

## **INITIAL TASK ORDER**

### **5.0 SPECIFIC TASKS**

The initial task order (TO) requirements for services in this SOW include performing the following OCIO specific tasks:

- Enterprise Case and Content Management (ECCM) Project Management Office (PMO) Support
- IT Strategic Business Management Support
- IT Strategic Planning Support

Within the sub-sections that follow, DOL identifies its requirements for successful execution of these services.

### **5.1 ENTERPRISE CASE AND CONTENT MANAGEMENT (ECCM) PROJECT MANAGEMENT OFFICE (PMO) SUPPORT**

During the period of performance the contractor shall provide the following OCIO ECCM PMO support tasks:

- Assist in the development and operation of the OCIO ECCM PMO, including: Providing assistance to the OCIO in managing the existing ECCM BPA contract, providing Agency meeting and presentation support, providing Agency TO initiation and execution support, and providing other related management support activities as required.
- Assist in the development and production of ECCM IT investment management planning documentation in accordance with the DOL OCIO IT investment management governance framework, including, the DOL SDLCM, the IT Capital Planning and Investment Control (CPIC) Guide, the DOL IT Computer Security Handbook, and Enterprise Architecture (EA). Other examples include: Necessary acquisition management, budget management (i.e., ECCM Exhibit 53 and 300 development and management), and program management deliverables to ensure the successful design, development, implementation, and operation and maintenance of an ECCM IT Investment for DOL.
- Conduct activities in support of the ECCM IT Investment to assist in meeting and reporting to DOL senior management, Office of Management and Budget (OMB), General Accountability Office (GAO), and the DOL Office of the Inspector General (OIG), as necessary.

#### **5.1.1 ECCM PROJECT MANAGEMENT ADMINISTRATION SUPPORT**

During the period of performance the contractor shall provide Project Management (PM) Administration support to ensure timely accomplishment of activities. These PM services shall include the management of scope, cost, schedule, and quality of the services and deliverables in this SOW. At a minimum, the contractor shall provide the following ECCM PM deliverables:

- **Kickoff Meeting** - A kickoff meeting shall be held at a location and time mutually agreed upon by the contractor and DOL for introductions, logistics (e.g., physical and information security, on-site accommodations, et al), hand-off of government furnished property (e.g., document templates), and initiation of work. The contractor shall provide an agenda, presentation, and related materials to conduct this meeting.
- **Schedule** - The Contractor shall develop in Microsoft Project (DOL currently uses MS Project 2003) a dynamic schedule of activities associated with this TO within 15 business days of SOW execution. This schedule shall be used to plan, execute, and monitor progress of work on this SOW and shall be maintained to allow for schedule reporting in conjunction with Status Reports.
- **Status Reports** - The contractor shall provide status reports on a mutually agreed upon frequency, day of the week, and time, but no more frequent than weekly. Each status report shall consist of the prior period's accomplishments, the up-coming period's planned activities, top risks, top open issues, upcoming schedule milestones, and overall project status.
- **Status Meetings** - Status Meetings shall be initiated after the Kickoff Meeting on a mutually agreed upon frequency, day of the week, and time, but no less frequent than monthly, to discuss the progress and status (overall project health) of the project. Whenever practicable, an agenda shall be circulated to a pre-defined attendee list via email the business day before the meeting. After each Status Meeting, meeting notes (informal written communications) shall be circulated for comment/revision.
- **Cost Management** - Understanding costs will be important to the balancing of resources and schedule constraints as well as performance requirements. On a mutually agreed upon frequency, but no less frequent than monthly, the contractor shall report contracted effort by labor category and Other Direct Costs (ODCs), effort and ODCs expended for the prior period, total effort and ODCs expended for the SOW, and remaining effort and ODC balances.

### 5.1.2 IT ACQUISITION SUPPORT

During the period of performance the contractor shall provide the OCIO Programs office acquisition support as specified or required by a task order against this IDIQ including, but not limited to, DOL OCIO Programs IT related acquisition support, ECCM BPA related Agencies IT TO support, and Agency IT investment acquisition support. The scope of IT acquisition support includes, but is not limited to the development and/or assistance with the following:

- Contract Line Items (CLINS)
- Contract Terms and Conditions
- Contract Pricing
- Independent Government Cost Estimate (IGCE)
- Market Research Requests
- Request For Information (RFI)
- Request For Quote (RFQ)
- Request For Proposal (RFP)

- Service Level Agreements
- Source Selection Evaluation Support
- Contact Award Support
- Statement of Objectives (SOO)
- Statement of Work (SOW)
- Task Order Development, Evaluation, and Award Support
- Post Task Order Award Quality Assurance

Activities may include the development of a Quality Assurance Surveillance Plan (QASP) for the TO, and the establishment of monitoring, inspection, and acceptance activities for the TO contract if the contractor is providing PMO services for the award.

## **5.2 IT STRATEGIC BUSINESS MANAGEMENT SUPPORT**

The Contractor shall provide IT Strategic Business Management support including, but not limited to, reviewing and assessing current Agency IT investments from an Agency business mission and technology perspective as well as from a Department-wide IT modernization perspective. This includes meeting with DOL Agency representatives to review and discuss their FY13 IT budget planning activities and future budget planning and acquisition activities. The goal is to assist, support, and/or provide IT portfolio guidance to Agencies to improve and/or enhance the efficiency and effectiveness of their IT portfolio in meeting business mission needs as well as Department-wide IT modernization goals and objectives. For the initial task order, the Contractor shall develop an OCIO specific Target Architecture and/or Transition Strategy and Sequencing Plan to cover DOL-wide crosscutting IT modernization programs as required by OCIO COR. This task includes assisting the OCIO with planning and implementing a program to ensure a strategic view and approach regarding the alignment of business areas across the Department by formulating the overall scope and direction, conducting business process mapping, determining the desired end state, developing a plan of action to transition, and assessing the need for implementing and managing an automated tool and/or repository.

The Contractor shall develop Agency specific Target Architecture and/or Transition Strategy and Sequencing Plan consistent with the DOL-wide crosscutting IT modernization target architecture as part of future Agency specific task orders against this contract. The Contractor shall also monitor OCIO and agency TS&SP activities to ensure alignment with the Agency and OCIO target architectures.

The contractor shall provide support with implementing the Strategic Business Alignment Committee (SBAC) activities. Efforts will include but are not limited to assisting and supporting with outlining a strategic direction for the SBAC, both short term and long term, to ensure the overall approach will improve and enhance DOL in meeting business mission needs through IT modernization goals and objectives.

## **5.3 IT STRATEGIC PLANNING SUPPORT**

The Contractor shall provide IT Strategic Planning Support services to include, but not limited to, assisting and supporting the IT strategic planning process that drives IT planning efforts at the Department. This includes providing a comprehensive update to DOL's IT Strategic Plan covering a five (5) year planning cycle, identifying and defining the IT vision, mission, and

strategic direction and focus areas for the Department, consistent with the business mission and goals of the Department.

#### 5.4 PERFORMANCE STANDARDS

The contractor must deliver the desired outcomes documented herein according to the performance standards noted in this section.

All date sensitive deliverables must be provided on the dates specified in this SOW or the contractor's resulting technical proposal. Any changes to a delivery date must have prior approval (in writing) by the CO. If the deliverable cannot be provided by the scheduled date, the contractor shall contact the CO or their designee in writing with a reason for the delay and the proposed revised delivery date. The request for a revised delivery date must include the impact on related tasks and the overall project. Any request for a revised delivery date must be reviewed and approved by the CO before taking effect.

All written deliverables must be phrased in terms and language that can be understood by non-technical personnel and developed in Microsoft Office file formats (DOL is migrating from MS Office 2003 to MS Office 2010) and conform to DOL document templates or standards, as provided to the contractor in advance of the start of work on a particular deliverable. DOL shall have fifteen (15) working days to review draft deliverables and provide comments to the contractor for inclusion in the final product.

The Government reserves the right to modify performance standards and/or metrics during the life of this contract, in order to ensure that the right outcomes are being assessed and that the performance standards are appropriate. Any changes will be accomplished via a bilateral contract modification.

The COR will conduct performance evaluations based upon the three performance standards areas:

- **Quality Level** - By monitoring the contractor, the COR will determine whether the performance levels set forth in the contract have been attained. Quality standards (i.e. performance standards) for all tasks are specified in Section 6 of the SOW.
- **Frequency** - Prior to award, the COR will evaluate appropriate levels of performance, according to the standards set forth in this SOW. During the performance of this SOW, the COR will take periodic measurements (i.e., conduct surveillance), as specified, and will analyze whether the negotiated frequency of measurement is appropriate for the work being performed. Adjustments may only be made by a modification to this SOW.
- **Management Responsiveness** - The COR will determine whether the contractor has managed the SOW effectively and efficiently, as specified in the performance standards set forth in Section 6 of the SOW. The COR will confirm whether the contractor has satisfactorily met all reporting requirements.

The following table contains the list of desired outcomes, deliverables or services required performance standards, acceptable quality levels, and methods of surveillance.

Desired Outcomes	Deliverables or Services Required	Performance Standard	Acceptable Quality Level (AQL)	Method of Surveillance
Effective management and delivery of SOW services	SOW Project Management Deliverables	<p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• Accuracy and consistency of data and content supplied in deliverables</li> <li>• Well written documents with no misspelled words, proper grammar, and appropriate formatting</li> <li>• Clarity of all documents to the customer</li> </ul> <p><b>Frequency</b></p> <ul style="list-style-type: none"> <li>• Timeliness of deliverables submissions</li> </ul>	<p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• All content accurate to Contractor's knowledge</li> <li>• Demonstrated consistency between deliverable sections and across related deliverables</li> </ul> <p><b>Frequency</b></p> <ul style="list-style-type: none"> <li>• Delivery within +/- 10% schedule or cost variance of SOW Schedule</li> </ul>	<p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• Inspections</li> </ul> <p><b>Frequency</b></p> <ul style="list-style-type: none"> <li>• Progress Against Schedule</li> </ul>
	SOW Project Management Services	<p><b>Management Responsiveness</b></p> <ul style="list-style-type: none"> <li>• Manage the SOW effectively and efficiently</li> <li>• Perform reporting appropriate for the audience and content</li> <li>• Able to swiftly and accurately respond to ad hoc tasks assigned by the CO or COR.</li> </ul>	<p><b>Management Responsiveness</b></p> <ul style="list-style-type: none"> <li>• Delivery within +/- 10% schedule or cost variance of SOW Schedule</li> <li>• Percentage of ad hoc tasks completed swiftly and accurately</li> </ul>	<p><b>Management Responsiveness</b></p> <ul style="list-style-type: none"> <li>• Progress Against Schedule</li> <li>• Inspections</li> </ul>

Desired Outcomes	Deliverables or Services Required	Performance Standard	Acceptable Quality Level (AQL)	Method of Surveillance
Effective IT Investment Management and governance compliance	IT Investment Management Deliverables	<p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• Accuracy and consistency of data and content supplied in deliverables</li> <li>• Well written documents with no misspelled words, proper grammar, and appropriate formatting</li> <li>• Clarity of all documents to the customer</li> </ul> <p><b>Frequency</b></p> <ul style="list-style-type: none"> <li>• Timeliness of deliverables submissions</li> </ul>	<p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• All content accurate to Contractor's knowledge</li> <li>• Demonstrated consistency between deliverable sections and across related deliverables</li> </ul> <p><b>Frequency</b></p> <ul style="list-style-type: none"> <li>• Delivery within +/- 10% schedule or cost variance of SOW Schedule</li> </ul>	<p><b>Quality</b></p> <ul style="list-style-type: none"> <li>• Inspections</li> </ul> <p><b>Frequency</b></p> <ul style="list-style-type: none"> <li>• Progress Against Schedule</li> </ul>
	IT Investment Management Services	<p><b>Management Responsiveness</b></p> <ul style="list-style-type: none"> <li>• Manage the SOW effectively and efficiently</li> <li>• Perform reporting appropriate for the audience and content</li> <li>• Able to swiftly and accurately respond to ad hoc tasks assigned by the CO or COR.</li> </ul>	<p><b>Management Responsiveness</b></p> <ul style="list-style-type: none"> <li>• Delivery within +/- 10% schedule or cost variance of SOW Schedule</li> <li>• Percentage of ad hoc tasks completed swiftly and accurately</li> </ul>	<p><b>Management Responsiveness</b></p> <ul style="list-style-type: none"> <li>• Progress Against Schedule</li> <li>• Inspections</li> </ul>

#### 5.4.1 Evaluation Methods

The COR will conduct performance evaluations based upon the Performance Standards section above and the required performance standards set forth in this section of the SOW. The following techniques will be used to perform surveillance:

- Progress Against Schedule - The COR will review schedule performance reporting to ensure that the services provided are on-target to meet key IT Investment milestones.

## ATTACHMENT 2

- Inspections - DOL staff will conduct 100% inspections of deliverables for accuracy and completeness. Results of the inspections will be documented, and the COR will review these results for compliance with the SOW.