

FICTITIOUS DEMONSTRATION SAMPLE

Technical Volume | Recovery Grant Portfolio Operations Support

Meridian Support Services, Inc. | RFQ 2099D-01 | FICTITIONAL DEMONSTRATION SAMPLE

Field	Response
Offeror	Meridian Support Services, Inc.
UEI / CAGE	DEMMERIDIAN1 / 7DEM0
GSA Schedule / SIN	47QDEM021D0042 / 541611
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Response date	16 September 2026

This independently invented sample demonstrates a GSA task-order response. It is not an anonymized client submission and was never submitted. Every company fact and performance result comes from a separate fictional Meridian record.

Response at a glance

Evaluation need	Meridian method	Accountable lead
Complete transition and baseline	Ten-day transition plan, 20-day record inventory, dated exception list, and named owners	Sarah Whitfield, Program Manager
Control intake, data, and exceptions	Two-day triage standard, risk-based sampling, aged exceptions, and traceable corrections	Marcus Reyes, Workflow Lead; Elena Park, Data Quality Specialist
Produce useful reporting and closeout packets	Source-linked dashboard, concise variance narrative, packet checklist, and surge trigger	Yolanda Briggs, Quality and Knowledge Lead; Avery Chen, Workflow Analyst
Maintain continuity and quality	Named backups, peer review, monthly quality record, and one-day corrective-action start	Sarah Whitfield, Program Manager

1. Technical approach

Meridian will give the Office of Recovery Grants a controlled portfolio workflow for the stated 680 active grants, approximately 55 new or modified cases per month, and about 140 quarterly closeout candidates: every supplied record enters the baseline, every exception has an owner and date, every reported number points to its source, and every closeout packet reaches Government review with a completed checklist. The method connects the six PWS tasks rather than treating intake, reporting, and closeout as separate queues.

PWS 4.1: transition and portfolio baseline

During working days 1 through 3, Sarah Whitfield confirms the staffing roster, access matrix, source exports, workflow ownership, quality checks, recurring calendar, Government decision points, communication route, and transition risks. By day 5, Marcus Reyes walks one representative case through intake, exception, reporting, and closeout readiness to confirm handoffs and field definitions. Meridian delivers the transition plan by day 10.

Elena Park then loads the agency export into a record-control ledger and reconciles source count, unique identifier, status, owner, and required-document flags. Avery Chen reviews exceptions against the agency checklist. By day 20, every supplied record is either accounted for or placed on a dated exception list with an owner and next action. This produces a measurable starting point without changing any Government eligibility, payment, enforcement, or closeout decision.

On Meridian's fictional Department of Community Services National Assistance Service Center order, performed as prime from June 2023 through May 2026, the team reduced a 1,260-item backlog to 190 in 14 weeks. That recorded queue-control result supports the proposed baseline and exception method.

PWS 4.2: case intake and records control

New and modified cases enter a daily intake view. Avery Chen checks required fields and documents, applies the agency taxonomy, records the received date, and routes deficiencies. Marcus Reyes reviews items approaching the two-working-day standard each afternoon. Any late item moves automatically to the weekly exception view with its age, owner, blocker, and next action.

The lead measures intake, triage timeliness, returned items, open inventory, and aging by band. A case is counted as triaged only after required fields have been checked and the next responsible party is recorded. This definition keeps the 95-percent standard auditable.

As prime at the National Assistance Service Center from June 2023 through May 2026, Meridian processed 18,420 requests and triaged 96.2 percent within one business day. As prime at the fictional Federal Facilities Service Bureau Vendor Operations Center from October 2021 through September 2024, Meridian processed 23,580 vendor-action packages and reduced incomplete returns from 18 percent to 4 percent.

PWS 4.3: data integrity and exception management

Elena Park owns the metric dictionary and quality sample. She reconciles duplicates and inconsistent fields to the agency export, records the original value and correction, and routes policy questions to the Government. Each month she selects a risk-based sample weighted toward changed records, aged exceptions, and closeout candidates. A material-field error is a missing or incorrect value that could change routing, status, payment readiness, or closeout review.

Every unresolved exception carries an owner, next action, target date, and source reference. Confirmed material defects receive a corrective-action record within one working day. The monthly dashboard shows the sample size, material-error rate, open exceptions, aging, and corrective-action status.

Meridian's National Assistance Service Center team achieved 99.5 percent required-field completeness across the 2023 through 2026 prime order. On a fictional Environmental Programs Administration subcontract performed through Northwind Civic Systems from March 2019 through March 2022, Meridian migrated 76,500 records with zero data loss and achieved 99.96 percent sample accuracy.

PWS 4.4: portfolio monitoring and reporting

The weekly exception view is delivered each Tuesday by 10:00 a.m. Eastern and answers six questions: what entered, what moved, what is aging, which items are oldest, what is blocked, and who acts next. The monthly package adds intake, throughput, backlog age, closeout readiness, data quality, staffing, risks, corrective actions, and comparison to the prior month. Elena Park ties every number to an identified agency export or approved calculation; Yolanda Briggs turns the reconciled data into a concise narrative explaining material movement, cause, consequence, and next action.

The Program Manager reviews the package against the metric dictionary and delivery calendar before release on the fourth working day. Meridian delivered all 36 monthly dashboards on time on the National Assistance Service Center prime order. It also delivered 144 weekly workload reports on time on the Vendor Operations Center prime order from October 2021 through September 2024.

With each monthly dashboard, Yolanda Briggs prepares the procedure and knowledge release log. Each entry states the version, change, reviewer, release date, and affected workflow, matching the content and timing required by the request.

PWS 4.5: closeout readiness and surge support

Avery Chen assembles each packet in the agency's checklist order and identifies missing evidence before Government review. Yolanda Briggs verifies document version, index, and explanatory notes. Elena Park checks the packet status against the portfolio record. Meridian reports the first-pass completeness rate and reason for every return. At kickoff, the team and Government set the rolling packet schedule and decision-ready priority order.

When monthly intake reaches 69 cases, the first whole-case count above 125 percent of the stated 55-case baseline, Sarah Whitfield activates the surge plan. The plan moves the Program Manager's administrative hours to delivery oversight, protects dashboard and closeout dates, prioritizes oldest and decision-ready items, and uses cross-trained staff against the same checklist. The Government retains every final eligibility and closeout decision.

PWS 4.6: program management and quality

Meridian maintains one delivery calendar, staffing plan, risk register, quality record, and corrective-action log. The Program Manager holds a monthly management review covering delivery status, workload, staffing, quality, risks, and improvements. Each work product receives producer validation and a second-person review. A confirmed material defect opens a corrective action within one working day; the record states the cause, owner, due date, correction, preventive step, status, and closure evidence.

The fictional quality record uses a 31-point checklist covering intake accuracy, source traceability, document completeness, queue and routing controls, and final delivery checks. The National Assistance Service Center maintained 99.5 percent required-field completeness; the Environmental Programs Administration subcontract achieved 99.96 percent sample accuracy. These records demonstrate the same control goals without claiming that one customer's procedure governs another.

2. Management and staffing

All five named personnel are fictional and recorded as available for this demonstration. The request states no degree, certification, or minimum-years threshold, so the qualification map preserves each person's supported current role and shows the exact priced category and proposed accountability without inventing a missing minimum.

Priced labor category	Named person and supported role	FTE	Fictional qualification basis	Proposed accountability
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Priced labor category	Named person and supported role	FTE	Fictional qualification basis	Proposed accountability
Program Manager	Sarah Whitfield, Program Manager	0.5	Civilian service-operations program leadership on the National Assistance record	Government coordination, transition, staffing, risk, quality, and management review
Workflow Lead	Marcus Reyes, Workflow Lead	1.0	Workflow leadership on the National Assistance and Vendor Operations records	Daily delivery, intake timeliness, exceptions, and closeout workflow
Workflow Analyst	Avery Chen, Workflow Analyst	1.0	Six years of civilian request and queue operations across the three performance records	Case-file review, deficiency routing, packet checklists, and surge work
Data Quality Specialist	Elena Park, Data Quality Specialist	1.0	Data-quality work on the National Assistance and Environmental Programs records	Reconciliation, metric definitions, sampling, exception analysis, and dashboard calculations
Technical Writer	Yolanda Briggs, Quality and Knowledge Lead, mapped to the proposed writing category	1.0	Quality and knowledge work across the three performance records	Procedures, knowledge articles, dashboard narrative, and release records

Each role has a named backup in the transition plan. The Workflow Lead and Data Quality Specialist cross-review intake and metric logic; the Workflow Analyst and Technical Writer cross-review packet and procedure completeness. This coverage protects recurring dates without adding unpriced labor.

The same 4.5-FTE mix applies across the six-month base period and both 12-month option periods: 4,131 hours in the base and 8,262 hours in each option. The price workbook carries the identical category and period mapping.

The team will perform primarily remotely in the agency-furnished system. Quarterly meetings will be attended virtually, consistent with the stated performance location.

3. Relevant experience and past performance

Example	Meridian role and period	Relevance	Documented results
Department of Community Services, National Assistance Service Center	Prime; June 2023 through May 2026; 5 FTE	Intake, backlog control, field quality, knowledge upkeep, and monthly dashboards	18,420 requests; 96.2% triaged within one business day; backlog reduced from 1,260 to 190 in 14 weeks; 99.5% field completeness; 36 dashboards on time
Federal Facilities Service Bureau, Vendor Operations Center	Prime; October 2021 through September 2024; 4 FTE	High-volume package review, exception reduction, routing, procedures, and weekly reporting	23,580 packages; incomplete returns reduced from 18% to 4%; 144 weekly reports on time; 128 knowledge articles; median routing reduced from 3.8 to 1.4 business days

Both examples are fictional. They are presented to demonstrate how a response should identify the performing company, role, period, comparable work, and measurable quality rather than rely on unsupported adjectives.

4. Performance commitments

Measure	Commitment	Evidence produced
Records accounted for at baseline	100% by working day 20	Reconciled inventory and dated exception list
Incoming cases triaged	At least 95% within two working days	Intake and aging view
Material-field error rate	No more than 1% in the monthly risk-based sample	Sample record and correction log
Monthly dashboard	Fourth working day after month end	Source-linked dashboard and narrative
Closeout packet completeness	At least 95% before Government review	Completed checklist and exception note
Confirmed material defect	Corrective action opened within one working day	Corrective-action record

These commitments give the agency a visible operating result for every task while preserving Government decisions and the source trail behind each measure.