**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. **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.**

Research Reporting and Analysis System Development

Performance Work Statement
XXX

# General Information

## Introduction

## Background and Purpose

<AGENCY> provides the corporate framework for <AGENCY> research administration, ensuring scientific integrity, public accountability, and effective stewardship of the <AGENCY> extramural research portfolio. <AGENCY> develops and maintains extramural and intramural research portfolio reporting databases and analysis tools on behalf of the <AGENCY>. The purpose of these tools is to improve AGENCY-wide internal staff and public access to data on AGENCY-funded research in order to facilitate evaluation and management of research portfolios and to satisfy certain reporting requirements of the <AGENCY> Reform Act of 2006 These tools integrate new and existing data sources to allow user-defined querying, reporting, analysis, evaluation, and visualization of <AGENCY> grants, intramural projects, contracts, and associated outputs. An additional purpose is to develop and maintain similar tools to support other Federal science agencies.

## Goals and Objectives

Specific goals of DATA Systems are to integrate information on <AGENCY> research portfolio with other relevant data sources; design, maintain, and enhance internal and public-facing reporting websites and web application software; analyze and present data from various data sources; and maintain a wide variety of internal <AGENCY> reporting and analysis tools. The objective of this task order is to provide <AGENCY> with access to personnel that have the required subject matter expertise and skill sets appropriate to assist in discharging the unique and specialized duties for supporting <AGENCY>. <AGENCY> is looking for an offeror with personnel who possess the requisite skills to perform the tasks outlined in this SOW and can ensure the successful implementation of the tasks.

# General Description of Proposed Tasks to be Performed

DATA Systems operations and maintenance tasks are to maintain websites and software developed, including updating data and links to other websites, support the operating environment in which the internal staff and public facing tools run, and make minor web-based applications updates, software fixes and enhancements. New development shall expand the capabilities of the current databases and tools to provide additional reporting capabilities AGENCY-wide in response to both internal and public-facing reporting requirements. Support will also be provided for analyses and online presentation of data related to <AGENCY> research and programs.

Applicable websites, web software applications, and data analyses include those developed and maintained for the <AGENCY> Office of the Director, institutes and centers, and other federal partners in trans-agency collaborations in which <AGENCY> is a participant. Currently, this includes support for the <AGENCY> Research Portfolio Online Reporting Tools (RePORT) and the electronic Scientific Portfolio Assistant (eSPA). In the future, this will include tools for the STAR METRICS (Science and Technology for America's Reinvestment: Measuring the Effect of Research on Innovation, Competitiveness and Science) program, and future versions of <AGENCY> eSPA, the Scientific Publication Information Retrieval & Evaluation System (SPIRES), the Query, View, and Report (QVR) internal reporting application, and other data analysis and reporting systems. Current applicable technologies include: HTML, ColdFusion, .NET, SQL Server, and Oracle.

The contractor shall provide all personnel, contractor-site task area support, and other items necessary to perform the tasks outlined below. Tasks will be executed on a Fixed Price (FP) basis. The requirements, duties and deliverables may change over time on an as-needed basis, and the contractor shall be able to respond to the changing needs of the customer through appropriate staffing, deliverables, and timelines approved by the Contracting Office's Representative (COR). Where opportunities exist to define specific tasks, The COR, and Contracting Officer (CO) shall work with the contractor to establish fixed price tasks.

# Requirements

## Task 1: Contract and Task Management (Fixed Price)

1. Contract Management: The contractor shall provide program and project management, project control, and contract administration necessary to ensure that the objectives, scope, deliverables, schedule, and roles and responsibilities are defined for all tasks and that cost, schedule and quality requirements are tracked and communicated to the COR or the COR designee.
2. The contractor shall ensure that tasks are performed in a timely manner. This sub-task includes the delivery of all required reports to monitor the execution of the task and daily activities required for successful delivery.
3. The contractor’s Project Manager, or an appropriate designee, shall meet on scheduled dates and times to be determined by the COR to discuss work in task areas (as defined in Sections below) and problem areas. The COR may include other government staff and contractors as required.
4. The contractor shall develop and maintain task project schedules for tracking each task and subtasks performed. The contractor shall update the project schedule weekly with percentage of work completed, schedule date changes, or other schedule changes as requested by the COR.
5. The contractor shall write monthly status reports. Each status report shall provide the status of each task area defined below that has been worked on, or scheduled to be worked on, during the reporting period. Each status report shall also document any problems encountered and how they were or shall be resolved. Each report shall also document the contractor’s plans for the next reporting period, including expected accomplishments, anticipated problems, and projected solutions. The report shall include a financial report (see Appendix A for the required format of the financial report). The contractor shall deliver status reports by the tenth calendar day of each month following the first full month of task order performance.

Deliverables for Program and Project Management Services include: project plans, regular verbal and written status updates as requested by the COR or designee, and monthly status and financial reports.

The table below describes the estimated level of effort for Task 1.

| **TASK 1: Contract and Task Management Support – FP; Effort for each Contract Year** | **Empty cell** |
| --- | --- |
| Task 1: Total Estimated Level of Effort (LOE) | 1.5 FTE |

## Task 2: RePORT Website and Web Applications Operations and Maintenance (O&M) (Fixed Price)

The contractor shall maintain content (add and update reports), maintain Section 508 compliance, design and maintain consistent presentation and graphic themes, provide systems security and privacy compliance, create tutorials and training videos, user guides, and system documentation, and prepare regular reports on site analytics and access trends. The contractor shall verify website links regularly and update all website links as appropriate. For RePORT website and web-based applications (including <AGENCY> RePORT Expenditures and Results, RePORTER) and systems with database back ends, the contractor shall work with operations support teams to manage the operating environment on <AGENCY> Windows and Linux Servers and ensure security and system uptime. The contractor shall also provide support for end user (internal and the general public) queries and information requests. The contractor shall maintain the websites and web applications software and fix software errors when identified. Dynamic web-based software is developed using HTML, AJAX, JavaScript, ColdFusion or .NET, and related technologies and tools, with Oracle or SQL Server backend.

This task is limited to the current <AGENCY> RePORT website and tools functionality XXX. O&M for any other systems falls within the scope of Task 3.

Deliverables include: RePORT Website and Web applications O&M, RePORT Web application software fixes.

The table below describes the estimated level of effort for Task 2.

| **TASK 2: RePORT Website and Web Applications Operations and Maintenance (O&M) – FP; Effort for each Contract Year** | **Empty cell** |
| --- | --- |
| Task 2: Total Estimated Level of Effort (LOE) | 3.5 FTE |

## Task 3: Website and Applications Development, Reporting, Analysis, and Related Support (Optional Tasks; Fixed Price)

As tasked, the contractor shall develop and enhance websites, applications, and databases based on requirements from customers that are approved by the COR. Customers may include <AGENCY> and other <AGENCY> offices, <AGENCY> institutes and centers, and other Federal agencies with whom <AGENCY> collaborates. Dynamic web-based software is developed using HTML, AJAX, JavaScript, ColdFusion, Java or .NET and related technologies and tools with Oracle or SQL Server backend. Subtasks include but are not limited to:

1. The contractor shall develop and maintain databases and software tools to provide the capabilities for grants and contracts data analysis and reporting, integrating them into existing <AGENCY> internal staff and public reporting websites, web application software, and applicable platforms. This includes analysis, architecture, design, development, and maintenance to reconcile and avoid duplication among other <AGENCY> enterprise and reporting systems, including technical support associated with integration and maintenance with the websites and web application software initiatives. Additionally, the contractor shall assist with portfolio analysis and tool repository design, operations and maintenance for the websites and web application software initiatives.
2. The contractor shall develop new data visualization capabilities for applicable websites and web application software that allows users to see visual summaries of <AGENCY> grant data. Visualizations shall be interactive and include drill-down capabilities.
3. The contractor shall integrate grants and contracts information with long-term results of AGENCY-funded research. In addition to constructing the database, the contractor shall develop an easy-to-use query interface and a system to generate reports.
4. The contractor shall develop the capability for the applicable websites and web application software users to design custom reports, store the report parameters, and generate the reports on-demand.
5. The contractor shall develop and maintain custom reports on <AGENCY> and XXX programs and associated grants and research outcomes reporting tools. As required, this includes meeting with <AGENCY> stakeholders, data collection, data validation, analysis, and development of tables, graphs, and written documents in a variety of electronic formats.
6. The contractor shall, independently as well as in partnership with <AGENCY> staff, identify communications and outreach opportunities, in particular approaches that create efficiencies over time, streamlining information for customers, and improving our ability to keep all our communications and outreach products up to date. Such opportunities shall include web site design, mobile apps, branding, events, social media, newsletters, brochures, and other strategies. The contractor shall recommend strategies, develop plans, pilot, and implement products and approaches, and provide on-going maintenance and support.
7. IT Management Analysis and Reporting Support: The contractor shall provide technical and programmatic subject matter experts (SMEs) to support <AGENCY> staff with the development of business cases (as applicable).The business cases shall include budget analysis support, analysis of alternatives, cost benefit analysis, schedule, performance management, portfolio analysis, and metrics definition, high-level requirements, risk management plans, architecture, privacy, security alignment with <AGENCY>//Federal guidance, and support related to applicable and <AGENCY> review/governance process, and other related data calls. This includes:
* Technical Compliance: The contractor shall provide technical and programmatic SME support to assist with alignment to the <AGENCY> Enterprise Architecture (EA), and OMB EA guidelines.
* Best Practices Research.
* Security and Privacy Compliance Support: The Contractor shall provide technical and programmatic SME support to assist with Federal Information Security Management Act (FISMA) and Systems Security Certification and Accreditation (C&A) process/requirements compliance analysis and support in association with the <AGENCY> Office of the Director (OD) Office of Information Technology (OIT), <AGENCY> OD Information Systems Security Officer (ISSO), and the <AGENCY> Center for Information Technology (CIT), maintaining Privacy Impact Assessments (PIAs) and other privacy related requirements.
* General and administrative program support as required, such as preparing presentations, scheduling meetings, etc.

Deliverables include: Databases, new tools and system enhancements, analyses and reports, communications products and services, and routine program support services.

The table below describes the estimated level of effort for Task 3.

| **TASK 3: Website and Applications Development, Reporting, Analysis, and Related Support (Optional Tasks) - FP** | **Empty cell** |
| --- | --- |
| Task 3: Total Estimated Level of Effort (LOE) | 27.0 FTE |

## Task 4: Science and Technology for America’s Reinvestment: Measuring the Effect of Research on Innovation (STAR METRICS) Program and Website/Web Application Support (Fixed Price)

The STAR METRICS project is a partnership between science agencies and research institutions to document the outcomes of science investments to the public.

The contractor shall support O&M of STAR METRICS Level I and II solutions. The contractor shall maintain content (add and update reports and data), maintain Section 508 compliance, design and maintain consistent presentation and graphic themes, provide systems security and privacy compliance, create tutorials and training videos, user guides, and system documentation, and prepare regular reports on site analytics and access trends. The contractor shall verify website links regularly and update all website links as appropriate. For STAR METRICS website and web-based applications and systems with database back ends, the contractor shall work with an operations support team to manage the operating environment on <AGENCY> and Center for Information Technology (CIT) Servers and ensure security and system uptime. The contractor will also provide support for responding to the end user (internal and the general public) queries and information requests. The contractor shall maintain the websites and web applications software and fix/enhance minor software errors when identified. Dynamic web-based software is developed using HTML, AJAX, JavaScript, ColdFusion or .NET and related technologies and tools; with Oracle or SQL Server backend.

Deliverables include: STAR METRICS databases, Website and Web application development and O&M, reports, and end-user support.

The table below describes the estimated level of effort for Task 4.

| **TASK 4: Star Metrics Program and Website/Web Applications Support (Optional Task) - FP** | **Empty cell** |
| --- | --- |
| Task 4: Total Estimated Level of Effort (LOE) | 5.6 FTE |

# Management Requirements (applies to all tasks, including optional)

1. The contractor shall provide program management, project management, project control, and contract administration support necessary to manage the contract process so that cost, schedule, and quality requirements are tracked and communicated to the COR.
2. The contractor’s Project Manager, or an appropriate designee, shall meet bi-weekly with the COR to discuss work in task areas (as defined below) and problem areas. The COR may include other staff as required.
3. The contractor shall develop and maintain components of task project schedules for tracking the task/sub-tasks described in this SOW. The Contractor shall develop a task or sub-task project schedule within 10 days of the start of a new task or sub-task. The contractor shall update the project schedule weekly with percentage of work completed, schedule date changes, or other schedule changes as requested by the COR.
4. The contractor shall write monthly status reports. Each status report shall provide the status of each task area that was worked on, or was scheduled to be worked on, during the reporting period. Each status report shall also document any problems encountered and how they were, or will be, resolved. Each report shall also document the contractor’s plans for the next reporting period, including expected accomplishments, anticipated problems, and projected solutions. The report shall include a financial report with a Table (see the Appendix for the required format of the financial report). The contractor shall deliver status reports by the tenth calendar day of each month following the first full month of task order performance.

## Personnel

1. The contractor shall provide personnel experienced and qualified to perform tasks under the direction of the COR related to accomplishing this statement of work.
2. The contractor shall propose all Key personnel for the required positions that are marked as Key by an asterisk (\*). Key personnel shall not be substituted by the contractor during the course of the execution of this task order without prior permission from the COR.
3. The Government reserves the right to review resumes and meet with proposed contractor staff this requirement to verify that potential staff has the necessary skills, experience, and knowledge required for their proposed labor category.

## Deliverables Requirements

1. The contractor shall deliver all draft, revised and final documentation to the COR electronically in Microsoft Word 2010 or later with any diagrams or charts embedded in the Word files. The contractor shall also deliver any final Excel files be used in the development of said diagrams and/or charts. The contractor shall also deliver monthly status reports electronically in Microsoft Word 2010 or PowerPoint or PDF. In certain cases, Adobe PDF, Microsoft Excel, Microsoft Visio, or Microsoft Project file formats may be used.
2. The contractor shall provide deliverables as defined by the Deliverables chart below.

Table 1 - Deliverables

| **Deliverables** | **Section** | **Due Date** |
| --- | --- | --- |
| Program and project management services, project plans, regular verbal and written status updates as requested by the COR or designee | TBD | As required |
| Monthly Status Reports | TBD | Tenth calendar day of each month, starting after first full month of contract performance. |
| RePORT Website and Web applications O&M, RePORT Web application software fixes | TBD | As required |
| Databases, new tools and system enhancements, analyses and reports, communications products and services, and routine program support services | TBD | As required |