**SAMPLE – For Reference Only** – This sample is a redacted copy of a work statement accomplished under a NITAAC GWAC. A Statement of Work (SOW) is typically used when the task is well-known and can be described in specific terms. Statement of Objective (SOO) and Performance Work Statement (PWS) emphasize performance-based concepts such as desired service outcomes and performance standards. Whereas PWS/SOO's establish high-level outcomes and objectives for performance and PWS's emphasize outcomes, desired results and objectives at a more detailed and measurable level, SOW's provide explicit statements of work direction for the contractor to follow. However, SOW's can also be found to contain references to desired performance outcomes, performance standards, and metrics, which is a preferred approach. The Table of Contents below is informational only and is provided to you for purposes of outlining the PWS/SOO/SOW. **This sample is not all inclusive, therefore the reader is cautioned to use professional judgment and include agency specific references and regulations to their own PWS/SOO/SOW.**

[1 Background 1](#_Toc12860987)

[1.1 <AGENCY> 1](#_Toc12860988)

[1.2 Organizational Background 2](#_Toc12860989)

[1.3 Project Background 2](#_Toc12860990)

[1.3.1 <AGENCY> Business Application Environment 3](#_Toc12860991)

[1.3.2 Infrastructure Environment 4](#_Toc12860992)

[1.3.3 Security Environment 4](#_Toc12860993)

[1.3.4 Cultural Environment 5](#_Toc12860994)

[2 Scope of Services 5](#_Toc12860995)

[2.1 Service Objectives 6](#_Toc12860996)

[2.2 Partnership Philosophy 7](#_Toc12860997)

[2.1 Staffing 7](#_Toc12860998)

[3 ITCS Environment 8](#_Toc12860999)

[3.1 IT Help Central (ITHC) 8](#_Toc12861000)

[3.2 End User Computing Environment 10](#_Toc12861001)

[4 General Requirements 10](#_Toc12861002)

[4.1 Standards and Common Practices 10](#_Toc12861003)

[4.2 Property Management 10](#_Toc12861004)

[4.3 Electronic Communications with <AGENCY> 11](#_Toc12861005)

[4.4 Access to <AGENCY> Facilities 11](#_Toc12861006)

[4.5 Records Maintenance and Reporting 11](#_Toc12861007)

[4.6 Government and Contractor Interfaces 12](#_Toc12861008)

[5 Work Statement 12](#_Toc12861009)

[5.1 Transition Services 12](#_Toc12861010)

[5.1.1 Transition In 12](#_Toc12861011)

[5.1.2 Transition Out 14](#_Toc12861012)

[5.2 Contract and Project Management Services 14](#_Toc12861013)

[5.2.1 Contract Transformation 14](#_Toc12861014)

[5.2.2 Program and Project Management Responsibilities 15](#_Toc12861015)

[5.2.3 Performance Management 18](#_Toc12861016)

[5.3 Core Operations 19](#_Toc12861017)

[5.3.1 Customer Facing Services 19](#_Toc12861018)

[5.3.2 Technology Services 30](#_Toc12861019)

[5.4 IT Specialist Work 41](#_Toc12861020)

[5.5 Special Projects 44](#_Toc12861021)

[5.6 Surge Labor 45](#_Toc12861022)

[5.7 Other Direct Costs / Travel 45](#_Toc12861023)

[5.8 Hardware / Tools 45](#_Toc12861024)

[6 Referenced Statement of Work Appendices 45](#_Toc12861025)

Information Technology Customer Support (ITCS) Services

Statement of Work

# Background

## <AGENCY>

The <AGENCY> is an independent agency of the U.S. Government, established by the XXX. <AGENCY> funds XXX and XXX in XXX. It does this through XXX colleges, universities, and other research and/or education institutions in all parts of the United States. <AGENCY> accounts for about XX percent of federal support to academic institutions for basic research.

Each year, <AGENCY> receives approximately XXX new or renewal support proposals for research, graduate and postdoctoral fellowships, and math/science/engineering education projects; it makes approximately XXX new awards. These typically go to universities, colleges, academic consortia, nonprofit institutions, and small businesses.

<AGENCY> occupies XXX.

The XXX is the governing board of <AGENCY>. XXX is composed of 24 part-time members, appointed by the President, and confirmed by the Senate. They are selected on the basis of their eminence in basic, medical, or social sciences, engineering, agriculture, education, research management or public affairs. The <AGENCY> Director serves on the Board, ex officio.

Other <AGENCY> senior officials include a Deputy Director who is appointed by the President with the advice and consent of the U.S. Senate, and XXX Assistant Directors. In addition to the Science Board, AGENCY> is divided into over XXX organizational divisions that support the various staff and program offices and is structured as follows:

* <AGENCY> Director
* <AGENCY> Deputy Director
* Seven staff Offices serving the Office of the Director
* Seven Directorates
* Two functional Offices oriented to financial or administrative support areas.

<AGENCY>’s mission is to fund research and education in science and engineering disciplines while supporting programs to strengthen the scientific and engineering research potential. Mission activities include receiving research proposals, conducting peer review through the use of panels or electronic messaging, and awarding funds to institutions and their principal investigators.

<AGENCY> does not conduct research or operate laboratories; however, through partnerships with other agencies, states, advisory committees, and academia, it funds research and education in science and engineering. It does this through grants, contracts, and cooperative agreements to more than XXX colleges, universities, and other research and/or education institutions in all parts of the United States.

<AGENCY> serves as a common ground for members of the scientific community by providing a collective point of information for current affairs and accounting for approximately 20 percent of federal support to academic institutions for basic research.

For more information about <AGENCY> please visit our website at XXX.

## Organizational Background

The Contractor will provide support to XXX. The mission of XXX is to provide information systems, human resource management, and general administrative and logistic support functions to the <AGENCY> community of scientists, engineers, and educators as well as to the general public.

XXX has primary technical responsibility for the technical direction of the work described herein. XXX is responsible for <AGENCY>-wide IT systems development and maintenance as well as the infrastructure necessary to support these systems.

## Project Background

This acquisition will replace an existing contract providing on-site Information Technology Customer Support (ITCS) services. It is expected that this acquisition will improve <AGENCY>’s ability to:

* Maintain a customer call center that is truly useful to customers and can handle most inquiries immediately, without the need for referral or call-back.
* Provide training, documentation and self-help tools that continually raises the ability level of the <AGENCY> customers so that they have less need for the Help Desk.
* Determine an appropriate support model for <AGENCY> that takes into account the different needs, resources, missions, and personalities of each segment of <AGENCY>’s customer base.

<AGENCY> manages a highly integrated work environment with 3rd parties managing IT security, data center, network, and business applications. This contract will have the responsibility for 1st call diagnosis, triaging, and managing escalation using Government Furnished Equipment (GFE) tools. Additionally, this contract will have the responsibility for the end user computing environment, i.e., desktops, laptops, mobile computing devices, etc. Services require a high degree of coordination and communication, and <AGENCY> seeks a Contractor with plans and methods for being pro-active – not simply responding to requests for service.

<AGENCY> wishes to partner with a vendor that can deliver these services in a timely, cost effective and efficient manner.

### <AGENCY> Business Application Environment

The ITCS Contractor must be able to support and respond to requests for assistance on all <AGENCY>’s business applications including FastLane, Research.gov, the Proposal and Review System (PARS), eJacket, the Awards System, and the Financial Accounting System (FAS). The Contractor is also expected to understand the interdependencies between <AGENCY>’s key Business applications and other agency (or external) systems, as applicable. Additionally, ITCS personnel are expected to work with other <AGENCY> customer support teams that can provide expertise on <AGENCY>’s Business applications. Key applications are briefly described below.

Figure - <AGENCY> key business applications

XXX is <AGENCY>’s web-based interactive system that allows individuals doing business with the agency to initiate and submit business transactions and view reports of their activities, including proposal submission, proposal and panel review, project reports, and administrative notifications. Support for XXX is cyclical, with typically high-volume months of January, June, July, and November. Approximately three-quarters of business application requests to the ITHC are for XXX support.

XXX modernizes XXX by providing next generation grants management capabilities to carry out <AGENCY>’s mission and enabling institutions and grantees to access a menu of grants management services for multiple federal agencies in one location.

<AGENCY>’s XXX application is the primary system used by <AGENCY> to process proposals once they have been submitted via XXX or the federal Grants.gov system.

<AGENCY>’s Proposal, PI, Panel, Budget & Reviewer System (PARS) is the customized legacy software system developed to handle proposals through the receipt, review, and recommendation processes.

Program Information Management System (PIMS) is <AGENCY>’s web-based system used to create program announcements and solicitations as well as make program data available for use on websites and other <AGENCY> systems.

The Awards Management and Award Letter System (Award) supports all processes related to award actions, such as making an award, composing an award letter, reviewing, and approving award actions, making continuing grant increments, sending electronic notification to the grantee, and post-award activities.

The Financial and Accounting System (FAS) is the primary vehicle for managing funding allocated to <AGENCY>.

<AGENCY> is preparing for significant changes to its business applications over the next several years. The ITCS Contractor is expected to work collaboratively with other XXX vendors to support these changes and prepare for business application releases with new or modified functionality. Significant changes anticipated over the life of this contract include:

* <AGENCY>’s accounting system, XXX, is being replaced with XXX, a COTS-based solution, on October 1, XXXX.
* Expansion of <AGENCY>’s business intelligence and analytics program
* Modernization of several client server business systems such as XXX, XXX and XXX
* Implementation of single sign on functionality

### Infrastructure Environment

<AGENCY>’s technological infrastructure is in a state of transition.

* <AGENCY>’s standard set of application development tools is evolving from the WebLogic and GlassFish Application servers to WebLogic and JBoss Application servers; from client-server applications to thin client (web) interfaces
* <AGENCY> is taking significant steps to standardize, consolidate, and virtualize servers and systems to simplify management and improve service levels
* <AGENCY> is adjusting systems and services to fully accommodate the federal government workforce with increased telework and mobile requirements
* Finally, <AGENCY> is planning a complete refresh of our network and voice services to be aligned with the Future <AGENCY> headquarters

### Security Environment

<AGENCY> maintains a defense-in-depth security environment that provides successive security controls as a user progresses through the security architecture. <AGENCY> has a separate operational security group responsible for vulnerability management, monitoring and management of intrusion detection systems, along with incident response/reporting. <AGENCY> maintains a firewall, an intrusion detection capability, managed security services, active anti-virus/anti-spyware on the desktop. Laptops are encrypted for protection of data, web traffic is filtered, and a security event/log management to provide more incident detection capability is being deployed. <AGENCY> maintains an active vulnerability management program that includes scheduled and un-scheduled vulnerability scans each month, and a mature process for ensuring that identified vulnerabilities are analyzed and mitigated.

### Cultural Environment

Support teams must to be able to communicate with <AGENCY> staff and customers on a wide range of technical questions. Because <AGENCY> staff and customers represent a very wide range of computer skills, levels of responsibility, and job pressures, it is important to be sensitive to customer perception, to be tactful in tense situations, and to diffuse tensions and complaints. Support teams must listen attentively and patiently to a wide range of questions and requests; log them specifically and correctly; and respond with tact and consideration. Questions range from consultations that can be solved over the phone, to very complex problems or questions that may require escalation to the appropriate specialist(s).

Customer follow-up and proper closures are considered critical in the delivery of quality and timely customer service. Customer satisfaction is paramount. <AGENCY> cannot stress enough the importance of customer service support programs to ensure a positive customer experience.

# Scope of Services

ITCS services are the services and activities, as further detailed in this Statement of Work (SOW), required to provide a one-stop-shop for all <AGENCY> customer IT related needs and services including desktop and mobile computing support, remote access, telephones and voicemail, business application support and much more. ITCS provides services to both internal <AGENCY> staff and the external <AGENCY> research community and provide these services via phone, email, and in-person support. Customers are primarily located in North America within centralized locations. However, the geographic scope of support covers users traveling within and outside the Continental United States, and in extended environments (e.g., teleworkers and remote users accessing systems via VPN connections).

The Contractor shall staff and manage the IT Help Central (ITHC) which serves as a single point of entry for IT-related and non-IT service requests. The Contractor shall establish and maintain controls for managing resources aligned to the various needs of users. For example, calls may pertain to <AGENCY> business applications and/or hardware infrastructure; or may involve business related questions/issues with Grants, Business Intelligence, Information Assurance, or general questions. The Contractor shall maintain and update service offerings that follow industry standards (e.g., HDI, ITIL, and ISO) and that deliver prompt, accurate, and professional IT-related support services to <AGENCY>’s internal and external customer communities.

The Contractor shall also provide technology and management support to end user devices, such as <AGENCY> provided desktops, laptops, printers, peripherals, and mobile computing devices; as well as asset management, ‘loaner’ management and logistics, configuration management, IT Security, initial provisioning/installation, moves, adds, changes, and removal. This includes, but is not limited to, image development and management; technology assessments and recommendations; managing and executing new technology pilots; account management; and property/asset management.

The Contractor shall also manage the Customer Relationship Management (CRM) tool and is expected to maintain and enhance integration into its customer service procedures.

Delivery of ITCS services must remain timely; standardized; stable; reliable; flexible; responsive; compliant with applicable standards, statutes, and agency mandates; and deliver value (i.e., cost effective and balanced against the needs of <AGENCY> and its customers). The services delivered under this SOW require varying domains of knowledge, and are accomplished through a cohesive and coordinated approach to service delivery and service management practices.

At all times, the Government will retain primary technical responsibility for the technical direction of the work described herein. The Contractor shall provide support to the Government’s contracting representative(s) and project team by supporting areas of operational significance called out within this document. These services are organized into the following areas of support:

* Other Direct Costs / Travel
* Hardware / Tools
* Contract Access Fee

## Service Objectives

The following are the key service objectives <AGENCY> expects from performance of ITCS services. The objectives are considered performance indicators by which <AGENCY> measures value of the IT organization and its’ inputs and outputs.

* The Contractor must leverage their unique position of front line to all <AGENCY> customers and apply situational awareness and business analysis skills to proactively identify business solutions to improve the Customer experience.
* The Contractor must actively advocate what is best for the customer and be an active leader/participant in projects that impact <AGENCY> Customers.

In meetings, for these objectives, the Contractor is expected to:

* Maintain alignment with <AGENCY> business needs by thoroughly planning, and executing activities in an effective, flexible, and responsive manner;
* Provide leadership, creativity and innovation in service delivery;
* Advance and improve standards, processes and use of approved tools;
* Achieve seamless integration across all Information Technology Service Areas (e.g., Applications, Infrastructure, IT Management and Security) among Contractors and <AGENCY> personnel;
* Attain results as measured performance standards;
* Maintain cost effective services that are on par with industry practices; and
* Provide rapid response and support for new initiatives and requests.

## Partnership Philosophy

In addition to meeting the objectives listed above and the requirements outlined in this SOW, the Contractor is encouraged to:

* Provide for continuous improvements so as to consistently advance awareness and understanding of Quality to <AGENCY>’s business and technical issues; and
* Continuously seek to improve on the effectiveness and efficiency of the services delivered; and work collaboratively with other Contractors, Government agencies, and business partners.

## Staffing

<AGENCY> desires leaders and experts capable of proactively identifying, promoting, implementing, and communicating the advancement of solution engineering and maintenance. As such, the Contractor is encouraged to:

* Provide a team of experienced resources that can fulfill a variety of activities ranging from subject matter disciplines and research to expertise and skills in planning and implementation.
* Provide flexibility in resources assigned. That is, where appropriate, maintain continuity through a mix of senior-, mid-, and junior-level staff experienced in supporting requirements in an environment similar to the size and complexity of the <AGENCY>. However, as technologies change, <AGENCY> expects that the Contractor will adjust resources and provide ad hoc expertise for projects and other short-term assignments.
* Establish continuous support and continuity through cross-training to ensure there are no impacts due to planned or unplanned staff changes.
* Be proactive in establishing and maintaining operational guides that document the <AGENCY> organization, responsibilities, and processes that can be used to train resources, transfer knowledge, and create the basis for knowledge management.
* Replace, modify and/or add staffing resources as needed in a timely, profession and consistent manner.

# ITCS Environment

<AGENCY> has a total workforce of about XXX at its XXX, headquarters, including approximately XXX career employees, XXX scientists from research institutions on temporary duty, XXX contract workers and the staff of the XXX office and the Office of the Inspector General. <AGENCY>’s population is varied and is heavily staffed by senior scientists. Nearly one-third of the senior scientists are on temporary (term) one to two (1-2) years duty at <AGENCY>. Consequently, we have many employees who are sophisticated in computing, are pressured by their short tenure, and must learn our environment quickly in order to be productive. We also have a segment of staff, whether temporary (term) or permanent, who tend to explore and test new tools. Although the ultimate goal is to provide a standardized desktop computing environment, given this corporate culture, central-computing services must remain flexible and accommodating.

## IT Help Central (ITHC)

<AGENCY>’s ITHC is the hub for the agency’s customer-focused IT service and support activities and is operational Monday through Friday, excluding Federal holidays, from 6:00 AM until 8:00 PM EST.

<AGENCY> staff and customers are encouraged to contact <AGENCY>’s ITHC for all service requests with the understanding that calls will be answered or referred, if necessary, to appropriate groups within XXX or <AGENCY> for timely follow through and problem resolution. <AGENCY>’s ITHC employs knowledgeable staff to effectively answer and process requests for service received from multi-channel inputs such as e-mail, phone, web, walk-in, etc. The ITHC serves as the single point of contact for all <AGENCY> IT-related support requests and responds to a large spectrum of service requests and problems from internal and external customers. As the single point of entry for IT-related service requests, <AGENCY>’s ITHC:

* Provides phone support for internal and external customers;
* Provides desk-side support for internal customers, including <AGENCY> staff, contractor and Intergovernmental Personnel Act (IPA) employees;
* Assists on-site visitors with their technology requirements for on- and off-site conferences, training sessions, and panels; and
* Supports technical assessment and deployment activities for <AGENCY> end user computing devices.

The ITHC is the first interface for internal <AGENCY> customers needing IT problem resolution, technical assistance, or answers to questions about any business application or system. Common requests include network login problems, file restore requests, printer installations, consultations and help with both custom and commercially available application features.

<AGENCY>’s external customers, including researchers and potential researchers, reviewers, research administrators, and organizations, use agency systems and electronic tools to conduct transactions with <AGENCY>. External customer support consists of providing timely and accurate responses to assist customers with <AGENCY>’s business and grants processing applications, services, and system-related requests. Many of these business applications are custom developed and are maintained and managed by XXX.

Internal and external customers frequently request information about key <AGENCY> applications and systems, such as eJacket, FastLane and Research.gov. External customers use <AGENCY> systems for electronic business and grants processing activities, and internal <AGENCY> staff members use electronic tools for the full life-cycle of the grant award process, from developing a solicitation to funding an award.

All customer requests received via the ITHC are documented, processed, and escalated per standard operational and procedural protocols. All service tickets are currently entered and tracked in XXX.

The ITHC is also <AGENCY> customers’ point of contact for additional technology services, including assistance with network printers, remote access to <AGENCY> tools, account administration activities, and technology equipment moves and changes. Each year, the ITHC:

* Addresses more than XXX service requests in the form of calls, e-mails, and desk-side visits;
* Supports more than XXX internal and XXX external customers;
* Supports transmission and processing of XXX research proposals; and
* Supports in excess of XXX panelists across XXX panels.

The ITHC uses the XXX system XXX Enterprise XXX. The XXX system is in place to capture call volume statistics, route voice mail and e-mail, and leverage skills-based routing technologies to provide for more efficient and timely response to customer requests. XXX and XXX software provides backup ACD support to the ITHC should XXX be unavailable. The ITHC must use and support the XXX system to route calls and report information pertaining to calls and customer service requests.

## End User Computing Environment

<AGENCY> supports a heterogeneous desktop environment and supports both PC and Mac devices. Approximately XX% of XXX+ <AGENCY>’s devices are XX based with the remaining XXX based. Customer devices are based on an <AGENCY> standard image, Microsoft Active Directory Group Polices, and are configured according to the United States Government Configuration Baseline (USGCB) as well as <AGENCY>-specific functional and security requirements. Appendix 1 delineates the standard images as of XXX.

Additional information and statistics are included in Appendix 2.

# General Requirements

The Contractor shall perform all the management and administrative tasks to satisfy the requirement of this SOW while adhering to all <AGENCY> and Federal policies.

## Standards and Common Practices

The following standards will be followed, as applicable to the specific tasks for which they are intended.

* XXX’s Quality Management Program <Website Reference and Link has been removed to avoid identifying the Originating Agency> – Contractor will use the appropriate ILC, SDLC and PMLC templates for projects
* Section 508 Standards
* IT Security Policies <Website Reference and Link has been removed to avoid identifying the Originating Agency>
* OMB Circulars such as, but not limited to:

1. A-11, Part 7, Planning, Budgeting, and Acquisition of Capital Assets;
2. A-109, Major Systems Acquisitions;
3. A-123, Management Accountability and Control;
4. A-127, Financial Management Systems; and
5. A-130, Management of Federal Information Resources National Institute of Standards and Technology (NIST) 800-37 Guidelines for the Security Certification and Accreditation of Federal Information Technology Systems.

## Property Management

The Contractor is responsible for maintaining an inventory of the Government equipment in their possession. This information shall be reported quarterly.

## Electronic Communications with <AGENCY>

The Contractor shall be capable of communicating electronically using an <AGENCY> compatible e-Mail system to communicate with the Contracting Officer Representative (COR), the Contracting Officer (CO), and Performance Monitors, as applicable.

All deliverables shall be submitted using secure electronic means or by other means as directed by the COR and if requested in hardcopy in formats compatible with standard <AGENCY> productivity products (e.g., MS Office products).

The Contractor shall comply with all applicable Government laws and regulations including, but not limited to, <AGENCY> policies and procedures, the Clinger-Cohen Act; Paper Reduction Act; Paperwork Elimination Act; the Performance and Results Act; and, Section 508 of the Americans with Disabilities Act.

## Access to <AGENCY> Facilities

The Government has the right to restrict and control access to its facilities, property, and data, including those that are identified in this SOW. Access privileges will be tailored to individual Contractor personnel responsibilities. The Government will be the final authority in determining access privileges. The Government’s exercise of its right to grant and revoke the access of particular individual(s) to its facilities, or parts thereof, shall not constitute a breach or change to the Contract, regardless of whether said individual(s) are employed by the Contractor, and regardless of whether said individual(s) are precluded from performing work under the resulting Contract.

## Records Maintenance and Reporting

The Contractor shall create and maintain files (e.g., records, reports, and logs) documenting the processing of work and associated information. Federal laws, regulations, and the direction of the COR shall govern access to this information.

The Contractor shall make files available to the COR upon request within a reasonable time (depending upon the circumstance and nature of the request) but no later than five (5) business days of receipt of the request. The Contractor shall maintain all records including files, documents, and working papers provided by the Government and/or generated for the Government in the performance of this SOW. These records shall be maintained in a format approved by the COR. In the event of default, or non-performance, the Government will have immediate access to records in order to ensure mission support is not interrupted. All such records shall be checked into the Government documentation management tool, properly versioned and turned over to the Government at the completion or termination of the Contract.

The Contractor shall respond to <AGENCY> requests for information, including scheduled (programmed) and ad hoc (un-programmed) requests, from the COR. The Contractor shall refer all requests for support to the COR if received from other Government personnel prior to responding. The Contractor shall submit to the COR programmed and un-programmed information.

Upon notification by the COR, the Contractor shall provide management and technical information including, but not limited to, technical evaluation of suggestions and/or alternatives, fact sheets, audits, Congressional inquiries, one-time reports, materials, equipment, facilities, property inventories and other listings, and equipment maintenance records.

All records, files, reports, and data deemed proprietary by the Contractor shall be marked accordingly. The Government will make the final determination of the appropriateness of proprietary claims by the Contractor.

## Government and Contractor Interfaces

To ensure smooth and cooperative operations, the Contractor shall continuously facilitate cross-team communications across the functional areas described in this SOW. Additionally, due to the need to manage this effort as an integrated function, and given the complexity of the networking structure and interdependence of the various systems used by <AGENCY>, the Contractor shall coordinate and work closely with other Contractors and with Government employees as specified by the COR. The Contractor shall provide seamless, well-coordinated service delivery across Government and Contractor boundaries.

# Work Statement

## Transition Services

### Transition In

The Contractor shall be responsible for transitioning current operational responsibilities and open projects to its control. Transition activities include planning, discovery, and programmatic functions (e.g., Contract Management, Human Resource Management, Quality Assurance, etc.) necessary to transfer all logistical and technical support to the new Contractor’s operations. Transition shall include all activities necessary to establish Back Office Support (e.g., finance and accounting) or to other Contractor resources (e.g., Personnel, Subcontractors, Vendors).

At a minimum, the Contractor shall be responsible for and produce a Transition Plan that addresses steps / phases of implementation; time management; controls for managing cost, schedule, risk; and identifying any requirements that might be placed upon XXX, <AGENCY>, or other parties.

The transition preparation and phase-in period shall be 30 calendar days, commencing upon formal Contract Kick-Off. During this period, the Contractor shall plan and manage those activities necessary to transition service from the existing service provider. Immediately after the notice to commence work, the Contractor shall perform due diligence through inventory of all <AGENCY> assets, system configuration information, current operations, and documentation. The Contractor shall document and provide findings to the Government in a Transition Plan. The plan shall include what has been accomplished related to the transition and what remains outstanding, including any issues that need to be addressed. The Transition Plan shall transfer service responsibility to the Contractor at the end of the maximum thirty-day (30-day) transition timeframe, upon which the Contractor shall assume responsibility for operational, technical, and financial performance.

Objectives for transition include:

* No break in current service levels,
* No delay in support for new and ongoing projects, and
* Existing <AGENCY> projects shall continue as is, unless the Government directs changes.

During the phase-in period, the Contractor shall organize, plan, and recruit personnel for remaining outstanding positions as well as mobilize resources, develop procedures, and accomplish all actions necessary to commence full performance of the services at the end of the transition period.

During the phase-in period, the Contractor shall:

* Recruit, hire, and on-board necessary personnel
* Attend post-award meetings as required

*Deliverables include:*

* Draft Transition Plan (as proposed by the Contractor in the response to the SOW)
* Final Transition Plan (as accepted by the Government, after contract award)
* Resource Plan
* Resource report
* Daily status report
* Draft service performance measures
  + Final service performance measures
  + Statement of assumption of Full Operational Capability (FOC) upon completion of the Transition In period

### 5.1.2 Transition Out

Toward the end of the Contract term, the Contractor may be required to support a successor Contractor, see FAR 52.237-3. In addition, during contract performance the Government’s needs or requirements could potentially alter the support efforts required by this contract. The Contractor shall cooperate to affect an effective, orderly, and efficient Transition-In / Transition-Out to any such successor Contractor during a Transition-In / Transition-Out period to be specified by the Contracting Officer. The Contractor shall be required to phase out the existing contract turning over total contract control to the new Contractor in a well-organized, systematic, and planned manner. The incumbent Contractor shall meet as necessary with the new Contractor. All contractor personnel shall support the efforts established by the Transition-In / Transition-Out Team. Both Contractors shall develop a joint Transition-In / Transition-Out Plan of critical areas to be satisfied, that will be initialed and dated by both parties.

The Contractors shall provide a statement of transfer of Full Operational Capability (FOC) upon completion of the Transition Out period.

## Contract and Project Management Services

Program and project management services include contract administration and compliance, audit, back-office related activities (e.g., invoicing), account management, program management, and other recurring routine functional tasks to plan, control and ensure technical objectives are delivered on schedule and within defined budgets. These services include a number of common Information Technology life cycle support and management practices that the Contractor shall provide by coordinating and communicating Solution Engineering, Maintenance, and Operational activities with other Contractors and <AGENCY> personnel performing work across all service areas. <AGENCY> intends to maintain a high-performing organization with integrated project teams and cross-functional services that will leverage such practices.

### 5.2.1 Contract Transformation

<AGENCY> is experiencing a significant amount of organizational change through the implementation of a new accounting system XXX in FYXX and preparations to move the <AGENCY> facility location to XXX in XXX. XXX is cognizant of the additional strain this places on <AGENCY>’s customers and XXX staff and has an increased need to carefully manage operational changes. The contract transformation period shall be six (6) months commencing with the assumption of contract responsibilities, i.e., upon completion of contract transition. During the transformation period, the Contractor is expected to:

* Assess current operations and define a plan to transform operations to improve service delivery, i.e., reduced cost, improved service, or both.
* Establish program and project management Standard Operating Procedures (SOPs). Content may include: Quality Control (QC), work assignments, approval authorities, workflow, functional relationships between the Government and the Contractor, functional relationships between the Contractors’ organizational elements (including Subcontractors), and any other information needed for efficient and uniform performance.

The table below lists deliverables and due dates.

Table : Deliverables and Due Dates

| **Deliverables** | **Due Date** |
| --- | --- |
| Draft Transformation Plan | 4 months after start of Contract Transformation period |
| Final Transformation Plan | 6 months after start of Contract Transformation period |
| Draft Program and Project Management SOPs | 3 months after start of Contract Transformation period |
| Final Program and Project Management SOPs | 4 months after start of Contract Transformation period |

### 5.2.2 Program and Project Management Responsibilities

Contract and Program Management services include the functions and activities necessary for the Contractor to plan and control the execution of high-quality work on schedule, and within defined budgets. These services include, but are not limited to, Quality Management, Risk Management, Change Management, Financial Management, and Performance Management. In the delivery of the SOW requirements, <AGENCY> requires the use of systematic program and project management methodology during the execution of solution engineering services. The methodologies shall use frameworks based on best practices such as SEI-CMMI and the Project Management Institute (PMI) frameworks for project management.

The Contractor shall provide the day-to-day management of the project and deliver the means, methods, and resources to meet the Contract end point requirements and the intermediate requirements that the Contracting Officer’s Representative (COR) and/or Performance Monitor(s) determined are value-added and necessary to achieve project success. The following table identifies program management roles and responsibilities.

Table : Program and Project Management Roles and Responsibilities

| **Program and Project Management Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| Fulfill Information Resource Management Strategic Plan, Circular A-130, and OMB reporting requirements | No | Yes |
| Provide services that support <AGENCY> business needs, technical requirements end-user requirements in planning and reporting under the <AGENCY> strategic plan for Information Resource Management. | Yes | No |
| Comply with <AGENCY> policies and standards and regulations applicable to <AGENCY> for information, information systems, personnel and resource management, physical and logical security | Yes | No |
| Develop, maintain, and communicate the Contractor’s resourcing strategy, issues, risks, and opportunities | Yes | No |
| Adjust resource plans to accommodate support for peak periods | Yes | No |
| Document and maintain operating guidelines, practices, and processes, i.e., Standard Operating Procedures (SOP) | Yes | No |
| Approve operating guidelines, practices, and processes | No | Yes |
| Provide appropriate levels of skilled and knowledgeable resources necessary to meet service objectives and requirements of the SOW – including unplanned surges in workload (e.g., emergencies, projects, backlog) | Yes | No |
| Provision quarterly account management reviews between <AGENCY> Executives and Contractor Executive personnel | Yes | No |
| Identify activities and dependencies where the Contractor has reliance on <AGENCY> and / or 3rd party resources, tools, and processes and incorporate into standard operating practices | Yes | No |
| Communicate opportunities and / or risks associated with identified activities and dependencies for which the Contractor has reliance on other parties | Yes | No |
| Maintain segregation of costs and activities by job codes to permit management and reporting of labor hour expenditures and tracking of allocations, or other resources and related costs. | Yes | No |
| Ensure sufficient cost visibility for both the Government and the Contractor to ensure quality across all activities (e.g., Transition, Implementation, Continuing Operations, and any disengagement support). | Yes | No |
| Accumulate data to report on costs, schedule, resources, deliverables, and performance (quality) and risks. | Yes | No |
| Control all costs, schedule, resources, deliverables, and performance for projects and immediately advise the COR, Contract Officer (CO), and designated Performance Monitors, as appropriate, of any problem(s) that arise or may imperil or impede performance | Yes | No |
| Provide impact assessments (e.g., financial impact, schedule, resource, risk levels) for all change requests or from new regulatory requirements. | Yes | No |
| Approve changes to cost, schedule, and resource baselines. | No | Yes |
| Attend meetings and / or conferences as required by <AGENCY> or is necessary to conform to contract and regulatory requirements | Yes | No |
| Provide availability during normal hours of operation to plan, direct, and control the overall management functions. | Yes | No |
| Within 30-minute notice, during normal work hours, meet with the COR, in person or as otherwise agreed upon by the COR, to discuss status or problems. After normal working hours shall be available within 60 minutes to meet the COR or designated alternate after notification to coordinate any necessary actions. | Yes | No |
| Provide status, weekly summaries, and detailed project reviews showing, at a minimum: Cost projections, schedule attainment, accomplishments and deliverables, planned activities, and risks. | Yes | No |
| Provide daily dashboard reporting at morning tag-up, to include service request daily and aging volumes, categorizations by functional area or service, and call resolution statistics | Yes | No |
| Provide, maintain, and update project plans, identifying critical path dependencies, major critical milestones, cost and schedule, project deliverables, and tracking (e.g., project earned value) for Projects and for ongoing Service Delivery | Yes | No |
| Provide mutually agreed to reports that enable and facilitate invoice reconciliation | Yes | No |
| Determine EVM application to individual projects | No | Yes |
| Provide monthly reports performance metrics determined by the COR | Yes | No |
| Provide monthly milestone achievement review and performance reports | Yes | No |
| Provide mutually agreed to reports that capture Service Requests demands and measure of ability to satisfy demand. | Yes | No |
| Define performance metrics and reporting cycles | No | Yes |
| Develop improvement plans for services that do not meet standards | Yes | No |
| Develop Privacy classification, prioritization and workflow, communication, escalation, and reporting processes | No | Yes |
| Compliance with <AGENCY> Privacy and information Access management policies and procedures – recommend changes as appropriate | Yes | No |
| Participate and support Security Reviews, IV&V, and / or Quality Assurance (QA) compliance assessments | Yes | No |
| Support reviews for Authority to Operate and / or Accreditation Reviews per NIST 800-53A | Yes | No |
| Report on participation in technical interchange meetings for exchanges on new technology insertion, functional requests, and change control meetings (e.g., impact on interoperability, risks, and recommendations). | Yes | No |

### 5.2.3 Performance Management

An objective of this SOW is to attain and utilize performance metric data as a management control tool. No positive or negative incentives are attached to these performance metrics however they shall be reported monthly. The contractor is also encouraged to propose, define, capture, and report relevant performance metrics that would be beneficial to effective management of this work. The following table identifies Performance Measure Monitoring Roles and Responsibilities roles and responsibilities

Table : Performance Measure Monitoring Roles and Responsibilities

| **Performance Measure Monitoring Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Approve and document performance measures, acceptable quality levels and reporting cycles | No | Yes |
| 1. Document performance measure requirements and agreements | Yes | No |
| 1. Report on performance improvement results or issues preventing successful outcomes | Yes | No |
| 1. Coordinate performance measure monitoring and reporting with designated <AGENCY> representative(s) and third party vendors, as required | Yes | No |
| 1. Measure, analyze, and provide management reports on performance relative to acceptable quality levels | Yes | No |
| 1. Develop performance improvement plans where appropriate | Yes | No |
| 1. Review and approve performance improvement and schedules | No | Yes |
| 1. Implement performance improvement plans | Yes | No |
| 1. Review and approve performance measures and performance reports | No | Yes |
| 1. Follow existing mechanisms for continuous improvements and equitable service management (e.g., Balance Scorecard, Value Engineering, Engineering Change Process, Service Request Reviews) – recommend changes as appropriate | Yes | No |

## Core Operations

Core Operations consist of two categories of service. The first is the Customer Facing Services that are the direct contact with <AGENCY> staff and contractors as well as customers external to <AGENCY>. The second category of service consists of Technology Services. These services are provided to internal <AGENCY> technical and administrative functions of <AGENCY>.

### 5.3.1 Customer Facing Services

Customer Facing Services represent the support by the Contractor necessary to manage performance and troubleshoot incidents, and answer questions, or resolve issues with end-user devices, connectivity, integration, applications, and business-related practices. Services include, but are not limited to the coordination, management, and third level response to Incidents and Service Requests made by <AGENCY> customers. <AGENCY> shall be responsible for providing the Contractor with access to the <AGENCY> Help Desk system. The Contractor is responsible for Tier 1 and Tier 2 (including physical touch) support, but shall provide support from the time that a ticket is logged and escalated to Tier 2 or Tier 3. The Contractor shall have end-to-end ownership (e.g., tracking, resolution, and reporting) of assigned Trouble Ticket Incidents and Service Requests through use of the Government provided system.

At a minimum the contractor shall:

* The Contractor shall provide multiple mechanisms for receiving requests (e.g., phone, email, web portal, walk-in) and assume responsibility as the single-point-of-contact to end users.
* Provide recording, referral of requests for support, closure of calls for support to the helpdesk, management escalation of tickets or calls requiring urgent support, development of a Knowledge Base Inventory for future Tier 1 issue resolution.
* Support users with connectivity issues, printing, navigation and general questions, and Job Aid locations. When necessary the contractor shall escalate of issues to Tier 2 or Tier 3.
* Resolve incidents or problems if related to minor technical queries for in scope applications.
* Provide end-to-end ownership (e.g., logging, tracking, resolution, and reporting) of Help Desk Incidents and Service Requests using the Government provided Siebel system.

#### IT Help Central (ITHC)

<AGENCY>’s ITHC provides the single point of entry for IT-related service requests, supporting internal and external customers who use <AGENCY>’s software, hardware, and infrastructure. The ITHC strives to provide comprehensive, customer-centric support for <AGENCY>’s business applications, software, and services available to <AGENCY> employees and customers. Customer requests are received from multi-channel inputs such as e-mail, phone, web, automated requests, walk-in, etc. In supporting ITHC services, the Contractor shall:

* Provide support for the ITHC’s main functions
* Provide phone support for internal and external customers
* Provide desk-side support for internal customers, including <AGENCY> staff, contractor, and Intergovernmental Personnel Act (IPA) employees; and
* Assist on-site visitors with their technology requirements for on- and off-site conferences, training sessions, and panels.
* Promote the use of the ITHC by all <AGENCY> staff and customers for IT-related service requests;
* Receive, document, manage, and track customer service requests through successful resolution while maintaining customer satisfaction;
* Ensure all calls are answered or referred, if necessary, to appropriate service areas within XXX;
* Ensure all service requests receive follow through and problem resolution;
* Ensure delivery of customer IT services adheres to established federal, <AGENCY>, and XXX policies and guidelines; and
* Keep XXX senior management informed of any issues regarding anomalies in service availability or areas of key interest to the management team.
* Manage and post system status messages
* Escalate, as necessary, to appropriate service area.

The ITHC is the first interface for <AGENCY> customers needing IT problem resolution, technical assistance, or answers to questions about any application or system. Customer satisfaction is paramount. With respect to customer contacts, the Contractor shall:

* Be equipped and prepared to speak with <AGENCY> staff and customers on a wide range of technical questions;
* Provide accurate advice, guidance, and assistance to <AGENCY> Customers (internal and external) regarding IT processes and procedures;
* Be sensitive to customer perception, tactful in tense situations, and diffuse tensions and complaints successfully if they arise;
* Listen attentively and patiently to a wide range of questions and requests;
* Log requests specifically and correctly; and respond with tact and consideration;
* Ensure customers and service providers are kept informed of system request status, provided with timely and accurate information, and notified, as appropriate, of system status and alert information;
* Manage customers’ expectations for delayed resolution when a request cannot be immediately resolved – escalate as required by policy or standard operational procedures; and
* Keep the customer informed of open service request status (according to defined response parameters) until the problem or condition is resolved to the customer’s satisfaction.

The following table identifies ITHC roles and responsibilities.

Table : ITHC Roles and Responsibilities

| **ITHC Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| **Section 1: Customer Call Center** | Empty cell | Empty cell |
| 1. Provide call-in access via a toll-free number for all ITHC services | No | Yes |
| 1. Provide multiple alternative communication channels, including voice messages, email, intranet, chat, etc. | No | Yes |
| 1. Provide TTY access point, disabled access capability to ITHC | No | Yes |
| 1. Provide escalation contact list for <AGENCY> contacts | No | Yes |
| 1. Provide prioritization requirements for managing service requests, when needed | No | Yes |
| 1. Ensure that responses to service requests are based on priority and impact | Yes | No |
| 1. Receive, track, answer, and resolve, or monitor to closure, customer, and technical staff inquiries | Yes | No |
| 1. Provide Tier 1 and 2 support | Yes | No |
| 1. Provide Tier 3 support | No | Yes |
| 1. Manage and post system status messages | Yes | No |
| 1. Immediately escalate to XXX senior management any issues regarding anomalies in service availability or areas of key interest to the management team | Yes | No |
| 1. Ensure delivery of customer IT services adheres to established federal, <AGENCY>, and XXX policies and guidelines | Yes | No |
| 1. Ensure all calls receive follow through and problem resolution and are answered or referred, if necessary, to appropriate groups within XXX | Yes | No |
| 1. Receive, document, manage, and track customer service requests through successful resolution while maintaining customer satisfaction | Yes | No |
| 1. Assist on-site visitors with their technology requirements for on- and off-site conferences, training sessions, and panels | Yes | No |
| 1. Provide a Self Help function with commonly asked questions and answers, job aids and self-help procedures to commonly asked tasks or processes (e.g., how to request a <AGENCY>-Visitor’s Badge, How to Request a Conference Room, etc.) | Yes | No |
| 1. Ensure cross-training of Customer Call Center staff so on-site support staff are able to assist with external callers during peak volume days | Yes | No |
| 1. Ensure proper coordination with program staff prior to <AGENCY>’s deadlines which may impact systems and customer service activities | Yes | No |
| 1. Ensure that customers and service providers are kept informed of service request status and are notified, as appropriate, with system status and alerts | Yes | No |
| 1. Provide High Priority Customer List. These customers are designated PLZ customers. | No | Yes |
| 1. Provide focused support to High Priority Customers | Yes | No |
| 1. Ensure timely escalation of service requests, as required, to appropriately route requests to other <AGENCY>/XXX teams for action and follow through | Yes | No |
| 1. Work collaboratively across all functional application teams | Yes | No |
| 1. In concert with the application teams, ensure staff is fully trained and has all the necessary call scripts and supporting documentation for system enhancements, defect fixes, and new service offerings prior to release | Yes | No |
| 1. Provide trending/statistical reports such as call volumes, common requests for assistance, types of calls, etc. | Yes | No |
| 1. Conduct Customer Satisfaction Surveys | Yes | No |
| 1. Review Customer Satisfaction Survey reports. | No | Yes |
| 1. Develop and maintain an organized, easily navigable repository of documentation to support IT Customer Support Center work, including Standard Operating Procedures (SOPs) for systems and services, completed project check lists, call center scripts, and other associated documentation for real-time access by project teams and help desk staff | Yes | No |
| **Section 2: Service Ticket Tracking** | Empty cell | Empty cell |
| 1. Provide Customer Relationship Management (CRM) tool, licenses, and access | No | Yes |
| 1. Provide staff knowledgeable in CRM | Yes | No |
| 1. Establish incident/problem classification by severity level | No | Yes |
| 1. Open a service request for each new Customer request | Yes | No |
| 1. Update Service Center systems and data bases to reflect changes with usernames, locations, hardware, software, peripherals (e.g., local printers, smart phone, tablets, etc.), and other devices and applications. | Yes | No |
| 1. Immediately, accurately, and completely document all requests made to the IT Customer Support Center and enter them into the XXX Customer Relationship Management (CRM) system | Yes | No |
| 1. Ensure consistent use of coding and categorization of service requests | Yes | No |
| 1. Enter all activities performed relative to that service request, up to and including resolutions/solutions, ensuring descriptions are detailed, accurate and complete in order to resolve and close each customer request | Yes | No |
| 1. Leverage technologies that increase first contact resolution such as self-service capabilities and remote assistance tools | Yes | No |
| 1. Provide information about specific service requests as requested by other XXX groups for follow-up or discussion | Yes | No |
| 1. Escalate any identified system or performance issues immediately to cognizant service owners and XXX management | Yes | No |
| 1. In the event of a CRM system outage during operational hours, ensure that a backup method (can be manual) is in place with no disruption to the receipt and processing of requests for service request | Yes | No |
| 1. Determine performance standards | No | Yes |
| 1. Assign, track, resolve, and close all service requests within established key performance indicators between the Contractor and <AGENCY>, as proposed by the contractor and agreed to by <AGENCY> | Yes | No |
| 1. Ensure that due dates/times are established for requests in accordance with performance standards | Yes | No |
| 1. Obtain customer concurrence regarding satisfactory resolution prior to closing service requests | Yes | No |
| **Section 3: <AGENCY> Business Application Support** | Empty cell | Empty cell |
| 1. Demonstrate expert knowledge of functionality and data related to <AGENCY>’s business applications | Yes | No |
| 1. Ensure staff are well trained on all aspects of the <AGENCY> business applications and provide assistance and resolution of associated service requests | Yes | No |
| 1. Perform first level diagnostics on reported system errors | Yes | No |
| 1. Participate in the requirements gathering, customer design, user acceptance testing, and support of <AGENCY> custom applications, and be prepared to advise from a customer service perspective about planned support for those tools | Yes | No |
| 1. Initiate and participate in cross-functional activities in support of Customer requests and requirements | Yes | No |
| 1. Keep abreast of evolving changes to applications and maintain cross training of staff, as appropriate | Yes | No |
| **Section 4: Remote Access Support** | Empty cell | Empty cell |
| 1. Manage the administration and issuance of SecurID tokens as well as <AGENCY>’s inventory of tokens | Yes | No |
| 1. Provision SecurID tokens | No | Yes |
| 1. Install, maintain, and provide desktop configuration services for <AGENCY>-issued mobile devices | Yes | No |
| **Section 5: Mobile Device Management** | Empty cell | Empty cell |
| 1. Manage the Mobile Device Management (MDM) tool, profiles, and enrollments | No | Yes |
| 1. Incorporate enrollment information into customer troubleshooting processes | Yes | No |
| **Section 6: Desk-side Support Services** | Empty cell | Empty cell |
| 1. Provide first contact support and coordination with personnel performing on-site, desk-side support in response to customer requests for assistance | Yes | No |
| 1. Diagnose, troubleshoot, and remediate hardware and software issues | Yes | No |
| 1. Provide pre-planning information and support for the installation, maintenance and configuration of desktops, peripherals, smart phones, tablets, and network devices, etc. | Yes | No |
| 1. Coordinate replacement of any needed parts while working with the organizational IT Specialist and/or Administrative Officer to facilitate this repair | Yes | No |
| 1. Provision hardware/software in support of desk-side services | No | Yes |
| **Section 7: Documentation and Job Aids** | Empty cell | Empty cell |
| 1. Approve documentation format and content | No | Yes |
| 1. Provide system specifications and documentation | Yes | No |
| 1. Develop operational documentation, processing flows, and diagrams | Yes | No |
| 1. Provide artifacts and source documents for use in Enterprise Architecture | Yes | No |
| 1. Provide system installation, support, configuration, and tuning manuals | Yes | No |
| 1. Provide application hardware and system software requirements documentation | Yes | No |
| 1. Provide logical and physical data model(s) | Yes | No |
| 1. Provide End-User documentation | Yes | No |
| 1. Provide/maintain system and application security procedures | Yes | No |
| 1. Provide/maintain standard operating procedures | Yes | No |
| 1. Prepare updates and release notes | Yes | No |
| 1. Distribute updates and release notes to functional groups and customers | No | Yes |
| 1. Maintain document repository for all software development documentation | Yes | No |
| 1. Document version control for all documentation for which Contractor is responsible | Yes | No |
| 1. Update documents for application service recovery and compliance with continuity policies and directives | Yes | No |
| 1. Approve documented application service recovery process | No | Yes |
| 1. Approve all documentation delivered | No | Yes |

#### Conference Room/Training Room/Panel Support

The <AGENCY> IT Customer Support Center provides support to <AGENCY> employees and visitors that use <AGENCY>’s conference and training facilities for educational opportunities, panels, or for other purposes.

The following table identifies the roles and responsibilities associated with Conference Room, Training Room, and Panel Support.

Table : Conference Room, Training Room, and Panel Roles and Responsibilities

| **Conference Room, Training Room, and Panel Support Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Assist clients in the operation of the relevant Audio Visual (AV) and computer equipment, systems, and technologies | Yes | No |
| 1. Configure, test, and update equipment in conference rooms, training rooms, and for panel-to include virtual conferences (e.g., WebEx and Webinars, etc. as required | Yes | No |
| 1. Provide advice and assistance to <AGENCY> staff and laptop and AV rental vendors in device set up and network support activities | Yes | No |
| 1. As required, work collaboratively with other contractors and <AGENCY> staff to ensure conference room availability, configuration and setup services are prepared for conferences, panel, and meetings | Yes | No |
| 1. As required, work collaboratively with other contractors and <AGENCY> staff to ensure conference and panel system images are current and error free | Yes | No |
| 1. Serve as the collection/distribution point for panel schedules (on-site and off-site), proposal deadline schedules, letters of intent submission, and target deadlines, etc., and maintain schedules and deadlines in electronic format | Yes | No |
| 1. Support off-site panels (within the metro DC area) as required | Yes | No |
| 1. Perform site visits prior to the panel to ensure supporting infrastructure/networking is adequate to meet panel demands based on anticipated size of the panel | Yes | No |
| 1. Support functionality and usage of the Interactive Panel System | Yes | No |
| 1. Develop/Maintain a Quick reference guide for panelists, including use of the Interactive Panel System and virtual panel information | Yes | No |
| 1. Develop/Maintain Panel planning guide/checklist for Program Officers and Program Assistants | Yes | No |
| 1. Provide electronic reporting of statistics related to the number of panels/panelists supported | Yes | No |

#### Application Self-Service Manager

The Application Self-Service Manager is a self-help tool that provides <AGENCY> customers quick and easy access to download and install pre-approved applications that are not part of the standard image on <AGENCY> computers. This function is shared with other XXX service areas and the Contractor is expected to collaborate and coordinate respective activities. The table below contains a list of roles and responsibilities for the Application Self-Service Manager.

Table : Application Self-Service Manager Roles and Responsibilities

| **Application Self-Service Manager Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Approve applications to be added to/removed from Application Self-Service Manager | No | Yes |
| 1. Provision applications available in Application Self-Service Manager | No | Yes |
| 1. Approve list of customers who can access individual applications | No | Yes |
| 1. Develop and test install package for Application Self-Service Manager | Yes | No |
| 1. Manage application access list in Application Self-Service Manager | Yes | No |
| 1. Install application packages | No | Yes |

#### Customer Education and Awareness/Training

The IT Customer Support Center promotes sophistication and awareness of new electronic tools and services by working together with <AGENCY> groups to share, transfer, and disseminate information about new technology offerings.

The following table identifies the roles and responsibilities associated with Customer Education and Awareness Support.

Table : Customer Education and Awareness Roles and Responsibilities

| **Customer Education and Awareness/Training Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Manage and maintain a program to inform the <AGENCY> community of new technology offerings as well as anticipated plans for, impacts of, and benefits brought by new tools and services | Yes | No |
| 1. Provide support to monthly IT Specialist meetings and events, brown bags, focus groups, etc. | Yes | No |
| 1. Work with other <AGENCY> and XXX groups to deliver accurate, timely, and user-friendly information through meetings, user groups, information exchanges, focus groups, etc. | Yes | No |
| 1. Coordinate open workshops, product demonstrations, and presentations to demonstrate effective implementations of new products or technologies | Yes | No |
| 1. Write articles for <AGENCY> newsletters and produce other documents describing IT Customer Support Center activities and offerings | Yes | No |
| 1. Prepare briefings on comparative features of old and new technologies within the <AGENCY> computing environment | Yes | No |
| 1. Provide customers with information about <AGENCY> computing services, including the PC of the Year (PCOY) and Laptop Rental programs | Yes | No |
| 1. Support customer outreach services by attending <AGENCY> Regional Grants Conferences and other meetings and events that require IT Customer Support Center staff presence | Yes | No |
| 1. Develop/Maintain checklists, templates, and master files in support of the Customer Care program | Yes | No |
| 1. Develop/Maintain announcements of new features, usage tips, and other similar information for timely distribution to Customers | Yes | No |
| 1. Provide customer education and awareness activities to inform <AGENCY> staff and customers of relevant technology events and activities | Yes | No |
| 1. Develop/Maintain customer self-service knowledge base | Yes | No |
| 1. Develop/Maintain user manuals | Yes | No |
| 1. Develop/Maintain reference materials for laptops, wireless, external network, etc. | Yes | No |

### 5.3.2 Technology Services

The Technology services include a variety of activities that directly and indirectly support <AGENCY> staff, <AGENCY>’s customers, and personnel conducting technology functions within XXX and <AGENCY>. Specifically, the Contractor shall:

* Continuously and pro-actively seek to improve the computer resources and services provided to <AGENCY> customers
* Partner with XXX and <AGENCY> employees to research and evaluate new products following the <AGENCY> processes and protocols to include participation in the planning, coordination, and special studies, with regard to integrated change management, new application evaluation and deployment, and establishing desktop performance expectations
* Provide technical assistance to XXX and <AGENCY> staff with respect to technology new product implementation issues
* Continually assess the state of technology and <AGENCY>’s IT requirements and infrastructure and propose/recommend new technology, software and services for <AGENCY>’s consideration
* Evaluate, recommend changes to, and chair implementation of new desktop applications
* Participate in and/or lead relevant technical committees and working groups, tiger teams, etc., and
* Leverage resource channels such as, but not limited to, Gartner to conduct technology research and assessments, comprising studies, analyses, and other reviews to evaluate emerging technologies

#### Desktop/Laptop Management

The desktop/laptop management function is shared with other XXX service areas and the Contractor is expected to collaborate and coordinate respective activities. <AGENCY>’s IT Customer Support Services conducts desktop configuration management and coordination activities to ensure that <AGENCY>’s desktop and laptop, including docking stations, computing environment aligns with industry best practices, remains responsive to <AGENCY> customer requirements, and that changes are implemented according to a well-organized methodology. Tasks under this functional area include:

* Image management
* Patch management
* Seamless mobile computing
* IT security
* Tier 2 support
* Network printer configuration

The following table identifies the roles and responsibilities associated with Desktop Management.

Table : Desktop Management Roles and Responsibilities

| **Desktop Management Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| **Section 1: Image Management** | **Empty cell** | **Empty cell** |
| Recommend new image configuration | Yes | No |
| Approve new image configuration | No | Yes |
| Develop and test new standard and ad hoc images for PC and Macintosh desktop and laptops | Yes | No |
| Maintain library of available desktop and laptop images. There are currently ~300 distinct images. | Yes | No |
| Ensure re-imaged laptops/desktops are restored to the customer’s satisfaction with that all preferences, settings, mapped drives, mailboxes, software, printer mappings, and other desktop elements are functioning properly | Yes | No |
| Collaborate and coordinate with other XXX service areas (i.e., IT security, business applications, infrastructure) to ensure error free deployment of desktop and laptop images. | Yes | No |
| Approve additions to and removals from the image library | No | Yes |
| **Section 2: Patch Management** | Empty cell | Empty cell |
| Recommend patch requirements | Yes | No |
| Determine IT security patch requirements | No | Yes |
| Approve patch requirements | No | Yes |
| Collaborate and coordinate with other XXX service areas (i.e., IT security, business applications, infrastructure) in the development of the requirements and in testing patch packages | Yes | No |
| Develop and test patch packages | Yes | No |
| Deploy patches and produce deployment status reports | Yes | No |
| Manually patch <AGENCY> Child Development Center desktops/laptops following <AGENCY>-defined schedule | Yes | No |
| **Section 3: Seamless Mobile Computing** | Empty cell | Empty cell |
| Recommend image requirements | Yes | No |
| Approve image requirements | No | Yes |
| Develop and test new images | Yes | No |
| Approve new images | No | Yes |
| Load new images onto OS manager server | Yes | No |
| Install images onto <AGENCY> laptops | Yes | No |
| **Section 4: IT Security** | Empty cell | Empty cell |
| Execute scans and identify potential viruses and security breaches on desktops/laptops on <AGENCY>’s network | No | Yes |
| Manually scan <AGENCY> Child Development Center desktops/laptops (approximately 10 devices) and identify potential viruses and security breaches | Yes | No |
| Identify desktop/laptops to be removed from <AGENCY> network | No | Yes |
| Remove desktop/laptops from <AGENCY> network | Yes | No |
| Provide loaner desktop/laptop equipment | No | Yes |
| Install loaner desktop/laptop equipment | Yes | No |
| Perform forensics and determine validity/extent of security breach | Yes | No |
| Coordinate with XXX’s IT security service area to determine if data is recoverable | Yes | No |
| Determine if/what data is recoverable | No | Yes |
| Recover data and remediate security problem | Yes | No |
| Provision tools and hardware for recovery and remediation | No | Yes |
| Determine special requirements for equipment used overseas | No | Yes |
| Complete special preparations for issuance and return of equipment used for overseas travel with unique requirements, i.e., scan images on devices returned from locations outside the Continental United States for changes to images and/or vulnerabilities. | Yes | No |
| **Section 5: Tier 2 Support** | Empty cell | Empty cell |
| Run reports to identify problems with inventory of desktops/laptops on <AGENCY> network and recommend remediation | Yes | No |
| Approve remediation activities | No | Yes |
| Remediate problems identified on desktops/laptops on <AGENCY> network | Yes | No |
| Provide first contact support and coordination with personnel performing on-site, desk-side support in response to customer requests for assistance | Yes | No |
| Diagnose, troubleshoot, and remediate desktop/laptop issues | Yes | No |
| Coordinate replacement of any needed parts while working with the organizational IT Specialist and/or Administrative Officer to facilitate this repair | Yes | No |
| Provide a reliable method for two-way communication between the IT Customer Support Center and technicians in the field servicing customers | Yes | No |
| **Section 6: Network Printer Configuration** | Empty cell | Empty cell |
| Provision network printers | No | Yes |
| Provide maintenance service to network printers | No | Yes |
| Determine configuration standards | No | Yes |
| Provide network printer configuration support | Yes | No |
| Determine patch requirements | No | Yes |
| Develop and test patch package | No | No |
| Approve patch packages for deployment | No | Yes |
| Deploy patches and produce deployment status reports | Yes | No |

#### Account Management

The account management function is shared with other XXX service areas and the Contractor is expected to collaborate and coordinate respective activities. The following table identifies the roles and responsibilities associated with Account Management.

Table : Account Management Roles and Responsibilities

| **Account Management Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Manage user accounts (additions, removal, changes) to <AGENCY> network | No | Yes |
| 1. Provide support for account administration and management activities for services and systems including remote access security tokens, network accounts, and encryption keys, etc. | Yes | No |
| 1. Provide network account information to new users | Yes | No |
| 1. Capture and maintain new user signed Rules of Behavior forms | Yes | No |
| 1. Provide password reset services for accounts | Yes | No |
| 1. Coordinate with application and/or system owners to troubleshoot and resolve issues related to accounts | Yes | No |
| 1. Coordinate with other system administrators in creating and deleting accounts, so that Customers have the same account name on all systems | Yes | No |
| 1. Provide remote access security tokens | No | Yes |
| 1. Distribute new remote access security tokens and recover tokens from departing employees and contractor staff | Yes | No |
| 1. Maintain and report on inventory of remote access security tokens | Yes | No |

#### New Technology Assessment

The new technology assessment function is shared with other XXX service areas and the Contractor is expected to collaborate and coordinate respective activities. With respect to this function, the Contractor is expected to:

* Collaborate with XXX service areas and evaluate impact of technology changes to existing project schedules
* Evaluate impact of technology changes to <AGENCY> customer experience
* Consider industry best practice in conducting technology assessments
* Consider new technological security threats in evaluating products

The following table identifies the roles and responsibilities associated with New Technology Assessment.

Table : New Technology Assessment Roles and Responsibilities

| **New Technology Assessment Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| **Section 1: Technology Assessments, Refresh, and Infusion Support** | Empty cell | Empty cell |
| 1. Approve new technology changes to be assessed | No | Yes |
| 1. Investigate targeted products, confirming compatibility with <AGENCY>’s current and planned technological environments | Yes | No |
| 1. Conduct advance support planning and coordination of changes to <AGENCY>’s computing environment, including both strategic and tactical planning | Yes | No |
| 1. Identify, evaluate, recommend, prototype, and conduct initial implementation of new hardware, software, and communication technologies that may be of potential use to and/or may improve system performance and utility at <AGENCY> | Yes | No |
| 1. Recommend new/improved products to support system improvements in efficiency and effectiveness and/or when new products are needed to respond to <AGENCY> mission responsibilities or tasks while ensuring recommendations reflect a solutions-based technology infusion approach and disseminate recommendations to XXX and <AGENCY> groups as appropriate | Yes | No |
| 1. Determine technology changes to <AGENCY> computing environment | No | Yes |
| 1. Support desktop management and coordination activities, including integrated change management, requirements definition, new application evaluation and insertion, and establishing desktop performance expectations | Yes | No |
| **Section 2: Test Lab Support** | Empty cell | Empty cell |
| 1. Provision equipment for test lab use | No | Yes |
| 1. Manage test lab to enable appropriate testing of new technology prior to deployment | Yes | No |
| 1. Create environment (i.e., images, virtual machine images) to support testing | Yes | No |
| 1. Install images in production environment | No | Yes |
| 1. Ensure the Test Lab is available for <AGENCY> staff and Contractors to test organization-specific technologies | Yes | No |

#### Property Management

The Contractor is expected to manage XXX assets including software, hardware, and peripherals. The following table identifies the roles and responsibilities associated with Property Management.

Table : Property Management Roles and Responsibilities

| **Property Management Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Property management Policies and Authorizations | No | Yes |
| 1. Tag new equipment with barcodes and log into <AGENCY> property system | No | Yes |
| 1. Maintain and keep current the XXX inventory in the <AGENCY> property system in accordance with <AGENCY> and XXX policies, procedures, and guidelines | Yes | No |
| 1. Ensure the XXX inventory in the <AGENCY> property system reflects, at a minimum, current equipment location and assigned user | Yes | No |
| 1. Conduct annual XXX inventory | Yes | No |
| 1. Gather and report statistics on the <AGENCY> desktop/laptop profile (i.e., age, OS, etc.) | Yes | No |
| 1. Disposal of removed equipment |  | Yes |
| 1. Develop and maintain ‘job aids’ and facilitate useful information to users (e.g., how-to request items; lead-times; where to obtain loaners, consumables, services, etc.; answers on policies and restrictions on use) | Yes | No |
| 1. Provide equipment (i.e., desktop, laptop, mobile devices) available for loan | No | Yes |
| 1. Manage and track ‘loaner’ equipment | Yes | No |
| 1. Report ‘loaner’ equipment weekly to include forecasts, trends in demand, new requirements, and/or shortages of loaner equipment | Yes | No |
| 1. Cleanse ‘loaner’ equipment of data and information before re-purposing to next user or before removal from service | Yes | No |
| 1. Manage logistics for loaners (e.g., storage, shipping and transportation, pickup and delivery coordination) for all loaner devices and Audio-Visual equipment. | Yes | No |

#### Customer Device Services

The IT Customer Support Center provides support of the end user computing environment. In addition to providing support for Installations, Moves, Additions and Changes (IMAC), the Contractor is expected to provide support to <AGENCY> in ensuring that <AGENCY>’s end user computing environment aligns with industry best practices and remains responsive to <AGENCY>’s customer requirements. The following table identifies the roles and responsibilities associated with Customer Device Services.

Table : Customer Device Services Roles and Responsibilities

| **Customer Device Services Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| **Section 1: Install, Move, Add, and Changed (IMAC) Support** | Blank cell | Blank cell |
| 1. Generate a service request with relevant information regarding to/from locations, phone information, network information, etc. using the move template request form in Siebel | Yes | No |
| 1. Determine desktop and laptop encryption protocol | No | Yes |
| 1. Image and encrypt new desktops and laptops | Yes | No |
| 1. Support physical moves of equipment resulting from relocations, inter-office moves, new hires, exiting employees, employee moves between buildings, or temporary relocations | Yes | No |
| 1. Provide comprehensive moving services and prepare equipment for physical moves from one customer location to another, in accordance with an approved service request | Yes | No |
| 1. Ensure equipment that is being moved is protected during the move and operational at completion | Yes | No |
| **Section 2: Customer Devices Services** | Blank cell | Blank cell |
| 1. Manage <AGENCY> wide purchasing agreement for customer devices (i.e., desktops, laptops, mobile devices, and future offerings) | No | Yes |
| 1. Recommend <AGENCY> wide requirements for software and hardware peripherals or devices periodically, approximately 4x annually. | Yes | No |
| 1. Approve <AGENCY> wide requirements for software and hardware peripherals or devices | No | Yes |
| 1. Evaluate customer requests for technology solutions and align to existing offerings on standard purchasing agreement | Yes | No |
| 1. Provide research and analysis support to XXX staff in the identification and/or exploration of specific technologies and technology families | Yes | No |
| 1. Research and implement unique technical solutions that may require technology infusions (e.g., use of an XXX to phase out XP desktops, etc.) | Yes | No |
| 1. Provide ad hoc support from <AGENCY> IT Specialists | Yes | No |

#### CRM Tool Support

<AGENCY>’s IT Customer Service Center leverages several tools and technologies to support and automate day-to-day operations and service delivery. The Contractor is expected to:

* Ensure that support tools are effectively and efficiently managed
* Ensure the tools are leveraged together as appropriate to provide a more consolidated view of <AGENCY> systems, services, and data
* Design, develop, customize, manage, maintain, and configure the tool to map to <AGENCY> business processes and procedures

The following table identifies the roles and responsibilities associated with CRM Tool Support.

Table : CRM Tool Support Roles and Responsibilities

| **CRM Tool Support Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| **Section 1: CRM Tool Maintenance** | No | Yes |
| 1. Provision CRM tool | Yes | No |
| 1. Develop and test maintenance releases and patches | No | Yes |
| 1. Approve and deploy maintenance releases | Yes | No |
| 1. Conduct on-going system evaluations to identify innovations and system enhancements for recommendation to the COR | Yes | No |
| 1. Gather and prioritize enhancements to meet customer and end-user requirements | No | Yes |
| 1. Approve system enhancements and process improvements | Yes | No |
| 1. Implement process improvements as required to facilitate ease of use | No | Yes |
| **Section 2: Reporting** | Blank cell | Blank cell |
| 1. Leverage enabling technologies (e.g., Siebel Analytics, Oracle OBIEE) to report on service requests and associated activities, including the generation, triage, and escalation, as appropriate, of service requests | Yes | No |
| 1. Leverage enabling technologies to analyze service requests trends and volume, call volume statistics, hardware and software configurations, self-service options, etc. | Yes | No |
| 1. Evolve capabilities to include enhanced reporting capabilities and data value by integrating with other data base stores, as applicable, to join data from other systems | No | No |
| 1. Report request trends and deliver customized information in dashboard form to XXX individuals and groups, as requested | Yes | No |
| 1. Develop ad-hoc reports as requested | Yes | No |
| **Section 3: Automated Call Distribution System** | Blank cell | Blank cell |
| 1. Provision and maintain ACD | No | Yes |
| 1. Develop reports providing information on system statistics, volumes, peak periods, etc. | Yes | No |
| 1. Recommend new/changed routing | Yes | No |
| 1. Modify the ACD routing | No | X |

#### Incident and Problem Management

Incident and problem management services include the activities associated with restoring normal service operations as quickly as possible when there is an issue impacting service, and minimizing the adverse impact of service issues on business operations of <AGENCY>. The Contractor is expected to proactively collaborate with other XXX service areas and vendors to conduct incident and problem management

The following table identifies the roles and responsibilities associated with Incident and Problem Management.

Table : Incident and Problem Management Roles and Responsibilities

| **Roles and Responsibilities** | **Contractor** | **<AGENCY>** |
| --- | --- | --- |
| 1. Establish incident/problem classification by Severity Level | No | Yes |
| 1. Establish processes for incident and problem management | No | Yes |
| 1. Follow XXX defined processes for incident and problem management | Yes | No |
| 1. Establish incident/problem workflow, escalation, communication, and reporting processes to support XXX defined processes | Yes | No |
| 1. Coordinate handoffs of workflow and incidents back to Level 2 and coordinate action with third party providers (e.g., hardware vendors, software vendors) | Yes | No |
| 1. Participate in problem resolution with <AGENCY> and third parties (e.g., hardware vendors, software vendors) | Yes | No |
| 1. Perform Root Cause Analysis of incidents, including engaging <AGENCY> teams as required, document findings and take corrective actions for in scope services. | Yes | No |
| 1. Periodically review the state of open problems and the progress being made in addressing problems | Yes | No |
| 1. Participate in problem review sessions and provide listing and status of problems categorized by problem impact | Yes | No |
| 1. Identify possible enhancement opportunities for improved operational performance and potential cost savings | Yes | No |
| 1. Approve projects to implement operational improvements | No | Yes |
| 1. Identify requirements and policies for Root Cause Analysis (e.g., events that trigger an RCA) | No | Yes |
| 1. Follow existing procedures for performing an RCA that meet requirements and adhere to defined policies – recommend changes as appropriate | Yes | No |
| 1. Approve RCA procedures | No | Yes |
| 1. Track and report recurring problems or failures and provide associated consequences of problems if there is a business impact to <AGENCY> | Yes | No |
| 1. Recommend solutions to address recurring problems or failures | Yes | No |
| 1. Approve solutions to address recurring problems or failures | No | Yes |
| 1. Flag and track until closure all incidents that require RCA | Yes | No |
| 1. Identify root cause of incidents and recommend appropriate resolution action | Yes | No |
| 1. Approve solutions to address incidents and prevent recurrence | No | Yes |
| 1. Provide status report detailing the root cause of and procedure for correcting recurring problems | Yes | No |

## IT Specialist Work

IT Specialist services are the activities associated with providing on-site Tier 1 and Tier 2 IT Support-like services for an individual business unit. Resources acquired under this scope, at the Government’s direction, shall be stationed within a particular office and/or business unit. They will provide initial computer support and then escalate to the Customer Service Center as required.

The resource will perform tasks along with the IT Customer Service Center as described above. Other tasks may be assigned but may be reviewed by the COR as necessary to determine scope fit. The tasks include, but are not limited to the following:

1. Support Requirements
   1. Desktop Applications
      1. Support for end-user applications
   2. Computing Systems and Peripherals
      1. Migration of computing systems to new platforms
      2. System administration and management
      3. Maintenance and security patching
      4. Software and Hardware repair, installations, hardware break/fix
      5. Relocation of computing systems and peripherals or otherwise known as office moves. 1-2 customers at a time (large office moves may require additional resources)
   3. Computing systems and peripherals, hardware/software acquisition support in compliance IT guidance provided
      1. Installation, support for evolving computing environment
   4. Central copiers and printers support may include
      1. Installation assistance
      2. Repair escalation
      3. Routine maintenance such as toner replacement
      4. Interfacing network enabled copiers to <AGENCY> Central IT services
      5. Installation/upkeep of printer drivers
      6. Administrative support for photocopier set-up, diagnostic, and operational management features
   5. Liaison with IT Help Central and other organizations
      1. Attend IT Specialist Meetings
      2. Liaison with <AGENCY> Foundation office automation and IT user groups
      3. Escalation of issues that need enterprise level support
      4. Coordinate with Tier 1 and Tier 2 at IT Customer Support Center
      5. Coordinate with Tier 3 resources on an as needed basis
      6. Coordination with <AGENCY> Administrative Services and IT Customer Support Center for the office telephone and facsimile machines, LAN outlet activations, deactivations, moves, adds, and changes
   6. Software licensing management compliance
      1. As required, support software license management needs of the directorate
   7. Office automation systems information security compliance with <AGENCY> requirements
      1. Incident reporting and response
      2. Vulnerability management
      3. Standard configuration compliance
         1. Compliance with <AGENCY> CIO policies regarding information security
   8. Electronic conferencing systems
      1. Audio and video conferencing equipment scheduling, operations, maintenance, and upgrades
   9. Systems requirements assessment for lifecycle replacement, upgrade, and new business needs
   10. Administration of laptop computer and transferable media encryption compliance
   11. Coordination, administration, and maintenance of electronic images for the staff
   12. Including support of staff presentations, publications, world-wide-web services, and information dissemination activities.
   13. Electronic presentation preparation support, to include image manipulation, graphics
   14. Electronic image collection management” image acquisition, archive, service for staff image requests
   15. IT systems inventory records management support
   16. Email support and coordination:
       1. Mailing lists, mail forwarding, user mail storage management, archiving,
   17. IT systems support to client sponsored meetings and conferences: Science program panel reviews; workshops; conferences; routine administrative meetings, etc.
   18. Develop training materials and procedures to train users in the proper use of video and audio systems
   19. Assist with file transfer and other large data file movements to/from the computing environment and external sources/destinations.
   20. Travel in support of customer requirements, as necessary.
2. Procedure Requirements
   1. Resources provided under this MOA will follow all established standard operating procedures of IT Customer Support Center, XXX and the Client
3. Contractor Reporting/Deliverables
   1. A technical monthly status report which will include:
      1. List of current projects and their updates
      2. Description of any recommendations from the contractor
      3. A cumulative list of any technical issues identified during the reporting period
      4. Stats of service calls and their current status:
         1. Volume of service request/trouble requests – open at beginning of month, received during the month, closed during the month, in-process or pending as of the end of the month.
   2. A financial monthly status report which will include:
      1. Resources names, labor categories, total hours worked in the month mapped to level of effort expenditure (WBS code)
      2. Line item listing of ODC costs: summary description, cost.
      3. Current charges for the month
      4. Funding Balance, Level of effort expended, in hours, broken out by labor position and mapped to standard service/support work breakdown structure categories (categories proposed by contractor, with Government concurrence at time of contract award).
      5. Dollar amount expended, mapped to level of effort expenditure (WBS) and to Other Direct Costs. Summary narrative describing work performed identification of issues for follow-up with Government, and any recommendations.
   3. As required, submission of relevant – Client office IT systems FISMA compliance data
      1. To include standard configuration compliance, patch management, protection of personally identifiable information, and laptop computer/transportable media encryption.
   4. Annual systems inventory
      1. All software licenses, software distribution media, and computer hardware managed under the terms of this Service scope.
   5. As required based on need, submission of a summary business case
      1. Assessment of need for an IT systems retirement, replacement, or upgrade, with an accompanying recommendation for implementation.

## Special Projects

The Contractor shall perform studies, analyses and provide other technical services in support of XXX objectives. Such studies/analyses may include, but are not limited to logistics / supportability, engineering, financial, operational, and business processes. The Contractor shall perform non-recurring engineering studies and analyses to evaluate the viability of potential solutions, alternatives to various technical issues and challenges, and emerging products or technology. The Contractor shall perform the evaluation of unproven technology applications and identification of potential risks. The development of pre-production or COTS-based prototypes may be required.

As required the Contractor shall furnish schedules and budgets for various project work as defined by <AGENCY>.

Potential Projects that could occur during the life of this contract may include the following:

* The Contractor shall perform assessments of various pilot projects. These assessments could focus upon the economic, technological or a combination of both factors in determining their viability. The Government sponsor would provide assessment criteria for the success of a particular pilot project at the time of release of this project.
* Specific <AGENCY> Program Areas (e.g., HR, Director’s Office, XXX, etc.) unique requirements

## Surge Labor

The Contractor will provide additional services for additional capacity as required by the Government. The Government estimates that this “surge” demand will not be greater than XX percent of Operations and Maintenance and/or Contract and Program Management sections detailed above.

## Other Direct Costs / Travel

The Government will reimburse the Contractor on the basis of actual cost plus the Contractor’s approved Materials Handling fee for items approved by the COR.

## Hardware / Tools

This CLIN is needed to ensure that XXX and its support contractor retain the flexibility to rapidly procure the Tools and Equipment necessary to respond to emergencies and unmitigated risks that may disrupt mission critical <AGENCY> operations. This is the only circumstance this CLIN will be used. The Government will reimburse the Contractor on the basis of actual cost plus the Contractor’s approved Materials Handling fee for items approved by the COR.

# Referenced Statement of Work Appendices

The following table lists the Appendices of the Statement of Work..

Table : Statement of Work Appendices

| **SOW Appendix** | **Description** |
| --- | --- |
| Appendix 1 | <AGENCY> Standard Device Images |
| Appendix 2 | ITCS Statistics |