government’s leverage in marketplace, e.g., describe the Government’s negotiation strengths and/or weaknesses in the market
- Describe nature of other market participants, e.g., other Governments (foreign, state/local), commercial firms, etc., and discuss how other buyers for the same product or service may affect your purchase
- Identify availability of commercial or non-developmental items that satisfy requirements (value or shortcomings of each) and sub-components

VIII. Prevalent Business Practices

- Identify standard/customary terms and conditions and industry business practices (include information on payment, freight delivery, acceptance, and warranties)
- Describe generally accepted business practices that differ from standard Government practices
- Discuss if contract financing is applicable. If so, ensure compliance with FAR 32.202-3, Conducting Market Research About Financing Terms
- Discuss any laws and regulations unique to the requirement

IX. Pricing and Market Issues

- Identify price sources (e.g., market price, catalog, GSA, etc.), price ranges, and price variations
- Describe market trends for product or service, e.g., technical, business, and pricing
- Describe how the application of cost or pricing market information collected from market research will be used in the development of the Independent Government Cost Estimate for the requirement

X. Other Considerations

- Identify other considerations gathered from market research, e.g., opportunities to “unbundle” requirements to enable more contracts or subcontracts to small, small disadvantaged and other socio-economic procurement categories
- Discuss qualifying factors, including such issues as past performance, references, product testing or evaluation, customer satisfaction, warranties, and quality problems
Describe consideration of environmentally preferable products and services. Include discussion of energy efficiency standards of market products, if applicable

Describe SAFETY Act applicability

Discuss Buy American Act applicability

Discuss Trade Agreements Act applicability

Discuss Section 508 applicability for Electronic and Information Technology

XI. Market Analysis Summary

Summarize the market research methods and resources used in the market research.

- Identify:
  - Products/Services available
  - If Commercial/Non-Developmental/Developmental Product/Service
  - Sources (companies, etc.)
  - Types of Businesses (large, small, etc.)
  - Pricing

- Summarize:
  - Market conditions (commercial marketplace)
  - Customary commercial practices
  - Other considerations

Identify the timeframes when staff used the market research methods

Provide the outcome and conclusion of the market research identifying potential sources, an analysis of the capabilities of potential sources and findings that impact the procurement, e.g., any actions taken as a result of the market research such as re-evaluation of the requirement to determine whether the need can be restated to permit commercial or non-developmental items to satisfy the agency’s needs; and solicitation and award of resultant contract using policies and procedures in FAR Part 12 - Acquisition of Commercial Items. (See FAR 10.002(c) and (d).)

Document the decision and rationale to satisfy the agency’s need with a commercial item/service, if market research so warrants

Document the decision and rationale if the agency’s need cannot be satisfied with a commercial item/service

Provide supporting documents, as appropriate

The following table provides a checklist for Market Analysis Summary information:

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Market Analysis Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Are there products/services and sources capable of satisfying the Government’s requirements?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are commercial items available to meet requirements?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are commercial items available that could be modified to meet requirements?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are commercial items available that could meet requirements if the requirements are modified to a reasonable extent?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are available items used exclusively for Governmental purposes?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If commercial items are not available, are non-developmental items available to meet requirements?</td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>If commercial items are not available, are non-developmental items available that could be modified to meet requirements?</td>
<td>Provided: Customary industry terms and conditions including warranties, buyer financing, discounts</td>
<td></td>
</tr>
<tr>
<td>If commercial items are not available, are non-developmental items available that could be modified to meet requirements if the requirements are modified to a reasonable extent?</td>
<td>Provided: Extent of competitive environment</td>
<td></td>
</tr>
<tr>
<td>Could commercial items or non-developmental items be incorporated at the Component level?</td>
<td>Provided: Environmental considerations and concerns</td>
<td></td>
</tr>
<tr>
<td>Provided: Customary industry terms and conditions including warranties, buyer financing, discounts</td>
<td>Provided: SAFETY Act consideration/applicability</td>
<td></td>
</tr>
<tr>
<td>Provided: Requirements of any laws and regulations unique to the item being acquired</td>
<td>Provided: Section 508 Applicability for Electronic and Information Technology</td>
<td></td>
</tr>
<tr>
<td>Provided: Extent of competitive environment</td>
<td>Provided: Distribution and support capabilities of potential vendors, including alternative arrangements and cost estimates</td>
<td></td>
</tr>
<tr>
<td>Provided: Environmental considerations and concerns</td>
<td>Provided: Size and status of potential sources (including small business status and if use of source is required by FAR Part 8)</td>
<td></td>
</tr>
<tr>
<td>Provided: SAFETY Act consideration/applicability</td>
<td>Provided: Identify available commercial items and describe the respective merits and shortcomings of each</td>
<td></td>
</tr>
<tr>
<td>Provided: Section 508 Applicability for Electronic and Information Technology</td>
<td>Provided: Description of any market conditions that may be time sensitive or changes in supply or demand, technology, laws, and supplier costs, etc.</td>
<td></td>
</tr>
<tr>
<td>Provided: Distribution and support capabilities of potential vendors, including alternative arrangements and cost estimates</td>
<td>Provided: Identification of potential sources. Description of capabilities of individual vendors, pricing information; delivery schedules, and standard terms and conditions, such as incentives and warranties</td>
<td></td>
</tr>
<tr>
<td>Provided: Size and status of potential sources (including small business status and if use of source is required by FAR Part 8)</td>
<td>Provided: Any market surveys developed by industry or other Federal agencies</td>
<td></td>
</tr>
<tr>
<td>Provided: Identify available commercial items and describe the respective merits and shortcomings of each</td>
<td>Provided: Pricing issues, price ranges, and price variations</td>
<td></td>
</tr>
<tr>
<td>Provided: Description of any market conditions that may be time sensitive or changes in supply or demand, technology, laws, and supplier costs, etc.</td>
<td>Provided: Description of industry/market trends – technical/pricing/business, etc.</td>
<td></td>
</tr>
<tr>
<td>Provided: Identification of potential sources. Description of capabilities of individual vendors, pricing information; delivery schedules, and standard terms and conditions, such as incentives and warranties</td>
<td>Provided: Buy American Act Consideration</td>
<td></td>
</tr>
<tr>
<td>Provided: Any market surveys developed by industry or other Federal agencies</td>
<td>Provided: Trade Agreements Act Consideration</td>
<td></td>
</tr>
<tr>
<td>Provided: Pricing issues, price ranges, and price variations</td>
<td>Provided: Other: Specify</td>
<td></td>
</tr>
<tr>
<td>Provided: Description of industry/market trends – technical/pricing/business, etc.</td>
<td>Provided: Other: Specify</td>
<td></td>
</tr>
<tr>
<td>Provided: Buy American Act Consideration</td>
<td>Provided: Other: Specify</td>
<td></td>
</tr>
<tr>
<td>Provided: Trade Agreements Act Consideration</td>
<td>Provided: Other: Specify</td>
<td></td>
</tr>
<tr>
<td>Provided: Other: Specify</td>
<td>Provided: Other: Specify</td>
<td></td>
</tr>
</tbody>
</table>
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of the Freedom of Information and Privacy Act
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(b)(5)

of the Freedom of Information and Privacy Act
I just received the note below from OPO. How would you like to respond?

Thanks!

R/

Office:

Mobile:

Hi,

Please advise when we can expect the revisions requested.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

From: [Redacted]
Sent: Wednesday, July 3, 2019 12:35 AM
To: [Redacted]
Cc: [Redacted]
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi, [Redacted]
I hope all is well. Please review the comments from [redacted] in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.

[redacted]
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [redacted]
Phone: [redacted]

From: [redacted]
Sent: Wednesday, June 19, 2019 1:23 PM
To: [redacted]
Cc: [redacted]
Subject: RE: CO for PR RSTC-19-00057 - Venntel Marketing Data

Please see final review comments in the attached documents. The market research report will require some work from the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.

Happy to discuss if needed. Thanks.

Respectfully,

[redacted]
Contracting Officer
Hi [b/(6)]

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:

Let me know your thoughts and I’ll reach out to [b/(6)] and his team.

Thanks,

[b/(6)]

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [b/(6)]
Phone: [b/(6)]
Hi,

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

Hi,

I believe so, but please confirm with [redacted].

Respectfully,
Hi,

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email:
Phone:
Checklist for Sensitive Information

Procurement Title: Venntel Marketing Data  Requisition #: RSTC-19-00057

The requiring office shall complete this checklist for all acquisitions when a written acquisition plan is not required (see the Acquisition Plan Matrix at HSAM 3007.103(e)(4) for details on when an acquisition plan is/is not required). If the requiring official determines that a contractor will have access to sensitive information and/or information systems will be used to input, store, process, output and/or transmit sensitive information, the requiring official shall ensure the Statement of Work, Statement of Objective, Performance Work Statement or specification is reviewed by the organizations identified at HSAM 3004-470(b) and obtain signatures, as applicable, on this checklist. The requiring office shall submit the completed checklist as part of the procurement request package in accordance with HSAM 3004.7101. The Contracting Office will route the checklist to the Head of Contracting Activity or designee for signature.

A. Sensitive Information and Access Requirements (completed by the requiring office):

1. Will the contractor have access to any of the types of the sensitive information listed below during the acquisition?

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Chemical-terrorism Vulnerability Information (CVI)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. For Official Use Only (FOUO)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Law Enforcement Sensitive Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Protected Critical Infrastructure Information (PCII)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Personally Identifiable Information (PII)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Sensitive PII (SPII)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Sensitive Security Information (SSI)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Other type of sensitive information Confidential, Secret, or Top Secret</th>
</tr>
</thead>
</table>

2. Will contractor employees have access to DHS information systems?  □ Yes  □ No

3. Will contractor employees require recurring access to Government facilities?  □ Yes  □ No

**Note:** If the answer is “No” to questions 1 through 3 above, proceed to the Signatures section of the checklist.

4. If the answer is “Yes” to either of questions 1 through 3 above, have information security, personnel security, and/or privacy provisions been identified and coordinated with the following, as applicable (see HSAM 3004.470(b) for coordination requirements).

**Information security provisions** include the development of the Requirements Traceability Matrix, identification of incident reporting and response requirements, and requests for the contractor to: provide security authorization documentation, obtain an independent assessment, perform continuous monitoring, provide the Government with
necessary access to perform security reviews, comply with federal reporting requirements.

**Personnel security provisions** include reviewing fitness requirements and other security matters related to access to sensitive but unclassified information and recurring access of contractor employees to Government facilities, information systems, security items or products.

**Privacy provisions** include requirements for handling PII and/or SPII, incident reporting, notification and credit monitoring.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
<th>Component Chief Information Officer (CIO) or designee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Component Chief Security Officer (CSO) or designee</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>Component Privacy Officer</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>TSA SSI Program Office</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>National Protection and Programs Directorate (NPPD) CVI Program Office</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>NPPD PCII Program Office</td>
</tr>
</tbody>
</table>

Note: For Components and offices that do not have a Component level CIO, CSO, or Privacy Officer, the acquisition planner shall coordinate with the DHS Headquarters CIO or designee, CSO and Chief Privacy Officer. (See HSAM 3007.103(j)(1)(ii))

5. Has the Component CIO, CSO, Privacy Officer, HCA (or designee for each) and program manager determined that this effort will have a “high risk” of unauthorized access to or disclosure of sensitive information in accordance with the requirements of HSAR Deviation 15-01, Safeguarding of Sensitive Information, applicable to this acquisition?  

   - Yes  
   - No

Note: If the answer to this question is “Yes” special clauses Safeguarding of Sensitive Information (MAR 2015), Information Technology Security and Privacy Training (MAR 2015) and HSAR clause 3052.204-71 Contractor Employee Access shall be included without revision in the solicitation and subsequent contract (as defined in FAR 2.101).

6. If the answer is “Yes” to any of the preceding questions, identify and describe the information security, personnel security, and privacy provisions to be included in the solicitation including the special clauses from HSAR Class Deviation 15-01, Safeguarding of Sensitive Information if applicable.

   - Clauses are in the security section of the DR

7. If foreign end products or services are allowed under the contract, what additional security provisions are to be included in the solicitation to protect sensitive information and facilities from unauthorized access and disclosure?

   - N/A
B. Authority to Operate (ATO) (completed by requiring office in coordination with Component CIO or designee):

1. Will contractor IT systems be used to input, store, process, output, and/or transmit sensitive information? □ Yes □ No

2. If “Yes”, has a Requirements Traceability Matrix (RTM) been developed by the Component CIO or designee for inclusion in the solicitation? □ Yes □ N/A

3. If “Yes” to #1, will the solicitation require the submission of a draft security plan and instructions on how the draft security plan will be evaluated? □ Yes □ N/A

Note: When a contractor IT system will be used to input, store, process, output, and/or transmit sensitive information, the RTM shall be included in the solicitation. The RTM is prepared by the Component CIO or designee in coordination with the program office and is provided as an attachment to the requirements document (i.e., Statement of Work, Statement of Objectives, Performance Work Statement). Vendors shall submit a draft security plan with their proposal/quotation as their response to the RTM. Instructions on how the draft security plan will be evaluated shall be included in the solicitation.

C. Continuous Monitoring Data Requirements (completed by requiring office in coordination with Component CIO or designee):

1. Will a contractor-operated information system(s) be used to input, store, process, output, and/or transmit sensitive information? □ Yes □ No

2. If “Yes”, does the requirements document identify how the contractor should submit monthly continuous monitoring data to the Government? □ Yes □ N/A

3. If “Yes”, identify and describe the continuous monitoring data requirements to be included in the solicitation.

D. Data Retention Requirements (completed by requiring office):

1. Will the contractor be required to retain sensitive information for the Government? □ Yes □ No

2. If “Yes”, does the requirements document identify (a) retention requirements (e.g., length of time data must be retained before return and/or destruction) and (b) security requirements for the protection of retained data? □ Yes □ N/A
3. If “Yes”, identify and describe the retention and security requirements to be included in the solicitation.

4. Does the Government have a plan to monitor and/or ensure contractor compliance with the retention and security requirements identified?  □ Yes □ N/A

5. If “Yes”, describe the Government’s plan to monitor and/or ensure contractor compliance with the retention and security requirements identified in the acquisition.

E. Additional Privacy Considerations (completed by requiring office in coordination with Component Privacy Officer or designee):

1. If the contractor will have access to PII or SPII, is contractor support needed to complete privacy compliance documentation (Privacy Threshold Analysis, Privacy Impact Assessment, and/or System of Record Notice, as appropriate)?  □ Yes □ No □ N/A

2. If contractor support is needed to complete the privacy compliance documentation, does the requirements document identify the activities and level of contractor support needed?  □ Yes □ N/A

3. If “Yes”, identify and describe the activities and level of contractor support needed to complete the privacy compliance documentation.

Signatures:

Data Analytics Technology Center
DHS Science & Technology Directorate

Component Chief Information Officer (CIO) or designee
DHS Science & Technology Directorate - Chief Information Office

Component Chief Security Officer (CSO) or designee
DHS Science & Technology Directorate - Security, Preparedness, & Continuity Office
(Enter Telephone Number)
Component Privacy Officer or designee
DHS Science & Technology Directorate - Privacy Office
(Enter Telephone Number)

Name
Date

TSA SSI Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
Date

National Protection and Programs Directorate (NPPD) CVI Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
Date

NPPD PCII Program Office, as applicable
(DHS Component and Organization)
(Enter Telephone Number)

Name
Date

Head of Contracting Activity or designee
(DHS Component and Organization)
(Enter Telephone Number)
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Market Research Report Template

A market research report documents market research in a manner appropriate to the size, complexity, and urgency of an acquisition. In accordance with the Homeland Security Acquisition Manual (HSAM) 3010.001(4), requirement-specific market research efforts and results are required prior to issuance of the solicitation and shall be clearly documented and included in the contract file. A market research report is required for contract actions awarded above the simplified acquisition threshold (SAT). In consultation with the Contracting Officer, the following template can be tailored to a requirement’s market research needs. Use only those sections applicable to your requirement. If a section is not applicable, it should be so identified and supported by a brief explanation.

I. Authority

Market research is required in accordance with:
- FAR 7.102, Acquisition Planning Policy
- FAR 10.001, Market Research Policy

II. Background Information

Describe the background of the procurement and circumstances/events leading up to the requirement. Include:
- Program Office
- Other stakeholders
- Program Office Point of Contact
- Type of acquisition (service or supply, including NAICS/PSC code)
- Expected dollar value of requirement
- Acquisition Team/IPT members, if applicable, and the responsibilities of the team members:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Office</th>
<th>Telephone</th>
<th>E-mail Address</th>
</tr>
</thead>
</table>

- Time frame in which the market research was conducted

III. Initial Requirements (as identified by the program office)
- Describe the Government’s requirement in terms of:
  - Functions to be performed
  - Performance required
  - Essential physical characteristics
- Discuss any cost effectiveness issues associated with the requirements:
o Any potential cost drivers? (e.g., additional costs from some other activity that may influence the cost of the requirement)
o Any cost/performance tradeoffs? (e.g., an analysis of the value added relating to costs and performance levels)

- Describe schedule requirements (e.g., performance periods and/or delivery due dates)
- Identify DHS Acquisition Plan including AAP number, when plan was published to the public, and whether it is included in the DHS Forecast of Small Business Opportunities

IV. Participants in Market Research

Describe the involvement of the individual Acquisition Team/IPT members and any other participants in the market research effort. (The titles listed in the table below are examples.)

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Office</th>
<th>Telephone</th>
<th>E-Mail Address</th>
<th>Role/Responsibility in Market Research</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Official</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contracting Officer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Contract Specialist</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Small Business Specialist</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Strategic Sourcing Specialist</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

V. Market Research Methods and Sources

Describe methods and sources used during market research. The following table may help structure and summarize the methods used in the market research effort.

<table>
<thead>
<tr>
<th>Check if part of research</th>
<th>Sources Used in Market Research</th>
<th>Details of Research/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DHS advance acquisition plan reviewed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Acquisition history reviewed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Other recent market research reviewed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interviewed knowledgeable individuals in industry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Interviewed knowledgeable individuals in Government</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Government databases reviewed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Commercial databases reviewed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Participated/attended tradeshows and industry conferences</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professional journals reviewed</td>
<td></td>
</tr>
</tbody>
</table>
Source lists of DHS and other Government agencies reviewed
Catalog and product literature reviewed
Participated in DHS small business vendor outreach sessions
Reviewed requirements with Small Business Specialist
Reviewed existing DHS-wide and Multi-Component Contract Vehicles with DHS Strategic Sourcing Program Office and/or on DHS Enterprise-wide Contract Vehicle Portal
Other

<table>
<thead>
<tr>
<th>Check if part of research</th>
<th>Sources Used in Market Research</th>
<th>Details of Research/Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Sources Reviewed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies: Agency inventories</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies: Excess from other agencies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies: Procurement list maintained by the Committee for Purchase from People who are Blind or Severely Disabled (AbilityOne) (formerly Javits-Wagner-O’Day (JWOD) Program at: <a href="http://www.AbilityOne.gov">http://www.AbilityOne.gov</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies: Wholesale supply sources (e.g., GSA)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supplies: Commercial sources (includes educational and non-profit institutions)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Procurement list maintained by the Committee for Purchase from People who are Blind or Severely Disabled (AbilityOne) (formerly Javits-Wagner-O’Day (JWOD) Program at: <a href="http://www.AbilityOne.gov">http://www.AbilityOne.gov</a></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Federal Supply Schedules</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Federal Prison Industries</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mandatory sources reviewed (per FAR Part 8) if applicable for:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Public utility services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Printing and related supplies</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Leased motor vehicles</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Helium</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Strategic and critical materials from inventories exceeding Defense National Stockpile Requirements</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services: Commercial sources (includes educational and</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
VI. Identify Product/Services and Sources Able to Meet the Requirement

- Identify or describe:
  - Product/Service, include any brand name product information
  - Product/Service characteristics and/or capabilities
  - Company information (e.g., name, POCs, address, telephone number, e-mail address, website)
  - Company characteristics, past performance, and business category

<table>
<thead>
<tr>
<th>Business Category</th>
<th>Name of Potential Source(s)/Other POC Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Large Business</td>
<td></td>
</tr>
<tr>
<td>Small Business</td>
<td></td>
</tr>
<tr>
<td>Small Disadvantaged Business</td>
<td></td>
</tr>
</tbody>
</table>
Section 8(a) Business
Woman-Owned Business
HUBZone Small Business
Veteran-Owned Small Business
Service-Disabled Veteran-Owned Small Business

➢ If sole source, describe efforts to locate additional sources

VII. Description of the Commercial Marketplace

➢ Describe marketplace
➢ Assess Government’s leverage in marketplace, e.g., describe the Government’s negotiation strengths and/or weaknesses in the market
➢ Describe nature of other market participants, e.g., other Governments (foreign, state/local), commercial firms, etc., and discuss how other buyers for the same product or service may affect your purchase
➢ Identify availability of commercial or non-developmental items that satisfy requirements (value or shortcomings of each) and sub-components

VIII. Prevalent Business Practices

➢ Identify standard/customary terms and conditions and industry business practices (include information on payment, freight delivery, acceptance, and warranties)
➢ Describe generally accepted business practices that differ from standard Government practices
➢ Discuss if contract financing is applicable. If so, ensure compliance with FAR 32.202-3, Conducting Market Research About Financing Terms
➢ Discuss any laws and regulations unique to the requirement

IX. Pricing and Market Issues

➢ Identify price sources (e.g., market price, catalog, GSA, etc.), price ranges, and price variations
➢ Describe market trends for product or service, e.g., technical, business, and pricing
➢ Describe how the application of cost or pricing market information collected from market research will be used in the development of the Independent Government Cost Estimate for the requirement

X. Other Considerations

➢ Identify other considerations gathered from market research, e.g., opportunities to “unbundle” requirements to enable more contracts or subcontracts to small, small disadvantaged and other socio-economic procurement categories
➢ Discuss qualifying factors, including such issues as past performance, references, product testing or evaluation, customer satisfaction, warranties, and quality problems
Describe consideration of environmentally preferable products and services. Include discussion of energy efficiency standards of market products, if applicable

Describe SAFETY Act applicability

Discuss Buy American Act applicability

Discuss Trade Agreements Act applicability

Discuss Section 508 applicability for Electronic and Information Technology

XI. Market Analysis Summary

Summarize the market research methods and resources used in the market research.

- Identify:
  - Products/Services available
  - If Commercial/Non-Developmental/Developmental Product/Service
  - Sources (companies, etc.)
  - Types of Businesses (large, small, etc.)
  - Pricing

- Summarize:
  - Market conditions (commercial marketplace)
  - Customary commercial practices
  - Other considerations

Identify the timeframes when staff used the market research methods

Provide the outcome and conclusion of the market research identifying potential sources, an analysis of the capabilities of potential sources and findings that impact the procurement, e.g., any actions taken as a result of the market research such as re-evaluation of the requirement to determine whether the need can be restated to permit commercial or non-developmental items to satisfy the agency’s needs; and solicitation and award of resultant contract using policies and procedures in FAR Part 12 - Acquisition of Commercial Items. (See FAR 10.002(c) and (d).)

Document the decision and rationale to satisfy the agency’s need with a commercial item/service, if market research so warrants

Document the decision and rationale if the agency’s need cannot be satisfied with a commercial item/service

Provide supporting documents, as appropriate

The following table provides a checklist for Market Analysis Summary information:

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
<th>Market Analysis Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Are there products/services and sources capable of satisfying the Government’s requirements?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are commercial items available to meet requirements?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are commercial items available that could be modified to meet requirements?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are commercial items available that could meet requirements if the requirements are modified to a reasonable extent?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Are available items used exclusively for Governmental purposes?</td>
</tr>
<tr>
<td></td>
<td></td>
<td>If commercial items are not available, are non-developmental items available to meet requirements?</td>
</tr>
<tr>
<td>Question</td>
<td></td>
<td></td>
</tr>
<tr>
<td>-----------------------------------------------------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If commercial items are not available, are non-developmental items available that could be</td>
<td></td>
<td></td>
</tr>
<tr>
<td>modified to meet requirements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>If commercial items are not available, are non-developmental items available that could be</td>
<td></td>
<td></td>
</tr>
<tr>
<td>modified to meet requirements if the requirements are modified to a reasonable extent?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Could commercial items or non-developmental items be incorporated at the Component level?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provided: Customary industry terms and conditions including warranties, buyer financing,</td>
<td></td>
<td></td>
</tr>
<tr>
<td>discounts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provided: Requirements of any laws and regulations unique to the item being acquired</td>
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<td>Provided: Extent of competitive environment</td>
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<tr>
<td>Provided: Environmental considerations and concerns</td>
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<tr>
<td>Provided: SAFETY Act consideration/appliability</td>
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<tr>
<td>Provided: Section 508 Applicability for Electronic and Information Technology</td>
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<tr>
<td>Provided: Distribution and support capabilities of potential vendors, including alternative</td>
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<tr>
<td>arrangements and cost estimates</td>
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<tr>
<td>Provided: Size and status of potential sources (including small business status and if use of</td>
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<tr>
<td>source is required by FAR Part 8)</td>
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<td>Provided: Identify available commercial items and describe the respective merits and</td>
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<td>shortcomings of each</td>
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<td>Provided: Description of any market conditions that may be time sensitive or changes in supply</td>
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<tr>
<td>or demand, technology, laws, and supplier costs, etc.</td>
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<tr>
<td>Provided: Identification of potential sources. Description of capabilities of individual vendors,</td>
<td></td>
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<tr>
<td>pricing information; delivery schedules, and standard terms and conditions, such as incentives</td>
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<td>and warranties</td>
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<tr>
<td>Provided: Any market surveys developed by industry or other Federal agencies</td>
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<td>Provided: Pricing issues, price ranges, and price variations</td>
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<tr>
<td>Provided: Description of industry/market trends – technical/pricing/business, etc.</td>
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<td>Provided: Buy American Act Consideration</td>
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<td>Provided: Trade Agreements Act Consideration</td>
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<td>Provided: Other: Specify</td>
<td></td>
<td></td>
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<tr>
<td>Provided: Other: Specify</td>
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</tbody>
</table>
Page 135

Withheld pursuant to exemption
(b)(5)

of the Freedom of Information and Privacy Act
Page 136

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 137

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 138

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(b)(5)

of the Freedom of Information and Privacy Act
Page 139

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 140

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Page 141

Withheld pursuant to exemption

(b)(5)

of the Freedom of Information and Privacy Act
Hi,

Heavy travel schedule, including travel on behalf of leadership, has caused some delays. However, we will work with CAPS and will provide an update next week. We are also actively working the Paxata and Cloud packages.

Also, I noticed in the email trail below that Jessica was not cc’d. We have communicated to please include her to help track these requests in the future. We are unable to help track if we don’t know about them.

Many thanks, and have a great weekend!

VR,

Department of Homeland Security
Science and Technology Directorate

I just received the note below from OPO. How would you like to respond? Thanks!

R/

[Redacted Information]

DHS-001-10083-002180
From: [b](6)
Sent: Thursday, July 18, 2019 2:57 PM
To: [b](6)
Cc: [b](6)
Subject: 2nd Request - FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi [b](6)

Please advise when we can expect the revisions requested.

Thanks,

[b](6)

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [b](6)
Phone: [b](6)

From: [b](6)
Sent: Wednesday, July 3, 2019 12:35 AM
To: [b](6)
Cc: [b](6)
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi [b](6)

I hope all is well. Please review the comments from [b](6) in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.
From: (b)(6)  
Sent: Wednesday, June 19, 2019 1:23 PM  
To: (b)(6)  
Cc: (b)(6)  
Subject: RE: CO for PR RSTC-19-00057 - Venntel Marketing Data

Please see final review comments in the attached documents. The market research report will require some work from the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.

Happy to discuss if needed. Thanks.

Respectfully,

Contracting Officer

From: (b)(6)  
Sent: Friday, June 14, 2019 3:55 PM  
To: (b)(6)  
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi, (b)(6)

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:

DHS-001-10083-002182
Let me know your thoughts and I'll reach out to Stephen and his team.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)

From: (b)(6)
Sent: Monday, June 10, 2019 12:50 PM
To: (b)(6)
Cc: (b)(6)

Subject: RE: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi (b)(6)

(b)(6) will be the CO.

(b)(6)
Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi,

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

---

Subject: RE: CO for PR RSTC-19-00057 Venntel Marketing Data

Hi,

I believe so, but please confirm with...

Respectfully,

Contracting Officer

---

Subject: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi,

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [REDACTED]
Phone: [REDACTED]
Procurement Innovation Lab

Contracting

Innovation Practitioner

DHS-001-10083-002187

"SHU"-ha-ri
Attached you will find OIC-TC’s priority (in green). This IAA agreement is transferred to Financial transaction (STPR-02213).

Best,

From: [b](6)
Sent: Wednesday, July 24, 2019 1:07 PM
To: Technology Center Feds [b](6)
Cc: [b](6)

Subject: FW: PR and IAA Priorities

Good afternoon Tech Centers,

We've been asked to provide a priority to OSE front office on all of our outstanding PRs. Could you each please take a look at the attached spreadsheet and do the following:

1. Highlight (in green) your PRs that are absolutely critical to get awarded before the end of the fiscal year.
2. Provide information in the last 3 columns on the right (date award needed; reason for priority; justification)

Please send back to me by COB tomorrow, July 25, and I'll get this aggregated up to OSE. Thank you in advance!!

R/ [b](6)
Office [b](6)
Mobil
Subject: PR and IAA Priorities

All,

As a follow-up to yesterday’s deputy meeting, please find an attached spreadsheet to consolidate OSE’s prioritized IAA and PR requests. In filling the document out, please complete the columns highlighted in yellow.

Please provide input by noon Friday and it will be consolidated and submitted to FBP and OPO.

I anticipate this will become a recurring update to provide OSE priorities up to FBD and OPO.

V/r,

[Redacted]

S&T Directorate
Office of Science and Engineering
<table>
<thead>
<tr>
<th>PK #</th>
<th>PK Title</th>
<th>PK Tracker ID</th>
<th>PK Dollar Value</th>
<th>Date Award Required</th>
<th>Reason for Priority</th>
<th>Justification for Prioritization</th>
</tr>
</thead>
<tbody>
<tr>
<td>b(4)</td>
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</tbody>
</table>

DHS-001-10083-002190
Good afternoon Tech Centers,
We’ve been asked to provide a priority to OSE front office on all of our outstanding PRs. Could you each please take a look at the attached spreadsheet and do the following:

1. Highlight (in green) your PRs that are absolutely critical to get awarded before the end of the fiscal year.
2. Provide information in the last 3 columns on the right (date award needed; reason for priority; justification)

Please send back to me by COB tomorrow, July 25, and I’ll get this aggregated up to OSE. Thank you in advance!!

R/

Office

Mobile

All,
As a follow-up to yesterday’s deputy meeting, please find an attached spreadsheet to consolidate OSE’s prioritized IAA and PR requests. In filling the document out, please complete the columns highlighted in yellow.

Please provide input by noon Friday and it will be consolidated and submitted to FBP and OPO.

I anticipate this will become a recurring update to provide OSE priorities up to FBD and OPO.

V/r,
<table>
<thead>
<tr>
<th>Priority</th>
<th>Award Required</th>
<th>Expanding POP Logic</th>
<th>PR</th>
<th>PR Tracker</th>
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<tbody>
<tr>
<td>Mission Critical</td>
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</tbody>
</table>

**Science and Technology Directorate**

**PR Prioritization**

**2019**

DHS-001-10083-002193
I presume there will be a consolidated submission from DA-TC for this tasker. As such, attached is my input for the third Phase III award for Mod9.

Please note: As far as I know, OPO is in the process of awarding this contract. The plan has been, once the contract is awarded, is for me and the [b](7)(E) team to meet with Arlo in person and to get things back on track. This is why I selected the date of August 15, 2019 in this tasker.

However, no other work on the contract may commence until the PTA is in place. And, we need the ATO for the lab. Given this, if you want (or need) to delay contract award until after September 30, certainly that is your call.

Thank you,
All,

As a follow-up to yesterday’s deputy meeting, please find an attached spreadsheet to consolidate OSE’s prioritized IAA and PR requests. In filling the document out, please complete the columns highlighted in yellow.

Please provide input by noon Friday and it will be consolidated and submitted to FBP and OPO.

I anticipate this will become a recurring update to provide OSE priorities up to FBD and OPO.

V/r,

S&T Directorate
Office of Science and Engineering
<table>
<thead>
<tr>
<th>PR</th>
<th>PR Title</th>
<th>PR Tracker ID</th>
<th>PR Dollar Value</th>
<th>Date Award Required</th>
<th>Reason for Priority</th>
<th>Justification for Prioritization</th>
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</table>

**Reason for Priority:**
- Expiring funds, POP expiring, Stop Work, Mission Critical.
<table>
<thead>
<tr>
<th>#</th>
<th>Priority Number</th>
<th>PR ID</th>
<th>PR Title</th>
<th>PR Tracker ID</th>
<th>PR Dollar Value</th>
<th>Date Award Required</th>
<th>Reason for Priority</th>
<th>Documentation for Prioritization</th>
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</table>

DHS-001-10083-002197
Data Analytics Technology Center
Science and Technology Directorate
Department of Homeland Security

All foreign national meetings require approval 20 days in advance for unclassified visits and 30 days in advance of classified visits. Please coordinate with me in advance.
<table>
<thead>
<tr>
<th>Date</th>
<th>Priority number</th>
<th>PR #</th>
<th>PR Title</th>
<th>PR Tracker ID</th>
<th>PR Dollar Value</th>
<th>Date Band Required</th>
<th>Mission Critical</th>
<th>Reason for Priority: Expiring funds: POD existing: Stop Work: Mission Critical</th>
<th>Justification for Prioritization</th>
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</table>
This one is underway but we do not want it to stop,
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<thead>
<tr>
<th>Priority</th>
<th>PR #</th>
<th>PR Title</th>
<th>PE Tracker ID</th>
<th>PE Dollar Value</th>
<th>Date Award Required</th>
<th>Justification for Priority</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Mission Critical</strong></td>
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</tbody>
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*Reason for Priority: Expired funds, POP expiring, Stop Work, Mission Critical*
Good afternoon, hope that you are well,
Here is our presentation. Let us know if you need anything,
Best regards,
Page 007

Withheld pursuant to exemption

(b)(5); (b)(7)(E)

of the Freedom of Information and Privacy Act
Withheld pursuant to exemption (b)(5) ; (b)(7)(E) of the Freedom of Information and Privacy Act
Withheld pursuant to exemption
(b)(5); (b)(7)(E)
of the Freedom of Information and Privacy Act
Page 012

Withheld pursuant to exemption

(b)(5); (b)(7)(E)

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Page 013

Withheld pursuant to exemption

(b)(5) ; (b)(7)(E)

of the Freedom of Information and Privacy Act
Page 014

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(b)(5); (b)(7)(E)

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Page 016

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(b)(5) ; (b)(7)(E)
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Withheld pursuant to exemption

(b)(5); (b)(7)(E)

of the Freedom of Information and Privacy Act
Page 019

Withheld pursuant to exemption

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(b)(5); (b)(7)(E)
of the Freedom of Information and Privacy Act
Page 021

Withheld pursuant to exemption
(b)(5); (b)(7)(E)

of the Freedom of Information and Privacy Act
Page 022

Withheld pursuant to exemption

(b)(5) ; (b)(7)(E)

of the Freedom of Information and Privacy Act
Withheld pursuant to exemption

(b)(5); (b)(7)(E)

of the Freedom of Information and Privacy Act
Thank you for all of your hard work in supporting the Data Analytics Technology Center and the critical missions of DHS. We have been in a long deliberative process regarding this effort. Unfortunately, we are now in a legal review that may take until October to complete. With this uncertainty, we will not be expecting to award this effort in FY19. We are interested in leaving the paperwork in place if that is possible, but to schedule this effort for award in FY20. We will withdraw and close this PR, and re-submit for FY-20 execution once the legal analysis is completed.

Hi,

Please advise when we can expect the revisions requested.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

I hope all is well. Please review the comments from (b)(6) in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.

Please see final review comments in the attached documents. The market research report will require some work from the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.

Happy to discuss if needed. Thanks.

Respectfully,

Contracting Officer
Hi,

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:

Let me know your thoughts and I'll reach out to [redacted] and his team.

Thanks,

[b](6)

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [redacted]
Phone: [redacted]

Hi [redacted]

[redacted] will be the CO.

[b](6)

Associate Director/Contracting Officer
Hi,

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

Hi,

I believe so, but please confirm with

DHS-001-10083-002225
Hi, [Contract Specialist]

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

[Contract Specialist]

S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Good afternoon.

This effort was de-committed in FFMS and can be closed in Prism.

If you have any question and/or require additional information, please do not hesitate to contact me.

Thank you.

Thanks for your email.

For FBD, please let us know when the funds on PR RSTC-19-00057 have been de-committed so that we can then send a ticket to the PRISM Help Desk to close this PR. Thank you.
Thank you for all of your hard work in supporting the Data Analytics Technology Center and the critical missions of DHS. We have been in a long deliberative process regarding this effort. Unfortunately, we are now in a legal review that may take until October to complete. With this uncertainty, we will not be expecting to award this effort in FY19. We are interested in leaving the paperwork in place if that is possible, but to schedule this effort for award in FY20. We will withdraw and close this PR, and re-submit for FY-20 execution once the legal analysis is completed.

Hi,

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Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Hi,

I hope all is well. Please review the comments from the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.

---

**From:** [Redacted]
**Sent:** Wednesday, July 3, 2019 12:35 AM
**To:** [Redacted]
**Cc:** [Redacted]
**Subject:** FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

---

Please see final review comments in the attached documents. The market research report will require some work from the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.

---

Department of Homeland Security
Email: [Redacted]
Phone: [Redacted]
Hi,

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:

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Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email [redacted]
Phone [redacted]
Hi,

(b)(6) will be the CO.

(b)(6)

Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: 
Phone:

Hi,

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

(b)(6)

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email:
Hi, (b)(6)

I believe so, but please confirm with (b)(6)

Respectfully,

(b)(6)
Contracting Officer

Hi, (b)(6)

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

(b)(6)
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)
Thanks for your email.

For FBD, please let us know when the funds on PR RSTC-19-00057 have been de-committed so that we can then send a ticket to the PRISM Help Desk to close this PR. Thank you.

Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email
Phone

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From: (b)(6)
Sent: Thursday, July 18, 2019 2:57 PM
To: (b)(6)
Cc: (b)(6)
Subject: 2nd Request - FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi (b)(6)

Please advise when we can expect the revisions requested.

Thanks,

(b)(6)
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)

From: (b)(6)
Sent: Wednesday, July 3, 2019 12:35 AM
To: (b)(6)
Cc: (b)(6)
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi, (b)(6)

I hope all is well. Please review the comments from (b)(6) in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.

(b)(6)
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Please see final review comments in the attached documents. The market research report will require some work form the PMO, please work with them to revise the report so it conforms to the template and the process outlined in the market research guide (attached for reference). Due to the dollar value, the scrutiny for this will be rather high and the entire package needs to present a cohesive and easily-followed case supporting the brand name requirement.

I did not see an IGCE attached to your initial message.

Happy to discuss if needed. Thanks.

Respectfully,

Contracting Officer

Hi,

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:
Let me know your thoughts and I’ll reach out to [redacted] and his team.

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [redacted]
Phone: [redacted]
From: (b)(6)
Sent: Monday, June 10, 2019 1:09 PM
To: (b)(6)
Cc: (b)(6)
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi (b)(6)

Who will be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)

From: (b)(6)
Sent: Monday, June 10, 2019 1:07 PM
To: (b)(6)
Cc: (b)(6)
Subject: RE: CO for PR RSTC-19-00057 Venntel Marketing Data

Hi (b)(6)

I believe so, but please confirm with (b)(6)

Respectfully,

Contracting Officer

From: (b)(6)
Sent: Monday, June 10, 2019 1:04 PM
To: (b)(6)
Cc: (b)(6)
Subject: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi (b)(6)

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?
Thanks,

(b)(6)

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: (b)(6)
Phone: (b)(6)
Thanks for your response, [redacted].

Regards,

[redacted]

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

Good afternoon [redacted].

This effort was de-committed in FFMS and can be closed in Prism.

If you have any question and/or require additional information, please do not hesitate to contact me.

Thank you

[redacted]
Subject: RE: 2nd Request - FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Thanks, [REDACTED] for your email.

For FBD, please let us know when the funds on PR RSTC-19-00057 have been de-committed so that [REDACTED] can then send a ticket to the PRISM Help Desk to close this PR. Thank you.

[REDACTED]

Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [REDACTED]
Phone: [REDACTED]

From: [REDACTED]
Sent: Tuesday, July 30, 2019 4:45 PM
To: [REDACTED]
Cc: [REDACTED]

Subject: RE: 2nd Request - FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Thank you for all of your hard work in supporting the Data Analytics Technology Center and the critical missions of DHS. We have been in a long deliberative process regarding this effort. Unfortunately, we are now in a legal review that may take until October to complete. With this uncertainty, we will not be expecting to award this effort in FY19. We are interested in leaving the paperwork in place if that is possible,
but to schedule this effort for award in FY20. We will withdraw and close this PR, and re-submit for FY-20 execution once the legal analysis is completed.

From: [Redacted]
Sent: Thursday, July 18, 2019 2:57 PM
To: [Redacted]
Cc: [Redacted]
Subject: 2nd Request - FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi [Redacted]

Please advise when we can expect the revisions requested.

Thanks,

[Redacted]
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email: [Redacted]
Phone: [Redacted]

From: [Redacted]
Sent: Wednesday, July 3, 2019 12:35 AM
To: [Redacted]
Cc: [Redacted]
Subject: FW: CO for PR RSTC-19-00057 - Venntel Marketing Data

Hi [Redacted]

I hope all is well. Please review the comments from [Redacted] in the email below, as well as those in the documents.

I have revised the Delivery Requirements document, and the JEFO. Please refer to the attached Marketing Research Report Template.
Hi,

I am including the package received for PR RSTC-19-00057 for the purchase of Venntel Marketing Data.

I have reviewed the documents submitted, and they were updated from the submission received last year:

DHS-001-10083-002245
Let me know your thoughts and I’ll reach out to [Redacted] and his team.

Thanks,

[Redacted]
Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

Hi [Redacted]

[Redacted] will be the CO.

Associate Director/Contracting Officer
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Subject: FW: CO for RSTC-19-00057 - Venntel Marketing Data

Hi,

Who will be the CO for RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security

---

Subject: RE: CO for RSTC-19-00057 - Venntel Marketing Data

Hi,

I believe so, but please confirm with [b](6)

Respectfully,

Contracting Officer
Hi,

Will you be the CO for PR RSTC-19-00057 - Venntel Marketing Data?

Thanks,

Contract Specialist
S&T Acquisitions Division
Office of Procurement Operations
Department of Homeland Security
Email:
Phone:
Thank you for the offer to demonstrate your new data capabilities with the HSI Innovation Lab. If you need additional information please let us know.

Regards

Innovation Lab
Homeland Security Investigations

Got it.

On Wed, Jul 31, 2019 at 9:16 AM wrote:

Sent with BlackBerry Work
(www.blackberry.com)
All,

I need comments for our strategic review slides as soon as you can, no later than noon tomorrow.

There was a template driving the information so not my design.

Thanks,
Page 056

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Page 063

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of the Freedom of Information and Privacy Act
Hello,

The attached version contains punctuation edits on Sides 2 and 3, and a capitalization correction for (b)(7)(E) on Slide 7.

Kind regards,

DHS Science and Technology Directorate (DHS S&T)
Data Analytics Technology Center (DATC)

All,

I need comments for our strategic review slides as soon as you can, no later than noon tomorrow.

There was a template driving the information so not my design,

Thanks,
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Hi

Suggested changes in red.

VR,

[Department of Homeland Security]

Science and Technology Directorate

Mobilizing Innovation for a Secure World

From: [b](6)
Sent: Tuesday, August 6, 2019 12:22 PM
To: [b](6)
Subject: For review and comment

All,
I need comments for our strategic review slides as soon as you can, no later than noon tomorrow, There was a template driving the information so not my design,

Thanks,
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of the Freedom of Information and Privacy Act
The best time for us to meet with Venntel is Thursday, September 5 from 1-2:30 pm. Can you please confirm that with Venntel and find a space that can accommodate about 15-20 attendees plus the Venntel folks?

Based on the response I received, it seems most of the attorneys are bringing their operations folks and if possible, their privacy representative. Additionally, the head PRIV attorney is bringing two people from HQ Privacy office.

Please let me know if you have any questions.

Best,

Attorney - Technology Programs Law Division
Office of the General Counsel
Department of Homeland Security

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My availability lines up with for next Thursday—1:00 to 2:30 would be best, but I could do 10:00 to 11:30 as an alternate.

Thanks,
RE: Mobile Marketing Data/Venntel Follow-up

Thanks for coordinating.

1. 10:00am-11:30am (2)
2. 1:00pm-2:30pm (1)
3. 3:00pm-4:30pm (Does not work)

Please include and from PRIV.

Thanks,

Mobile Marketing Data/Venntel Follow-up

All —

Thank you again for making yourselves available today.

I’ve spoken with S&T and Venntel is available to provide a briefing on Thursday, September 5. The briefing will be either at S&T – 1120 Vermont Ave, NW or at ICE HQ located at 500 12th St, SW.

Please let me know which time slot works the best for you:

1. 10:00am-11:30am
2. 1:00pm-2:30pm
3. 3:00pm-4:30pm
Also, if you’d like to have someone from your Privacy offices or operational offices accompany you, please let me know so that I can include them on the invite. From S&T, the lead Subject Matter Expert, (b)(6) will likely participate in the meeting.

Best,

(b)(6)

 Attorney - Technology Programs Law Division
Office of the General Counsel
Department of Homeland Security

(Office)
(Cell)

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Updated spreadsheet attached for the status meeting tomorrow.

R/

Original Appointment

From: [Redacted]
On Behalf Of [Redacted]
Sent: Monday, May 6, 2019 12:25 PM
To: [Redacted]
Cc: [Redacted]

Subject: Tech Centers Division, OPO STAD CO Dial-in: [Redacted]

When: Tuesday, August 13, 2019 11:00 AM-12:00 PM (UTC-05:00) Eastern Time (US & Canada).
Where: 8-202

Recurring meetings will be held to discuss status of contract actions.
Prep for Privacy & Legal meeting

When
Thu Sep 5, 2019 11am – 11:30am Eastern Time - New York

Where
1120 Vermont Avenue, NW Washington, DC 20005 (map
<https://www.google.com/maps/search/1120+Vermont+Avenue,+NW+Washington,+DC+20005?hl=en> )

Calendar
(b)(4)
Who
- organizer

Directions:
We are located at 1120 Vermont Avenue, NW, Washington, DC. A picture ID is required to enter this facility. Please sign in at the ground floor lobby and proceed to the 5th floor for badging. The receptionist will contact (b)(4) and she will escort you to the meeting space.

Metro:
The closest metro station is McPherson Square (Orange/Blue Line). Take the Vermont Avenue/White House exit and head north on 15th street (next to the park), crossing over K Street and L Street.

Invitation from Google Calendar <https://www.google.com/calendar/>

You are receiving this courtesy email at the account (b)(4) because you are an attendee of this event.

To stop receiving future updates for this event, decline this event. Alternatively you can sign up for a Google account at https://www.google.com/calendar and control your notification settings for your entire calendar.

Forwarding this invitation could allow any recipient to send a response to the organizer and be added to the guest list, or invite others regardless of their own invitation status, or to modify your RSVP. Learn More <https://support.google.com/calendar/answer/37135#forwarding>.
Attached are the slides that we will present tomorrow. Please let me know if you have any questions and we can address them at our meeting at 11am or at lunch.

Have a great evening.

Venntel, Inc.
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