

## STATEMENT OF WORK (SOW)

### 1.0 INTRODUCTION

The Department of Homeland Security (DHS) has recognized the need to continue a Mentoring Program as part of the leadership and succession programs within the Office of the Chief Human Capital Officer's (OCHCO) Learning, Education, and Development Strategy Office (LEADS). The Mentoring Program supports the Department's human capital goals, and the Chief Human Capital Officer's (CHCO) priorities relating to leadership development, diversity, and career planning. The program will continue to address the potential loss of institutional knowledge through retirements and other employee attrition, enhance leadership skills, and encourage a culture of learning and sharing within the Department.

The Mentoring Program supports the Office of Personnel Management's (OPM) requirements for the Pathways Program and DHS's Cornerstone Program, as well as other priority programs within the Department.

DHS wants to create a modernized, software-based mentoring program that will significantly improve efficiency and availability and create strategic value to the organization. The system will enable an all-inclusive, open communication network across all participants who are matched using algorithms and filters based on member preferences. The capability to automate matching and communications allows a structured, manageable enterprise-wide program resulting in a sustainable mentoring program. Additionally, a modernized software-based mentoring program creates strategic value providing business analytics to gauge the health of the mentoring connections and the overall program. In addition, mentoring is a low-cost approach/option to enhance employee engagement, morale, and wellness.

### 1.1 SCOPE

The contractor shall provide a compliant commercial Software as a Solution (SaaS) mentoring program product. The product shall be scalable and configurable to DHS needs. The commercial product shall have a demonstrated industry presence with quantifiable results such as case studies or customer reports. The product shall have a framework to provide connections with a guided experience through a mentoring relationship. The product shall have the capacity to hold up to 24,000 profiles. The product shall employ a data-driven architecture to allow analytics on all data entered. The product shall employ an algorithmic-based capability to optimize matching. The product shall be fully app enabled supported on Android and IOS devices, meet DHS compliance requirements, and be accessible from all workstations, regardless of domain (.gov, .mil, .com etc). Provide dedicated staff for major program elements, and a 24x7 tech support staff for routine queries.

DHS requires the following capabilities from a commercial software-based mentoring program:

Matching Algorithm Software that provides an algorithm that automatically suggests best match options by analyzing data in each participant profile. Software that allows matching based on factors such as location, unit, rank, gender, ethnicity, availability, duration of partnership, education, experience, expertise, etc. Algorithms in the software that will match thousands of participants simultaneously which is humanly impossible with the current manual program.

Reporting & Analytics Software that provides a full suite of business data analytics that provides robust reports highlighting various indicators of program satisfaction and connection health/effectiveness. The data quickly tracks and analyzes the performance of the mentoring program and provides senior leaders metrics for oversight.

Automated Surveys Software that enables a more agile mentoring program by automatically surveying participants at pre-defined intervals. Providing automated survey results conveyed in a way that's easy to digest; visually allowing managers and participants to determine the health of the program.

Automated Communications Software that automates targeted emails and reminder communications which can be scaled enterprise-wide.

Mobile Responsiveness & Mobile Apps Convenience to access all mentoring tracks and resources to increase enrollment. Scaling all content to be Mobile-enabled and responsive.

## **1.2 OBJECTIVE**

The objective of the DHS Mentoring Program is to prepare employees for future leadership position at DHS, to enhance current capabilities and engagement, and to begin creating a mentoring culture within the agency that is integrated with other learning and development programs, leadership philosophies, and overall organizational goals. The Mentoring Program is intended to:

- Develop a diverse, high-performing workforce to support succession planning
- Establish and institutionalize a DHS workforce with a platform to enable connection to a mentor in DHS
- Provide a platform that will allow access, connection methods, and a plan for mentoring pairs to guide them in their relationship
- Increase the number of senior executives and managers who serve as mentors
- Provide another vehicle for employee professional and personal growth to augment
- Enhance the leadership, coaching, and interpersonal skills of both mentors and mentees
- Promote the development of career paths and achievement of goals

## **1.3 Period of Performance**

The period of performance for this purchase order is one (1) twelve-month base period and four (4) twelve-month option periods.

## **1.4 Place of Performance**

The primary place of performance will be contractor's facilities with occasional visits to the DHS facilities in the Washington Metro Area.

## 2.0 SPECIFIC REQUIREMENTS/TASKS

Provide a Commercial SaaS Enterprise Mentoring platform with the following capabilities:

- The ability to publish a DHS Consent to Use and Monitoring Flash Screen as condition of logging in and having system access
- Provide full Admin roles for DHS administrators, to employ fast and agile system changes
- Provide admin ability to monitor PII/HIPAA/OPSEC/spillage
- Provide admin ability to create fully customizable profile fields
- Provide an algorithm-based matching process that can be automated, semi-automated, or manual
- Provide ability for multiple mentoring sub programs with walled –off metrics (i.e., Communities, reverse, flash, and one to one)
- Provide an integrated survey feedback system that is administratively customizable
- Provide confidential user messaging to Administrative
- Provide the capability to log and track mentoring meetings/times/dates for DHS reporting
- Provide the ability to export program data and analytics
- Provide IOS/Android supported device applications (app) integration and access
- Provide a framework to enable admins to monitor connection health for accountability and feedback
- Provide a capability to deploy digital data resources such as documents, videos, and podcasts
- Provide a means of having each mentoring connection complete a mentoring partnership agreement within the system electronically
- Provide the ability to set and track mentoring connection goals
- Provide ability for all users to take notes in various areas in the system
- Provide ability for users to capture reflective notes on their interactions
- Provide the ability to advertise and market program events and updates
- Provide the ability to administer/organize/conduct group mentoring for specific targeted topics/groups with the same data collection
- Provide a customizable program executive dashboard and individual track dashboards to collect and display key admin-defined performance indicators and outcome metrics
- Provide the ability to conduct training and interactive system/program user guides
- Provide full data transparency on all data collected for business intelligence analytics, including every field of data entered by any participant and system interaction metrics (logins etc.)
- Provide consulting representative for program build-out and monitoring throughout the contract term
- Provide help-desk support to remedy technical issues
- Meet DHS information technology compliance certifications,
- Work towards becoming FEDRAMP and DISA compliant
- Enables all eligible DHS federal employees to apply to the Mentoring Program using an online form for program participants
- Provides participants' (mentor/mentee) profile information representative of meaningful data for future reporting within the program
- Provides a program calendar and reminders of mentoring events to program participants to ensure timely program submission

## **2.1 Provide a Single Commercial Software as a Service (SaaS) Mentoring Platform**

**2.1.1** Must be a Commercial Software as a Service solution that requires no software or hardware from DHS.

**2.1.2** Must be accessible from any desktop, tablet, or mobile device. Must have a dedicated mobile device app for Apple and Android devices. Being ‘web-optimized’ is not acceptable as a mobile device use.

**2.1.3** The Contractor must be able to be branded to DHS specifications and have a customized DHS URL.

**2.1.4** The Contractor must provide a variety of configurable mentoring formats (one-to-one, circle mentoring, situational mentoring, etc.). Configuration ability must be enabled to DHS admins for building to the unique formats, types, and needs of DHS program. These formats must be able to support potential DHS Strategic goals for mentoring such as (but not limited to): career development, recruiting, leadership development, retention, diversity and inclusion, professional development, executive development, knowledge transfer, coaching, and networking.

**2.1.5** Provide the ability for different matching types. These types must include self-matching, admin matching, and algorithm-based automated matching. System must allow user level filtering based on any of the profile field components.

## **2.2 TASK TWO. Provide a Guided Experience**

**2.2.1** The contractor shall provide a facilitation holistic relationship for mentees and mentors to follow in their mentoring relationship. All elements of the connection framework must be admin customizable.

**2.2.2** The connection framework should be in the form of a user-friendly reference checklist, tailored to a time-based connection. For example, the beginning to the checklist may include (1) resources/tips on how to break the ice for having a successful mentor/mentee relationship, (2) reminders to set up a communication plan and routine, (3) tips for setting up a first meeting, etc. The connection plan should also allow for situations such as prompting survey completion, goal setting, recurring meeting scheduling, and healthy ways to close out a relationship.

**2.2.3** The Contractor shall provide a suite of connection matching capabilities. At a minimum, the contractor shall provide a system allowing for (1) self-selected matches, (2) admin selected matches, and (3) an automated matching algorithm using customer-supplied weighted criteria.

**2.2.4** The Contractor shall provide a means to schedule meetings that has the capability to sync with standard calendar programs like outlook, google calendar etc.

**2.2.5** The Contractor shall provide a means to communicate through the platform in the form of messaging.

**2.2.6** The Contractor shall provide a means for connection partners to keeps notes/reflections on their relationship.



### **2.3 TASK THREE. Administrative Resources**

**2.3.1** The Contractor shall provide a dedicated customer service representative to work with DHS Admin for system setup, configuration, design, and front-end build work. This representative shall be a primary partner for program marketing, launching and enrollment. This representative shall be a conduit for programmatic issues during the execution phase of the mentoring program.

**2.3.2** The Contractor shall provide Live Technical Help Desk support and resources 24x7. This service shall be used to provide technical help to Admins.

**2.3.3** The Contractor shall provide strategic consulting in evaluating program performance for future improvements, at a minimum of annually.

**2.3.4** The Contractor shall provide a Library capability within the interface based on a standard electronic file hierarchy. The library structure should be configurable to the customer's needs of structure, access, warehousing, and curating.

**2.3.5** The Contractor shall provide a library that shall be initially furnished with standard documents and user guides for users to help indoctrinate them and provide guidance for using all aspects of the platform.

**2.3.6** The Contractor library shall also be configurable with the ability for the customer to populate specific program resources. These mentoring training resources may be in the form of any standard document type, presentation, video, or audio podcasts

### **2.4 TASK FOUR. Data and Analytics**

**2.4.1** The Contractor shall provide a suite of analytic and reporting software tools that can look at data at the following levels: individual, connection (mentor/mentee), mentoring communities (i.e., one-to-one), global program (all sub-programs together). Data must be exportable to other desktop applications. Data must be stored and backed-up for the duration of the contract

**2.4.2** The Contractor shall provide a flexible data architecture that will allow data to be collected and analyzed based on DHS strategic mentoring goals and Key Performance Indicators. Examples of data to be included is static enrollment data, fluid connection engagement data, and customer satisfaction and all other survey data.

**2.4.3** The Contractor shall provide a fully customizable enrollment profile form. The contractor shall have all standard suite of question formats - i.e., select one, multiple choice, ordered options, date, multiple lines, etc.).

**2.4.4.** Provide a fully customizable survey system. Shall have all the standard suite of question formats (i.e., select one, multiple choice, ordered options, date, multiple lines, etc.).

### **2.5 Post Award Conference**

The contractor shall attend a Post Award Conference no later than ten (10) business days after the date of award or as otherwise scheduled by the Contracting Office. The purpose of the Post Award

Conference, which will be chaired by the Contracting Office, is to discuss contractual objectives of this Purchase Order. The Post Award Conference will be held via teleconference or Microsoft Teams. The Post Award Conference, may or may not be held concurrently with the Kick-Off meeting as scheduled by the Contracting Office.

## **2.6 Kick-Off Meeting**

The purpose of the Kick-Off meeting, which will be chaired by the Contracting Officer's Representative, will be to discuss technical requirements and to review the Contractor's draft implementation plan. The Kick-Off meeting will be scheduled by the COR. The Kick-Off meeting will be held in person, virtually via Microsoft Teams, or via teleconference. The date and time will be provided after award by the COR. Upon award of the Purchase Order, the contractor shall contact the COR and coordinate the date, time, attendees and agenda for the conference.

## **2.7 Implementation Plan (Project Plan)**

The Contractor shall provide a draft Implementation Plan at the Kick-Off meeting for Government review and comment. The plan, at a minimum, shall include: (a) list of work to be performed; (b) project schedule; (c) description of intended results; (d) role of key personnel, if applicable and (e) how quality of service (project) will be maintained throughout life of contract. The Vendor shall provide a final Implementation Plan to the COR not later than 14 business days after the Government's approval of the draft.

## **3.0 CONTRACTOR PERSONNEL**

### **3.1 Qualified Personnel**

The Contractor shall provide qualified personnel to perform all requirements specified in this SOW. The Government requires that all Contractor personnel positions be filled in accordance with Section III, 8.0 Deliverables and Delivery Schedule. All personnel shall have a security clearance obtained before working on any task.

### **3.2 Key Personnel**

#### **3.2.1 Replacement of Key Personnel**

Before replacing any individual designated as Key by the Government, the Contractor must notify the Contracting Officer and the COR no less than 15 business days in advance, submit written justification for replacement, and provide the name and qualifications of any proposed substitute(s). All proposed substitutes must possess qualifications equal to or superior to those of the Key person being replaced. The Contractor must not replace Key Contractor personnel without acknowledgment from the Contracting Officer.

#### **3.2.2 Project Manager**

The Contractor shall provide a Project Manager who shall be responsible for all Contractor work performed under this SOW. The Project Manager shall be a single point of contact for the Contracting Officer and the COR. The name of the Project Manager, and the name(s) of any alternate(s) who shall act for the Contractor in the absence of the Project Manager, shall be provided to the Government as part of the Contractor's proposal. The Project Manager is further designated as *Key* by the Government. During any absence of the Project Manager, only one alternate shall have full authority to act for the Contractor on all matters relating to work performed under this contract. The Project Manager and all

designated alternates shall be able to read, write, speak, and understand English. Additionally, the Contractor shall not replace the Project Manager without prior approval from the Contracting Officer.

The Project Manager shall be available to the COR between the hours of 8:00 a.m. and 4:30 p.m. EST, Monday through Friday, and shall respond to a request for discussion or resolution of technical problems within 24 hours of notification

### **3.3 Continuity of Support**

The Contractor shall ensure that the contractually required level of support for this requirement is maintained at all times. The Contractor shall ensure that all contract support personnel are present for all hours of the workday. If for any reason the Contractor staffing levels are not maintained due to vacation, leave, appointments, etc., and replacement personnel will not be provided, the Contractor shall provide e-mail notification to the Contracting Officer's Representative (COR) and the contracting officer prior to employee absence. Otherwise, the Contractor shall provide a fully qualified replacement.

### **3.4 Employee Identification**

Contractor employees visiting Government facilities shall wear an identification badge that, at a minimum, displays the Contractor name, the employee's photo, name, clearance-level, and badge expiration date. Visiting Contractor employees shall comply with all Government escort rules and requirements. All Contractor employees shall identify themselves as Contractors when their status is not readily apparent and display all identification and visitor badges in plain view above the waist at all times.

### **3.5 Employee Conduct**

Contractor's employees shall comply with all applicable Government regulations, policies and procedures (e.g., fire, safety, sanitation, environmental protection, security, "off limits" areas, wearing of parts of DHS uniforms, and possession of weapons) when visiting or working at Government facilities. The Contractor shall ensure Contractor employees present a professional appearance at all times and that their conduct shall not reflect discredit on the United States or the Department of Homeland Security. The Project Manager shall ensure Contractor employees understand and abide by Department of Homeland Security established rules, regulations and policies concerning safety and security.

### **3.6 Removing Employees for Misconduct or Security Reasons**

The Government may, at its sole discretion (via the Contracting Officer\*), direct the Contractor to remove any Contractor employee from DHS facilities for misconduct or security reasons. Removal does not relieve the Contractor of the responsibility to continue providing the services required under the contract. The Contracting Officer will provide the Contractor with a written explanation to support any request to remove an employee.

### **3.7 Non-Disclosure Agreement**

All Contractor staff members are required to sign the DHS Non-Disclosure Agreement (Attachment II) before initiating any work on this Purchase Order which will be provided at the time of award.

#### **4.0 OTHER PERTINENT INFORMATION OR SPECIAL CONSIDERATIONS:**

##### **4.1 Travel**

The Government does not anticipate travel for this requirement. However, Contractors are authorized to utilize the various DHS shuttles while conducting “official business” on behalf of the Government in performance of this requirement.

Travel performed for personal convenience or daily travel to and from work at the Contractor’s facility or local Government facility (i.e. designated work site) shall not be reimbursed.

#### **5.0 GENERAL REPORT REQUIREMENTS**

The Contractor shall provide all written reports in electronic format with read/write capability using applications that are compatible with DHS workstations. (Windows 8, Windows XP, Windows 10 and Microsoft Office Applications).

#### **6.0 PROTECTION OF INFORMATION**

Contractor access to proprietary information is required under this SOW. Contractor employees shall safeguard this information against unauthorized disclosure or dissemination in accordance with DHS MD 11042.1, Safeguarding Sensitive But Unclassified (For Official Use Only) Information. The Contractor shall ensure that all Contractor personnel having access to business or procurement sensitive information sign a non-disclosure agreement (DHS Form 11000-6).

#### **7.0 GOVERNMENT ACCEPTANCE PERIOD**

**7.1** The COR and PM will review deliverables prior to acceptance and provide the Contractor with an e-mail that provides documented reasons for non-acceptance. If the deliverable is acceptable, the COR will send an e-mail to the Contractor notifying it that the deliverable has been accepted.

**7.2** The COR and PM will have the right to reject or require correction of any deficiencies found in the deliverables that are contrary to the information contained in the Contractor’s accepted proposal. In the event of a rejected deliverable, the Contractor will be notified in writing by the COR of the specific reasons for rejection. The Contractor may have an opportunity to correct the rejected deliverable and return it per delivery instructions.

**7.3** The COR and PM will have 10 business days to review deliverables and make comments. The Contractor shall have 5 business days to make corrections and redeliver the invoice with an “R” after the invoice document number to denote a revision and resubmission.

**7.4** All other review times and schedules for deliverables shall be agreed upon by the parties based on the final approved Project Plan. The Contractor shall be responsible for delivering deliverables in a timely matter to Government personnel in the agreed upon project plan, at each stage of the review. The Contractor shall work with personnel reviewing the deliverables to assure that the established schedule is maintained.

#### **8.0 DELIVERABLES AND DELIVERY SCHEDULE**

All deliverables shall reference the DHS Contract number and the Purchase Order number. The



contractor shall ensure and the Government will review all draft and final deliverables to ensure accuracy, functionality, completeness, professional quality, and overall compliance with government policies, regulations, laws, and directives. Written documents shall be concise and clearly written.

1. Final documentation deliverables shall be provided in hard and soft copy using MS Office products as specified below. Daily, weekly, interim, informal deliverables and working-copy products may be provided by e-mail or disk, as arranged.
2. All Deliverables shall be submitted to the COR identified in this Purchase Order. A copy of the Monthly Status Report shall be submitted to the COR, PM, and CO.
3. All DHS training materials (visual, digital, or print) shall use official DHS branding in accordance with DHS office of Public Affairs Brand and Identity Program Policy. Use of Contractor branding and logos shall only be used with permission from the DHS COR and PM and shall not be used in conjunction with the DHS branding.

In the event the Contractor anticipates difficulty in complying with any deliverable, the Contractor shall provide written notification immediately to the CO and COR. Each notification shall give pertinent details, including the date by which the Contractor expects to make delivery; provided that this data shall be informational only in character and that receipt thereof shall not be construed as a waiver by the Government of any purchase order delivery schedule.

#### 9.0 DELIVERABLE TABLE

Deliverable	SOW Paragraph Ref.	Due Date	Distribution
Post Award Conference	2.5	5 Days of Award	CO, CS, COR
Kick-Off Meeting	2.6	10 Days After Post Award Meeting	COR
Contractor Project Implementation Plan	2.7	Draft at Kick-Off / Final 14 Days of Draft Approval	COR, PM
Mentoring Program Support and Commercial SaaS	2.0	Upon ATO Approval	COR, PM
Section 508 Deliverables	See below	Upon Request	COR