

## **SECTION C – STATEMENT OF WORK**

### **C.1 Introduction**

Information Technology (IT) commodities, solutions, and Value-Added Reseller (VAR) services permeate almost every element of the Department of Homeland Security (DHS) and represent a significant portion of the IT budget. The purpose of this acquisition is to establish FirstSource III, DHS's department-wide vehicle for a wide variety of IT commodities (hardware and software) and value-added reseller services. This acquisition will assist the Government in minimizing incompatibilities and maximizing strategic decision making across the IT infrastructure. This objective is met firstly by focusing on commercial and standards-based technology and acquisition practices. Secondly, information flow between industry and the Government end-user is paramount in providing the Government with the knowledge to make informed decisions. With a full suite of standardized products and ready access to key data, it is anticipated that DHS will have the ability to use these contracts for strategic IT purchases.

### **C.2 Background**

In Fiscal Year 2012, DHS competitively awarded a suite of follow on Indefinite-Delivery/Indefinite Quantity contracts under a Department-wide program called FirstSource II. The FirstSource II contracts facilitated streamlined purchase, delivery, and installation of IT commodity products and solutions. The contracts supported the DHS goal of establishing a functionally integrated Department, demanding integrated methods of operation among and between the various Components with the support systems that enhance mission effectiveness and create economies of scale through consolidation of requirements. This has facilitated establishing a functionally integrated, centrally coordinating IT infrastructure, and ensuring compatibility within "One Network" and "One Infrastructure." Prior to the origination of FirstSource, DHS acquired the IT commodity products needed to fulfill the specific missions of individual Components through the issuance of separate contracts utilizing differing terms and conditions under a variety of contractual arrangements. With FirstSource III, DHS intends to continue its efforts to standardize commodities and the procurement processes to further reduce acquisition lead-times and include managed services. Furthermore, DHS will add or remove standardized configurations as necessary to adapt to changing agency needs and market trends, such as the increased use of tablets and the transition from traditional computing to virtual infrastructure.

### **C.3 Scope**

In support of its mission and strategic goals, DHS requires commercial IT commodity solutions and value-added reseller services for a wide variety of applications throughout the Department. DHS requires access to emerging technological advances and new business practices that increase productivity, efficiency, and/or reduce costs while leveraging Department-wide buying power to obtain the lowest available prices. The scope is to provide DHS with a full array of value-added reseller services and access to a wide and renewable variety of IT commodities and solutions (hardware and software) from multiple Original Equipment Manufacturers (OEMs) that will be available through Delivery Order competitions.

DHS anticipates awarding multiple IDIQ contracts under two Functional Categories, one Functional Category for IT Value Added Resellers (ITVAR) using NAICS Code 541519 footnote 18 and a second Functional Category for software using NAICS 513210 footnote 15. The two Functional Categories are separate and distinct from one another.

DHS requires hardware and software to address an increasingly difficult, complex, and evolving set of requirements, while also providing IT product-based solutions to assist all components in meeting their IT needs. Furthermore, DHS may require managed IT service solutions that combine IT support with the proactive monitoring of IT workstations and infrastructure. Any commercially available IT product and value-added reseller services may be made available through this vehicle. The ITVAR Functional Category using NAICS 541519 footnote 18 and the Software Functional Category using NAICS 513210 footnote 15 are categorized below. Please note, the awarded contract will reflect either C.3.1 or C.3.2 below based upon the proposal and source selection process.

### **C.3.1 Information Technology Value Added Reseller (ITVAR)**

Information Technology Value-Added Reseller includes all commercial off-the-shelf (COTS) IT Hardware/Equipment and related accessories, Managed Services, ancillary Software, and all required Value-Added Services where applicable, in accordance with NAICS code 541519, footnote 18. ITVAR includes the following:

- **Small Form Factor Device:** Portable mobile computing device with a display screen that provides an interface for viewing and processing data that can be transported for normal human-computer interaction. (For example, laptops, netbooks, tablets, barcode readers, Radio Frequency Identification (RFID) readers)
- **Static Device:** A computing device, equipment storage system or visual display device that remains in a permanent location and is not transported for normal business functions. (For example, desktop workstation, monitor, security card reader, server and network racks)
- **Domain Device:** A device that provides information technology service management for the optimization, administration and security of data, voice, and video transmission and all interrelated interfaces to support network and application protocols and processing, storing, replication, recovering, monitoring and auditing of all information system processes. (For example, router, switches, servers and blade servers, SAN, security appliances, firewalls, software, tape backup device, Uninterruptable Power Supply, Video Teleconferencing)
- **Virtual Desktop Infrastructure (VDI) Device (desktop virtualization):** A device that supports distributed applications for wired and wireless heterogeneous and homogenous network environments for mobile small factor devices and static devices for the transmission, processing, creating, storing, retrieving and manipulating of data. (For example, virtual machines and applications that operate within a centralized, decentralized or hosted infrastructure interface device, such as virtual desktop infrastructure device or thin client application)

- **Peripheral Device:** Auxiliary hardware for system management, productivity and collaboration, monitoring and sustainment for small factor devices, static devices, domain devices and VDI devices. (For example, printers, USB memory sticks, scanners, auxiliary cables and connectors, RFID tags, and cameras)
- **Managed Services:** Ongoing and regular services, such as network, application, infrastructure, storage and security, providing support and active administration on the customer's premises, in the managed service provider's premises or in a third party's premises.
- **Value Added Reseller (VAR) services** consist of, but are not limited to, configuration consulting and design, systems integration, installation of computer equipment, customization of hardware or software, training, product technical support, hardware and software maintenance service and end user support.

ITVAR solutions can include ancillary amounts of software as long as the software is included as part of the overall solution. An example would be a requirement for laptops with the operating system and other software to be loaded at the time of delivery. Requirements for software licenses and maintenance only cannot be purchased under ITVAR.

#### **C.4 Program Objectives**

The overall objectives that the Department intends to achieve over the course of the program are to:

- Obtain the best value for the delivery of IT commodities and related services offered by the Contractor as determined through application of fair opportunity and competition in the ordering process.
- Maintain continuous access to a broad range of IT and new technology as it is introduced to the commercial marketplace
- Provide and implement a set of performance measurements and metrics to include current and accurate data for the following areas:
  - Customer Satisfaction Measurement,
  - Spend Management, and
  - Problem Resolution Measurement.
- Meet dynamic DHS customer requirements for IT commodities, VAR services, special delivery needs, and related services throughout the term of the contract.
- Implement standardized IT configurations and solutions consistent with the evolving DHS Enterprise Architecture standards.
- Provide a flexible and dynamic contract vehicle to access and leverage world-class small business partners.

#### **C.5 Requirements and Considerations**

This section describes DHS's technical and management requirements and considerations that must be accommodated by Offerors in the development of potential solutions. These items relate directly to the FirstSource III Program Objectives listed in Section C.4.

### **C.5.1 Technical Requirements and Considerations**

The Contractor shall meet or exceed those requirements listed in the salient characteristics provided in support of the pricing schedules. The following sections describe additional technical requirements and considerations that offerors shall address in their technical solutions.

### **C.5.2 Power Requirements (applies to ITVAR only)**

The Contractor shall provide hardware that is operable at all DHS locations including CONUS and OCONUS locations using the standard power outlets (to be defined at the Delivery Order level) available at the location.

### **C.5.3 Section 508 Requirements**

Section 508 of the Rehabilitation Act, as amended by the Workforce Investment Act of 1998 (P.L. 105-220) (codified at 29 U.S.C. § 794d) requires that when Federal agencies develop, procure, maintain, or use information and communications technology (ICT), it shall be accessible to people with disabilities. Federal employees and members of the public with disabilities must be afforded access to and use of information and data comparable to that of Federal employees and members of the public without disabilities.

1. All products, platforms and services delivered as part of this work statement that, by definition, are deemed ICT or that contain ICT shall conform to the revised regulatory implementation of Section 508 Standards, which are located at 36 C.F.R. § 1194.1 & Apps. A, C & D, and available at <https://www.gpo.gov/fdsys/pkg/CFR-2017-title36-vol3/pdf/CFR-2017-title36-vol3-part1194.pdf>. In the revised regulation, ICT replaced the term electronic and information technology (EIT) used in the original 508 standards.

Item that contains Information and Communications Technology (ICT): hardware and software

Applicable Exception: N/A Authorization #: N/A

Applicable Functional Performance Criteria: All functional performance criteria in Chapter 3 apply to when using an alternative design or technology that results to achieve substantially equivalent or greater accessibility and usability by individuals with disabilities than would be provided by conformance to one or more of the requirements in Chapters 4 and 5 of the Revised 508 Standards, or when Chapters 4 or 5 do not address one or more functions of ICT.

Applicable 508 requirements for electronic content features and components (including Internet and Intranet website; Electronic documents; Electronic forms; Electronic document templates; Electronic emergency notifications; Electronic surveys; Electronic reports; Electronic training materials; Multi-media (video/audio); Interactive maps): All requirements in E205 apply, including all WCAG Level AA Success Criteria Apply

Applicable 508 requirements for software features and components (including Web, desktop, server, mobile client applications; Electronic content and software authoring tools and platforms;

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**FirstSource III FC 1 ITVAR**

Software infrastructure; Service Offerings): All requirements in Chapter 5 apply, including all WCAG Level AA Success Criteria, 502 Interoperability with Assistive Technology, 503 Application, 504 Authoring Tools

Applicable 508 requirements for hardware features and components (including Computers & laptops; Servers; Tablets; Printers and Copiers; Document scanners; Multi-function office machines; Peripheral Equipment (ex. keyboards); Information kiosks and transaction machines; Mobile phones; Video Teleconferencing Equipment; Video Displays and Monitors): All requirements in Chapter 4 apply

Applicable 508 requirements for support services and documentation: All requirements in Chapter 6 apply

2. When providing and managing hosting services for ICT, the contractor shall ensure the hosting service does not reduce the item's original level of Section 508 conformance before providing the hosting service.
3. When providing installation, configuration or integration services for ICT, the contractor shall not reduce the original ICT item's level of Section 508 conformance prior to the services being performed.
4. When providing maintenance upgrades, substitutions, and replacements to ICT, the contractor shall not reduce the original ICT's level of Section 508 conformance prior to upgrade, substitution or replacement. The agency reserves the right to request an Accessibility Conformance Report (ACR) for proposed substitutions and replacements prior to acceptance. The ACR should be created using the on the Voluntary Product Accessibility Template Version 2.2 508 (or later). The template can be located at <https://www.itic.org/policy/accessibility/vpat>
5. When developing or modifying ICT for the government, the contractor shall ensure the ICT fully conforms to the applicable Section 508 Standards. When modifying a commercially available or government-owned ICT, the contractor shall not reduce the original ICT Item's level of Section 508 conformance.
6. When developing or modifying web and software ICT, the contractor shall demonstrate Section 508 conformance by providing Section 508 test results based on the versions of the DHS Trusted Tester Methodology currently approved for use, as defined at <https://www.dhs.gov/508-testing>. The contractor shall use testers who are certified by DHS on how to use the DHS Trusted Tester Methodology (e.g. "DHS Certified Trusted Testers") to conduct accessibility testing. Information on how testers can become certified is located at <https://www.dhs.gov/trusted-tester>.
7. When developing or modifying ICT that are delivered in an electronic Microsoft Office or Adobe PDF format, the contractor shall demonstrate conformance by providing Section 508 test results based on the Accessible Electronic Documents – Community of Practice (AED COP) Harmonized Testing Guidance at <https://www.dhs.gov/508-testing>.

8. When developing or modifying software that generates electronic content (e.g., an authoring tool that is used to create html pages, reports, surveys, charts, dashboards, etc.), the contractor shall ensure software can be used to create electronic content that conforms to the Section 508 standards.
9. Contractor personnel shall possess the knowledge, skills and abilities necessary to address the applicable revised Section 508 Standards for each ICT.
10. Exceptions for this work statement have been determined by DHS and only the exceptions described herein may be applied. Any request for additional exceptions shall be sent to the Contracting Officer and a determination will be made according to DHS Directive 139-05, Office of Accessible Systems and Technology, dated November 12, 2018 and DHS Instruction 139-05-001, Managing the Accessible Systems and Technology Program, dated November 20, 2018.

#### **C.5.4 System Requirements**

The Contractor shall provide components that are factory-installed and ready for immediate use (e.g., device drivers loaded; all cables and adapters included; license keys) unless otherwise specified in individual Delivery Orders. The Contractor shall provide documentation either included or available on-line, or both, for all products offered. DHS intends to integrate products provided from these contracts into various DHS network environments. For this reason, the Contractor shall provide products that contain industry standard ports and interfaces for, among other things, network connectivity, printing, communications, and device control.

During the awarded performance period, the Contractor shall deliver, furnish for Government use, or furnish for Contractor use at a Government-owned facility, only personal computer products that at the time of submission of proposals were the Electronic Products Environmental Assessment Tool (EPEAT) Bronze registered or higher where such EPEAT products are available at [www.epeat.net](http://www.epeat.net).

Personal computer products include a notebook computer, a desktop computer, or a computer monitor, and any peripheral equipment that is integral to the operation of such items. For example, the desktop computer together with the keyboard, the mouse, and the power cord would be a personal computer product.

When an ordering activity specifies personal computer products that are not EPEAT registered and suitable EPEAT products are available, the Contractor shall:

- a. Notify the requester of the requirement to purchase the EPEAT product; and
- b. Provide a suitable alternative(s) that meet the EPEAT registered requirements.

#### **C.5.5 DHS Enterprise Licensing Requirements**

DHS has a department-wide Enterprise License Agreement (ELA) for the acquisition of Microsoft Software enterprise products (excluding Windows Client Operating System). All of these Microsoft enterprise products are acquired by DHS through the ELA. Therefore,

Contractors shall not duplicate, mark-up, or otherwise increase the price of any Client PC or Server to provide this enterprise software for which DHS already has an agreement in place.

#### **C.5.5.1 Microsoft Software Pricing**

For consistency in FirstSource III pricing, and while the Microsoft ELA is in force, all Client PCs and Servers will be priced as replacement systems. The ELA allows for the transfer of the existing licenses to the replacement systems. Client PCs should be priced to include only the basic operating system with no additional OEM software; Microsoft Servers shall be priced to include no operating systems, unless otherwise specified at the Delivery Order level. Note: Successful FirstSource III Contractors will be provided complete details regarding DHS's ELA after award.

#### **C.5.6 Enterprise Software Licensing**

DHS does not intend to issue any Delivery Orders for software licenses for which it has an existing ELA. If, at a future date, an ELA is established for software licenses which have previously been ordered under FirstSource III, all software licenses will be transferred to the DHS ELA. As a condition of any Delivery Order issued under FirstSource III, the vendor agrees that it will facilitate the transfer of any software licenses purchased under FirstSource III to any future DHS ELA, at no additional cost to the Government.

#### **C.5.7 New Equipment and Software Release Requirements**

The Contractor shall provide only new OEM equipment. Refurbished equipment is not acceptable. Third party components/parts integrated into a system that are configured by the Contractor must be authorized and approved, in writing, by the Government. The use of third-party components/parts must meet all specifications of the Government's requirement, must comply with existing DHS Enterprise Architecture standards, and must include equivalent standard customary warranty service. The Contractor shall disclose which components/parts are the third-party components/parts in the proposal, and the decision to accept or reject the proposal rests with the Government.

For software products, the Contractor shall provide only the latest commercially available version unless otherwise expressly approved, in writing, by the Government. The Contractor shall ensure all software technical support (updates, patches, bug-fixes, etc.) for all products purchased are provided.

If the Contractor provides refurbished or counterfeit equipment the Contractor shall bear sole and entire responsibility for 1) replacing the items with new OEM equipment at no additional cost to the Government; and, 2) any damages or replacement costs associated with the refurbished/counterfeit equipment.

### **C.5.8 Americans with Disabilities Act Considerations**

Some users with disabilities may require specialized hardware and software to effectively operate the provided products. Specialized hardware and software requirements will be defined on a case-by-case basis. These products will be specified and priced at the time the specific Delivery Order is issued under the base contract.

### **C.6. Management Requirements and Considerations**

The following sections describe the management requirements and considerations that offerors shall address in their management solutions.

#### **C.6.1 Production and Business Capability Requirements**

The Contractors and their respective project teams, including major subcontractors, OEMs, and suppliers, shall be capable of meeting the following production and Department-wide business requirements (notwithstanding, the below is in no way a guarantee of the volume of orders to be submitted under FirstSource III):

1. Production and delivery of at least the following volume per month: five thousand (5,000) standard laptop computers; five hundred (500) power user laptops; and five hundred (500) desktop computers with the associated software, services, and peripherals.
2. Management Staffing and Infrastructure, Financial Capacity and Infrastructure, Data Systems, Fulfillment Capacity and Infrastructure, and Administrative and Billing Capacity suitable, at a minimum, for the production and delivery volumes set forth in paragraph 1.
3. Ability to provide software products across a wide variety of capabilities, vendors, and delivery means (digital, physical, etc.) to meet business requirements.

#### **C.6.2 DHS Imaging Requirements**

The Contractor shall provide DHS image installation services on designated equipment as specified in individual Delivery Orders. The Contractor's DHS image installation process shall include adequate burn-in time to assure image integrity. The Contractor shall maintain an electronic library of all DHS provided images, accessible by DHS upon request. The Contractor shall consider the DHS image data as proprietary information and shall protect this information in accordance with applicable Government regulations. The Contractor shall, upon award, provide an estimated cost for image installation services to the Government.

#### **C.6.3 OEM Management Requirements**

The prime Contractors shall be responsible for the management of their OEMs, suppliers and subcontractors during the term of the contract. Attributes of such responsibility are expected to involve the assessment, selection, coordination, and management of the OEMs, suppliers, and subcontractors who provide the products offered to DHS.

#### **C.6.4 Technology Refreshment Requirements**

The Contractors shall be responsible for introducing new equipment (both hardware and software) to the DHS community as soon as it is commercially available from the OEM(s).

#### **C.6.5 Warranty**

The Contractors shall provide the standard commercial warranties for all products, unless otherwise specified in the individual Delivery Order solicitations. Product warranties shall include a product return policy. If a product return policy is not included with the standard commercial warranty for the item being procured, the Contractor shall notify the DO CO, in writing, that the standard commercial warranty for the item does not include a return policy, and/or identify what return policy it may elect to offer. Any OEM warranties associated with products delivered shall be available directly to DHS. Extended warranties may be required by DHS as specified in individual Delivery Orders.

#### **C.6.6 Order Input and Processing Requirements**

The Government intends to issue Delivery Orders and potentially expand its use of various forms of Electronic Commerce tools, including reverse auctions and the DHS Reverse Auction Marketplace ([www.TBD.com](http://www.TBD.com)) to compete and/or award individual Orders against the FirstSource III contracts. The Contractor shall possess the capability to conduct business through these tools.

#### **C.6.7 Final Review/Acceptance of Work Products**

Although the Contractor shall be responsible for generating work products, recommendations, etc. (if/as set forth in individual delivery orders), the Contractor is advised that final determination for all work products, recommendations, etc. is reserved for Government officials. Any documents, briefings, or oral recommendations provided to Government staff are only recommendations, and the decision to accept, reject, or modify them is the responsibility and authority of the cognizant Government Official.

#### **C.6.8 Reporting Requirements**

DHS requires reporting and data, both at the IDIQ contract and Delivery Order levels. As detailed below, and unless otherwise noted, the Contractor shall provide all IDIQ contract-level reports to the FirstSource III COR via e-mail. Delivery Order level reporting shall be established at the Delivery Order level to include reporting format, content, delivery frequency, and delivery location. DHS holds non-exclusive, fully paid rights to hold, use, distribute, transfer and modify this data for its own use. DHS' rights are perpetual in duration and worldwide in scope. The Contractor shall provide DHS with electronic copies of all such data upon its request if the data is not otherwise available in the aggregate to DHS as a matter of course.

### **C.6.8.1 Transactional Data Report (TDR)**

The Contractor shall provide current and accurate data regarding the description of purchases, the amounts awarded and the components making the awards. The report shall be submitted on a monthly basis and include all data required as represented within the TDR template form provided as Attachment 2.

The TDR is due by the 15th calendar day of each month with activity of the previous month. (For example: The report due February 15th should cover the awards for the period January 1st through January 31st. If the 15th calendar day falls on a weekend or holiday, the report is due the following business day.) If there is no activity during the reporting period, a "no activity" response shall be submitted via e-mail to the IDIQ contract CO and IDIQ Contracting Officer's Representative (COR) via TBD mailbox. The report shall be submitted via e-mail to the IDIQ contract CO and IDIQ contract COR via the TBD mailbox. The subject line of the email shall be annotated with - Transactional Data Report (Month/Year) (Contract No.).

### **C.6.8.2 Problem Resolution Report**

The Contractor shall provide a problem resolution report regarding the status and/or resolution of delivery and/or performance issue, product deficiency, warranty repair service, etc. Reporting format, content to include, at a minimum, the below referenced items, delivery frequency, and delivery location shall be established at the Delivery Order level as required.

- Date of problem/issue occurred
- Requestor's name, organization name, and telephone number
- Description of problem/issue
- Course of action taken
- Date of resolution completed

### **C.6.8.3 EPEAT Report**

The Contractor shall provide the EPEAT report on a quarterly basis. Please note the report has two tabs, the first tab is the Quarterly Report and the second is for reporting non EPEAT compliant items. The non-compliant report is only submitted when non EPEAT compliant items are purchased. Each quarterly report shall quantify the number of EPEAT registered and non-EPEAT registered products purchased or leased for the specified quarter. The information must be reported in the template form provided as Attachment 3, and submitted to the FirstSource III IDIQ contract CO and COR and cc to the DHS Environmental Program Manager at [ocao-sustainabilityreports@hq.dhs.gov](mailto:ocao-sustainabilityreports@hq.dhs.gov), no later than the 15th of the month following the quarter being reported on. If non-EPEAT registered products are sold and reported, a brief explanation of procurement background or justification shall be included in the report. Each quarterly reporting period is defined as follows:

Quarter	Reporting Period	Due Date
1st Quarter	October 1 – December 31	January 15
2nd Quarter	January 1 – March 31	April 15

3rd Quarter	April 1 – June 30	July 15
4th Quarter	July 1 – September 30	October 15

#### **C.6.8.4 Warranty Report**

The Contractor shall provide current and accurate warranty information as required at the Delivery Order level. Reporting format, content, delivery frequency, and delivery location shall be established at the Delivery Order level as required.

#### **C.6.8.5 No Bid Report**

The Contractor shall provide a no bid report on a quarterly basis. The report shall include all data required as represented within the No Bid Report template form provided as Attachment 4 no later than the 15th of the month following the quarter being reported on. The report shall be submitted via e-mail to the IDIQ contract CO and IDIQ contract COR via the TBD mailbox. The subject line of the email shall be annotated with – No Bid Report (Quarter/Year).

Each quarterly reporting period is defined as follows:

Quarter	Reporting Period	Due Date
1st Quarter	October 1 – December 31	January 15
2nd Quarter	January 1 – March 31	April 15
3rd Quarter	April 1 – June 30	July 15
4th Quarter	July 1 – September 30	October 15

### **C.7 Customer Support and Technical Assistance Considerations**

DHS has substantial IT support services available through other sources, e.g., the organization's help desk capabilities. Offerors shall consider the availability of these services in development of their solutions. DHS may require technical assistance that supplements the existing DHS help desk capabilities. Individual requirements for technical assistance, which may include installation and integration of ordered equipment, will be specified in individual Delivery Orders issued under the base contract.

### **C.8 Testing Considerations**

DHS may require the Contractors to provide equipment for testing and evaluation purposes. The terms and conditions for providing equipment for testing purposes will be addressed in individual Delivery Orders.

### **C.9 Applicable Standards as Requirements**

The Contractor's offered equipment and software shall conform to any applicable DHS standards, and shall continue to comply with the applicable standards as they are revised from time-to-time during the period of contract performance.

### **C.10 Promoting the Contract**

The Contractor shall promote this contract to eligible DHS users during the life of the award. The Contractor's goals shall be to:

- Make customers aware of this procurement vehicle;
- Make customers aware of available products and services; and,
- Make customers aware of subcontractor(s) products and services, including small business participation.

### **C.11 Safeguarding of Sensitive Information**

The contractor shall comply with the applicable information security clauses to be found in the FirstSource III solicitation and resulting award.

END OF SECTION C.