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U.S. Department of State

Evolve

Attachment J-32

Sample Task Order

for

IT Portfolio Management Services

SOLICITATION  
19AQMM22R0029

**OCTOBER 2022**

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**Performance Work Statement**

**for**

**IT Portfolio Management Services**

1. General
   1. Introduction

This Performance Work Statement (or “PWS”) sets forth the roles and responsibilities of the Parties for Information Technology (IT) Portfolio Management provided under the EVOLVE IDIQ contract as part of the IT Management Services Functional Category. Portfolio Management Services are the services and activities, as further detailed in this PWS, required to deliver a wide range of services on demand to the Department of State (DOS) and its partners.

* 1. Background

The Bureau of Information Resource Management (IRM), led by the CIO, empowers the Department of State (from here on, “Department” or “DOS”) to achieve its foreign policy mission by providing modern, secure, and resilient information technology (IT) services. Rapid changes in technology are transforming how our diplomats advance U.S. foreign policy by altering the way we connect with others and communicate information. Our diplomats require powerful new technologies to advocate policy positions, promote awareness, and enhance transparency – that is where IRM comes in. IRM is seeking to award multiple performance-based Task Orders (TOs) to govern, manage, design, engineer, operate, maintain, improve, and secure the Department’s mission critical IT infrastructure and its associated programs.

IRM’s foremost objective is to foster innovative, effective, and interconnected diplomacy by constantly improving, modernizing, and refreshing tools and services. IRM is expanding the use of collaborative information development and refinement to provide end users with accurate and useful information – anytime, anywhere. IRM supports new IT solutions that provide access to collaborative tools and enables mobility, while simultaneously protecting our information and IT assets against evolving cyber threats and vulnerabilities.

IRM is currently undergoing a re-organization within its Foreign Operations and Operations directorates to modernize its management of IT services across the Department. Today, IRM’s IT services are decentralized and stove-piped across the Department resulting in duplication, inconsistent services, and localized solutions.

* 1. Objective

DOS is seeking an industry partner to provide strategic services to assist DOS leadership with the overall management, strategy development, and planning of secure and robust IT services. The objective of this task order is to acquire expertise and skilled resources that will enable and deliver sound IT Portfolio Management practices and consistently deliver strategic, high-quality program support across the enterprise. This Portfolio Management task order is intended to support DOS with policy, guidance, and oversight for the work executed under the other Evolve functional areas (IT Management, Network and Telecommunication Services, Cloud and Data Center Services, Application Development Services, and Customer and End User Support Services.).

Through execution of this task order, DOS business and program units seek to accomplish their mission objectives, as outlined below.

**Mission Objectives:**

* Advance the diplomatic mission of the Department through improved IT service delivery with associated efficiency gains and cost savings.
* Improve customer service, reduce customer complaints, and reduce disruption of services.
* Improve network and systems availability anywhere/anytime, improving remote services.
* Streamline the acquisition process through category management, and government-wide contracts for use across the Bureau.
* Continue to expand on solutions that enable ubiquitous telework.
* Improve IT modernization efforts, including reengineering business processes to gain efficiencies and better leverage new and emerging technologies that enable improved customer experience.
* Inject agility into our governance processes and eliminate the need for much of the documentation produced for IT projects today.
* Promote collaboration among vendors supporting DOS mission and objectives. Leverage information and data sharing to reduce redundancy.
  1. Scope

The Contractor shall provide the full range of IT Portfolio Management Services to meet the mission needs of the Department. IT solutions/capabilities will support DOS on a world-wide basis.

IT Portfolio Management Services consists of resources to assist DOS leadership with the overall strategy, planning, and management of enterprise IT services. It includes resources involved in integrating overarching IT governance, data analytics, IT finance and costing, IT billing, business value, metrics, benchmarking, portfolio management, service catalog management, service level management, program management, and performance monitoring and reporting of delivered services performed in the other functional categories (Network and Telcom Services, Cloud and Data Center Services, Application Development Services, and Customer and End user Support Services).

Portfolio Management Services includes business solution consulting to help the enterprise improve service delivery through analysis of existing business problems and development of plans for improvement and ensuring best practices are implemented across the enterprise to include ITIL v4, Agile methodology, the Capability Maturity Model Integration (CMMI), and Six Sigma. Additional services supported under IT Management Services include implementation of Technology Business Management, innovation and ideation, allowing technology and business leaders to collaborate on solutions for improving business outcomes. Additionally, IT Portfolio Management Services provides policy, business process and assistance with business process reengineering efforts across management and oversight aspects supporting IRM and customer programmatic needs across bureaus.

The scope of this task order includes the following task areas outlined in the table below.

1. IT Portfolio Management Task Areas

| **IT Portfolio Management Task Areas** |
| --- |
| 1. Program and Project Lifecyle Support Services  * IT Service Management Coordination * Program Management Support Services * Project Management Support Services |
| 1. Stakeholder Engagement and Strategic Communications  * Stakeholder Engagement * Strategic Communications * Organizational Change Management |
| 1. IT Business Management  * IT Capital Planning * Governance * IT Strategic and Tactical Planning * Audit Support * Financial Planning and Management |
| 1. Vendor Management Support  * Acquisition Management * Contract Management * Vendor Performance Management |
| 1. Quality Management |
| 1. Executive Program Support |
| 1. Process Improvement |
| 1. Workforce Planning Support  * Human Capital Support * Professional Development * Diversity, Equity, and INclusion * Workforce Strategy |
| 1. Special Projects and Subject Matter Expert Support |
| 1. Cross-Functional Requirements |

* 1. Tools, Applications, and Technology

The following tools, applications, and technology listed in Table 2 are currently utilized in support of IT Portfolio Management Activities.

1. Tools

| **Tools** |
| --- |
| Integrated Logistics Management System – Acquisition (Ariba) and Hardware Asset Management (Altiris) |
| Global Financial Management Systems (GFMS) – Cost Data and Acquisitions Data (Momentum) |
| Information Assurance Authority to Operate Systems – A&A data on IT Systems (Xacta) |
| Managing State Projects for Information Technology (MSP-IT) – (O365’s Project Server Online and SharePoint) |
| iMatrix – The Department’s IT Investment Portfolio Management System (Oracle Primavera) |
| Budget & Planning Management Systems (BPMS, formally called IRM Financials) (ServiceNow) |
| Allotment Management System (AMS) (ServiceNow) |
| Software Asset Management System (SAM) (ServiceNow) |
| DOS Assessment System (Government Assessment) (DOSAT) ServiceNow |
| Vendor Performance Management Vendor Metric Validation system (ServiceNow/MS Tools/Tableau) |
| Vendor Insights/Management System (VMS) (ServiceNow/Apptio) |
| Office Funds Tracking System (OFTS) (ServiceNow) | |
| Configuration Management Data Base (CMDB) – IT Assets System (ServiceNow) |
| IT Service Management (ITSM) – Ticketing systems (ServiceNow) |
| DWEST (cmLite) |

* 1. Project Constraints

The following constraints apply to this task order.

The contractor shall:

* Comply with Government technical direction.
* Ensure all documents and advisory assistance follow the Federal Acquisition Regulation (FAR), Executive Orders, Department of State Acquisition Regulation (DOSAR), as well as other DOS standards, policies, procedures, and guidelines and will comply with applicable international and country-specific laws, regulations, and guidelines.
* Adhere to the Department’s policies and process for IT Capital Planning and Investment Control
* Use the DOS Managing State Projects for Information Technology (MSP-IT)
* Not conduct themselves or convey information in a manner that will give the appearance the Contractor is a government representative and/or is authorized to make decisions on behalf of the Government.
* Comply with all DOS guidelines, protect classified and sensitive information and maintain accountability of government furnished equipment.
* Comply with any policies, processes, reporting requirements, etc. issued by the IRM/BMP/ITA Contract Management Division which overseas and centrally manages all IRM IT Service contracts and must copy IRM/BMP/ITA/CM on all cost, performance, and deliverable status, including any performance issues.
* Be willing to perform in a fiscally constrained environment, characterized by uncertainty, which may result in the Government incrementally funding the contract.
* Comply with policies and processes outlined by the IRM/BMP/ITA/Vendor Performance Management Division with metric generation and updates, monitoring and reporting. The vendor
* Utilize/implement Agile SAFe methodologies, hold SCRUM sessions, integrate and enable Enterprise use of SaaS and Cloud technologies across IRM.
* Work collaboratively with other Evolve vendors.
  1. Contract Type

This is a performance-based task order that utilizes Labor Hour Contract Line Items (CLINs).

1. Task Order Performance Requirements

For all task areas described herein, the contractor shall:

* Ensure all work activities are performed in a timely and cost-effective manner while maintaining the highest quality of performance to achieve expected outcomes.
* Document all processes utilized in the successful execution of portfolio, program, or project management activities.
* Ensure communications are thorough, accurate, timely, and tailored to the audience for both IRM stakeholders and the customer.
* Translate technical information into clear, readable content for use by business level and non-technical personnel.
* Organize, conduct, and attend meetings as required.
* Develop and deliver timely, complete, and accurate meeting artifacts as required.
* Use DOS designated repositories for all deliverables as required.
  1. Task Area 1: Program and Project Lifecyle Support Services

As the DOS mission, technologies, and work environment continue to evolve, IRM requires support with transforming how it delivers and supports IT services within DOS. This requires improving service delivery planning and operations in support of IRM service owners and Evolve stakeholders. Support under this task area includes IT Service Management Coordination and Program and Project Lifecycle Support Services.

* + 1. IT Service Management Coordination

IT Service Management (ITSM) includes the processes and technology used to plan, deliver, and support IT services. ITSM focuses on customer needs and IT services rather than IT systems, with the goals of delivering value and continuous improvement. The (Portfolio Management) (PfM) contractor will support IRM with the execution and continual improvement of these processes as they relate to the activities performed under the other Evolve Functional Categories.

The contractor shall:

1. Coordinate ITSM activities across IRM to ensure that IT services are planned, developed, implemented, and supported in accordance with the Information Technology Information Library (ITIL®) version 4 framework.
2. Provide processes and functions across the entire ITIL lifecycle (Service Strategy, Service Design, Service Transition, Service Operation, and Continual Service Improvement) as required to support IRM’s Enterprise IT Portfolio. Program offices may require specific ITIL processes and support to their IT operating models.
3. Standardize and improve IRM’s IT Service Management functions to continuously improve the delivery of IT services with the goal of improving the customer experience.
4. Improve, maintain, and update Service Catalogs hosted in DOS SharePoint and ITSM tool and service portal with all relevant data.
5. Identify new opportunities for self-help and transition those to the service portal and/or FAQs.
6. Assist IRM and its portfolio of IT vendors with the development of comprehensive deployment planning, management, and execution for new or improved IT services across the enterprise.
7. Assist IRM and its portfolio of IT vendors with the development of comprehensive change management procedures to ensure process consistency across the department.
8. Promote sustainable and consistent delivery and management of services by seeking innovation to streamline operations.
9. Focus on the improvement of the customer experience.
10. Respond to dynamic mission requirements and priorities.
11. Apply lean/agile principles to service management practices.
    * 1. Program Management Support

Program Management is the process of managing a group of related projects in a coordinated manner with the goal to obtain benefits not available from managing projects individually. The PfM contractor will support IRM with Program Management Office activities as they relate to the management of activities performed under the other Evolve Functional Categories.

* + - 1. Program Management Support Services

The PfM contractor shall support IRM with the execution of program management activities to include coordinating projects and resources, managing interdependencies, stakeholder and sponsor communications, schedule management, and risk management.

The contractor shall:

1. Coordinate with other contractors, vendors, and program stakeholders to ensure satisfaction of program objectives.
2. Function as a liaison between IT project managers, Branch/Division Chiefs, and IRM leadership, coordinating project management activities and helping ensure projects follow OMB Circular A-11, OMB Circular A-130, the MSP-IT lifecycle methodology and Project Management Institute’s (PMI) project management standards in addition to the ITIL framework.
3. Oversee the execution of the program’s projects and assess their progress against project plans.
4. Provide conduit for discussions/collaboration between government and contractor staff management across bureaus / agencies.
5. Assess resource needs across the program and support assignment of resources.
6. Measure and communicate program/project performance, risks, and benefits to IRM and project stakeholders.
7. Develop materials to support Program Management Reviews or other Program related briefings, to include internal and external requests for information.
8. Coordinate with relevant Program Offices to develop, review and submit agreements for systems or services.
9. Organize and facilitate agreements meetings, including preparing reports, agendas, writing meeting minutes, and documenting outcomes.
10. Develop and deliver training programs to support the professional development and continuing education of the Department’s IT program and project managers
    * + 1. Risk Management

Risk management is a continuous process that is adjusted as conditions change, and incorporated into planning and decision-making in a systematic, appropriate, timely and transparent manner while taking into account uncertainty and the impact on our capabilities to protect people, property, information and other assets. These activities should be collaborative among relevant stakeholders, including various levels within and outside of the organization as appropriate to the situation. The PfM contractor shall support Risk Management activities as they relate to the execution of programs and projects under the other Evolve Functional Categories.

The contractor shall:

1. Develop and implement a risk management program consistent with the DOS Enterprise Risk Management Policy.
2. Continually evaluate risk exposure, to include opportunities and threats to maximize positive impacts and minimize negative impacts to the program.
3. Develop and maintain a risk register; log the results of the risk analysis and track the risk response plans.
4. Facilitate risk response and determine appropriate countermeasures, as required by the Government.
5. Monitor countermeasures implemented against realized risks (issues) to ensure response is adequate and adjusting as necessary.
6. Support risk management board meetings.
7. Provide program level risk information in response to data calls or requests for information.
   * + 1. Schedule Management

The PfM contractor shall support Schedule Management activities as they relate to the execution of programs and projects under the other Evolve Functional Categories.

The contractor shall:

1. Establish standard project planning, approval, and tracking capabilities to include an integrated master schedule (IMS) of IRM’s project portfolio requiring tracking and enforcing a consistent IRM-wide WBS aligned to existing and emerging IRM standard methodologies.
2. Use DOS provided project management and schedule tools such as iSchedule to maintain the IRM, bureau level, view of the IMS of O&M, project and surge activities.
3. Assist with the review and analysis of vendor project schedules.
4. Update and maintain resourcing levels in the IMS.
5. Develop, document, update, and maintain overall project schedules using DOS specified tools, which at a minimum include Microsoft Project.
6. Provide program level schedule information in response to data calls or requests for information.
   * 1. Project Management Support Services

Project Management includes all activities relating to the eight project performance domains identified as critical for effectively delivering project outcomes in the Project Management Body of Knowledge (PMBOK®) Guide and spans the full range of development approaches (agile, hybrid, predictive).

Support activities span the project lifecycle and include the development and maintenance of project plans and program documents in accordance with the Department of State’s Managing State Projects - Information Technology (MSP-IT) methodology, OMB Circular A-11, and OMB Circular A-130. Project Managers will support IRM and its offices with leading, overseeing, and ensuring successful delivery and management of Evolve projects executed under the Evolve Functional Categories.

The Contractor shall:

1. Provide Project Management services to IRM and its Program Management Offices (PMOs) across the IT vendor portfolio. Project management approach, governance, and processes shall be tailored to best suit the project environment. This includes recommending the approach (i.e. agile, predictive) or combination of approaches (hybrid) that is most appropriate for the unique characteristics of the project. The approach selected should consider balancing competing demands including, but not limited to, the following items: Speed to delivery; Minimizing project costs; Optimizing value delivered; Quality of deliverables or outcomes; Adhering to standards; Satisfying stakeholder expectations; and adapting to change.
2. Organize and manage project teams into a cohesive unit to achieve mission goals and performance objectives to include effectively managing Evolve projects within cost, schedule, and quality/technical performance baselines.
3. Oversee all aspects of projects assigned, leading teams on significant projects or a significant segment of large and complex projects.
4. Develop, document, update, and maintain overall project artifacts in accordance with MSP-IT framework, GTM, and CPIC requirements.
5. Ensure project data is kept up-to-date and accurate in DOS designated systems (e.g., MS Project Server site collection and IRM’s iSchedule and iMatrix) to enable effective project portfolio management and financial analysis for all active projects of varying sizes, complexity, and scope.
6. Facilitate and attend project control gate meetings and provide input on project readiness and assess whether applicable control gate requirements were met or if further documentation, information, or planning is required.
7. Identify project risks and develop mitigation plans and provide project risk information as requested in support of program level risk activities.
8. Develop, document, update and maintain project schedules using DOS specified tools, which at a minimum includes Microsoft Project.
9. Develop project management templates, such as for project plans, risk plans, quality control plans, project charters, control account plans, etc., as required.
10. Provide project management support services as required to meet governance needs. Examples include preparing materials required by Project Review Board (PRB), eGov PMO, IRM Executive Committee/Steering Committee, or other governance boards.
11. Develop and maintain processes, templates, and other supporting documentation and SharePoint site for Project Control Boards (PCB).
    * + 1. Earned Value Management

Earned Value Management (EVM) is a project management methodology that effectively integrates a project’s scope of work with cost and schedule elements to enable optimum project planning and control. As required by Office of Management and Budget (OMB) Circular A-11 Part 7, the Department utilizes EVM to monitor its investment’s costs, schedule, and performance goals.

The contractor shall:

1. Lead the development and implementation of EVM processes within PMOs and monitor the implementation of EVM processes.
2. Develop and provide documentation on EVM processes such as SOPs, Process and Procedure Guides, System Administration Guides, and Training Documentation.
3. Develop EVM methodologies (i.e., Create/Recommend methods to accurately determine the status of the work-in-progress) for better tracking labor, materials, Other Direct Costs (ODCs), etc.
4. Provide EVM analysis as well as statistical and trend analysis regarding performance and recommendations as to where improvements are needed Conduct detailed analysis of all EVM data and input into monthly EVM reports and/or web application dashboard. Detailed analysis should include Earned Schedule Analysis, Percent Spent and Percent Complete, and Estimated Outcomes.
5. Support Integrated Baseline Reviews for IT projects.
6. Prepare and analyze ad-hoc reports and present materials to technical and/or management staff.
7. Communicate EVM process updates to CAMs and Planners through documentation, meetings, and/or training.

* + - 1. Agile Project Delivery

Agile project management utilizes an iterative approach to deliver value and focuses on continuous release and customer feedback. For Evolve projects utilizing agile project management, the contractor shall:

1. Provide guidance and coaching to support the government with agile adoption and implementation
2. Provide resources (e.g. scrum masters) as appropriate to support agile project management activities across the Evolve contract functional areas.
3. Be responsible for teams performing the full suite of development tasks using agile methodologies, including, but not limited to participating in creating user stories for business functionality, technical requirements and defining acceptance criteria; estimating the size of user stories; solution design; development; and testing.
4. Assist in the documentation of user stories, acceptance criteria and tasks to be completed to fulfill the definition of done for a story.
5. Establish and execute repeatable processes and ceremonies (e.g. daily standups, backlog grooming, product demonstrations, retrospectives) to facilitate the agile team’s ability to deliver value to the customer.
6. Assist teams with the prioritization of features and user stories to maximize value delivery to the customer.
7. Utilize agile project management software/tools to support project activities, to include monitoring project progress against plan.
   1. Task Area 2: Stakeholder Engagement and Strategic Communications

IRM requires support for leaders at all levels of the organization to create long-lasting mutually beneficial relationships with its customers. IRM requires an industry partner who can interface with customers to analyze their needs, support multichannel communication activities, and increase the adoption of IRM’s services through tailored content.

* + 1. Stakeholder Engagement

Stakeholder engagement includes implementing strategies and activities that promote productive involvement with internal and external IRM customers. The contractor shall support IRM with initiatives that mature stakeholder and customer relationships through a managed approach with the goal of improving IRM’s service delivery and interactions with Bureau, Departmental, and external stakeholders.

Internal stakeholders include consumers of services and systems within the Department. External stakeholders include, but are not limited to, other federal agencies (i.e., the Government Accountability Office (GAO), Office of Inspector General (OIG), Office of Management and Budget (OMB), and United States Congress) and private sector industry partners.

The Contractor shall:

1. Coordinate and execute the necessary stakeholder engagement activities to provide transparency as it relates to the performance of the IRM portfolio and its programs.
2. Provide conduits for discussion and collaboration between the government, its business partners, and across the bureaus.
3. Manage relationships of business partners and organizations across IRM and the department to ensure alignment of objectives.
4. Conduct internal customer engagement outreach within the Department to communicate and drive stakeholder involvement in the Department’s collaborative effort required to achieve its IT goals and digital initiatives.
5. Conduct external customer engagement outreach (i.e. Federal agencies, private sector industry partners, Congress), to communicate the IT goals, initiatives, and relevant experiences of the CIO and the Department.
6. Coordinate with individual programs to define desired service levels and work with stakeholders to develop roadmaps to achieve future state objectives.
7. Develop and coordinate responses to data calls and requests for information from external federal agencies (i.e. OMB, GAO, OIG, Congress).
8. Respond to internal and external requests for information while adhering to deadlines. Coordinate with multiple contributors across IRM and the Department to articulate the Department’s position. Coordinate with internal and external stakeholders to track activity and status of the task.
9. Create, measure, and manage sponsor engagements from initial planning through execution.
10. Document and maintain Standard Operating Procedures and Processes as they pertain to Customer Engagement processes and Department Service Agreements Policy.
    * 1. Strategic Communications

IRM develops and executes the strategic communication goals of the Departments Chief Information Officer (CIO) and Head of the Bureau of IRM and serves as the authoritative source for information about technology at the State Department. It is responsible for developing and disseminating unified messages and marketing campaigns for internal and external customers and for effectively communicating and fulfilling the Departments IT Strategic Plan goals and objectives.

The contractor shall:

1. Identify communications objectives and target audience needs. Determine appropriate strategies and tactics and identify the current and desired branding across multiple media channels (digital, print, video, social media etc.). Create, review, and maintain content created across media channels.
2. Support the development, maintenance, and execution of communications management plans. These plans should cover internal and external stakeholders, outreach efforts, training and awareness, and the development of supporting documents, memorandums, and other correspondence necessary for project success.
3. Support IRM with articulating the CIO and executive leadership’s strategic visions, goals, and action plans.
4. Assist IRM with providing awareness of its evolving role in cybersecurity, and to enable the exchange of best practices and strategies for supporting the Department's mission and goals.
5. Support the design, development, and delivery of the CIO and IRM Leadership’s external outreach and public relations campaigns to key stakeholders inside the bureau, across the Department, and to external stakeholders.
6. Develop a media relations plan which addresses media opportunities to proactively engage media.
7. Support developing, maintaining, and executing communications management plans. These plans may include:
   1. Identifying communications objectives and target audience needs (internal and external).
   2. Determining appropriate strategies and tactics to accomplish objectives (e.g., memorandums, outreach, training, supporting materials, etc.).
   3. Leveraging multiple media channels as appropriate (e.g., digital, print, video, social media, etc.).
   4. Providing plain language communications on complex IT issues and assisting/editing IT verbiage to achieve common clarity.
8. Support monitoring, measuring, and reporting on communications plan effectiveness.
9. Develop metrics based on industry standards and customer engagement to measure effectiveness of messages and plans.
10. Report metrics on message campaigns and plans.
    * 1. Organizational Change Management

Organizational Change Management (OCM) includes planning, communicating, and executing change initiatives while ensuring the workforce can maintain focus and energy amid disruption.

The contractor shall:

1. Assist IRM with organizational change management (OCM) efforts, to include assessing the need for change, defining and setting change objectives, planning change communications, preparing the workforce to implement change, and implementing and sustaining changes.
2. Develop, deliver, and maintain an organizational change management plan.
3. Train and educate the workforce/leadership on OCM in the areas of implementation, trends, techniques, and case studies.
4. Develop a proactive communication plan to establish and enhance the customer experience, using principles and techniques of change communications as directed by the government.
   1. Task Area 3: IT Business Management

IRM Executive Leadership requires support to maximize the value IRM receives from its service providers and requires support from its IT portfolio management vendor to maintain existing and establish new procedures and controls to align IT services with IRM's strategic objectives, organization, personnel, skills, and requirements. The scope of IT Business Management activities includes Portfolio Management, IT Capital Planning, Governance, IT Strategic and Tactical Planning, and Financial Planning and Management. Leverage enterprise architecture processes to ensure IRM’s strategic goals, objectives, and strategic initiatives are in alignment with the current standards and the DOS budget allocation process.

1. Support IRM Executive Management to ensure resources are appropriately applied to support IRM’s priority activities and to provide portfolio management at all levels with appropriate status and oversight, to include support in developing policies, processes, tools, and training.
2. Prepare reports, presentations, and other responses to internal and external inquiries regarding the State Department’s enterprise-wide IT portfolio.
3. Measure portfolio performance and track the interdependencies between initiatives in the portfolio.
4. Anticipate, plan for, and actively manage changes related to the delivery of new initiatives.
5. Provide guidelines and establish processes to create new programs efficiently and effectively.
6. Refine and manage methodologies to design and execute initiatives effectively and reduce time spent on unnecessary tasks and deliverables.
7. Ensure repeatable delivery, reduce risk, and improve predictability of outcomes.
8. Facilitate the continuous evolution of internal delivery standards and governance processes.
9. Monitor quality of compliance and flag deviances from DOS’ prescribed methodology.
10. Define and maintain the necessary level of oversight to assess and effectively manage risk.
11. Use relevant tools to monitor initiatives, projects, portfolio, and resources.
    * 1. IT Capital Planning

The Capital Planning and Investment Control (CPIC) process is a three-stage systematic approach to selecting, controlling, and continually evaluating IT investments following OMB CPIC guidelines (i.e. OMB Circulars A-11 and A-130) and the State Department’s CPIC policy.

The contractor shall:

1. Assist IRM with IT Capital Planning activities in accordance with applicable Federal and DOS guidance (e.g,. OMB Circular No. A-11 and A-130).
2. Coordinate with stakeholders to integrate strategy, budget, architecture, acquisitions, human resources, and project execution with CPIC policies and procedures.
3. Manage review of new investment proposals and facilitate communications between requesters and reviewers across multiple functions and disciplines to ensure comprehensive reviews of business cases including, but not limited to, strategy, architecture, budget, acquisitions, security, records, accessibility, IT operations, privacy, and human resources
4. For priority, new, untested, or risky investments, provide an increased level of support to facilitate timely and thorough reviews, and if required, assessment by specialized governance bodies.
5. Provide strategic thought leadership to assist Department leadership to identify, define, plan, and prioritize the most effective new priority IT investments.
6. Identify and implement processes that support the requirements of the Department’s CPIC practices and policies.
7. Analyze CPIC processes to ensure they accurately integrate strategic planning, architecture, security, budgeting, procurement, and the management of IT. Identify gaps and make recommendations for process improvements.
8. Provide support to collect ideas, requests, and projects, and to assess and prioritize the demands accordingly. Requirements include validating the requests against business needs, addressing resourcing constraints, and routing the demand for fulfilment.
9. Support the solicitation, creation, and evaluation of proposals to support decisions on fund allocation.
10. Identify, evaluate, and prioritize the portfolio of initiatives and advise on the allocation of resources based on established criteria.
11. Complete periodic reviews of investments, which include project performance measures including cost and schedule data, performance metrics, status, risk management activities, and compliance with the Department’s security requirements as required.
12. Input new and revised justification, cost, and other project and O&M information into the Departments Electronic CPIC System (currently iMatrix) as required by the Department’s internal review process to meet all OMB Departmental reporting deadlines.
13. Support identification of processes to improve visibility into IT investment activities, budgets, and spending across the enterprise.
14. Provide financial planning and tracking of investments, programs, and services in compliance and response to OMB, Department needs and other external reporting requirements.
15. Review technical design documents for IT investments to assess compliance with Federal requirements and determine effectiveness in meeting performance goals.
16. Ensure that all submissions for external audiences are written in plain language, suggesting improved verbiage for Legislative, Executive, or non-IT audiences as appropriate prior to submission.
17. Develop independent status and dashboard reports of existing efforts and assist with the preparation of executive level briefings.
18. Assess investment risk, recommend risk ratings, and maintain CIO investment risk ratings on the public facing IT Dashboard.
19. Conduct analysis and assist in the coordination and logistics of conducting deep-dive, fact-based technology reviews for select programs and projects
20. Support the government to articulate requirements for capital planning and investment control processes and tools and represent those requirements in interagency working groups and communities of practice.
21. Assess guidance changes from OMB and the need to update processes and systems; ensure CPIC tools are fully developed and configured to support data submissions to OMB.
22. Respond to inquiries and provide support to program and project managers as they work to adhere to CPIC and address CPIC requirements.
23. Assist the government in conducting reviews of purchases to ensure that IT expenditures are consistent with planned investments and approved acquisition strategies and plans.
24. Identify communications objectives for the enterprise IT PMO and target audience needs. Determine appropriate strategies and tactics; create, review, and maintain content created across media channels.
25. Provide support for IT governance meetings related to IT resource decisions and investments or policies to include scheduling, preparing agendas and materials, capturing action items, developing executive summaries, and drafting information memos.
26. Support special analyses, expert services, management analyses, and participation in working groups or panels that support initiatives, as required by the COR or other Government-designated points of contact.
    * 1. IT Capital Planning Program Level Support
27. Support development of detailed Business Cases and all supporting data to include Risk Management Plans, Program Management Plans, Performance Metrics, Financial Impact Statements, and Resource needs, under the direction of IRM leadership and in accordance with OMB, DOS, and IRM regulations and policies. Maintain and update plans as required.
28. Incorporate all component projects and operations & maintenance (O&M) requirements into the various sections of the Business Case. Draft technical revisions to the business case and support documentation based on recommendations from Senior Program Managers, OMB, governance boards to ensure all business case sections reflect a coherent, and programmatic approach to Program Office initiatives.
29. Complete and submit Major and Non-Major business case submissions.
30. Develop and deliver draft and final versions of Exhibit supporting documents such as project plans, risk plans, and alternatives of analysis.
31. Provide programmatic information for the President’s budget, congressional reports, briefings, and testimonies.
    * 1. Governance

Governance is the structure and relationships that control, direct, and regulate the performance of an enterprise and its portfolios, projects, infrastructure, and processes. Governance consists of the leadership, structures, and processes that enable IRM and the Department to make decisions aligning with its strategic goals and objectives.

The contractor shall:

1. Support IRM Executive Management in ensuring resources are appropriately prioritized and applied in support of the organizations mission priorities and to provide governance support to include developing policies, processes, tools, and training.
2. Provide resources with proven experience in governance and compliance to assist in developing and managing the existing governance programs managed by the bureau.
3. Perform high-level department and Government-wide policy and strategy research, analysis, and evaluation, including interpretation of policies and implementation of Government programs and policies.
4. Evaluate programs and policies to develop/advise policy and strategy recommendations and changes supporting the various DOS deliverables and mandates.
5. Develop processes and procedures to streamline the governance processes with the goal of reducing complexity while meeting compliance requirements.
6. Support the periodic charter review and update process.
7. Provide support for IT governance meetings (e.g., CIO Council) to include scheduling, preparing agendas and materials, capturing action items, developing executive summaries, and drafting information memos.
8. Support special analyses, expert services, management analyses, and participation in working groups or panels that support initiatives, as required by the COR or other Government-designated points of contact.
   * 1. IT Strategic and Tactical Planning

The Contractor shall:

1. Develop, maintain, and support the implementation of IRM strategic, tactical, performance, investment, architectural, business, and other plans and planning processes.
2. Support defining, articulating, and documenting IRM’s strategic vision, goals, and action plans. This may include:
   1. Facilitating strategic planning sessions to elicit input from stakeholders.
   2. Providing insights on industry and/or technology trends.
   3. Applying knowledge of the DOS environment to advise on strategy.
3. Provide input and recommendations in support of Strategic Plan development.
4. Provide recommendations for further incorporating strategic initiatives into business processes.
5. Support monitoring, measuring, and reporting on progress against the Strategic Plan.
6. Assess the effectiveness of new and existing IRM plans, planning processes, and newly available technologies, including Enterprise platforms, licensing structures and service offerings.
7. Provide advice and assistance to support establishing and implementing an IT capacity planning function and operation.
8. Develop, analyze, and support the implementation of metrics, statistics and business intelligence and visualization tools for measuring and evaluating the usage, capacity, and performance of DOS’ IT infrastructure, network, and IT assets.
9. Analyze research and authoritative information on emerging and future IT trends and provide advice on the potential issues and implications of these trends on the enterprise.
10. Conduct research and gather data to develop and analyze IT planning scenarios, perform scenario and trend analysis, including Analysis of Alternatives (or Business Case Analysis) studies, support the implementation or enhancement of existing IRM planning processes, and support the development and implementation of new planning processes.
11. Provide support for all federally mandated IT initiative.
    * 1. Audit Support

The Contractor shall:

1. Support data gathering and requests for information in support of internal or external audits.
2. Support compilation of data from financial systems, source documents from physical files, and interviews with key staff.
3. Provide hard copy documents and supporting documentation from accounting system to satisfy requests.
4. Coordinate artifacts for closing audit recommendations.
5. Draft response to audit findings in collaboration with stakeholders.
   * 1. Financial Planning and Management

IRM requires support with budget formulation and execution activities, to include Financial Planning and tracking of investments, programs, and services in compliance and response to OMB reporting; support of investment planning and management; IRM program office budget formulation; and budget execution. The Contractor shall provide financial experts accomplished in navigating the Department’s financial software (GFMS) and procurement tracking system (ILMS/Ariba); IRM’s AMS; Financial Budget and Financial Tracking systems; and knowledge of budget and standard accounting practices.

The contractor shall support IRM and its program offices with budget and financial management activities, to include the following:

* + - 1. Budget Formulation

Budget formulation is the initial phase of the budget process that involves obtaining the necessary workforce and dollar resources to support program performance for a specific period of time.

The contractor shall:

1. Assist IRM and its program offices with program planning, budgeting, and resourcing activities.
2. Support Program Offices in gathering requirements and developing annual (or as required) budget requests, phasing plans, proposed performance metrics, FTE and other resource requirements.
3. Assist in preparing and reviewing budget request materials (OMB exhibits).
4. Develop IT Concept Questions (ITCQ) to support new funding requirements.
5. Conduct analysis on budget submissions and passbacks.
6. Collaborate with COR/GTM, and Division Chiefs to prepare the annual IT operating budget submission.
   * + 1. Budget Execution

Budget execution is the phase of the budget cycle where financial resources are applied to accomplish program objectives. IRM requires support for Program Offices to include executing procurements, conducting invoice reviews, researching billing issues, and financial reporting. Additional budget execution support activities may include supporting IRM to address Unliquidated Obligations (ULOs), conducting detailed tracking of office procurements against budget, and providing ad hoc spending reports.

The contractor shall:

1. Provide financial experts accomplished in navigating DOS financial and procurement software systems.
2. Review plans, budget information, and spending to ensure visibility, adequate resourcing, and compliance with relevant program and budget guidance.
3. Support development of Operating Plans and Phasing Plans under the direction of IRM leadership and in accordance with OMB, DOS, and IRM regulations and policies.
4. Develop and update program spend plans. Monitor financial transactions and program spend plans to ensure programmatic obligations and expenditures are meeting or exceeding benchmarks. Identify and recommend solutions for any issues mitigating meeting benchmarks.
5. Draft/initiate financial execution documents and transactions (e.g., Procurement Requests (PR).
6. Review invoices and supporting documentation for completeness and accuracy prior to Government invoice approval.
7. Prepare ad hoc financial reports on cumulative IT expenditures related to specific IT projects.
8. Develop, update, and maintain detailed spreadsheets, presentations, and reports for use in response to internal or external data calls and briefings.
9. Provide detailed accounting of funding and expenditures, tracking procurements to a granular level and tagging to support the TBM Taxonomy.
10. Answer Requests for Information (RFIs) and data calls and provide support for projects involving budget and finance input.
11. Establish and maintain a financial dashboard with accurate financial data regarding all funding and expenditures.
12. Perform analysis of standard general ledger accounts to confirm balances.
13. Support the monthly and annual closing process.
14. Track obligations and expenditures and prepare financial reports
15. Analyze, reconcile, and provide detailed financial execution status reports. Develop monthly execution reports for IRM and program office leadership that demonstrate expenditures against planned budgets.
16. Develop detailed data analytics to include trend analysis of funding and expenditures cost benefit analysis, and forecasting.
17. Act as Division’s Purchase Card (PCard) coordinator, ensure PCard requests are submitted in ARIBA, ensure Cardholder and Approving Official reconcile and approve credit card statement within required timeframe.
18. Submit Divisions procurement requests.
19. Order Division supply items through ARIBA.
20. Maintain log of credit card purchases and receipts.
21. Conduct annual credit card audit.
    1. Task Area 4: Vendor Management Support

Repeatable, efficient, and effective vendor management through IRM is a critical element in achieving many of the Department’s strategic IT goals. Vendor Management encompasses areas of Acquisition Management, Contract Management, and Vendor Performance Management support. All vendor management activities must be performed in accordance and with approval from IRM to ensure there is no conflict of interest and that performance of activities does not conflict with the authorities of IRM.

* + 1. Acquisition Management Support

The contractor shall provide acquisition strategy and support services that span the acquisition life cycle. To efficiently deliver services, the Government seeks to integrate pre-award efforts and provide prioritization tools to deliver effective acquisition strategy services throughout IRM. All support in this area shall be coordinated and approved by IRM/BMP/ITA/CM prior to taking any action to avoid any conflict of interests.

The contractor shall:

1. Assist with the development of innovative acquisition strategies that utilize procurement best practices. This includes developing a multi-year strategy across contracts, as well as solicitation specific strategies.
2. Assist with preparing, reviewing, coordinating, and staffing acquisition documents to include procurement request (PR) packages, Acquisition Plans (APs), Acquisition Strategies (AS), Statements of Work (SOW), Performance Work Statements (PWSs), Statement of Objectives (SOO), Source Selection Plans (SSPs), Justification and Approvals (J&As), and Determination and Finding (D&F), ensuring adequacy, consistency, and compliance with administrative, regulatory, and procedural requirements.
3. Support IRM with scope, requirements, solicitation development, acquisition alternatives, pricing, technical analysis, market research, source selection support, and customer education.
4. Analyze statutory, regulatory, and policy updates and provide guidance on the impact to DOS acquisitions.
5. Provide recommendations and support the implementation of improvements and efficiencies within the acquisition process.
6. Review and assist with the management of IRM’s procurement portfolio. This requires operating in a sensitive contracting operations environment, supporting complex, multi-million-dollar contracts, grants, and cooperative agreements.
7. Provide acquisition expertise, support, and guidance to assist with drafting and / or reviewing acquisition documents which may include market research, performance work statements or statements of objectives, Independent Government Cost Estimates (IGCE), Requests for Information (RFI), Sources Sought Notices, and acquisition lessons learned documents. Documents and information will be drafted in accordance with Government input to ensure it meets the goals and objectives of the supported office(s).
   * 1. Contract Management Support

IRM requires support for contract lifecycle activities, to include pre-award and post-award activities. Support includes standardizing and improving contract administration capabilities across IRM contracts as approved and authorized by IRM/BMP/ITA/CM. All support in this area shall be approved and coordinated through IRM/BMP/ITA/CM prior to taking any action. Additionally, the contractor shall assist with establishing internal business processes for the IRM/BMP/ITA/CM division.

The contractor shall:

1. Provide guidance and recommendations on all aspects of the contracting lifecycle.
2. Assist DOS in performing quality assurance surveillance functions and support the COR, as required, by providing advice, recommendations, and documentation.
3. Maintain a centralized file of all appropriate and required contract documents.
4. Assist with the planning and development of acquisition-based guides, templates, and instructions on preparing required contracting documents as needed.
5. Establish and deploy standards for managing and executing labor and non-labor contracts. This requires transparency into vendor performance and compliance with contract requirements to reward good performance and to correct under-performance.
6. Provide support with performance metrics.
7. Support the Government with monitoring and quality management activities for existing contracts within IRM to ensure that they are meeting objectives, within the original constraints of the investment. This includes the review of deliverables and contract efficiencies in support of the Department’s CPIC guidelines.

**NOTE:** Notwithstanding any of the above, the contractor will NOT perform any inherently Governmental functions as set forth by example in FAR 7.503.

* + 1. Vendor Performance Management

IRM requires assistance to ensure the appropriate performance metrics are established and maintained to enable IRM to assess, reward, and penalize, if appropriate, its IT vendors in accordance with FAR and DOS directives. This support will be directed to the IRM offices, CORs, and GTMs with the development of independent validation and verification of performance metrics. Additionally, the contractor shall recommend outcomes for vendor performance.

The contractor shall:

1. Oversee the measurement and reporting of vendor performance, including the development of evaluation tools based on stakeholder needs, and the creation of scorecards and dashboards that will accurately present this data.
2. Ensure that the metrics used to evaluate performance are properly tied to business outcomes and bias-free, and that the associated communications around these metrics are clear.
3. Manage delivery of performance feedback to vendor organizations and oversee action plans and corrective measures which may arise from the performance management process.
   1. Task Area 5: Quality Management

Provide quality assurance, quality control, and testing to evaluate compliance with DOS policies and ensure IT services acquired via Evolve vendors meet approved requirements.

The Contractor shall:

1. Prepare quality assurance plans and maintain records of quality assurance audit results and suggestions for improvement.
2. Review Quality Plans for each program or project, as requested, to assess the degree to which the plan meets standards and addresses how quality will be measured.
3. Evaluate compliance with DOS policies and ensure IT services meet approved requirements.
4. Support the standardization and improvement of quality management activities across IRM.
5. Participate in risk management meetings, peer reviews, formal customer reviews or other process improvement team meetings.
6. Perform process (control gate) audits, product reviews, and other audits as needed on projects/programs.
7. Plan and coordinate team efforts pertaining to quality audits of Technical Support Unit (TSU) State Messaging and Archive Retrieval Toolset (SMART) tickets. Ensure all internal and external audit findings are resolved and completed within the prescribed timeline.
8. Take lead in designing, producing, maintaining, and reporting Beltsville Messaging Center (BMC) incident management performance metrics and data analytics.
9. Analyze performance metrics, produce charts, interpret results, and provide recommendations for improvements.
10. Assist with maintaining ISO 2000 certification, acting as lead point of contact for the certification program and coordinating all ISO 2000 process areas and related activities
11. Assist the QA Manager with managing the execution of ISO 2000 processes and improvements.
12. Assist process owners with process and standard concerns.
13. Support the review/update of process access library documents as appropriate.
    1. Task Area 6: Executive Program Support

Provide CIO-to DAS level or equivalent executive support to bureaus at the executive level to support the coordination, planning, business process review and reengineering, special project research (including prototyping), and strategic communications.

The Contractor shall:

1. Support the CIO front office priority initiatives and strategies by providing drafting, review, and editing of executive level documentation.
2. Develop independent status and dashboard reports of existing efforts and assist with the preparation of executive level briefings.
3. Identify, communicate, and mitigate potential risks that may impact schedule and deliverables.
4. Coordinate executive-level responses to taskers (assignments), data requests, and queries from both internal and external queries.
5. Track all identified front office deliverables and actions that are assigned to or may have impact on CIO priorities.
6. Assist the OIT front office in the determination and execution of processes that streamline business operations processes.
7. Identify, recommend, and implement best practices and quality assurance in support of CIO front office and Bureau functions and opportunities to improve financial processes and increase efficiency.
8. Provide high-level support in the use of visual and print graphics in support of organizational branding.
9. Provide support for the development of frameworks that effectively manage projects and initiatives.
10. Provide support for validating, tracking, and reporting of fiscal activities as it relates to the development of briefing presentations and/or dashboard scorecards/charts.
11. Provide high-level skillsets (senior-level and mid-level) professional services for an executive support function with varied categories of Subject Matter Experts.
12. Provide subject matter expertise capable of advising IRM Senior Leadership, IRM Offices, and Division/Branch Chiefs on services, techniques, and technologies capable of supporting and enhancing the mission. Such services may include in-depth technology analyses, development of white papers, reports, and briefings, establishment of working groups, and development of new business processes and procedures leading to improved efficiencies.
13. Develop procedures, guidance, and documentation to facilitate the submission of data calls.
14. At a minimum, the procedures, guidance, and documentation shall align with federal, Department, and Bureau policy, mandates, strategic and tactical guidance for addressing these data calls.
15. The procedures, guidance, and documentation shall also address governance, administrative, and tactical implementation.
16. Assist IRM in analyzing, tracking, and responding to IT Investment, program and project request at all levels of the agency.
17. Work with the IT Investment Managers and Program and Project teams to review and analyze project documentation or artifacts that may support the Department’s ability to address the data call.
    1. Task Area 7: Process Improvement

Examine current processes, develop current-state process maps, and identify process inefficiencies to recommend documented future state processes.

The Contractor shall:

1. Analyze existing business processes and services leveraged by functional and regional bureaus and identify strategies and methodologies to streamline and improve these activities.
2. Assist in the implementation of the process improvement framework by providing expertise and advice.
3. Provide consulting and business impact analysis as required for improving the efficacy of the Department’s Programs and IT services.
4. Conduct process improvement identification and recommendations as well as assist in process re-engineering and/or changing business processes.
5. Write and edit Standard Operating Procedures, Processes, Plans, Policies, Job Aids, and Memorandum of Understanding.
6. Document and work to resolve complex QA-related problems, act as an information resource, perform workflow analysis and recommend quality improvements
7. Provide Business Process Improvement Meeting support (prepare agenda, track action items, and corrective/preventive action items, etc.).
8. Act as change agent to instill a culture of continuous improvement and waste reduction throughout program offices.
   1. Lead and Coach efforts to improve business processes.
   2. Educate and promote a culture of continuous improvement.
   3. Lead the growth and application of Process Improvement skills independently.
9. Lead and drive cross-functional Lean Six Sigma projects and/or Kaizen events to deliver significant operational improvements and financial benefits and services.
   1. Task Area 8: Workforce Planning Support

IRM’s goal is to create a modern IT workforce capable of supporting the evolving technologies employed by the DOS.  Workforce Planning encompasses areas of Human Capital Support; Professional Development; Diversity, Equity, and Inclusion; Talent Management; and Workforce Strategy. A brief description of support activities is provided below. The contractor shall support the following workforce planning activities below:

* + 1. Human Capital Support

The contractor shall:

1. Develop approaches, methodologies, and supporting materials to launch and maintain recruiting and retention programs.
2. Develop and utilize specialized analytic dashboards to identify and target IT talent groups to maximize the Department's recruiting, sourcing, and marketing efforts.
3. Develop position descriptions, vacancy announcements, quick hire questions, and job analyses.
4. Update and monitor the status of vacant positions.
5. Maintain and update all organization charts.
6. Draft human resource and organization changes to the FAM and FAH.
   * 1. Professional Development

The contractor shall:

1. Support IRM with comprehensive talent management capabilities to include talent acquisition and onboarding, talent development and performance management, and succession and workforce planning.
2. Provide support for the planning and development of IT professional training to include the domains of cybersecurity, acquisition, and other IT-specific skills.
3. Develop strategic training plans and strategies to establish formal training programs and artifacts. Establish a training evaluation process to verify the effectiveness of the training.
4. Design and develop fair, transparent, and compliant skills-incentive programs.
5. Develop and analyze knowledge, skills, and abilities (KSAs) for the IT workforce.
6. Prepare communications and briefing materials to work with government stakeholders in advancing Career Development Plans (CDP) for IT professionals earlier in their careers to increase proficiency in high-risk competencies.
7. Coordinate and collaborate with Foreign Service Institute (FSI) to develop or provide any End User training.
8. Provide training services to include, but not limited to: needs analysis, curriculum design and development, knowledge article/user guide editing, training planning, training execution, and evaluation.
9. Coordinate and manage all technical and operational training on custom or COTS products, including training facilities, materials, equipment, environments, instructors, scheduling, delivery, and tracking. Stakeholders include, but are not limited to, agency users, supervisors, help desk support, technical, operational, and training personnel.
10. Provide milestone-specific knowledge transfer related to products developed or configured under this task order, as required, with clear deliverables for each set of activities.
11. Conduct all training in consideration of, and compliance with, Section 508 mandates.
    * 1. Diversity, Equity, and Inclusion

IRM requires increased individual understanding for IRM staff of what diversity, inclusion, and equity mean and how each plays a role in their lives, both professionally and personally - and development of skills and strategies for staff to employ.

The contractor shall:

1. Identify and implement organizational level practices, policies, and processes to become more diverse, inclusive, and equitable as a workplace.
   * 1. Workforce Strategy

The contractor shall:

1. Develop a workforce strategy and IT Workforce Plan that is rooted in data, using advanced analytics, trend analysis, and powerful visuals is necessary to predict the future needs of the State Department IT workforce.
2. Access foreign and domestic competency studies, IT workforce data, and government workforce trends to inform updates to the IT Workforce Plan.
   1. Task Area 9: Special Projects and Subject Matter Expert Support

The Contractor shall provide subject matter expertise capable of advising IRM, IRM Offices, and Division/Branch Chiefs on services, techniques, and technology capable of supporting and enhancing the mission.

Such services may include in-depth technology analyses, development of white papers, reports, and briefings, establishment of working groups, and development of new business processes and procedures leading to improved efficiencies.

* 1. Task Area 10: Cross-Functional Requirements

The following table summarizes the Cross-Functional categories that all contractors are required to support across each task order.

Table 2.1 – Cross Functional Requirements

| **Requirements Category** | **Description** |
| --- | --- |
| IT Compliance | IT Compliance resources setting policy, establishing controls and measuring compliance to relevant legal and compliance requirements. Includes but is not limited to: Governance, Risk & Compliance, Business Continuity & Disaster Recovery. |
| Security | IT Security resources setting policy, establishing process and means, measuring compliance and responding to security breaches. Includes Identity & Access Management, Security Awareness, Cybersecurity & Incident Response, Threat & Vulnerability Management, and Data Privacy & Security |
| Disaster Recovery | IT Disaster Recovery resources setting DR Policy, establishing process and means, dedicated failover facilities, performing DR testing: NOTE: DR designated equipment is included directly in its own sub-tower (e.g., extra servers for DR are included in Compute tower, etc.). |
| Client Management | Resources or “account managers” aligned with the lines of business to understand business needs, communicate IT products, services and status of IT projects. |
| IT Service Management | Resources involved with the incident, problem and change management activities as part of the IT Service management process (excludes the Tier 1 help desk). |
| Product and Project Management | Resources involved with managing and supporting IT related projects and/or continuous product development (e.g., Agile) across business and IT-driven initiatives. |
| Innovation, Ideation, and Modernization | The investment, development, and incubation of new technologies to create new or better solutions which meet unarticulated or existing market needs. Includes new technology solutions and new product incubation services.  Includes enterprise architecture solutions that enhance and modernize DOS services. |

* + 1. IT Compliance

IT Compliance resources include setting policy, establishing controls and measuring compliance to relevant legal and compliance requirements. This includes but is not limited to: Governance, Risk & Compliance, Business Continuity & Disaster Recovery.

The Contractor shall:

1. Comply with all relevant certification and accreditation requirements and documentation specified by DOS and the U.S. Government.
2. Adhere to policies and procedures defined in the Foreign Affairs Manual (FAM) and associated Foreign Affairs Handbooks (FAHs) to include, but not limited to proactively reporting non-compliance issues and risks.
3. Participate in compliance, risk and regulatory governing bodies, processes and activities as required.
4. Measure (or provide inputs needed to support measurement of) compliance to relevant legal and compliance requirements.
5. Monitor all work performed by assigned Contractor personnel to ensure the ongoing and continuous incorporation of and adherence to all appropriate Compliance requirements.
6. Report on compliance in coordination with other DOS stakeholders and/or Contractors.
7. Support remediation of compliance discrepancies as directed.
8. Support the definition and establishment of controls to monitor compliance.
   * + 1. 508 Compliance

The Contractor shall ensure the system is compliant with Section 508 throughout the implementation and integration of the work to be performed. The Contractor shall ensure the system is compliant with all appropriate 508 requirements and lead the testing and validation for every major and minor release. In the event that a user with disabilities identifies a defect with 508 compliance the Contractor must accommodate appropriately. Section 508 of the Rehabilitation Act of 1973, as amended (29 U.S.C.794d) requires that when Federal agencies develop, procure, maintain, or use electronic information technology, Federal employees with disabilities have access to and use of information and data that is comparable to the access and use by Federal employees who do not have disabilities, unless an undue burden would be imposed on the agency.

Section 508 also requires that individuals with disabilities, who are members of the public seeking information or services from a Federal agency, have access to and use of information and data that is comparable to that provided to the public who are not individuals with disabilities, unless an undue burden would be imposed on the agency.

Applicable standards are 1194.211194-26.

Implementation Instructions

* <http://www.section508.gov/content/learn/laws-and-policies>
* <http://www.access-board.gov/508.htm>
* <http://www.w3.org/WAI/Resources>
  + 1. Security

IT Security resources setting policy, establishing process and means, measuring compliance and responding to security breaches. Includes Identity & Access Management, Security Awareness, Cybersecurity & Incident Response, Threat & Vulnerability Management, and Data Privacy & Security.

* + - 1. Information Technology Security Plan

In accordance with Dept of State Acquisition Regulation (DOSAR) clause 652.239-71(b), the contractor shall develop, provide, implement, and maintain an IT Security Plan.

* + - 1. Cybersecurity

Cybersecurity is mandatory for all task orders placed under the Evolve contract. The objective of the cybersecurity requirement is to ensure that all task orders placed under the Evolve IDIQ not only comply with DOS standards but go above and beyond those requirements to consider how to make DOS systems more resilient and secure in the face of continuously changing threats. The following are the current cybersecurity standards, frameworks and policies that will apply at the task order level as applicable. These lists are not all inclusive and are subject to change:

1. Federal Information Processing Standards Publications

| Federal Information Processing Standards Publications (FIPS Pub) | Reference |
| --- | --- |
| Security Requirements for Cryptographic Modules | FIPS Pub 140-3 |
| Standards for Security Categorization of Federal Information and Information Systems, February 2004 | FIPS Pub 199 |
| Minimum Security Requirements for Federal Information and Information Systems, March 2016 | FIPS Pub 200 |
| Personal Identity Verification of Federal Employees and Contractors,” January 24, 2022 | FIPS Pub 201-3 |

1. National Institute of Standards and Technology Publications

| National Institute of Standards and Technology (NIST) | Reference |
| --- | --- |
| Guide for Applying the Risk Management Framework to Federal Information Systems:  A Security Life Cycle Approach, June 10, 2014 | NIST SP 800-37 |
| Security and Privacy Controls for Federal Information Systems and Organizations, January 22, 2015 | NIST SP 800-53 Rev. 4 |
| A Recommendation for the Use of Personal Identity Verification (PIV) Credentials in Physical Access Control Systems, November 20, 2008 | NIST SP 800-116 |
| Digital Identity Guidelines, June 2017 | NIST SP 800-63-3, 800-63A, 800-63B, 800-63C |
| Guidelines for Derived PIV Credentials, December 2014 | NIST SP 800-157 |
| Guidelines on Hardware-Rooted Security in Mobile Devices (Draft), October 2012 | NIST SP 800-164 |
| Draft National Institute of Standards and Technology Interagency Report - Mobile, PIV, and Authentication, March 2014 | NISTIR 7981 |

1. Office of Management and Budget Publications

| Office of Management and Budget (OMB) | Reference |
| --- | --- |
| Managing Federal Information as a Strategic Resource,” July 28, 2016 | OMB Circular A-130 |
| Continued Implementation of Homeland Security Presidential Directive (HSPD) 12 – Policy for a Common Identification Standard for Federal Employees and Contractors, February 3, 2011 | OMB Memorandum M-11-11 |
| Transition to IPv6, September 28, 2010 | OMB Memorandum |
| Acquisition of Products and Services for Implementation of HSPD-12, June 30, 2006 | OMB Memorandum M-06-18 |
| Implementation of Homeland Security Presidential Directive (HSPD) 12 – Policy for a Common Identification Standard for Federal Employees and Contractors, August 5, 2005 | OMB Memorandum 05-24 |
| Safeguarding Against and Responding to the Breach of Personally Identifiable Information, May 22, 2007 | OMB Memorandum M-07-16 |
| Implementation of Trusted Internet Connections (TIC), November 20, 2007 | OMB Memorandum M-08-05 |
| Securing the Federal Government’s Domain Name System Infrastructure, August 22, 2008 | OMB Memorandum M-08-23 |
| Improving the Federal Government’s Investigative and Remediation Capabilities Related to Cybersecurity Incidents August 27, 2021 | OMB Memorandum M-21-31 |
| [Identity, Credentialing, and Access Management (ICAM)](https://www.whitehouse.gov/wp-content/uploads/2019/05/M-19-17.pdf), May 2019 | OMB Memorandum M-19-17 |

1. Security Policies

| Security Policies | Reference |
| --- | --- |
| "Trusted Internet Connections (TIC) Reference Architecture Document, Federal Interagency Technical Reference Architectures, Department of Homeland Security, ([https://www.doi.gov/sites/doi.gov/files/uploads/tic\_ref\_arch\_v2-0\_2013.pdf](https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Fwww.doi.gov%2Fsites%2Fdoi.gov%2Ffiles%2Fuploads%2Ftic_ref_arch_v2-0_2013.pdf&data=04%7C01%7CWeakley-LugoKF%40state.gov%7C14aea13923b646e405db08d96bae63f1%7C66cf50745afe48d1a691a12b2121f44b%7C0%7C0%7C637659219012429211%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C1000&sdata=YbP5%2FAfsntmTWA2EUBBBFCR5F8gVqSLDiifPXpmWiWs%3D&reserved=0)) " | Version 2.0, October 1, 2013\*Version 3 in draft |
| "Trusted Internet Connections (TIC) https://obamawhitehouse.archives.gov/sites/default/files/omb/assets/omb/memoranda/fy2008/m08-05.pdf" | OMB M-08-05 |
| "Domain Name System Security (NSSEC) https://obamawhitehouse.archives.gov/sites/default/files/omb/assets/omb/memoranda/fy2008/m08-23.pdf" | OMB M-08-23 |
| Federal Information Security Modernization Act (FISMA) of 2014 | 44 U.S.C. § ch.35 |
| Clinger-Cohen Act of 1996 also known as the Information Technology Management Reform Act of 1996 | 40 U.S.C |
| Privacy Act of 1974 | 5 U.S.C. § 552a |
| Homeland Security Presidential Directive, “Policy for a Common Identification | HSPD-12 |
| Standard for Federal Employees and Contractors, August 27, 2004 |  |
| Management of Federal Information Resources, and Appendix III, | (OMB) Circular A-130 |
| Security of Federal Automated Information Systems”, as amended | OMB Circular A-130 | |
| E-Authentication Guidance for Federal Agencies | OMB Memo M-04-04 | |
| Standards for Security Categorization of Federal Information and Information Systems | FIPS PUB 199 | |
| Minimum Security Requirements for Federal Information and Information Systems | FIPS PUB 200 | |
| Security Requirements for Cryptographic Modules | FIPS PUB 140-3 | |
| Guide for Developing Security Plans for Federal Information Systems | NIST Special Publication 800-18 Rev 1 | |
| Risk Management Guide for Information Technology Security Risk Assessment Procedures for Information Technology Systems | NIST Special Publication 800-30 | |
| Contingency Planning Guide for Information Technology Systems | NIST Special Publication 800-34 | |
| Guide for the Security Certification and Accreditation of Federal Information Systems | NIST Special Publication 800-37 | |
| Security Guide for Interconnecting Information Technology Systems | NIST Special Publication 800-47 | |
| Recommended Security Controls for Federal Information Systems | NIST Special Publication 800-53 | |
| Guide for Assessing the Security Controls in Federal Information Systems | NIST Special Publication 800-53A | |
| Voice Over Internet Protocol (VoIP) Telephony | CNSSI 5000 | |
| Voice over Secure Internet Protocol (VoSIP) | CNSSI 5000 ANNEX I | |
| Softphone Security Requirements | CNSSI 5000 ANNEX J | |
| Type-Acceptance Program for Voice Over Internet Protocol (VoIP) Telephones | CNSSI 5001 | |
| Telephony Isolation Used for Unified Communications Implementations Within Physically Protected Spaces | CNSSI 5002 | |
| National Instruction for Approved Telephone Equipment | CNSSI 5006 | |
| Telephone and Security Equipment Submission and Evaluation Procedures | CNSSI 5007 | |
| Safeguarding Communications Security (COMSEC) Facilities and Materials | CNSSI 4005 | |
| Enabling Mission Delivery through Improved Identity, Credential, and Access Management | OMB Memo M19-17 | |
| Cybersecurity Strategy and implementation Plan (CSIP) | OMB Memo M16-04 | |
| Strengthening the Cybersecurity of Federal Networks and Critical Infrastructure | E.O 13800 | |
| Structural Reforms to Improve the Security of Classified Networks and the Responsible Sharing and Safeguarding of Classified Information | E.O. 13587 | |
| Instruction for National Security Systems (NSS) Public Key Infrastructure (PKI) X.509 Certificate Policy, Under CNSS Policy No. 25 | CNSSI 1300 | |

The contractor is responsible for remaining abreast of all new mandatory cybersecurity requirements at both the federal and DOS level and complying with the requirements relevant to this task order.

In addition to being able to perform in accordance to the referenced publications as required at the Task level for sensitive data and information technology (IT) resources, a contractor shall ensure that the contractor's information security policies, procedures, and practices applicable to all information systems it owns or operates which contain, transmit, or process information provided by or generated for the Government to support the operations and assets of a Federal agency (“Federal Information”), and which may be reasonably contemplated to be used during the performance of this contract, meet, at a minimum, the requirements of the security control baseline for Low-Impact information systems (in the most current version of NIST Special Publication 800-53), or conform to commercial standards requirements that provide a substantially equivalent or greater level of security.

* + 1. Disaster Recovery

Disaster Recovery services are the services and activities required to prevent and/or respond to a disaster event through the restoration of key computing functions as swiftly and smoothly as possible. A “disaster event” in this context is any event that prevents a mission-critical system from maintaining an operational state at the client production data center.

The Contractor shall:

1. Design, maintain, update, and enhance IRM’s business continuity for all IT Services detailed in Continuity of Operations Plan (COOP) and demonstrated Disaster Recovery (DR) capability to maintain the same level of operational support and ensure that the alternative capability meets SLAs and COOP guidelines.
2. Coordinate the involvement of all Vendor and third-party resources managed by the Vendor in the development, maintenance, testing, and execution of the disaster recovery and COOP plan.
3. Develop, evaluate, and maintain a Disaster Recovery Plan IAW IRM COOP and NIST SP 800-34 and review and update annually.
4. Ensure changes are accurately reflected in Continuity of Operations Plan (COOP) and Disaster Recovery (DR) as necessary.
5. Develop, maintain, test, and support disaster preparedness, high availability, and recovery procedures in accordance with the IRM hosted server environment.
6. Provide a single point-of-contact upon the declaration of a Disaster to coordinate with DOS or their designee and all appropriate third parties
   * 1. Client Management

Client Management includes resources or “account managers” that are aligned with the lines of business to understand business needs, communicate IT products, services, and status of IT projects.

The Contractor shall:

1. Designate a single point of contact to liaise directly with the Program Offices utilizing services delivered via this Task Order.
   * 1. IT Service Management

The Portfolio Management task order provides overarching ITSM activities for the task orders executed under the other Evolve functional categories. See PWS Section 2.1.1 for ITSM requirements for the subject task order.

* + 1. Program and Project Management

The Portfolio Management task order provides overarching Program, Product, and Project Management activities for the task orders executed under the Evolve IDIQ contract vehicle across functional categories. See PWS Section 2.1 for Program and Project Management requirements for the subject task order.

* + 1. Innovation, Ideation, and Modernization

The investment, development, and incubation of new technologies to create new or better solutions which meet unarticulated or existing department needs. Includes new technology solutions and new product incubation services.  Includes enterprise solutions that enhance and modernize DOS services.

The Contractor shall:

1. Supply value engineering reports as needed.
2. Provide the most cost effective, efficient, state-of-the-art, integrated turnkey solutions while incorporating practical innovations and technologies.
3. Determine and develop best practice processes by building upon ones already in place at IRM to improve operational efficiency.
4. Identify, develop, and advance the IRM vision and strategic plan to reform IT acquisitions by bringing industry standard best practices and driving innovations.
5. Ensure IRM remains current with evolving requirements and technology advances.
6. Special Requirements / Instructions
   1. Standards (e.g., 5 FAM 600)

The Contractor shall ensure that all work is completed in accordance with U.S. government and Department of State standards, policies, procedures and guidelines as provided.

* 1. Government-Furnished Equipment / Information

The Government may furnish workspace and other appropriate furnishings, computer hardware and software, telephones and other material appropriate to the performance of tasks. Any Government furnished materials, data, or property shall remain the property of the Government and will be returned upon completion of the support services. Government furnished equipment shall be tracked through applicable procedures that will be provided by the Contracting Officer in accordance with the Federal Acquisition Regulation (FAR).

* 1. Place of Performance

Work under this task order shall be performed primarily at DoS facilities in the Washington, DC metropolitan area, including primarily State Annex (SA-34) at 7374 Boston Blvd., Springfield, VA 22153, the Harry S. Truman Building and other State Annexes in the Washington, DC area. Additional support may be required at the State Annex 26 in Beltsville, MD and/or the ESOC West Data Center in Denver, Colorado and SA-20 – Rosslyn.

The Government authorizes offeror personnel to telework for the performance of their work functions. If telework or remote work is contemplated for the performance of tasks in this PWS, it shall be conducted per Government telework policies and be authorized by the COR or the CO.

* 1. Standard Work Hours

The Department normal work hours are 8:15 a.m. to 5:00 p.m., Monday through Friday. Contractor personnel are to be available both during normal working hours and as required for after-hours on-call support, when approved in advance by the GTM.

Unless other hours are specified in the task order, hours of performance on the contract will be an 8-hour workday, excluding lunch, but start times may vary depending on the task assignment. The Contractor will be required to cover the core hours from 0900 to 1500, Monday through Friday. During times of emergency and under unusual conditions, i.e. declared emergencies, civil unrest etc., the Contractor shall be prepared for 24-hour performance.

* 1. Period of Performance

This task order comprises a one-year base performance period, with up to four, one-year option periods.

Base Year: *Beginning and End Dates* *to be inserted at IDIQ award*

Option Year 1:

Option Year 2

Option Year 3:

Option Year 4:

* 1. Security Clearance Requirements

Contractor personnel assigned to this contract shall possess up to a **TOP SECRET** with Special Compartmented Information **(SCI)** personnel security clearance issued by the Defense Counterintelligence and Security Agency (DCSA) commensurate with the level of access required, prior to contract performance. All Contractor personnel supporting this contract will possess at least the minimum-personnel security clearance issued by the Defense Security Service commensurate with the level of access required and as specified in the DD Form 254, prior to contract performance, unless otherwise notified.

Security clearance requirements for contractors accessing DoS information systems shall be in accordance with Volume 12, Foreign Affairs Manual, Section 600. Furthermore, while at DoS locations, the Contractor shall comply with applicable DoS regulations relative to the protection of classified and/or sensitive information. The Office of Information Security (DS/IS/ISP/INB) is responsible for inspecting the Contractor’s activities with at Department locations.

Contractor personnel shall meet the personnel security clearance requirements identified in the DD-254 and task order/s. Most contractor personnel supporting the contract are expected to have a SECRET level security clearance, at a minimum. Additional security clearance requirements may be stipulated by the GTM. The prime or, in the case of a joint venture (JV), the owners of the JV (all primes) must have a TOP SECRET facility clearance by the date of the proposal submission, or it will be considered non-compliant. Subcontractors do need a cleared facility based on the highest-level clearance of their employees.

Visit requests are to be sent to DS/IS/ISP/INB, SA-20, 13th floor, Rosslyn, Virginia 22209. Letters of Consent issued by the Defense Security Service must be attached to all Visit Authorization Requests (VARs). All DD Form 254 for subcontracts shall be forwarded to DS/IS/ISP/INB for certification prior to issuance to the subcontractor.

See the contract clauses and DD 254 for the complete security requirements.

* 1. Non-Disclosure Agreement

The Contractor shall sign a non-disclosure agreement with the Department of State when working with sensitive and/or proprietary information (forms to be executed and maintained by the Contracting Officer Representative (COR)). The Contractor and its employees shall exercise the utmost discretion in regard to all matters relating to their duties and functions. The Contractor shall not communicate to any person any information known to them by reason of their performance of services under this task order which has not been made public, except in the necessary performance of their duties or upon written authorization of the contractor officer.

All documents and records (including photographs) generated during the performance of work under this task order shall be for the sole use of and become the exclusive property of the U.S. Government. Furthermore, no article, book, pamphlet, recording, broadcast, speech, television appearance, film or photograph concerning any aspect of work performed under this task order shall be published or disseminated through any media without prior written authorization of the contracting officer. The contractor shall include the substance of this provision in all contracts of employment and in all subcontracts.

* 1. Organizational Conflict of Interest (OCI)

**Determination:** The Government has determined that this effort may result in an actual or potential conflict of interest or may provide one or more Offerors with the potential to attain an unfair competitive advantage. The nature of the conflict of interest and the limitation on future contracting (description to be included in task order request).

If any such conflict of interest is found to exist, the TO Contracting Officer may (1) disqualify the Offeror, or (2) determine that it is otherwise in the best interest of the United States to contract with the Offeror and include the appropriate provisions to mitigate or avoid such conflict in the task order awarded. After discussion with the Offeror, the TO Contracting Officer may determine that the actual conflict cannot be avoided, neutralized, mitigated or otherwise resolved to the satisfaction of the Government, and the Offeror may be found ineligible for award and if the task order has already been awarded and new information comes to light such as a Corporate Change as described in section f, the government may terminate the contract for connivence.

**Disclosure:** The Offeror hereby represents to the best of its knowledge that:

* + 1. \_\_\_\_It is not aware of any facts which create any actual or potential organizational conflicts of interest relating to the award of this task order, or
    2. \_\_\_\_It has included information in its proposal, providing all current information bearing on the existence of any actual or potential organizational conflicts of interest, and has included the mitigation plan in accordance with paragraph (d) of this provision.

**Mitigation/Waiver:** If an Offeror with a potential or actual conflict of interest or unfair competitive advantage believes it can be mitigated, neutralized, or avoided, the Offeror shall submit a mitigation plan to the Government, IRM/BMP/ITA/CM, for review. Award of a contract where an actual or potential conflict of interest exists shall not occur before Government approval of the mitigation plan. If a mitigation plan is approved, the restrictions of this provision do not apply to the extent defined in the mitigation plan. If not defined, then this provision applies fully.

**Other Relevant Information:** In addition to the mitigation plan, the TO Contracting Officer may require further relevant information from the Offeror. The TO Contracting Officer will use all information submitted by the Offeror, and any other relevant information know to DOS, to determine whether an award to the Offeror may take place, and whether the mitigation plan adequately neutralizes or mitigates the conflict.

**Corporation Change:** The successful Offeror shall inform the TO Contracting Officer and Evolve Program Manager within thirty (30) calendar days of the effective date of any corporate mergers, acquisitions, and/or divestures that may affect this provision.

**Flow-down:** The contractor shall insert the substance of this clause in each first-tier subcontract that exceeds the simplified acquisition threshold.

* 1. Associate Contractor Agreements

Within the first 30 days of task order award the contractor shall provide a draft ACA to the Evolve Program Manager for review and approval. An example is provided in Attachment J-7, Associate Contractor Agreement Sample.

Table in paragraph (g) below will be populated once prime task order contract awardees are known.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(a) The Contractor shall enter into Associate Contractor Agreements (ACA) for any portion of the contract requiring joint participation in the accomplishment of the Government’s requirement. The agreements shall include the basis for sharing information, collected mission requirements, code, data, technical knowledge, expertise, and/or resources essential to the integration of the Evolve

Program and individual task order objectives, software baselines, and components, which shall ensure the greatest degree of cooperation for the development of the program to meet the terms of the contract. Associate contractors are listed in paragraph (g) below.

(b) ACAs shall include the following general information (See template to utilize):

(1) Identify the associate contractors and their relationships.

(2) Identify the program involved and the relevant Government contracts of the associate

contractors.

(3) Describe the associate contractor interfaces by general subject matter.

(4) Specify the categories of information to be exchanged or support to be provided.

(5) Include the expiration date (or event) of the ACA.

(6) Identify potential conflicts between relevant Government contracts and the ACA; include

agreements on protection of proprietary data and restrictions on employees.

(7) Identify the process through which contractors will ensure interoperability of processes and technology used under each task order. For example, ensuring that no tool can only be operated by one contractor

(c) A copy of such agreement shall be provided to the awardees by the Government for review

before execution of the document by the cooperating contractors. All awardees need to collaborate on finalized ACA.

(d) The Contractor is not relieved of any contract requirements or entitled to any adjustments to

the contract terms because of a failure to resolve a disagreement with an associate contractor.

(e) Liability for the improper disclosure of any proprietary data contained in or referenced by any agreement shall rest with the parties to the agreement, and not the Government.

(f) All costs associated with the agreements are included in the negotiated cost of this contract.

Agreements may be amended as required by the Government during the performance of this

contract.

(g) The following contractors are associate contractors with whom agreements are required:

1. Associate Contractors

|  |  |  |
| --- | --- | --- |
| Contractor | Address | Program/Contract |
|  |  |  |
|  |  |  |

* 1. Travel

Personnel assigned to this contract may be required to travel. All officially directed travel, per diem and associated miscellaneous expenses required as a result of work performed under this task order shall strictly adhere to all Government travel regulations. Travel is receipt reimbursable. Unless otherwise specified in the task order, travel to work locations within 50 miles of the National Capital Beltway (495) is considered local travel and will not be reimbursable.

* 1. Other Direct Costs

Other direct costs may be required to deliver the services in this PWS.

* 1. Funding

This task order will be incrementally funded.

1. Task Order Management

Task Order (TO) Management is mandatory for all TOs placed under the Evolve contract. The objective of TO management is to provide the program management, project control and contract administration necessary to manage a high volume, multiple contract type TO process for a large, diversified team so that the cost, schedule and quality requirements of each order are tracked, communicated to the government, and ultimately attained.

The use of commercially available automated tools and the application of expertise on processes and metrics that support task order management are encouraged to achieve the above objectives. The objective of the tool is to provide quicker access, improved accuracy, and enhanced accessibility for Contractors/clients, real-time monitoring of status/deliverables, tracking the quality of work products and gauging overall customer satisfaction.

* 1. Key Personnel

The Contractor shall identify key personnel and provide resumes for the positions identified as key personnel for this task order. If the proposed key personnel are not current employees, then the resume must be accompanied with a signed letter of intent that states the prospective employee has authorized their resume to be submitted, intends to accept employment if the Offeror is selected for award, and that the parties have agreed to salary parameters. If any of the key personnel candidates become unavailable at any point during the evaluation process, the Offeror shall immediately notify the Contracting Officer. The contractor shall be able to replace key personnel within 15 business days. Replacement requires government approval and personnel must meet same criteria as the original employee.

Listed below are minimum key personnel considered essential to the performance of work for this Task Order.

1. Task Order Key Personnel

| Labor Category | Description |
| --- | --- |
| Task Order Program Manager | Acts as a single technical point of contact (POC) who shall work closely with the Government Program Manager (PM), Contracting Officer Representative (COR), and Government Technical Monitor (GTM).  **The Task Order PM shall:**   * Be ultimately responsible for ensuring the Contractor’s performance meets all task order requirements. * Have the requisite authority for full control over all company resources necessary for task order performance. * Have the authority to approve task order modifications in emergent situations. * Be ultimately responsible for personnel management, management of Government material and assets, and personnel and facility security. * Demonstrate progressive IT experience in the functional area of the task order. At least one project shall have occurred within the past three (3) years of similar scope with a total contract value greater than $10M and global delivery in a highly complex environment. Oversight or management of at least one project shall have been conducted in accordance with a CMMI certified, Agile, and ITIL approach. * Demonstrate proven experience and documented success supervising large IT services contracts, including people of various job categories and skills. * Demonstrate expertise in the management and control of costs and resources and demonstrated capability in managing projects of this type and complexity. * Demonstrated experience providing system modernization and innovation that resulted in increased operational efficiency or cost savings.   **Minimum qualifications:**   * 10 years of relevant experience * Bachelor’s degree in a related field, with a preference for a Master’s degree in Business Administration (MBA) or Information Technology * ITIL Certified * PMP Certified (current) * Agile certification highly desired |

* + 1. Substitution of Key Personnel

The Contractor shall notify the TO CO and the TO COR prior to making any changes in Task Order Key Personnel. No changes in TO Key Personnel will be made unless the Contractor can demonstrate that the qualifications of prospective replacement personnel are equal to or better than the qualifications of the TO Key Personnel being replaced. All proposed substitutes shall have qualifications equal to or higher than the qualifications of the person to be replaced. The TO CO shall be notified in writing of any proposed substitution at least forty-five (45) days, or sixty (60) days if a security clearance is to be obtained, in advance of the proposed substitution. Such notification shall include:

1. an explanation of the circumstances necessitating the substitution;
2. a complete resume of the proposed substitute; and
3. any other information requested by the TO CO to enable him/her to make a key personnel replacement determination

The Evolve Program Manager and the contract level CO will evaluate substitutions at the contract level and the TO CO and TO COR will evaluate TO level substitutions. Requests will be reviewed promptly the Contractor will receive timely written notification of his/her approval or disapproval in writing. All disapprovals will require resubmission of another substitution within 15 calendar days of receipt of the written denial by the Contractor. The Contractor shall allow a minimum of a two-week transition of key personnel.H.11 Insurance

Insurance of the following kinds and minimum amounts shall be furnished at any time at the request of the CO and maintained during the period of performance of this contract:

1. Worker's compensation and employer's liability. The Contractor shall, as a minimum, meet the requirements specified at (FAR) 48 CFR 28.307-2(a).
2. General liability. The Contractor shall, as a minimum, meet the requirements specified at (FAR) 48 CFR 28.307-2(b).
3. Automobile liability. The Contractor shall, as a minimum, meet the requirements specified at (FAR) 48 CFR 28.307-2(c).
   1. Meetings/Conferences
      1. Task Order Kick-Off Meeting

The purpose of the Kick-Off Meeting is to achieve a clear and mutual understanding of all task order requirements and to identify and resolve potential problems.

The Contractor shall:

* Attend a task order kick off meeting convened by the Government, onsite or virtual, within 30 days after task order award
* Introduce key personnel during the meeting and present management and risk management processes to be used under the task order, addressing key risks to include dependencies and mitigation for each identified risk
* Update and present the following:
  + - Updated Transition-In Plan
    - Updated Project Management Plan
    - Master Milestone Schedule
    - Associate Contractor Agreement(s)
    - Updated Earned Value Management Plan (if applicable)
    - Agile Reporting Tool (if applicable)

The CO is responsible for establishing the time and place of the conference and will notify the appropriate Government representatives and the Contractors. The Evolve Program Manager will designate or act as the chairperson at the conference. The chairperson of the conference shall conduct the meeting.

The conference may be conducted at a location within the Washington, DC commuting area or completely online at the Government’s discretion.

* 1. Task Order Deliverables

1. Unless the Government identifies otherwise, all deliverables must be submitted in English and in electronic, Microsoft Office compatible, format via email.
2. The Government will review each deliverable product and may provide oral and written comments. The Contractor shall review and incorporate comments or implement directed changes no later than five (5) business days thereafter. This time period may be extended, at the sole discretion of the Government, by written approval of the Contracting Officer or COR (if responsibility has been delegated by the CO).
3. All documentation and reports developed or provided by the Contractor shall become the property of the U.S. Government. Reports shall not contain any markings or legends which will restrict the Department’s use of such reports in any way. All deliverables, including attachments, shall comply with the data right clauses incorporated in the contract. The Government will reject all deliverables containing markings contradicting said clauses.
4. Deliverables longer than 5 pages shall include a table of contents. Attachments, if any, shall include the attachment number, deliverable name and number, and contract number and task order number.
5. For purposes of delivery, all deliverables shall be made by close of business (COB) 4:30 P.M. local time (Washington, DC) at destination, Monday through Friday, unless stated otherwise.
6. All deliverables submitted in electronic format shall be free of any known computer virus or defects. If a virus or defect is found, the deliverable will not be accepted. The replacement file shall be provided within two (2) business days after notification of the presence of a virus.
7. Each deliverable shall be accompanied by a cover letter from the Contractor. Multiple deliverables may be delivered with a single cover letter describing the contents of the complete package.
8. In the event the Contractor anticipates difficulty in complying with any task order-level deliverable, the Contractor shall provide written notification immediately to the task order-level Contracting Officer and TO COR. Each notification shall give pertinent details, including the date by which the Contractor expects to make delivery; PROVIDED, that this data shall be informational only in character and that receipt thereof shall not be construed as a waiver by the Government of any contract delivery schedule, or any rights or remedies provided by law or under this contract.
9. Schedule of Deliverables

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Deliverable | Section Reference | Due Date | Update Frequency | Distribution |
| Associated Contractor Agreement | 3.9 | 30 days after every new task order award and updated as applicable | As needed | Evolve Program Manager |
| Meetings/Conferences (Meeting notes/action items) | 4.2/4.3.5 | 3 working days after meeting / conference | As required | CO, TO COR, Evolve Program Manager |
| Project Management Plan, to include Quality Control Plan | 4.3.3 | Within 30 calendar days after TO award (Draft) | Annually, or upon request |  |
| Task Order Kick Off Meeting (Draft Schedule) | 4.2.1 | Prior to task order start date | N/A |  |
| Task Order Monthly Status Reports | 4.3.4 | 1 month after award of first task order | Monthly | CO, COR, Evolve Program Manager |
| Transition-in Plan | 4.3.1 | 30 calendar days from award of first task order | One-time | TO CO, TO COR, TO CPM |
| Transition-out Plan | 4.3.2 | NLT 120 calendar days prior to the end of contract or 60 calendar days following the Government’s request | One-time | TO CO, TO COR, TO CPM |

* + 1. Transition-In Plan

The contractor shall develop a Transition-in Plan that details activities that shall be completed no later than 30 calendar days from the effective date of performance.

The Transition-In Plan shall include the following:

* Planned transition activities
* Transition activity timelines and milestones
* Transition resource requirements (includes the retention of current staff, as applicable and appropriate)
* Transition security implications
* Transition risks and mitigation or avoidance strategies; and
* Transition notifications and training of users
  + 1. Transition-Out Plan

The contractor shall develop a Transition-out Plan that facilitates the accomplishment of a seamless transition from the incumbent to an incoming contractor/Government personnel at the expiration of the contractor.

The contractor shall provide a final Transition-Out Plan NLT 120 calendar days prior to the end of the contract, or 60 calendar days after the Government requests the deliverable.

The Transition-Out Plan shall include the following:

* Project management processes
* Points of contacts
* Location of technical and project management documentation, data, and methods of providing these to these to the incoming service provider
* Status of ongoing technical initiatives
* Appropriate contractor-to-contractor coordination to ensure a seamless transition
* Transition of Key Personnel
* Schedules and milestones
* Actions required of the Government
* Methods of measuring transition risks that includes a complete inventory of the transition risks, with assigned severity and probability, and response plans to address the risks either through avoidance, mitigation, or other means
* Method of permitting the successor service provider to observe and become familiar with any and all operation specified in this PWS for a minimum of 120 calendar days prior to the expiration or termination of the contract
* Method of establishing and maintaining effective communication with the incoming service provider for the period of the transition via weekly status meetings; and
* Method for ensuring that all information assets and related configuration information is up-to-date and available for the Government’s review at least 120 calendar days prior to the end of the contract
  + 1. Project Management Plan

The Project Management Plan (PMP) shall define policies and procedures for managing and directing the effort for productivity, quality, cost control, and early identification and resolution of problems. The PMP shall include schedules, milestones, tasks, and subtasks required in the PWS.

* The PMP shall provide a Work Breakdown Structure (WBS) or epics with user stories, and associated roles and responsibilities of the Contractor.
* The PMP shall include the Contractor’s Quality Control Plan (QCP), Transition Plan Overview, and the stakeholder management and communication plan. The Contractor shall provide the Government with an initial PMP draft.
* The Contractor will be prepared to review and discuss the initial PMP outline at the Project Kick-Off Meeting. The PMP is a “living document” and shall be updated as necessary to reflect current tasks, objectives, and deliverables. The Contractor shall work from the latest Government approved version of the PMP.
  + 1. Task Order Monthly Status Reports (MSR)

The Contractor’s PM shall develop and provide an MSR via electronic mail to the CO, COR and GTM by the 10th of the following month. The Contractor shall consult with the COR on the format of the report. The MSR shall include, at minimum, the following:

* Activities during reporting period, by task (include: on-going activities; new activities; activities completed; progress to date on all above-mentioned activities). Start each section with a brief description of the task
* Problems and corrective actions taken. Also include all new and pending issues or concerns and proposed resolutions to address them
* Personnel gains, losses, and status
* Government actions required
* Project schedule (major tasks, milestones, deliverables, planned and actual start and completion dates, etc.)
* List of all documents submitted during reporting period to include version number and last revision date.
* If applicable, submit a summary of trips taken, conferences attended, etc.

At the CO’s, COR’s, or GTM’s request, a monthly status meeting may be held. In addition, the contractor shall meet as necessary with the government to discuss progress and problems. These meetings shall enable problems to be identified and resolved quickly. The contractor shall document the problems and the solutions.

* + 1. Meeting Minutes

Sharing meeting minutes as a record of information shared at the meeting is a guiding principle for the task order.

All formal meetings’ minutes for staff in an organizational unit shall be shared with Office Directors of the organizational unit at a minimum, either via email or, with the Office Director’s concurrence, a shared online repository. If meetings are informal or non-recurring, then requirements for meeting minutes will be determined by the Government staff in the meeting. Meeting minutes may be shared with additional Government personnel as requested by team leads, Government leadership, and COR/COs. Meeting minutes will only be used for evaluating contract staff if that requirement is coordinated with the COR prior to the start of the meeting and should not be used as a primary performance source.

1. Performance Requirements
   1. Quality of Reports and Deliverables

General quality measures, as set forth below, will be applied to each work product received from the Contractor under this contract.

1. Accuracy: work products shall be accurate in presentation, technical content, and adherence to accepted elements of style.
2. Clarity: work products shall be clear and concise. Any/all diagrams shall be easy to understand and be relevant to the supporting narrative.
3. Consistency to Requirements: All work products must satisfy the requirements of this contract and specific task orders.
4. Timeliness: work products shall be submitted on or before the due date specified herein or submitted in accordance with a later scheduled date determined by the Government.
   1. Quality Control and Quality Assurance
      1. Quality Control

The contractor shall develop and maintain an effective quality control program to ensure services are performed in accordance with this PWS. The contractor shall develop and implement procedures to identify, prevent, and ensure non-recurrence of defective services. The contractor’s quality control program is the means by which it assures that the work complies with the requirement of the contract.

After acceptance of the quality control plan the contractor shall receive the contracting officer’s acceptance in writing of any proposed change to his QC system.

* + 1. Quality Assurance

The Government will utilize several quality assurance procedures to ensure contractor compliance with this task order, as detailed in attachment J-X: QASP. The QASP sets forth the procedures and guidelines that the Department of State, Bureau of Information Resources Management will use in ensuring the required performance standards or services levels are achieved by the contractor

Examples include inspection of deliverables, review of reports, and onsite progress meetings, performance evaluations, etc. to ensure that, at a minimum, the PWS requirements have been met; sufficient consideration has been given to alternative approaches for implementing the components of the project; and defensible explanations have been provided to justify recommendations, etc.

The contractor shall maintain the highest degree of quality for all activities performed throughout the period of performance of the task order. The Government shall regularly evaluate the Contractor’s performance including, but not limited to:

* Inspections of deliverables identified within this PWS for completeness, accuracy and timeliness; note that it is the Contractor’s responsibility to ensure adherence to the submitted QCP to ensure acceptable performance under the award.
* Assurances that validated and correct implementation strategies have been selected for the program.
* The contractors’ ability to retain quality individuals to perform the contact requirements.

Appendix A: Basic Performance Standards

The contractor shall meet all the requirements listed in this PWS. Specific minimum performance requirements are listed for some tasks. Where specific minimum requirements are not listed, the basic standard is assumed to be an accurate, timely, high-quality product that effectively performs its intended function. The Government may review performance on any and all requirements contained in this PWS. Failure to meet the basic performance standards could result in administrative actions

Performance Requirements Summary (PRS)

| PERFORMANCE REQUIREMENTS SUMMARY | | | | | |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Performance Objective** | **Performance Requirement** | **Target Performance Metric** | **Monitoring Method** | **Percentage and Weight** | **Calculation** | |
| Maintain sufficient numbers of qualified staff to resolve day-to-day issues. | Contractor shall provide qualified employees to adequately staff the program. Existing staff cannot backfill vacant positions. | Average staffing level at the end of the month for any given task area is at least 96% and vacancies shall be filled within 30 days unless otherwise accepted by the government | Inspection of monthly staffing plan and vacancy report | >4% vacancy rate per task area = 0%  < 7% variance rate per task area = 10% | # of Man Hours of work performed by qualified staff per task area / # of workable hours per task area | |
| Maintain key personnel positions | Contractor shall maintain fully qualified, trained and experienced key personnel to support the mission at all times. | All key contractor positions must be filled at all times with no more than a total of 15 business days vacant. | Inspection of monthly staffing plan of key position | >15 business days vacant = 0%  <15 business days vacant = 10% | # of qualified and experienced personnel / Total # of personnel | |
| Quality Deliverables | Contractor shall ensure all correspondence and deliverables will be a quality product and will have less than 2% defects. | All deliverables will contain less than 2% defects at final acceptance | 100% inspection | >2% defect rate= 0%  <2% defect rate= 20% | # number of deliverable defects / 10 | |
| Timely Reporting and Submission of Deliverables | All deliverables (i.e. reports, documentation) are accurate and submitted within two days after established schedule. | Deliverables will be provided on time with less than 2% defects at final acceptance | 100% inspection | Deliverables >2 days late= 0% Deliverables <2 days late= 10% | # days difference between the date of submission and scheduled due date | |

1. Performance Requirements Summary Table
2. Performance Requirements Summary Table Definitions

|  |  |
| --- | --- |
| **Definitions** | |
| Performance Objective | Area within the overall Task Order where the Government describes what it wants to accomplish by end of this Task Order |
| Performance Requirement | Requirements represent organizational needs |
| Target Performance Metric | Standard represents the performance baseline against which the Contractor will be measured |
| Monitoring Method | The source, or data collection methodology, the organization will use to measure contractor performance |
| Percentage and Weight | The percentage of the 10% disincentive pool funds available to be earned in the performance of the applicable objective |
| Calculation | The method by which performance in the applicable objective is measured |