

**U.S. Department of Homeland Security  
Office of the Citizenship and Immigration Services Ombudsman  
Mission Support Services**

**Statement of Work (SOW)**

**1.0 Background**

The CIS Ombudsman has the statutory mission to: (1) assist individuals and employers in resolving individual case problems with U.S. Citizenship and Immigration Services (USCIS); (2) identify serious and pervasive problems stakeholders encounter in dealing with USCIS; and (3) proposing changes to mitigate identified issues. By statute, the CIS Ombudsman submits an annual report to Congress by the 30th of June.

**2.0 Scope of Work**

The objective of this Statement of Work is to obtain a task order to provide Mission Support Services and to express the immediate need of the CIS Ombudsman for assistance with services in the following areas: call center support, data entry, and customer service, as well as administrative tasks to support the office's Executive, Casework, Policy, Public Engagement, Operations, and Strategy teams.

**3.0 Tasks**

The Contractor Company shall provide assistance and support to federal employees in several operational and administrative functions of the CIS Ombudsman, by maintaining a close and highly responsive relationship to the day-to-day activities of the office. Tasks for each Labor category listed below include but are not limited to:

**3.1 Labor Category: Senior Administrative Professional (Contract Lead)**

The contractor shall assist CIS Ombudsman federal employees to:

1. Serve as contract lead for tasks including:
  - a. Providing background to contractors for tasks assigned to them by CIS Ombudsman staff and provide guidance for task completion;
  - b. Creating a quality control plan approved by CIS Ombudsman management for each task performed by the contract team;
  - c. Conducting quality control by reviewing random case matters on a monthly basis to ensure that contractors have followed office protocols for case handling and interacted professionally with customers through well-written correspondence, and followed up appropriately with customers. The review will include a check of data fields for completion and accuracy, as well as a review of emails for clarity, tone, and accurate and timely response to the customer's concern or issues.
  - d. Ensure duties of contractors in other labor categories are being properly performed.
  - e. Monitor contractor's schedules.

2. Support case assistance services by:
  - a. Coordinating call center and administrative functions; responding to call center inquiries regarding case status and other requests for basic information, using standard operating procedures;
  - b. Providing assistance with tracking activities such as emails and phone calls along with appropriate case notes in the CIS Ombudsman case management system;
  - c. Providing assistance with updating the CIS Ombudsman case management system;
  - d. Obtaining missing information and documentation from customers;
  - e. Processing and helping triage requests for case assistance;
  - f. Performing quality assurance on calls, emails, and data entry done by the contractors;
  - g. Reporting on contractor employee work (the number of emails sent, calls received and responded to, etc.)
  - h. Drafting correspondence using templates and entering information into the CIS Ombudsman case management system.
3. Support office travel by providing assistance in preparing and creating internal travel forms and travel documentation to include but not limited to authorizations and vouchers (to the extent permissible) in Concur Government Edition.
4. Provide general administrative support by:
  - a. Assisting with onboarding new CIS Ombudsman employees, detailees and contractors;
  - b. Coordinating with internal and external contacts to prepare special reports and executive correspondence;
  - c. Supporting supply and asset management inventory;
  - d. Answering questions and making recommendations regarding recordkeeping methods and information control processes;
  - e. Assisting the training coordinator with tasks as required such as updates to the internal training tracking database;
  - f. Scheduling, reserving and maintaining the conference rooms, and addressing and resolving scheduling conflicts as required;
  - g. Recommending revisions to internal standard operating procedures; and
  - h. Attending meetings to take notes, assisting in summarizing meeting notes, interpreting outcomes and objectives, posting finalized notes for office visibility in the designated location.
5. Provide assistance and other duties as assigned to support the CIS Ombudsman including tasks listed under the other labor categories.

### **3.2 Labor Category: Senior Administrative Professional (Executive Assistant)**

1. The contractor shall assist CIS Ombudsman federal employees to:

- a. Provide assistance with handling of all Executive Secretariat (ESEC) email; forward emails to appropriate CIS Ombudsman staff; follow up with staff for ESEC action items and send reminder emails to staff; coordinate responses with other components as needed, and organize and file ESEC emails.
- b. Attend Executive Secretariat meeting.
- c. Support the CIS Ombudsman and senior staff in drafting correspondence and responding to formal correspondence.
- d. Draft, update and distribute agendas and other documents and information for meetings.
- e. Print documents and compile binders for the CIS Ombudsman and senior staff as requested including briefing material and documents for signature.
- f. Print and scan documents as requested.
- g. Manage the CIS Ombudsman's and Deputy Ombudsman's calendars by scheduling meetings.
- h. Schedule and ensure the conference rooms are properly prepared for meetings and trainings.
- i. Attend meetings and trainings as requested; take and distribute notes.
- j. Edit meeting and/or training notes and consolidate multiple meeting notes into one document. Upload/post meeting notes and other documents and files to internal sites and shared drives.
- k. Display PowerPoint presentations and agendas, as well as other materials, for office meetings.
- l. Review systems for responsive records for FOIA and other requests as needed.
- m. Compile, edit, format and send out reports as required.
- n. Assist in onboarding new staff by adding them to meetings, scheduling one-on-ones with Ombudsman and or Deputy and ensuring they receive equipment and materials.
- o. Report Ombudsman and Deputy Ombudsman travel on a weekly basis.
- p. Assist with records management.
- q. Schedule car pickup and drop-offs for the Ombudsman and Deputy as needed.
- r. Research travel information (flights, hotels, etc.) and ensure that planned travel complies with all applicable federal regulations and guidelines.
- s. Prepare travel documents including authorizations and vouchers in the travel system for the Ombudsman, Deputy and other office leaders.
- t. Assist new travelers with setting up travel accounts in Concur Government Edition.
- u. Schedule interviews and communicate with job applicants.
- v. Assist with public engagement logistics.
- w. Assist with Annual Report tasks as required.
- x. Assist with Presidential transition documents as requested.
- y. Assist with casework as needed.
- z. Assist with collection and presentation of data from CIS Ombudsman stakeholder surveys.
- aa. Provide assistance and other duties as assigned to support CIS Ombudsman including but not limited the tasks listed under other labor categories.

### **3.3 Labor Category: Senior Administrative Professional (Data Analysis Support)**

1. The contractor shall assist CIS Ombudsman federal employees to:
  - a. Analyze, interpret, and present data visually to provide CIS Ombudsman management with insights and information to make more effective business decisions.
  - b. Collect, organize, and store data that would be important and useful for better business decisions.
  - c. Use various data analysis trends to turn raw data into useful statistics, information and explanations for more efficient business decisions and actions.
  - d. Knowledge of Software development life cycle (SLDC).
  - e. Create charts, diagrams and other data visuals using Microsoft and other software tools.
  - f. Assist in creating requirement documents, as well as use-cases and user stories.
  - g. Support project teams during the analysis and planning stages of software development.
  - h. Advise CIS Ombudsman federal staff on strategic initiatives, biometric technology capabilities development and the allocation of resources toward achieving strategic and management level objectives directly related to strategic priorities.
  - i. Prepare graphs and tables for leadership as needed.
  - j. Prepare risk assessments and analyses as bases for planning.
  - k. Project long-range planning forecasts related to the impact of immigration policies and processes.
  - l. Perform studies requiring application of advanced analytical and statistical methods and techniques.
  - m. Apply knowledge of quantitative and qualitative methods and techniques to assist in planning, coordinating, integrating and implementing initiatives such as strategic management planning and business process reengineering.
  - n. Helping to manage internal action plans including collecting updates and data in designated trackers;
  - o. Monitoring and tracking incoming items in the office's suggestion box;
  - p. Compiling results from surveys;
  - q. Assisting with preparation of Strategy Team agendas and (in collaboration with others in the team) keeping track of completion of team tasks; and
  - r. Assisting with the planning of the office's annual in-person conference.
  - s. Provide assistance and other duties as assigned to support CIS Ombudsman including the tasks listed for the Journeyman, and Junior Administrative Professional.

### **3.4 Labor Category: Senior Administrative Professional (Policy Analyst Support)**

1. The contractor shall assist CIS Ombudsman federal employees to:
  - a. Managing the office's policy email inbox by assigning and tracking incoming emails and sending follow-up template responses;



- b. Attending and taking notes at meetings with other Government agencies, external stakeholders, and team meetings;
- c. Setting up and maintaining activity trackers of duties performed, including a tracker of regulatory review and executive secretariat tasks;
- d. Supporting activities surrounding the office's Annual Report, including tracking progress of studies and following up as needed;
- e. Tracking formal and informal recommendations, including maintaining web pages and uploading documents as needed; and
- f. Organizing, collating, and posting policy-related notes to internal sites.
- g. Assisting with research in immigration benefits, including tracking and compiling regulatory actions and policy updates;
- h. Provide administrative support, such as assisting with travel authorizations, reimbursement requests, and posting leave to the office Outlook calendar.

### **3.5 Labor Category: Journeyman Administrative Professional:**

The contractor shall assist CIS Ombudsman federal employees to:

- 1. Support case assistance services by:
  - a. Staffing the office's call center and responding to emails from the public using standard operating procedures;
  - b. Responding to and following up on inquiries regarding case status and other requests for basic information;
  - c. Obtaining missing information and documentation from customers.
  - d. Processing and helping triage requests for case assistance;
  - e. Drafting correspondence using templates and entering information into the CIS Ombudsman case management system;
  - f. Providing assistance with responding to and tracking call center activities such as emails and phone calls;
  - g. Notating 'Confidential' status of cases within the CIS Ombudsman case management system; and
  - h. Provide assistance with updating cases in the CIS Ombudsman case management system.
- 2. Support public engagement:
  - a. Supporting the logistics for CIS Ombudsman engagements by sending meeting invitations and confirming speakers, making the appropriate reservations (conference room, conference call line, Teams invite, etc.), providing RSVP responses, taking notes and consolidating lists of questions and action items, and other activities;
  - b. Supporting outreach related to the release of the CIS Ombudsman Annual Report;
  - c. Monitoring the office's public affairs mailbox and routing and responding to inquiries as appropriate;
  - d. Posting updates to the CIS Ombudsman website, intranet and social media accounts;

- e. Disseminating outreach materials and updates to stakeholders;
  - f. Attending meetings and summarizing outcomes;
  - g. Recording and tracking outreach visits for reporting on performance measures;
  - h. Gathering feedback and consolidating edits for draft written communications materials;
  - i. Attending virtual stakeholder meetings and posting links to information where appropriate;
  - j. Maintaining engagement schedules and calendars;
  - k. Maintaining a tracker of the team's activities;
  - l. Maintaining stakeholder contact lists; and
  - m. Identifying new stakeholders across the country.
3. Support CIS Ombudsman strategic efforts by:
- a. Helping to manage internal action plans including collecting updates and data in designated trackers;
  - b. Monitoring and tracking incoming items in the office's suggestion box;
  - c. Compiling results from surveys;
  - d. Assisting with preparation of Strategy Team agendas and (in collaboration with others in the team) keeping track of completion of team tasks; and
  - e. Assisting with the planning of the office's annual in-person conference.
4. Support office travel by providing assistance in preparing and creating internal travel forms and travel documentation to include authorizations and vouchers (to the extent permissible) in Concur Government Edition; and
5. Provide general administrative support by:
- a. Posting information for CIS Ombudsman staff to internal sites and shared drives;
  - b. Providing assistance with review of all Executive Secretariat (ESEC) email and taskers; forwarding emails and taskers to appropriate CIS Ombudsman staff; tracking tasker expiration dates and following up with staff for ESEC action items and sending reminder emails to staff for timely responses; organizing and filing ESEC emails;
  - c. Assisting with formal correspondence;
  - d. Scheduling and sending out agendas for meetings;
  - e. Supporting collection and compiling of data from CIS Ombudsman customer satisfaction surveys;
  - f. Attending meetings and taking meeting notes as assigned;
  - g. Schedule car pickup and drop-offs for the Ombudsman and Deputy;
  - h. Printing or emailing documents for signature and compiling binders for briefing materials;
  - i. Signing off on Purchase Card Transactions and forwarding to Operations staff to acknowledge receipt/acceptance; and Recording or transcribing pertinent trainings and meetings.
6. Provide general IT support by:

- a. Monitoring DHS systems for new IT issues;
  - b. Assisting staff in resolving IT issues, conducting research as needed;
  - c. Contacting DHS IT and submitting tickets to obtain resolution for issues or guidance on how to resolve them;
  - d. Providing IT systems guidance, support, and coordination to staff/customers;
  - e. Identifying ways internal business processes can be enhanced through technology;
  - f. Managing internal transfer of DHS IT equipment and assets;
  - g. Offering guidance on adapting to current technological trends;
  - h. Monitoring future technological changes that could impact internal business processes;
  - i. Developing IT quick reference sheets, guides, and other resources and uploading them to MS Teams to enhance staff awareness;
  - j. Creating training materials and conducting trainings for staff on systems and applications used by the CIS Ombudsman; and
  - k. Ensuring conference room IT equipment has been tested and is ready for scheduled meetings and trainings.
7. Provide assistance and other duties as assigned to support the CIS Ombudsman mission including tasks listed for the Junior Administrative Professional.

### **3.6 Junior Administrative Professional**

The contractor shall assist CIS Ombudsman federal employees to:

1. Support case assistance services by:
  - a. Performing data entry of new requests for assistance submitted by mail, fax or email;
  - b. Identifying requests for case assistance missing information or documentation;
  - c. Reviewing spreadsheets and other materials for accuracy;
  - d. Responding to and tracking casework-related activities such as emails and phone calls; and
  - e. Updating case notes in the office's casework management system.
2. Support the public engagement by:
  - a. Assisting with logistics for meetings and events;
  - b. Taking notes during stakeholder meetings; and
  - c. Tracking outreach for reporting on performance measures.
3. Support office travel by providing assistance in preparing and creating internal travel forms and travel documentation to include authorizations and vouchers (to the extent permissible) in Concur Government Edition.
4. Provide general administrative support by:
  - a. Processing physical mail and fax requests, as well as packages and supplies;
  - b. Coordinating pickup and removal of burn bags;

- c. Scheduling and reserving the conference rooms;
- d. Providing elevator escorts; and
- e. Providing other front desk and administrative support as required.

5. Provide assistance and other duties as assigned to support CIS Ombudsman.

The Contractor shall provide principal administrative support to the CIS Ombudsman office, assist with projects and workload, maintain a close and highly responsive relationship to the day-to-day activities of the office, and perform varied management analysis assistance tasks requiring knowledge of office routine and an understanding of organization, programs and procedures related to the work of the office.

### **3.7 Additional Surge Support**

The contractor shall provide additional surge support, defined as events that require additional hours, to meet workload needs to ensure the CIS Ombudsman's goals and mission are met while complying with DHS policies throughout the period of performance of the task order. All optional tasks, to include optional additional surge tasks, may be exercised in accordance with FAR 52.217-7 Option for Increased Quantity – Separately Priced Line Item. After exercise of the option, the Contractor shall provide additional support upon request from the COR. The Contractor must clearly articulate and provide its surge communication and operations plan to the COR.

## **4.0 DELIVERIES OR PERFORMANCE**

### **4.1 Period of Performance**

The performance period of this task order is a Base Year of 12 months from date of award with (4) four 12-month option periods.

### **4.2 Place of Performance**

The primary place of performance will be within the Washington Metropolitan Area. The Contractor shall be based within a 50-mile radius of the National Capital Region (NCR). The anticipated duty station will be at the Government's facility at 375 E Street, SW, Washington, DC 20024. The Contractor Project Manager (PM) may be required to attend face-to-face in person monthly meetings or meetings as needed with the COR and/or CIS Ombudsman management in the CIS Ombudsman office.

### **4.3 Hours of Performance**

Contractor personnel shall generally perform all work between the hours of 6:00 am - 6:00 pm Eastern Time, Monday through Friday (except Federal holidays or Government closures for weather,



emergency or Executive Order) under government oversight. Each position will be assigned a schedule within the above stated hours to include an eight hour work day, Monday through Friday. However, there may be occasions when the Contractor employees' schedule may be re-adjusted if the change is to the benefit of the government. Changes in schedule, if beneficial to the government will be based on existing workload and at the approval of the COR or alternate COR. The standard hourly rates shall be based on a 40- hour week and 1920 hours per labor year, per labor category. Each labor category shall not exceed a 40-hour work week. All contract work shall not be performed without the oversight of the government.

## **5.0 DELIVERABLES AND DELIVERY SCHEDULE**

### **5.1 Post Award Conference**

The Contractor shall attend a Post Award Conference with the CO and the COR no later than ten business days after the date of award. The purpose of the Post Award Conference, which will be chaired by the CO, is to discuss technical and contracting objectives of this task order. The date, time, and location will be provided after award by the CO or COR.

### **5.2 Kick-Off Meeting**

The Contractor shall attend a kick-off meeting for this task order no later than ten business days following the date of award. The kick-off meeting will be held at the Government's facility or via teleconference. The date, time, and office location will be provided after award by the COR and may be held concurrently with the Post Award Conference.

### **5.3 Activity Reports and Progress Meetings**

The contractor shall submit monthly Status/Activity report by the 10th.

The Contractor shall submit a monthly hour report for each contractor employee assigned to CIS Ombudsman by the 5th. The report shall include the following:

- a) Daily billable hours by name of each employee and position;
- b) A total of billable hours for each employee; and
- c) Total of overall billable hours.

The Contractor shall meet with the COR monthly or as needed in the CISOMB office or via Microsoft Teams to discuss progress under the SOW and the Status/Activity Report. The purpose of the status meeting is to exchange information and resolve emergent technical problems and/or issues. This meeting will be conducted at the Government's facility.

The status/activity report shall be submitted beginning two weeks from task order award and thereafter on the 10th of the month. The report shall include the following:

- a) A Summary of progress during the reporting period (include any significant technical information).
- b) Unanticipated technical or management problems of significance.
- c) Problems anticipated in future reporting periods.
- d) Summary of important meetings, briefings, trips and conferences during the period of the report and those planned for the following period.
- e) Any requirements for changes in key personnel.

All reports and correspondence shall be directed to the COR. Simultaneously, a copy shall be forwarded to the CO.

#### 5.4 Hours Report

The Contractor shall provide a Previous Months Hours report to the COR by the 5<sup>th</sup> of each month. The report shall be a detailed list of hours for each contractor by name and position or labor category. The report shall detail the hours worked by each employee for each day. The report shall be subtotaled for each week by employee with a grand total of hours worked per employee for the month.

#### 5.5 Monthly Quality Control Report

The Project Manager shall provide a monthly Quality Control report to COR, Alternate COR and division Chief (s) by the 10<sup>th</sup> of each month. The report shall be a detailed list of steps taken to perform the Quality Control review. The report shall also contain a list of samples taken for each contract employee to include the date reviewed, a description of sample, the name of contract employee being reviewed and the results of the review. Lastly, the report shall include a plan for corrective action taken if problem(s) are found. Each contract employee shall be subject to a monthly Quality Control review as deemed necessary by the CIS Ombudsman's office. A report template shall be provided by the CIS Ombudsman office and may be revised as required by the office. It shall be the responsibility of the Contract Lead to insure the most recent revision of the template is being used.

<u>Item</u>	<u>SOW Reference</u>	<u>Event/Deliverable</u>	<u>Date Due</u>	<u>Format</u>	<u>Distribution</u>
1	5.1	<u>Post Award Conference</u>	<u>Within Five (5) Business Days of Task Order Award or as coordinated by CO/CS</u>	<u>In-person or virtual meeting</u>	<u>Contracting Officer/ Contract Specialist (CO/CS), COR</u>

2	5.2	Kick Off Meeting	Within seven (7) Business Days of Task Order Award or as coordinated by the COR	In-person or virtual meeting	COR
3	5.3	Progress Meeting	Monthly	In-person meeting at government facility or virtual meeting	COR
4	5.3	Status/Activity Report	Monthly by the 10 <sup>th</sup> of the month	Microsoft Word (Electronic)	COR
5	5.4	Previous Months Hour's Report	Monthly - by the 5th of the month	Microsoft Excel (Electronic) or PDF	COR
6	5.5	Quality Control Report	Monthly by the 10 <sup>th</sup> of the month	Microsoft Excel/Word or Report template (Electronic) or PDF	COR & Alternate COR

## 6.0 GENERAL CONTRACT REQUIREMENT

### 6.1 Overtime

No overtime will be authorized under this task order. The standard hourly rates shall be based on a 40-hour week and 1920 hours per labor year, per labor category. Each labor category shall not exceed a 40-hour work week. All contract work shall not be performed without the oversight of the government.

### 6.2 Holiday Pay

The Government will not require or authorize contractor personnel to work on holidays. The government will NOT be responsible for paying the non-working days, including holidays.

### 6.3 Government Closures

The Government will not require the contractors to perform work during government closures as a result of weather conditions or Executive Order. However, if the contractors are telework-ready and has tasks that can be performed at an alternate location, telework may be approved by the CO, COR or alternate COR. If a contractor is permitted to telework, the contractor will be required to be in the office at least one day per week or as often as required by the CISOMB office. Contractors will not be permitted to perform work in the government facility or via telework during government closures due to funding lapse. The government will NOT be responsible for paying the non-working days.

#### **6.4 Telework**

Telework may be authorized under this Task Order. Telework is not guaranteed and not a right. It is an advantage for productivity purposes and can be rejected or denied at the discretion of the CO, COR or alternate COR. Telework will be authorized only under the discretion of the COR of the DHS/CIS Ombudsman office. In the event of mandatory telework office-wide for CIS Ombudsman office, the government may allow the Contractor employees to telework if the employee can perform their regular duties in a telework environment as if they were in the office environment and as long as there is government oversight available. If the contractors have government furnished equipment and it malfunctions, at the discretion of the government and as the funding allows, the government may pay regular hours for time lost due to government furnished malfunction if no other options exist.

### **7.0 CONTRACTOR PERSONNEL**

The contractor personnel shall be eligible to obtain Suitability clearances.

#### **7.1 Qualified Personnel**

The Contractor shall provide qualified personnel to perform all requirements specified in this SOW.

In addition, the Contractor employees shall, at a minimum, be proficient in the use of the following software:

Microsoft Windows	Microsoft Outlook
Microsoft Word	Microsoft Excel
Microsoft Power Point	Microsoft Teams

Knowledge and experience with VISIO is preferred but not required. Immigration experience and immigration benefits knowledge is preferred but not required.

The Contractor shall be responsible for employing technically qualified personnel to perform the work specified in the statement of work. The Contractor shall maintain the personnel, organization, and administrative control necessary to ensure that the work delivered meets the Government's



specifications and requirements. The work history of each contractor employee must contain experience directly related to work he/she is required to perform under this task order. The Government reserves the right, during the life of this order, to request work histories on any contractor employee for the purposes of verifying compliance with the above requirements; additionally, the Government reserves the right to review and approve resumes of contractor personnel proposed to be assigned to this order.

## **7.2 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) prior to employee absence. Otherwise, the Contractor shall provide a fully qualified replacement.

## **7.3 Key Personnel**

Before replacing any individual designated as Key by the Government, the Contractor shall notify the Contracting Officer 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 shall possess qualifications equal to or superior to those of the Key person being replaced, unless otherwise approved by the Contracting Officer. The Contractor shall not replace Key Personnel without approval from the Contracting Officer.

The following two (2) Contractor personnel are designated as Key for this requirement:

Project Manager

Senior Administrative Professional (Contract lead)

### **7.3.1 Project Manager (PM)**

The Contractor shall provide a part-time Project Manager (PM) who will be responsible for all contractor work performed under this SOW. The PM shall be a single point of contact for the Contract Officer (CO) and the Contract Officer Representative (COR). The PM shall be one of the senior level employees provided by the Contractor and the name of the PM, and the name(s) of any alternate(s) who shall act for the Contractor in the absence of the PM shall be provided to the Government as part of the Contractor's proposal. During any absence of the PM, only one alternate shall have full authority to act for the Contractor on all matters relating to work performed under this task order. The PM shall be available to the COR via telephone between the hours of 7:00 am and 5:00 pm Eastern Time, Monday through Friday, and shall respond to a request for discussion or resolution of problems

or issues within four hours of notification. The PM shall meet with the COR biweekly, once a month by phone or Microsoft Teams as required by the COR, alternate COR and CIS Ombudsman leadership. Additional meetings shall be scheduled as required.

The PM shall have at least a BA/BS degree and at least five years of experience in project management.

### **7.3.2 Contract Lead (Senior Administrative Professional)**

The Contract Lead (Senior Administrative Professional) shall have a bachelor's degree and 4 years of administrative experience within the scope of the tasks listed in this SOW as well as documented immigration experience.

### **7.4 Non-Key Contractor Personnel Qualifications**

Contractors may deviate from the GSA OASIS SB Pool 1 Contract Section J.1. OASIS SB Labor Categories and Definitions so long as the deviations are clearly identified.

#### **7.4.1 Senior Administrative Professional**

The Senior Administrative Professional shall have a bachelor's degree and 4 years of administrative experience within the scope of the tasks listed in this SOW as well as documented immigration experience.

CISOMB prefers the Senior Administrative Professional (Data Analyst for the Strategy Division) have 2 years of specific experience as data analyst.

CISOMB prefers the Senior Administrative Professional (Policy Analyst for the Policy Division) have 5 years, minimum of 2 years, of policy experience in any government agency or profession.

#### **7.4.2 Journeyman Administrative Professional**

The Journeyman Administrative Professional shall have a high school diploma, at least 2-3 years of college and, 3 years of administrative experience within the scope of the tasks listed in this SOW as well as documented immigration experience.

#### **7.4.3 Junior Administrative Professional**

The Junior Administrative Professional shall have a high school diploma, at least 1- 2 years of college, and 1 year of administrative experience within the scope of the tasks listed in this SOW as well as documented immigration experience.

## **7.5 Anticipated Level of Effort**

### **7.5.1 Base Requirements**

The Government anticipates the following level of effort:

Base Year:

- Four (4) Senior Administrative Professional to serve as contract team lead and provide mission support in other areas.
- Five (5) Journeyman Administrative Professionals to support CIS Ombudsman leadership (Ombudsman, Deputy Ombudsman, Chief of Staff, and division chiefs) and each division (Casework, Policy, Public Engagement, Strategy, and Operations).
- One (1) Junior Administrative Professional to support all divisions in the office as required.
- One (1) part-time Project Manager (150 hours per period of performance (12 months)).

Option Periods 1 through 4:

- Four (4) Senior Administrative Professional to serve as contract team lead and provide mission support in other areas.
- Five (5) Journeyman Administrative Professionals to support CIS Ombudsman leadership (Ombudsman, Deputy Ombudsman, Chief of Staff, and division chiefs) and each division (Casework, Policy, Public Engagement, Strategy, and Operations).
- One (1) Junior Administrative Professional to support all divisions in the office as required.
- One (1) part-time Project Manager (150 hours per period of performance (12 months)).

### **7.5.2 Anticipated Surge Support**

Base Year:

- A maximum of three (3) additional Senior Administrative Professionals may be required to assist with IT issues and requirements, support Ombudsman leadership (Ombudsman, Deputy Ombudsman, Chief of Staff and division chiefs) as well as other divisions in the office as required.
- A maximum of five (5) additional Journeyman Administrative Professionals to support CIS Ombudsman leadership (Ombudsman, Deputy Ombudsman, Chief of Staff, and division chiefs) and each division (Casework, Policy, Public Engagement, Strategy, and Operations).
- A maximum of five (5) additional Junior Administrative Professionals may be required to support all divisions in the office as required.
- One (1) part-time Project Manager (a maximum of 30 additional hours per contract year).

Option Periods 1 through 4:

- A maximum of three (3) Senior Administrative Professional may be required to assist with IT issues and requirements, support Ombudsman leadership (Ombudsman, Deputy Ombudsman,

Chief of Staff and division chiefs) and the Strategy Division as well as other divisions in the office as required.

- A maximum of five (5) Journeyman Administrative Professionals to support CIS Ombudsman leadership (Ombudsman, Deputy Ombudsman, Chief of Staff, and division chiefs) and each division (Casework, Policy, Public Engagement, Strategy, and Operations).
- A maximum of five (5) Junior Administrative Professionals may be required to support all divisions in the office as required.
- One (1) part-time Project Manager (a maximum of 30 additional hours per month).

The Contractor will require knowledge of the organization, programs, and procedures related to the work of the office. This knowledge should be gained by a combination of education and experience that demonstrates the ability to perform the tasks required. The contractors must be proficient in the Microsoft Office Software Suite (Outlook, Word, Excel, MS Teams, PowerPoint, and SharePoint). The contractors shall have the demonstrated ability to learn new technologies within a reasonable amount of time. The contractors shall perform and dress in a professional manner. The Contractor shall provide at least two employees that are fluent in Spanish. Daily, Contractor shall provide a primary employee fluent in Spanish. Fluency required is the ability to read, write and speak Spanish. The employee shall be fluent with the ability to translate English into Spanish or Spanish into English for the CIS Ombudsman's office and stakeholders.

#### **7.6 Non-Disclosure Agreement**

All contractor personnel will be required to sign the DHS Non-Disclosure Agreement before initiating any work on this task order. A copy of this agreement will be provided to the COR upon award. After award, any new contractor personnel will be required to sign the DHS Non-Disclosure Agreement before initiating any work on this task order. A copy of this agreement will be provided to the COR at the time of onboarding with the CIS Ombudsman's office.

#### **7.7 Standard Conduct at Government Installations**

The Contractor shall be responsible for maintaining satisfactory standards of employee competency conduct, appearance and integrity and shall be responsible for taking such disciplinary action with respect to their employees as may be necessary. The Contractor is also responsible for ensuring that their employees do not disturb papers on desks, open desk drawers or cabinets, or use Government telephones except as authorized.

In performing on-site work under this task order on a Government installation or in a Government building, the Contractor employees shall:

- a) Conform to the specific safety requirements established by a task order.
- b) Comply with the safety rules of the Government installation that concern related activities not directly addressed in this task order.



- c) Take all reasonable steps and precautions to prevent accidents and preserve the life and health of contractor and Government personnel connected in any way with performance under this task order.
- d) Take such additional immediate precautions as the CO or COR may reasonably require for safety and accident prevention purposes.

## **7.8 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 always display all identification and visitor badges in plain view above the waist at all times. Contractor employees working on-site at Government facilities shall wear a Government issued identification badge.

## **8.0 OTHER APPLICABLE CONDITIONS**

### **8.1 Travel**

Contractor personnel working under this task order will not be reimbursed for local travel by the Government. Contractor travel outside of the Washington, D.C. metropolitan area is not anticipated in support of this effort.

### **8.2 Training**

The Contractor shall be responsible for the cost of all required training by the contractor personnel.

## **9.0 GOVERNMENT FURNISHED EQUIPMENT AND MATERIALS**

The Government will provide the workspace, equipment and supplies necessary to perform the services described in the Statement of Work. Contractors shall use Government furnished facilities, property, equipment and supplies only for the performance of work under this task order and shall be responsible for returning all Government furnished facilities, property, and equipment in good working condition, subject to normal wear and tear.

The Government will provide all necessary information and data and documents to the Contractor for work required under this task order. Contractors shall use Government furnished information, data and documents only for the performance of work under this task order. It is the Contractor's responsibility to return all Government furnished information and data and documents to the Government at the end of the performance period. The Contractor and its employees shall not release Government furnished information and data and documents to outside parties without the prior and explicit written consent of the CO.

The Contractor shall be responsible for returning all Government furnished property in good working condition, subject to normal wear and tear, within 10 days after completion of the task order.

## **10.0 SPECIAL CONTRACT REQUIREMENTS**

### **10.1 Disclosure of Information – Official Use only**

Each officer or employee of the Contractor or Subcontractor at any tier to whom "Official Use Only" information may be made available or disclosed shall be notified in writing by the Contractor that "Official Use Only" information disclosed to such officer or employee can be used only for a purpose and to the extent authorized herein, and that further disclosure of any such "Official Use Only" information, by any means, for a purpose or to an extent unauthorized herein, may subject the offender to criminal sanctions imposed by 18 United States Code (U.S.C.) Sections 641 and 3571. Section 641 of 18 U.S.C. provides, in pertinent part, that whoever knowingly converts to their use or the use of another, or without authority sells, conveys, or disposes of any record of the United States or whoever receives the same with the intent to convert it to their use or gain, knowing it to have been converted, shall be guilty of a crime punishable by a fine or imprisoned up to ten years or both.

### **10.2 Post Award Instructions regarding security requirements for non-classified contracts/orders**

Carefully read the security clauses in the contract. Compliance with the security clauses in the contract is not optional.

The procedures outlined below shall be followed for the DHS Office of the Chief Security Officer (OCSO), Personnel Security Division (PSD) to process background investigations, Entry on Duty (EOD) determinations, and Fitness determinations, as required, in a timely and efficient manner.

- a) Contractor employees (to include applicants, temporaries, part-time and replacement employees) under the contract, requiring access to sensitive information shall undergo a position-sensitivity analysis based on the duties everyone will perform on the contract.
- b) The results of the position sensitivity analysis shall identify the appropriate background investigation to be conducted. All background investigations will be processed through the DHS OCSO/PSD. Prospective contractor employees shall submit the below completed forms to the DHS OCSO/PSD. The Standard Form (SF) 85-P must be completed electronically through the Office of Personnel Management's e-QIP SYSTEM. The SF-85P signature pages and other completed forms must be given to the OSCO/PSD no less than thirty (30) days before the start date of the contract or thirty (30) days prior to the requested entry on duty date, for all Contractor employees whether a replacement, addition, subcontractor employee, or vendor:
  - i. Standard Form (SF) 85-P, "Questionnaire for Public Trust Positions"
  - ii. SF-85P Certification

- iii. SF-85P Authorization for Release of Information
- iv. FD Form 258, "Fingerprint Card" (2 copies)
- v. DHS Form 11000-6 "Conditional Access to Sensitive but Unclassified Information Non-Disclosure Agreement"
- vi. DHS Form 11000-9, "Disclosure and Authorization Pertaining to Consumer Reports Pursuant to the Fair Credit Reporting Act"

Only complete packages will be accepted by the DHS OCSO/PSD. Specific instructions on submission of packages will be provided upon award of the contract.

- a) The DHS OCSO/PSD may, as it deems appropriate, authorize and grant a favorable EOD decision based on preliminary checks. A favorable EOD decision allows a contractor employee to commence work temporarily prior to the completion of the full background investigation. The granting of a favorable EOD decision shall not be considered as assurance that a favorable Fitness determination will follow. In addition, a favorable EOD or Fitness determination shall in no way prevent, preclude, or bar DHS from withdrawing or terminating access to Government facilities or information, at any time during the term of the contract. No employee of the Contractor shall be allowed unescorted access to a Government facility without a favorable EOD or Fitness determination by the DHS OCSO/PSD.
- b) Limited access to Government buildings is allowable without an EOD decision if the contractor is escorted by a Government employee and the purpose of the visit is to attend a limited number of required briefings or nonrecurring meetings in order to facilitate the transition of a contract. The intent of this statement is to allow a minimum amount of meeting/ transition attendances to prepare for the new contract.
- c) The DHS OCSO/PSD shall be notified of all terminations/resignations within five (5) days of occurrence. The contractor shall return to the COR all DHS issued identification cards and building passes that have either expired or have been collected from terminated employees. If an identification card or building pass is not available to be returned, a report shall be submitted to the COR, referencing the pass or card number, name of individual to whom it was issued and the last known location and disposition of the pass or card.
- d) Failure to follow these instructions may delay the completion of background investigations, EOD and Fitness determinations. Note that any delays in this process, which are not caused by the Government, do not relieve a Contractor from performing under the terms of the contract.
- e) Your POC at the Security Office is:

DHS OCSO/PSD Security Customer Service Center  
Telephone: [REDACTED]  
E-mailbox: [REDACTED]

## **11.0 CONTRACT ADMINISTRATION DATA**

**11.1** This task order will be administered by:

[REDACTED] Contracting Officer  
MGMT/OP/DOAD/Mailstop 0115  
U.S. Department of Homeland Security  
245 Murray Lane, S.W.  
Washington, DC 20528-0115  
Email: [REDACTED]

[REDACTED] Contract Specialist  
MGMT/OP/DOAD/Mailstop 0115  
U.S. Department of Homeland Security  
245 Murray Lane, S.W.  
Washington, DC 20528-0115  
Email: [REDACTED]

Copies of all correspondence concerning this task order shall be provided to the Contracting Officer listed above.

### **11.2 Contracting Officer Representative (COR)**

Name: TBD, CISOMB

### **11.3 Contracting Officer's Authority**

A warranted Contracting Officer is the only person authorized to issue modifications to the task order, approve changes in any of the requirements, or obligate funds. Notwithstanding any clause/provision contained elsewhere in this task order, the authority to modify the task order remains solely with the Contracting Officer. If the Contractor Company makes any task order changes at the direction of any person other than the Contracting Officer, the change will be considered to have been made without authority and no adjustment will be made in the task order to cover any increases in charges that may result. The Contracting Officer has the authority to perform any and all post-award functions in administering and enforcing the proposed task order in accordance with its terms and conditions.

### **11.4 Contracting Officer Representative (COR)**

The Contracting Officer may designate a Representative (COR) to assist in monitoring the work under this task order. The COR is responsible for the technical administration of the task order and technical liaison with the Contractor. The COR is not authorized to change the scope of work or specifications as stated in the task order, to make any commitments or otherwise obligate the Government or authorize



any changes which affect the task order price, delivery schedule, period of performance, or other terms or conditions.

## **12. INSPECTION AND ACCEPTANCE**

### **12.1 Inspection, Acceptance and Receiving Report**

An inspection, acceptance, and receiving report that accounts for all labor hours rendered shall be signed by an authorized Government representative to evidence receipt, inspection and acceptance. The report shall be completed at the place(s) specified in the task order for Government receipt and acceptance. DHS Form 700-21, Material inspection and Receiving Report, may be used for this purpose. Other forms/formats are acceptable if they contain: (1) Data; (2) Contract/Task Order Number; (3) Modification Number; (4) Contractor's name; (5) Date items received or date recurring payment due; (6) Location where items were delivered or Contractor's performance; (7) All the requirements have been inspected, received and accepted and meet the terms of the contract/task order except as noted below; (8) List the requirements that were not accepted and/or the deductions made and state the reason why; (9) Total amounts of deductions; (10) Signature of authorized Government representative; (11) Title of authorized Government representative; and (12) Date signed.

DHS inspection and acceptance of services, reports and other required deliverables or outputs shall take place in Washington, DC or at any location designated by the COR where the services are performed and reports and deliverables or outputs are produced or submitted. The COR listed in Section VI has been delegated authority to inspect and accept all services, reports and required deliverables or outputs.

### **12.2 Contractor Responsibilities Regarding Inspection and Acceptance**

The Contractor shall be responsible for completion, verification, confirmation and communication to the Government of all inspections and test results necessary to substantiate that the products and services furnished confirm to the task order requirements. Receipt is not complete and Government testing, inspection and acceptance will not begin until after the Contractor has fulfilled the aforementioned responsibilities.

### **12.3 Acceptance Criteria**

The COR will review all draft and final deliverables to ensure accuracy, functionality, completeness, professional quality, and overall compliance with the task order requirements. High quality deliverables shall be clear, concise, accurate, well-structured, and easily comprehended. Deliverables will be considered acceptable if they adequately cover all required topics; are professionally prepared in terms of format, clarity and readability; and are delivered to the designated delivery location. The Government will consider errors, misleading statements, incomplete, irrelevant information, or repetition as deficiencies and the Contractor shall make corrections at no additional costs.

The COR will review deliverables prior to acceptance and provide the Contractor with an email

notification of acceptance or rejection. The COR shall review the deliverable for acceptance or rejection within 10 business days of receipt from Contractor. In the event of a deliverable rejection the COR will concurrently notify the Contractor of the reason(s). The Contractor shall correct and resubmit rejected deliverables no later than five business days after receiving the rejection notification from the COR.