

FICTITIOUS DEMONSTRATION SAMPLE

Response to Sources Sought

NCRA-2099-RFI-004 | Grant Closeout Readiness and Portfolio Support

Meridian Support Services, Inc.

4 June 2026

FICTITIOUS DEMONSTRATION SAMPLE. Meridian, the buyer, the notice, the performance records, the people, and every result in this response are invented. This document is not a Government submission.

1. Company, Schedule, and size

Meridian Support Services, Inc. is a woman-owned small business based in Madison, Wisconsin. Meridian holds GSA Multiple Award Schedule contract 47QDEM021D0042 under Special Item Number 541611.

Meridian would respond as the prime contractor for the contemplated follow-on work.

2. Recent relevant experience and role

Meridian presents the following civilian service-operations records because they address high-volume intake, record completeness, exception reduction, routing, recurring reporting, and data quality. Meridian does not characterize these records as prior grant-closeout work.

National Assistance Service Center | Prime

Meridian performed this \$4.08 million effort with 5 FTE from June 2023 through May 2026. The team processed 18,420 requests, triaged 96.2 percent within one business day, reduced the backlog from 1,260 to 190 in 14 weeks, achieved 99.5 percent required-field completeness, and delivered all 36 dashboards on time.

This record is relevant to establishing a 680-grant baseline, controlling monthly intake, resolving aged exceptions, and reporting portfolio status without losing visibility into individual cases.

Vendor Operations Center | Prime

Meridian performed this \$1.94 million effort with 4 FTE from October 2021 through September 2024. The team processed 23,580 packages, reduced incomplete returns from 18 percent to 4 percent, delivered all 144 weekly reports on time, maintained 128 knowledge articles, and reduced median routing time from 3.8 to 1.4 business days.

This record is relevant to completeness checks, repeatable routing, weekly workload visibility, and written guidance for a portfolio with recurring additions and modifications.

Environmental Programs Administration | Subcontractor

Meridian performed a \$910,000 subcontract workshare with 3 FTE from March 2019 through March 2022. The team handled 76,500 records with zero data loss, achieved 99.96 percent sample accuracy, documented 12 procedures, and reduced routing time from 5 to 2 business days.

This record supports data-integrity, procedure, and routing relevance. Meridian performed as a subcontractor on this effort; it is not presented as prime experience.

3. Transition and capacity

Meridian's role roster includes Sarah Whitfield, Program Manager; Marcus Reyes, Workflow Lead; Avery Chen, Workflow Analyst; Elena Park, Data Quality Specialist; and Yolanda Briggs, Quality and Knowledge Lead. This sources-sought response identifies relevant role coverage but does not commit any individual to the contemplated work. Meridian would confirm named assignments and availability in response to a future solicitation.

Meridian would organize transition around five functions and one portfolio baseline:

- The **Program Manager** would own the transition calendar, buyer coordination, decisions, and performance reporting.
- The **Workflow Lead** would establish intake, routing, aging, and workload-balancing rules.
- The **Workflow Analyst** would support case intake, status reconciliation, exception tracking, and closeout-candidate flow.
- The **Data Quality Specialist** would lead required-field checks, duplicate and mismatch review, and correction traceability.
- The **Quality and Knowledge Lead** would maintain the operating guidance, review finished reports and packets, and track recurring error causes.

The team would first account for all 680 active grants and record, for each grant, its status, responsible office, required-field completeness, open exception, exception age, closeout candidacy, and next action. Meridian would then stabilize the monthly flow of approximately 55 new or modified cases while preparing the approximately 140 quarterly closeout candidates as a separate time-bound cohort. Weekly reports would show intake, completed reviews, aged exceptions, closeout-packet status, and emerging surge conditions. Monthly reports would reconcile the full portfolio and explain changes from the prior month.

The three cited records show experience with higher cumulative request, package, and record volumes, but they do not by themselves establish the staffing level for this grant portfolio. A future solicitation should provide the starting inventory, field definitions, source-of-record rules, closeout checklist, acceptance authority, access lead times, historical exception aging, and due-date calendar. Meridian would use those inputs to validate the final staffing and surge plan.

4. Measurable standards and risks

Meridian recommends standards that let the office measure the whole portfolio and the work completed during each reporting period.

Performance area	Recommended measure
Transition baseline	Account for 100 percent of the 680 active grants by the agreed transition milestone, with each grant assigned a status, owner, exception state, age, closeout candidacy, and next action.

Performance area	Recommended measure
New or modified cases	Complete initial triage for at least 95 percent within one business day and report the remainder by age and cause. Meridian's National Assistance record achieved 96.2 percent.
Case and record completeness	Maintain at least 99.5 percent required-field completeness and report missing-field causes. This matches Meridian's National Assistance result.
Data integrity	Maintain at least 99.5 percent sample accuracy, reconcile every detected mismatch, and record zero verified loss attributable to handling or migration. Meridian's Environmental Programs subcontract achieved 99.96 percent sample accuracy and zero data loss.
Aged exceptions	Report open exceptions by owner and agreed aging band each week. Set a reduction target after the transition baseline establishes the starting population.
Portfolio reporting	Deliver 100 percent of scheduled weekly and monthly reports on time. Meridian delivered 144 weekly reports and 36 dashboards on time across two prime efforts.
Closeout-readiness packets	Measure the percentage reviewed by the required date, first-review acceptance, missing mandatory items, and time to cure. Set acceptance thresholds after the office publishes the packet checklist and decision authority.
Surge capacity	Define the trigger, priority rule, requested response window, and maximum concurrent cohort in the solicitation, then measure performance separately from the steady-state workload.

The principal risks are inconsistent field definitions, incomplete starting records, delayed access, duplicate or stale entries, exceptions without a decision owner, and workload compression around the quarterly closeout cohort. The future requirement should reduce those risks by naming the source of record for each field, providing one accepted closeout checklist, assigning correction and acceptance authority, establishing aging bands, and separating surge measures from routine performance.

5. Recommended acquisition structure

Meridian recommends one outcome-based GSA Multiple Award Schedule task order under SIN 541611 and NAICS 541611 if the final work remains within that scope. The work statement should separate:

1. transition and the accepted 680-grant baseline;
2. steady-state case, record, exception, reporting, and closeout-readiness support; and
3. defined surge support triggered by stated workload conditions.

Each part should have its own workload assumptions, deliverables, acceptance owner, and performance measures. This structure lets the office compare staffing against the known monthly and quarterly flow without treating surge demand as ordinary workload.

The office should consider a small-business or WOSB set-aside only after market research shows a competitive pool of responsible Schedule holders under SIN 541611. Meridian's WOSB status is one market data point, not sufficient evidence by itself. The office should compare respondents' active Schedule coverage, recent work at comparable scale, prime-contractor record, proposed capacity, and ability to meet the measurable standards. Subcontract experience can support a capability area, but it should remain clearly distinguished from prime performance.

Meridian has not included pricing or proprietary methods in this response.