Attachment 1

USCIS Transformation Program
Program Management Office (PMO)
Support Services

Statement of Work (SOW)

Version 1.0
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Department of Homeland Security
Office of Procurement Operations
Information Technology Acquisition Center
Washington D.C.
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1. PROJECT: PROGRAM MANAGEMENT OFFICE SUPPORT SERVICES

The United States Citizenship and Immigration Services (USCIS) Transformation Program Office (TPO) requires Program Management Office (PMO) Support Services to achieve its current mission of modernizing agency-wide business processes. Modernization will be accomplished through the acquisition and integration of services supporting the end-to-end adjudication process. Whenever possible, the TPO will make use of services offered by other components of DHS integrated with commercial services purchased on a transaction-fee basis. Additional transformation needs will be met through the conventional acquisition of services that are government owned and government or contractor operated. To reduce risk to the Government, the TPO will use an incremental approach for deploying transformed business capabilities.

The acquisition, integration and deployment of the services supporting transformed business processes are all part of a large, complex long-term investment. The TPO needs PMO support to assist the Government with the overall management of this investment. This work includes, but is not limited to, assisting the Government with the management and oversight of Transformation Program contracts for products and services, the management and oversight of cost, scope and schedule for each Transformation Program pilot and proof-of-concept, the development and execution of Transformation Program public relations and marketing and support with organizational change.

2. BACKGROUND

2.1. Agency Overview

USCIS implements U.S. immigration policy through the processing and adjudication of immigrant and non-immigrant benefits. USCIS is made up of approximately 15,000 employees and contractor personnel located in over 250 offices worldwide, including three international District offices overseeing 28 sub-offices around the globe. In Fiscal Year (FY) 2005, USCIS completed approximately 7.5 million benefit applications and received 6.3 million more.

2.2. Transformed Business Process

The current USCIS business process is carried out by means of a paper intensive, form-centric model that makes it difficult for USCIS to efficiently process immigration benefits, combat identity fraud and provide other government agencies the information required to quickly identify criminals and possible terrorists. The transformed business process (see graphic below) will be based on a “person-centric” model and customer accounts. The new approach will enable customers and their representatives to become “account holders,” who engage in “transactions” with USCIS rather than merely submitting applications and petitions.

For individual applicants and petitioners, biometrics will also be linked to the account to ensure unique identity. All information related to an individual will be linked in a single account
and available through the system thereby creating the transformed end-to-end adjudicative process.

Key processes and features of the transformed business process include:

- Create Account on-line
- Electronically complete and submit application
- Submit payment via credit/debit card or EFT
- Capture biometrics at Application Service Center (ASC)
- Lock-in biometric identity
- Perform background checks using Background Check System to consolidate and update results
- eWorkflow/assignment of work
- Scan on Demand of supporting documentation
- Assess risk factors
- Verify identity through biometrics
- On-line documentation of determinations

Figure 1: USCIS Transformed Business Process
If approved, issue document
Update electronic account and digital file
Electronic correspondence/communication
Systems generated Performance Measures

USCIS anticipates the transformed business process will deliver the following benefits:

- Improved accuracy and consistency USCIS-wide
- Standardized business processes
- Workload and caseload management
- Increased customer accessibility
- Greater accountability
- Decreased duplication of records
- Enhanced Data Sharing
- Elimination of manual reporting

2.3. Pilots and Proof-of-Concept

At the end of fiscal year 2006, the TPO awarded contracts to develop several pilots and a proof-of-concept. These efforts represent first steps for improving or validating approaches for standing up the capabilities in the Integrated Operational Environment (IOE).
**Adoptions Proof of Concept (SIMS)**

(w/US-VISIT and DOS)

The pilot will validate the workflow capabilities of COTS software to manage electronic processing of one business line, i.e. Adoptions.

**Enumeration Pilot**

(w/US-VISIT)

This pilot will link biometrics to biographic data and freeze the identity of the individual throughout the USCIS immigration process.

**BSS Pilot**

(with US-VISIT)

This pilot will improve USCIS' biometrics management of 10-print images and other biometrics data (photograph and 2-print).

**Digitization Pilot**

(with CBP & ICE)

This pilot will validate the ability of USCIS to scan, digitize and make electronic files available to any authorized user.

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**Figure 2: USCIS Pilots and Proof-of-Concept**

The TPO anticipates these efforts will facilitate the rapid deployment of capabilities available in the new operational environment. The TPO will need to manage the pilots and proof-of-concept to ensure that project schedules are aligned and all dependencies are identified. The TPO will coordinate interface agreements and/or transfers of system ownership if required during the incremental deployment of the IOE.

### 2.4. Solutions Architect

In April 2007, the TPO issued a Draft RFP for the incremental design, development and deployment of the IOE. The TPO is currently revising the draft. The final RFP is scheduled for release in August of 2007. This solicitation will result in an award to one vendor who will become the "Solutions Architect" (SA) for the Transformation Program. The SA contract will be performance based and require the SA to competitively procure some of the services they will integrate into the IOE.

The Contractor will assist the Government overseeing and managing the SA contract to ensure that performance measures are mapped to program goals and aligned with other TPO projects. Management of the SA contract will enable the TPO to generate a continuous status of the overall program investment including program level schedule/cost variances as well as the status of program risks.
2.5. Transformation Program Governance, Roles and Responsibilities

2.5.1. USCIS Transformation Program Governance

The Transformation Program governance structure has been developed in conformance with DHS Management Directive 1400 (MD 1400) to ensure required management, oversight, control, reporting and review of all Transformation Program activities. Figure 2-1, below, provides a depiction of the Transformation Program Governance Structure. At the highest level, all TPO activities report to the DHS Investment Review Board (IRB). Within USCIS, the Transformation Leadership Team (TLT) provides oversight of the Transformation Program, with the advice of the USCIS Operations Advisory Board (OAB) and in consultation with the Federal Stakeholder Advisory Board (FSAB), whereby all acquisitions exceeding the approved Transformation Program Spend Plan require the approval of the Senior Review Board (SRB). At the program level, the Transformation Program Management Team (PMT) within the TPO constitutes the program wide decision-making authority. At the increment level, decisions that do not impact other projects or require a modification to a contract or agreement fall under the responsibility of the responsible Integrated Project Team (IPT).

![Figure 3: Transformation Program Governance Structure](image)

2.5.2. USCIS Transformation Program Office Organizational Structure

The USCIS Transformation Program Office (TPO) organizational structure is pictured below. The TPO organizational structure complements the Transformation Governance structure. Roles and responsibilities of the Program Operations Layer are described in detail in the USCIS Transformation Program Management Plan (see attached).
2.5.3. Contract Support

In addition to the PMO support services contract to be awarded through this procurement, the TPO will maintain existing or award new contracts for the following:

- Federally Funded Research and Development Center (FFRDC) support for expert assistance regarding strategic planning, governance, stakeholder coordination, Solutions Architect oversight, acquisition planning, and technical solutions

- Contractor support for the design, development, test, deployment and operations and maintenance for the current transformation pilots and proof-of-concept

- Solutions Architect to design, build and/or acquire services, integrate, test, deploy and provide ongoing management of the IOE (includes all enabling IT technology and infrastructure required by transformed benefits processes and business capacity needs which may require the procurement of new hardware and software and/or services, the development, integration, test and deployment of interfaces to other internal and external systems, the decommissioning of legacy systems and operations and maintenance services)

- Full life cycle Independent Verification and Validation (IV&V) services

- Systems Assurance services
3. SCOPE

The USCIS TPO is a dynamic organization where the expectation is that Contractors add value and are not simply here to complete assigned tasks. TPO has established an environment where particular value is placed upon contract resources that act and perform in a consultative and advisory manner. Contractor staff is expected to engage in an open, free exchange of ideas that challenge the status quo, to ask probing questions to ensure progress is properly aligned, and ensure full consideration is given to competing options and ideas. Emphasis is placed on working in a positive, professional and collaborative manner with Government and other contractor staff and competing vendors.

The scope of this Statement of Work (SOW) includes services supporting the Government TPO staff with the following functions and activities:

- Program Management Assessment and Planning
- Program Management Operations and Oversight Support
- Program and Project Management Analysis and Implementation Support
- Contract Management and Administration
- Public Relations, Communications and Outreach
- Organizational Change and Training

The Contractor will provide support in all aspects of planning, developing, revising, coordinating, managing and implementing program and project management processes, tools and procedures. The Contractor shall also function as a catalyst for referenced tasks by ensuring each work product is complete, by providing analytical tools and techniques to ensure continual progress toward the implementation of the Transformation Program initiatives.

The Contractor’s Project Manager (PM) for the delivery of services under this task order shall be one of the onsite key personnel, and will act as the sole, primary point of contact with the Government. The PM shall work directly with, and under the direction of, the COTR to ensure success. The following is an overview of the effort and the Government’s expectation of how the Contractor will engage during the delivery of services under this task order.

- Support shall include facilitation, change management, logistics support, project lifecycle, quality control, Earned Value Management (EVM), business case development and maintenance, financial, clerical and administrative support from planning to requirements development and process/program administration.
- The service requires a diversity of skills suitable to an information technology program and project environment in support of a DHS/Immigration related functional area.
- The Contractor must respond to and perform assignments with high quality services within a stringent time frame.
- The Offeror shall propose how to accomplish transition without disruption of the TPO in the Offeror’s Transition Plan, to be submitted along with the Technical Proposal.
- The Contractor shall maintain continuous performance regardless of the absence of individual performers.
• The Offeror must provide a single interface person to coordinate the Contractor activities with authority to act. If for any reason this person is determined to be unacceptable, the Contractor shall immediately replace this resource.

4. APPLICABLE DOCUMENTS

Existing, applicable documentation will be made available to the Contractor post-award to assist in the performance of their work under this SOW. Documentation that the Government has determined to provide to assist Offerors with the development of their proposal has been provided in the attachments to this SOW.

5. SPECIFIC TASKS

All tasks performed under this SOW will be compensated on a Labor-Hour basis.

5.1. Task 1: Program Management Assessment and Planning

The Contractor shall perform a comprehensive assessment and of the current TPO program operations and establish an approach to implement the processes, procedures, methodologies, and tools identified in the proposal. At the end of the of this task, the Contractor will have performed their discovery and assessment, conducted a gap analysis, established a Contractor Project Management Plan for accomplishing the required work, and implemented their proposed recommendations and tools.

The Contractor shall assist the Government TPO staff with standing up and operating robust program level risk management, quality management and configuration management capabilities. The Contractor shall work with the Government TPO staff to integrate new and existing methodologies and toolsets to support the implementation of the Program Management Plan and facilitate program oversight. During this period the contractor will migrate all relevant management information into their new tool(s) as appropriate to ensure a comprehensive and continual management view of the program. The contractor shall implement and maintain a tracking database for risks, issues, and action items. The Contractor shall also perform a requirements analysis and assessment for an integrated program management tool to be purchased by the Government, and operated and maintained on a platform provided and managed by USCIS OIT.

The Contractor shall communicate the results of their review, analysis, assessment, and implementation in a briefing at the end of this task.

This task includes the revision and update of the existing TPO Program Management Plan following industry and government best practices, and based upon the guidance from the TPO staff. The Contractor shall revise and update the associated supporting plans to the Program Management Plan, which include:

• Scope Management Plan
• Configuration Management Plan (including document management and control)
• Budget and Cost Management Plan
The Contractor shall provide support for the development and deployment of standard operating procedures (SOPs) based on the Contractor’s knowledge and experience of PMO best practices. The Contractor shall create templates, develop and maintain supporting program management documentation and artifacts as requested by the Government TPO staff.

5.2. Task 2: Program Management Operations and Oversight Support

The Contractor shall provide program management operations and oversight support, with a primary emphasis on the TPO Chief and Deputy Chief, as well as the Program Support Division (PSD). These resources all will also provide matrix support to the other TPO organizations as necessary and directed.

The Contractor shall assist the Government TPO staff with the implementation of the Program Management Plan and investment management and oversight. The Contractor shall perform periodic updates of the Program Management Plan and associated plans to ensure that the plans reflect changes in the program’s scope, schedule and resource levels or priorities. The Contractor shall assist the Government TPO staff across the organization, with program budget activities and with cost, scope and schedule management.

Support TPO management with comprehensive program management and oversight across all TPO projects and initiatives. The Contractor shall assist with the establishment of a program management process that provides accurate and timely schedule and performance information. Assist the TPO in the establishment and maintenance of integration plans with other DHS and external agency organizations and activities as directed. Facilitate the Transformation Program implementation process. The Contractor shall assist the Government TPO staff with the preparation for attending and conducting various milestone reviews.

The Contractor shall support the Government TPO staff with required revisions to and tailoring of the TPO’s adopted life cycle model. The Contractor shall support the development, implementation and maintenance of TPO operation models and ensure alignment between the model and the Program Management Plan and other TPO program documentation.

The Contractor shall work with the FFRDC contractor to develop a program level Integrated Master Schedule (IMS), Program Work Breakdown Structure (PWBS) and PWBS Dictionary. The Contractor shall update the program level IMS on a weekly basis, and assist the Government TPO staff with the maintaining and monitoring of program scope and cost impacts to the IMS.

The Contractor shall assist the government with the implementation of an EVMS that complies with EIA 748A. The Contractor shall assess, quantify, and forecast trends; analyze
variances; and together with the Government TPO staff, facilitate development and implementation of corrective actions.

The Contractor shall assist the Government TPO staff with the execution of the Quality Management Plan. Support activities under this task include assisting the Government TPO staff with the implementation of the Quality Control Plan, the review and periodic updating of quality objectives and metrics as well as ongoing quality surveillance support.

The Contractor shall also support the Government with the development, execution and management of Service Level Agreements (SLA), Memorandums of Agreement/Understanding (MOA/MOU), Inter-Agency Agreements (IAA) and other relevant documentation.

The Contractor shall coordinate, attend, and document meetings with the Government TPO staff and TPO contractors to capture ongoing project data and information. Support shall include the capture, edit and publishing of meeting minutes. These meetings shall include Program Management Reviews (PMR), Integrated Management Reviews (IMR), and other periodic and ad-hoc reviews as requested by the Government TPO staff and as tasked by the COTR. The Contractor shall develop and maintain the TPO weekly Integrated Management Report and other program level reports as required and specified by the Government. The Contractor’s coordination responsibilities shall include developing and managing meeting schedules, developing agendas, capturing, tracking and updating risks, issues and action items, and capturing and publishing minutes. The Contractor shall coordinate with TPO managers to schedule off-site facilities for meetings, conferences, workshops.

The Contractor shall assist the Government TPO staff with the organization, management, and control of all program management related documents and artifacts. The Contractor shall establish and implement document management control procedures and processes within TPO. The Contractor shall maintain existing program documentation and historical program files, to include program-related project plans, briefings, meeting agendas and minutes, analytic white papers, and technical assessments. The Contractor shall provide documentation update support for program reporting documents such as: the OMB E-300, the annual budget, and expenditure plans. The Contractor shall utilize the DHS/USCIS specified tools to establish and maintain OMB Exhibit 300.

The Contractor shall provide Configuration Management support, to include document/deliverable management and control. The Contractor shall develop, implement and maintain a configuration management baseline and change control procedures under the governance of the USCIS Information Technology Lifecycle Management (ITLM). ITLM is different from a systems development lifecycle (SDLC) by emphasizing the entire lifecycle, rather than centering on the development component. The focus and applicability of the process is extended to a broader scope of technology initiatives, such as commercial-off-the-shelf/Government off-the-shelf (COTS/GOTS) implementation and infrastructure-related projects where little development or customization to a product occurs. The ITLM process enables oversight of the technical, security, and quality aspects of technology projects and management of the integration of technology into the USCIS organization by guiding IT projects through USCIS process and documentation requirements. The Contractor shall define TPO program change control procedures and documentation templates and coordinate the establishment and execution of TPO configuration control board(s) as required.
The Contractor shall assist the Government TPO staff with the portfolio and budgeting across the program and help TPO oversee and maintain visibility into the program cost and performance. Support the development of strategies, plans, requirements, and to advance Transformation Program goals and objectives. Assist Program and Project Managers with the development and maintenance of integrated budgets and performance plans. Establish maintain and monitor performance strategies, standards and metrics that align with the goals and objective of the USCIS Transformation Program. In accordance with OMB Circular A-11, the Government will use Earned Value Management (EVM) to monitor tasks. Provide and maintain an Earned Value Management System (EVMS) report methodology for measuring cost and scheduling performance for all contracts under direct control of the TPO and prepare monthly EVM reports. The Contractor shall provide cost estimating and budgeting development, establishment of financial performance measures, and budget and performance tracking.

The Contractor shall provide inputs to briefings to Congress, Oversight bodies, and other interested parties as well as inputs to responses to Congress and other requests for information received by the TPO. The Contractor shall support the Government TPO staff in crafting responses to audits by oversight organizations. Monitor and track TPO compliance with and responsiveness to Governance, OMB, DHS, GAO, OIG, Ombudsman guidance, findings and reports as well as other Federal policies and regulations

The Contractor shall assist the Government TPO staff with Human Resource (HR) planning, staffing and management activities.

The Contractor shall provide Administrative Assistant support to monitor the TPO front office and perform other administrative duties as assigned. Establish and implement routine program office procedures from administrative to logistical. Provide internal controls, management oversight, and office support.

The Contractor shall assist the Government TPO staff with the full range of business and technical management services to ensure the development and implementation of IT products and services that are compliant with the USCIS Enterprise Architecture, as well as the DHS Enterprise Architecture policies, procedures, guidelines, and directives (e.g., EA reference models, Investment Review Process). All IT products and services provided by the contractor shall be subject to EA governance oversight performed by USCIS Office of Information Technology (OIT).

5.3. Task 3: Program and Project Management Analysis and Implementation Support

The Contractor shall provide program and project management analysis and implementation support to the TPO staff within the Increment Management Division (IMD).

The Contractor shall assist the Government TPO staff with milestone reviews.

The Contractor shall support the Government TPO staff with assisting Transformation contractors with the development and maintenance of project level Work Breakdown Structures (WBSS) for Transformation projects, e.g. the current pilots and proof-of-concept. These WBSSs shall incorporate the scope and deliverables from the project contracts and each WBS element shall be traceable to the contract via a contract number. The structure of the project WBSSs shall
be consistent with the PWBS to enable integration of all project WBSs into the program level IMS. The Contractor shall update the project level WBSs on a weekly basis and provide monthly Earned Value Management reports for each project.

The Contractor shall assist the Government TPO staff with the execution of the Quality Management Plan. Support activities under this task include assisting the Government TPO staff with the implementation of the Quality Control Plan, the review and periodic updating of quality objectives and metrics as well as ongoing quality surveillance support. The Contractor shall also support the Government with the development, execution and management of Service Level Agreements (SLAs).

The Contractor shall coordinate, attend, and document meetings with the Government TPO staff and TPO contractors to capture ongoing project data and information. These meetings shall include Program Management Reviews (PMRs) and other reviews requested by the Government TPO staff and as tasked by the COTR. The Contractor’s coordination responsibilities shall include developing meeting schedules and agendas, establishing an Action and Issues Item database, capturing, tracking and updating action and issue items, and capturing and publishing minutes. Areas of project level support include:

- Assist with project schedule development, including task definition, duration, and resource estimates.
- Support performance of market research and perform gap analysis against defined requirements;
- Provide support to the Government TPO staff to oversee and monitor contractors associated with the projects;
- Working with members of TPO staff and the IPTs to develop processes and associated business and requirements documentation (business rules, data specification, data and process flows, etc.)
- Ability to work independently with Integrated Project Teams (IPT) on requirements issues;
- Perform data analysis
- Facilitate meetings and conference calls, as required. This shall include scheduling the meetings; drafting and delivering agendas and meeting minutes; providing and archiving required documentation; and documenting, tracking, and following-up on action items from the meetings;
- The Contractor shall review specific projects systems for compliance with established DHS/USCIS/TPO standards and for quality factors such as correctness, completeness, consistency, usability, fitness for use, maintainability, and traceability to project/program needs
- Maintain membership information for each of the IPTs
- Establish and maintain project charters for each IPT, which defines purpose, membership, strategy, boundaries, process, and deliverables.
Tasks in the area of requirements and Business Process Reengineering (BPR) support to include:

- Assist in developing requirements configuration management baseline and change control procedures for the projects, based upon guidance from program level guidance from TPO
- Maintain existing project level documentation to include project-related plans, briefings, reports, meeting (including agendas and minutes) and business requirements
- Conduct and document requirements analysis as required to support the projects
- Provide analytical support to the projects to include assisting with software design reviews, and review and cataloging of software documentation and software change requests.
- Support the TPO staff with the oversight, review, analysis and revision of BPR artifacts as specified by the TPO management. Performing business analysis associated with TPO projects. Perform business process modeling and re-engineering support activities as required.

5.4. Task 4: Contract Management and Administration Support

The Contractor shall assist the Government TPO Contracting Officer’s Technical Representatives (COTRs) with the management and administration of Transformation Program contracts. The activities under this task include requested support for contract administration activities, inspection and acceptance of work to ensure full compliance with contract requirements, and preparation of files that support actions performed under TPO contracts, as well as the development and execution of COTR work plans monitoring contract performance.

The Contractor will need to assist the Government with the oversight and management of TPO contracts to ensure that performance measures are mapped to program goals and aligned with other TPO projects. The Contractor will help TPO monitor contractor performance against Quality Assurance Surveillance Plans (QASP) and other metrics as required by the specific contracts and as directed by the Government. The Contractor will assist the Government TPO staff with the coordination of regular, periodic (e.g. monthly, quarterly) contract performance reviews with vendors.

5.5. Task 5: Public Relations, Communications and Outreach Support

The Contractor shall provide the Government TPO staff with Public Relations, Communications and Outreach support to include the development and management of both internal and external communications.

The Contractor shall assist the Government TPO staff with the development and implementation of a Communications Management Plan and associated tactics.

The Contractor shall support the development of standard messaging strategies for both internal and external communications and shall ensure that these strategies are aligned with the
output of the TPO’s Change Management Division (CMD). Specifics activities to be performed under this task include:

- Development of written internal communications
- Copyrighting and editing for written internal and external communications
- Development of presentations
- Updates to USCIS Intranets sites and communications portals
- Develop and maintain TPO management’s briefing portfolio (i.e. Manager’s Toolkit)
- Internal outreach activities and support to include email, conferences, focus groups
- Provide support collaborative tools and graphics
- Work with Federal counterpart(s) and existing TPO communications support staff.
- Maintain the Transformation Program communications to promote awareness and education.
- Develop and maintain a style guide and design templates for various TPO communications vehicles as well as the TPO program communications plan.

5.6. Task 6: Organizational Change and Training Support

The Contractor shall support the Government TPO CMD staff with the execution of organizational change management and training activities. Organizational change activities will include stakeholder assessments, stakeholder management, analysis of job and tasks, development of skill gap-fit analysis, evaluation of survey data and preparation of reports.

Organizational change task will also include the performance of business analysis and impact assessment and activities. These activities include collection of data, via surveys, feedback sessions and attendance at IPT meetings, analysis of data, and development of organizational change strategies. Provide teambuilding strategies and facilitator capabilities.

The Contractor shall support the development and execution of the TPO change management strategy and associated plan, inclusive of both strategic and tactical factors to enable the Transformation Program’s success, identify and fully articulate the major organizational changes that the Transformation Program will bring, and develop specific transition and communication strategies for key stakeholder groups.

Training support activities will focus around the design, development and delivery of training programs for internal and external stakeholders, selection of appropriate delivery media, delivery of presentations and demonstrations.

6. DELIVERABLES AND DELIVERY SCHEDULE
6.1. Transition Documentation

The Contractor shall deliver the initial Transition Plan to the Government at the Project Orientation Briefing. The revised Transition Plan shall be delivered to the Government 14 work days after the Project Orientation Briefing.

- Transition Plan (Initial) - At the Project Orientation Briefing.
- Transition Plan (Revised) – 14 work days after the Project Orientation Briefing

6.2. Monthly Project Status Report

The Contractor shall deliver a monthly project status report that will include:

- Management Summary - includes documenting any major problems/issues, and any significant progress or events.
- Resource Expenditures – includes expense reporting for each task including planned and actual funds expended during the reporting period, cumulative total, and funds remaining on each task and the contract. Other information required includes name, labor category, hours planned and expended, cumulative hours expended and hours remaining on contract, and projected total hours for each individual working on each task.
- EVM: - includes planned value, earned value, actual cost, as well as schedule and cost variance information and graphs, for each task and the overall contract.
- Narrative - includes a description of work performed on tasks(s) during the reporting period and expected to be performed during the next reporting period, including discussions of any problems/issues and recommendations for correction

6.3. Deliverables and Delivery Schedule

All deliverables shall be submitted to the Chief, USCIS Transformation Program Office, the COTR, and the Contracting Office, unless otherwise agreed upon. All deliverables and work products shall meet the following constraints:

- File editing – All text and diagrammatic files shall be editable by the TPO.
- Format – Deliverables and work products shall conform to USCIS and Government standards for correspondence and written products. Unless designated as a briefing, presentation or integrated master schedule/program work breakdown structure (IMS/PWBS), or spreadsheet, all deliverables in this SOW shall be written in narrative form and submitted to the Government in Microsoft Word format. Microsoft PowerPoint files shall be acceptable only for deliverables described as a “briefing” or “presentation.” The Integrated Master Schedule and Program Work Breakdown Structure (IMS/PWBS) shall be prepared in Microsoft Project or an equivalent application to be approved by the Government. Microsoft Excel and/or Microsoft Access shall be used for spreadsheet and database deliverable work products respectively. The Contractor shall use appropriate DHS and/or USCIS templates when available. The Contractor shall submit final deliverables and work products in both hard copy and soft copy. Soft copies shall be submitted in Microsoft Professional Office Suite, Visio, or as needed on a case-by-case basis using versions currently supported by USCIS.
Timeliness – Deliverables shall be submitted in accordance with baselines as established by mutual agreement between the Contractor and the COTR.

Unless otherwise specified, the Government will have a maximum of ten (10) working days from the day the draft deliverable is received to review the document, provide comments back to the Contractor. The Contractor shall also have a maximum of five (5) working days from the day comments are received to incorporate all changes and submit the final deliverable to the Government.

Unless otherwise specified, the Government will have a maximum of ten (10) working days from the day a final deliverable is received to review and either approve or disapprove the deliverable(s).

The following contract deliverables are a minimum requirement. The Offeror is not limited to providing only those documents, and is encouraged to propose additional operational documentation as part of their proposed solution.

The Contractor shall submit the contract deliverables on the following schedule:

<table>
<thead>
<tr>
<th>Deliverable</th>
<th>Delivery Date</th>
<th>SOW Section Reference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Orientation Briefing</td>
<td>Contract Award + 7 Calendar Days</td>
<td>6.1</td>
</tr>
<tr>
<td>Contractor Project Management Plan (Initial)</td>
<td>Contract Award + 7 Calendar Days (at Project Orientation Briefing)</td>
<td>5.1</td>
</tr>
<tr>
<td>Transition Plan (Initial)</td>
<td>Contract Award + 7 Calendar Days (at Project Orientation Briefing)</td>
<td>6.1</td>
</tr>
<tr>
<td>Transition Plan (Revised)</td>
<td>Contract Award + 21 Calendar Days (14 work days after the Project Orientation Briefing)</td>
<td>6.1</td>
</tr>
<tr>
<td>Quality Assurance Surveillance Plans (QASP)</td>
<td>Contract Award + 7 Calendar Days (at Project Orientation Briefing)</td>
<td>6.4</td>
</tr>
<tr>
<td>Note: This plan will be definitized within 30 calendar days of contract award.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Completed DHS/USCIS security package requirements for all Key Personnel and proposed staff.</td>
<td>Contract Award + 7 Calendar Days</td>
<td>13</td>
</tr>
<tr>
<td>Project Status Report</td>
<td>Frequency: Monthly Delivered by the 15 Calendar day of each month.</td>
<td>6.2</td>
</tr>
<tr>
<td>Contractor Project Management Plan (Revised)</td>
<td>6 weeks after delivery of Orientation Briefing</td>
<td>5.1</td>
</tr>
<tr>
<td>Implementation of Proposed Processes, Procedures, Methodologies and Tools</td>
<td>10 weeks after delivery of Orientation Briefing</td>
<td>5.1</td>
</tr>
</tbody>
</table>
6.4. Performance Measures and Acceptance Criteria

The Contractor shall deliver a Quality Assurance Surveillance Plans (QASP) at the Project Orientation Briefing (Contract Award + 7 Calendar Days). This plan will be definitized within 30 calendar days of contract award.

7. GOVERNMENT FURNISHED EQUIPMENT AND INFORMATION

The Government will provide the following support for the performance of this contract:

- Documentation - access to manuals, routine reports, and related materials necessary to perform this task.
- Office spaces - equipped with a desk, computer, and telephone and convenient access to a printer, fax machine, and photocopier.
- Standard office supplies - such as paper, pens, notebooks, etc., required to operate efficiently.

8. PLACE OF PERFORMANCE

The primary place of performance shall be the USCIS TPO facilities 111 Massachusetts Avenue, N.W., 20 Massachusetts Avenue N.W., or 633 3rd St N.W., Washington DC. At a minimum, the Contract will perform work on site with the USCIS TPO facility of assignment during core business hours 8:30 a.m. to 4:30 p.m. Monday through Friday, excluding Federal holidays. It is the expectation that all personnel on this contract will fulfill their duties at the assigned place of performance. Any work to be performed at sites other than the DC offices of the USCIS TPO requires pre-approval by the COTR.

Any off-site Contractor meetings that require the attendance of the staff on this contract will be limited to half-day once per month and must be coordinated with the COTR and must not adversely impact the TPO operations. Any additional meetings by the Contractor that are conducted off-site during core business hours must be approved in advance by the COTR.

9. OFFICIAL TRAVEL

Travel outside of the Metropolitan Washington, DC area may be required. In the event travel is required, travel shall not be performed in connection with this contract without prior
approval in writing (Email for the request and approval is acceptable) of the COTR. The Contractor shall be reimbursed for travel in accordance with the Joint Federal Travel Regulations (JFTR). Upon completion of travel all documentation associated with the respective travel shall be submitted with the invoices.

Local travel under this contractual vehicle will be reimbursed according to government approved mileage rates and may be incurred only when the Government requests on-site performance by the Contractor at other than the Government client workplace DHS/USCIS/TPO facilities (Email for the request and approval is acceptable). Local travel is defined as travel within 50 miles of the DHS/USCIS/TPO facilities at 111 Massachusetts Avenue, N.W., Washington DC. Otherwise local travel reimbursement is not allowed.

10. PERIOD OF PERFORMANCE

The base period of performance is January XX, 2008 through December 30, 2008. There are four optional periods for this effort:

- **Option Period 1**: Date of Award through December 30, 2009;
- **Option Period 2**: December 31, 2009 through December 30, 2010
- **Option Period 3**: December 31, 2010 through December 30, 2011;
- **Option Period 4**: December 31, 2011 through December 30, 2012.

11. SECURITY

USCIS has determined that performance of this contract requires that the Contractor, subcontractor(s), vendor(s), etc. (herein known as Contractor), requires access to sensitive but unclassified information.

All Offerors shall have the following completed forms for Key Personnel, at a minimum, ready for submission to OSI through the COTR upon award of the contract. All other contractor personnel shall submit the following completed forms no less than 30 days before the starting date of the contract or 30 days prior to entry on duty of any employees, whether a replacement, addition, subcontractor employee, or vendor:

1. Standard Form 85P, “Questionnaire for Public Trust Positions”
2. DHS Form 11000-6, “Conditional Access to Sensitive But Unclassified Information Non-Disclosure Agreement”
3. FD Form 258, “Fingerprint Card” (2 copies)
4. Form DHS-11000-9, “Disclosure and Authorization Pertaining to Consumer Reports Pursuant to the Fair Credit Reporting Act”
5. Position Designation Determination for Contract Personnel Form
6. Foreign National Relatives or Associates Statement

Required forms will be provided by USCIS at the time of award of the contract. Only complete packages will be accepted by OSI. Specific instructions on submission of packages will be provided upon award of the contract.

11.1. Identification/Building Pass

The Contractor must make their personnel available for photo identification badges on a schedule to be determined by the Contracting Officer’s Technical Representative (COTR). The badges will be made by the Government utilizing supplies, materials and equipment provided by the Government. Each Contractor employee must sign the appropriate badge, as applicable, at the time of photographing. In order to obtain a badge, personnel will be required to provide requested pertinent information.

The Contractor is responsible for ensuring that each of his/her employees performing work under this task order display their photo-identification badges at all times they are present on-duty in the building. Refusal or repeated neglect to display the photo-identification may result in an unsuitability determination.

Upon termination, resignation or other event leading to a task order employee leaving duty under this task order, the Contractor is responsible for returning all Government identification, building passes, keys, and other Government property issued to that employee. Failure on the part of the Contractor may result in the Contractor's liability for all costs associated with correcting the resultant breech in building security.

11.2. Security Policies and Procedures

All Contractor personnel shall be subject to USCIS security policies and procedures for access to facilities. The USCIS shall not provide Contractor personnel with access to the Internet from the USCIS facilities for non-USCIS computing equipment.

11.3. Cooperation with Other On-Site Contractors

When the Government undertakes or awards other task orders or contracts for additional work at the facilities, the Contractor must: (1) fully cooperate with the other Contractors and Government employees, and (2) carefully fit its own work to such other additional contracted work as may be directed by the Contracting Officer’s Technical Representative (COTR). The Contractor must not commit or permit any act that will interfere with the performance of work awarded to another Contractor or with the performance of other Government employees.

In any case where, in the course of fulfilling the task order requirements, the Contractor disturbs any work guaranteed under another separate contract, the Contractor must restore such disturbed work to a condition satisfactory to the COTR and guarantee such restored work to the same extent as it was guaranteed under the other contract.
11.4. Confidentiality and Non-Disclosure

All information regarding the procedures developed under this task order must be regarded as sensitive information by the Contractor and not to be disclosed to anyone outside the Contractor’s organization without the written permission of the Contracting Officer.

All Contractor personnel shall sign a non-disclosure agreement. The Contractor shall take all reasonable precautions not to divulge information about the business case and associated analysis, or to use this information for the Contractor’s gain and shall not divulge any information to any other organization (outside the USCIS) without written permission from the Chief, USCIS Transformation Program Office.

12. AVOIDANCE OF PERSONAL SERVICES

The Government shall not supervise Contractor employees. The Contractor shall determine work schedules and work methodology for its employees.

12.1. Prohibition on Personal Services

No personal services shall be performed under this Task Order. No Contractor employee will be directly supervised by the Government. All individual employee assignments and daily work direction shall be given by the applicable employee supervisor. If the Contractor believes any Government action or communication has been given that would create a personal services relationship between the Government and any Contractor employee, the Contractor shall promptly notify the Contracting Officer of this communication or action.

12.2. Performance of Inherently Governmental Functions

The Contractor shall not perform any inherently governmental functions under this Task Order. No Contractor employee shall hold himself or herself out to be a Government employee, agent, or representative. No Contractor employee shall state orally or in writing at any time that he or she is acting on behalf of the Government. In all communications with third parties in connection with this contract, Contractor employees shall identify themselves as Contractor employees and specify the name of the company for which they work. In all communications with other Government Contractors in connection with this contract, the Contractor employee shall state that they have no authority to in any way change the contract and that if the other Contractor believes this communication to be a direction to change their Task Order, they should notify the Contracting Officer for that contract and not carry out the direction until a clarification has been issued by the Contracting Officer.

12.3. Government Rights

Nothing in this clause shall limit the Government’s rights in any way under any other provision of the contract, including those related to the Government’s right to inspect and accept the services to be performed under this contract.
13. RELEASE OF INFORMATION

The Contractor and Subcontractors may NOT release to the public or other Government agencies any information developed under or pertaining to this contract or subcontracts without the approval of the Contracting Officer. This information includes press releases, promotional literature, price lists and deliverables.

14. PERSONNEL

14.1. Key Personnel

The following personnel shall be designated as “Key Personnel”. The Contractor shall propose appropriate labor categories for these positions. The implication of “suggested” is that the Government does not intend to dictate the composition of the ideal team to perform this Task Order. The Contractor is encouraged to propose key positions as it deems beneficial to the Government in light of its proposed managerial and technical methodology.

While a one to one correlation between key personnel and core competencies is not required, it is suggested that the Contractor propose a balanced team to mitigate project risk.

- Senior Program Manager
- Portfolio/Financial Analyst
- Quality Assurance Specialist
- Risk Management Specialist
- Configuration Management Specialist
- Performance Management Specialist
- Program Manager
- Project Manager (Three positions)
- Senior Contracts Consultant
- Senior Communications Specialist
- Senior Training Specialist

14.2. Specialized Disciplines

Specialized experience for the Key Personnel is specified in the following paragraphs. The specialized experience listed below is desirable, but not mandatory. All experience will be evaluated based on relevance to this Task Order.

14.2.1. Senior Program Manager

The Contractor shall identify a Senior Program Manager (PM) to serve as the Government’s major point-of-contact and to provide supervision and guidance for all Contractor personnel assigned to the Task Order. The PM is ultimately responsible for the quality and
efficiency of the TPO PMO support effort. The PM should have recent experience successfully planning, directing and managing complex investments similar in size and scope of the USCIS Transformation Program.

The PM shall have demonstrably strong managerial experience organizing, planning, directing, and managing Contractor staff to ensure that the goals and objectives of the program are met. The PM shall be possess an appropriate certification in program or project management such as the DHS Acquisition Certification for Program Manager Level II/III, Project Management Institute Project Management Professional, Defense Acquisition Workforce Improvement Act Program Management Certification Level II/III, Federal Acquisition Certification for Program and Project Management Journeyman/Expert Level, etc. The PM shall demonstrate strong experience in problem resolution and customer satisfaction accomplished within prescribed time frames and funding parameters. It is desirable that the PM demonstrate:

- Working knowledge and experience managing and/or overseeing multiple investments and substantial services based programs similar in size and scope to the USCIS Transformation Program
- Knowledge, background and experience with DHS/UCSIS/Immigration related programs related to modernization and transformation.
- Administrative leadership of task compliance with industry accepted standards, and working under structured life cycle standards.
- Knowledge of configuration management and quality assurance concepts and guidelines
- Experience successfully managing large scale integration efforts utilizing a services-based architecture and including areas such as portal development, enterprise application integration, web content management, and knowledge management taxonomy development.
- Knowledge of web development and web-based software applications
- The ability to analyze, diagnose, and define problems, issues, and develop resolution pertaining to complex long-term investments and the procurement and management of integrated services
- Significant experience managing cost type contracts with incentive-based performance metrics and subcontracted tasks
- Demonstrated ability for oral and written communication with the highest levels of management

14.2.2. Portfolio/Financial Analyst

This key resource should have analytical and programmatic skills and experience operating in a complex consulting environment. Recent consulting experience should be as a lead portfolio and/or financial analyst on a complex services-based, enterprise-wide system implementation and include investment analysis and control, cost-benefit analysis, alternatives analyses, baseline management, feasibility analyses and transition planning. A management
background with demonstrated knowledge of a business or management technical discipline is desired. It is desirable that this key person demonstrates:

- Ability to build, maintain and improve financial models as well as the ability to provide alternatives analysis with detailed costs and benefits
- Demonstrated expertise performing investment analysis and control on large government programs
- Ability to provide support during budgeting cycle
- Superior quantitative and analytic abilities
- Demonstrated ability for oral and written communication with the highest levels of management

14.2.3. Quality Assurance Specialist

The Contractor should identify a Quality Assurance Manager (QAM) who is responsible for the supervision and guidance for all Contractor personnel assigned to the quality assurance function of the Task Order. The QAM is responsible for assisting the Government with the quality and efficiency of the overall transformation effort. The QAM should have experience managing QA projects of similar size and scope, and experience developing and validating quality business products and services. The following experience is desirable:

- Experience managing a QA team and developing QA processes for a services based enterprise-wide business modernization effort
- Experience developing successful quality control procedures and QA programs
- Experience implementing and monitoring QA performance metrics and surveillance plans
- Possess excellent written and verbal communication skills, and have experience in presenting material to senior project officials

14.2.4. Risk Management Specialist

The Contractor shall identify a Risk Management Specialist to support the Government with the identification and mitigation of Transformation Program risks. This resource should have recent experience developing and implementing a successful risk management program for an investment similar in size and scope to the USCIS Transformation Program. It is desirable that the Risk Management Specialist demonstrates specialized knowledge and/or experience in the following areas:

- Establishing and implementing systems and procedures for the identification, collection and analysis of risk related information
- Development and management of strategic risk plans
- Continued management of risk to realize core opportunities and threats as they occur
- Leading, facilitating and advising project managers on risk management practices
- Knowledge of statistics, data collection, analysis and data presentation
- Excellent interpersonal communication and problem-solving skills

14.2.5. **Configuration Management Specialist**

The Contractor should identify a Configuration Management Manager (CM Mgr.) with substantial experience in Configuration Identification; Configuration Control (Change Control); Configuration Status Accounting; Configuration Audits and Reviews, and; CM Release Processing. At least one project should have occurred within the past three years. The CM Mgr. should have direct experience leading a configuration management task for a services based enterprise-wide business solution. It is desirable that the CM Mgr. demonstrates specialized knowledge and/or experience in the following areas:

- Establishing and employing automated configuration management systems and procedures in environments similar to USCIS
- Establishing and maintaining configuration baselines for a large program
- Establishing change control requirements and procedures for a large program
- Determining change logistics, change costs, change timing, and change impacts
- Maintaining accurate and current records of customers, sites, and deployed assets
- Establishing and maintaining a documentation library

14.2.6. **Performance Management Specialist**

The Performance Management Specialist should have at least 7 to 10 years experience in performance management and measurement of large-scale federal IT programs as well as educational experience appropriate to the discipline. This key resource should have significant recent experience acting as a strategic resource to define the performance measures and associated metrics for an enterprise-wide system implementation in a decentralized government organization. It is desirable that the Performance Management Specialist demonstrates specialized knowledge and/or experience in the following areas:

- Experience in establishing and monitoring performance metrics in a large, Federal IT programs and organizations
- Development and implementation of performance management strategies and tactics.
- Develop and monitor performance metrics for the projects to measure both contractor performance as well as the performance of the USCIS/TPO and other government stakeholder/partner organizations.
- Develop and monitor performance metrics for the Transformation Program, the TPO and the overarching solution.
- Ensure alignment of program metrics with organizational mission, goals and objectives, as well as stakeholder expectations.
14.2.7. **Program Manager**

The Contractor shall identify a Program Manager to provide the core program management support for the Increment Management Division. The PM shall possess an appropriate certification in program or project management such as the DHS Acquisition Certification for Program Manager Level II/III, Project Management Institute Project Management Professional, Defense Acquisition Workforce Improvement Act Program Management Certification Level II/III, Federal Acquisition Certification for Program and Project Management Journeyman/Expert Level, etc. Initial responsibilities will focus on the Transformation Program proof-of-concept, currently in various stages of their development life cycle, but will transition to focus to the services provided by the Solutions Architect. This position requires knowledge and experience in managing scope, schedule and budget for services across multiple enterprise-wide projects and programs. This resource should have recent experience managing a diverse group of functional activities and subordinate groups of technical and business personnel. At minimum, this key resource shall be responsible for the following:

- Overall technical, business, and financial management of TPO proof-of-concept
- Maintenance and oversight of budgets, schedules, and performance for TPO proof-of-concept
- Availability and effective use of resources to achieve goals and performance outcomes
- Preparation and communication of program status, progress and results
- Providing expertise at highest government levels

14.2.8. **Project Managers (Three positions)**

The Contractor shall identify three (3) Project Managers (PMs) to provide the core project management support for the Increment Management Division. The PMs shall possess an appropriate certification in program or project management such as the DHS Acquisition Certification for Program Manager Level II/III, Project Management Institute Project Management Professional, Defense Acquisition Workforce Improvement Act Program Management Certification Level II/III, Federal Acquisition Certification for Program and Project Management Journeyman/Expert Level, etc. Initial responsibilities will focus on the Transformation Program pilots, currently in various stages of their development life cycle, but will transition to focus to the services provided by the Solutions Architect. These positions require knowledge and experience in managing scope, schedule and budget for services based enterprise-wide projects and programs. The resources should have recent experience managing a diverse group functional activities and subordinate groups of technical and business personnel. At minimum, these key resources shall be responsible for the following:

- Overall technical, business, and financial management of TPO pilots
- Maintenance and oversight of budgets, schedules, and performance for TPO pilots
- Availability and effective use of resources to achieve goals and performance outcomes
- Preparation and communication of program status, progress and results
• Providing expertise at highest government levels

14.2.9. Senior Contracts Consultant

The Contractor shall identify a Senior Contracts Manager to lead the team supporting the Government with the management of Transformation Program contracts. This resource should have recent Contract Management or Contract Administration experience with a federal agency program as well as appropriate degrees (e.g. Procurement, Finance, Law, MBA) and/or certifications. It is desirable that the Senior Contracts Manager demonstrates specialized knowledge and/or experience in the following areas:

• Experience in complex enterprise agreements (hardware, software, maintenance), procurement and service contracts ranging in size/length, legal contract terms, structures and provisions
• Experience with and subject matter expertise relevant to IT and program support contracts.
• Experience developing and managing Service Level Agreements (SLAs)
• Experience negotiating/revising contracts, creating/incorporating amendments, accommodating scope changes or changes in organization requirement
• Experience with the development and maintenance of a contract management repository for tracking contracts, expiration dates and other pertinent information
• Excellent written and verbal skills; process and detail-oriented

14.2.10. Senior Communications Specialist

The Senior Communications Specialist should have at least 7 to 10 years experience in communications as well as educational experience appropriate to the discipline. This resource will be responsible for the development of Transformation Program communications and related promotional materials that advance the goals and adoption of the transformed USCIS business process. It is desirable that the Senior Communications Specialist demonstrates specialized knowledge and/or experience in the following areas:

• Experience with the development of an overall strategy, tactics and success metrics for a communications plan
• Experience managing the development, production, inventory and distribution of written communications materials
• Experience planning, organizing and implementing a communications program that is focused on both internal and external stakeholders to provide continual and timeline information on Transformation Program activities
14.2.11. Senior Training Specialist

The Senior Training Specialist should have at least 7 to 10 years experience in organizational training as well as a degree in Instructional Design, or other comparable educational and training as appropriate to the discipline. This key resource should have significant recent experience with the design and delivery of training programs for large, enterprise-wide system implementations. It is desirable that the Senior Training Specialist demonstrates specialized knowledge and/or experience in the following areas:

- Experience coordinating across multiple related projects in a program to ensure program/project lead awareness of potential risks/issues
- Experience in developing and conducting both classroom and web-based training
- Experience working with key stakeholders to ensure that all processes identified are covered in training and policy and procedures
- Ability to work closely with the program/project managers to identify, develop and implement training tasks required to achieve program objectives
- Strong communication, facilitation and presentation skills

14.3. Substitution or Diversion of Key Personnel

The key personnel are considered essential to the work performed. The Contractor shall not substitute key personnel without written permission from the Contracting Officer. Before substituting or replacing the specified individuals, the Contractor shall notify the Contracting Officer in writing no less than 15 calendar days in advance and shall submit justification (including the names and resumes of the proposed substitution(s)) in sufficient detail to permit evaluation of the impact on the program. The Government will review resumes and interview candidates for replacement of all key personnel positions. The Contractor must wait for the written approval and acceptance from the Contracting Officer before placing a candidate in a key personnel position. The proposed substitution(s) shall possess qualifications equal or superior to those of the key person(s) being replaced. The Contractor shall ensure knowledge transfer and full transition of responsibilities occurs between the key person and the approved substitute.

In the event that a change in key personnel is caused by an individual’s sudden illness, death, or termination of employment, the Contractor shall promptly notify the Contracting Officer and provide the information required to provide for a replacement.

14.4. Transitional Planning and Support

Ninety (90) days before the expiration of this contract, the Government reserves the right to request that the contractor develop a Transition Plan and Transition Support activities for all transition efforts for follow-on requirements in order to minimize disruption of services. The Transition Plan and support shall be as follows:

- Inventory of all government furnished equipment (GFE) and government furnished property (GFP) in Contractor possession.
• Status of all deliverables.
• Problems encountered during period of performance.
• Current issues, problems, or activities in process which require immediate action.
• Delivery of all documentation, including all updates to Standard Operating Procedures, both in hard copy and electronic formats.
• The plan on how the contractor intends to transition follow-on requirements and the list of key personnel involved in this effort.
• Final deliverable due
• Identify and provide a schedule of routine events for continuity of program (example: reports, processes)

The government COTR and Program Manager shall approve this plan and transition support. Transition support if determined by the Government shall commence 30-60 business days prior to expiration of the contract. Upon award of a follow-on contract, the Contractor will work with the new Contractor to provide knowledge transfer and transition support as required by the COTR and the TPO Program Manager.

15. EARNED VALUE MANAGEMENT

In accordance with OMB Circular A-11, the Government will use Earned Value Management (EVM) to monitor tasks. The Contractor shall provide EVM that meets the criteria as defined in the current American National Standards Institute/Electronic Industries Alliance (ANSI/EIA) Standard 748-2002, Earned Value Management Systems, approved May 19, 1998.

Task orders in support of programs that have assets in the development, modernization, or enhancement phase will require the use of EVM to measure the cost, schedule, and performance of those assets against the established baseline. For task orders that are greater than or equal to $5M, the Government requires full compliance with the ANSI/EIA Standard 748 (2002) guidelines, with self-verification. For those task orders that are less than $5M but greater than or equal to $1M, the Government requires compliance to a specific subset of the ANSI-748 guidelines, with self-verification. For task orders that are under $1M annual cost, Earned Value Management is at the discretion of the Program Manager. The Contractor shall self-verify the compliance of its system. The Government reserves the right to apply the higher alternative EVMS standard to Prime Contractors with multiple task orders with a total cumulative value greater than $5M and greater than $1M. The Government reserves the right to obtain independent verification of a Prime Contractor's EVM system.

The following section provides the basic requirements thresholds while specific application will be determined by the Government at the task order level based on value, risk, and the nature of the work to be performed.

<table>
<thead>
<tr>
<th>Alternative</th>
<th>Task Order Level</th>
<th>Cost-based Task Order</th>
<th>Applicable Fixed Price Task Order</th>
<th>ANSI Standard-748 Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>$5M</td>
<td>Yes</td>
<td>Yes</td>
<td>Full</td>
</tr>
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</table>

Department of Homeland Security 30 August 2007
USCIS Transformation Program

PMO Support Services Statement of Work

<table>
<thead>
<tr>
<th>Alternative II</th>
<th>&gt;/=$1M, &lt;$5M</th>
<th>Yes</th>
<th>Yes</th>
<th>• Self-verified EVMS</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1. Mandatory subset of ten guidelines</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2. Self-verified EVMS</td>
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<table>
<thead>
<tr>
<th>Alternative III</th>
<th>&lt;$1M</th>
<th>Discretionary</th>
<th>Discretionary</th>
<th>3. Discretionary</th>
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<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4. Up to subset of ten if used</td>
</tr>
</tbody>
</table>

16. ADDITIONAL REFERENCE(S)

The following additional FAR and HSAR reference(s) have been identified for inclusion in this SOW and will be applicable for this contract:

<table>
<thead>
<tr>
<th>FAR Clause No.</th>
<th>Title</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>52.204-9</td>
<td>Personal Identity Verification of Contractor Personnel</td>
<td>Nov 2006</td>
</tr>
<tr>
<td>52.227-14</td>
<td>Rights In Data – General Alternates IV And V</td>
<td>Jun 1987</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>HSAR Clause No.</th>
<th>Title</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>3052.204-70</td>
<td>Security Requirements for Unclassified Information Technology Resources</td>
<td>Dec 2003</td>
</tr>
<tr>
<td>3052.204-71 (Alternate 1)</td>
<td>Contractor Employee Access</td>
<td>Jun 2006</td>
</tr>
<tr>
<td>3052.209-70</td>
<td>Prohibition on Contracts with Corporate Expatriates.</td>
<td>Jun 2006</td>
</tr>
<tr>
<td>3052.215-70</td>
<td>Key Personnel or Facilities</td>
<td>Dec 2003</td>
</tr>
<tr>
<td>3052.209-73</td>
<td>Limitation Of Future Contracting</td>
<td>Jun 2006</td>
</tr>
</tbody>
</table>

HSAR 3052.209-73 LIMITATION OF FUTURE CONTRACTING (JUN 2006)

HSAR 3052.209-73

a) The Contracting Officer has determined that this acquisition may give rise to a potential organizational conflict of interest. Accordingly, the attention of prospective offerors is invited to FAR Subpart 9.5--Organizational Conflicts of Interest.

(b) The nature of this conflict involves the contractor assisting the Government in developing requirements or having access to source selection information resulting in disqualification from future procurements.
(c) The restrictions upon future contracting are as follows:
(1) If the Contractor, under the terms of this contract, or through the performance of tasks pursuant to this contract, is required to develop specifications or statements of work that are to be incorporated into a solicitation, the Contractor shall be ineligible to perform the work described in that solicitation as a prime or first-tier subcontractor under an ensuing DHS contract. This restriction shall remain in effect for a reasonable time, as agreed to by the Contracting Officer and the Contractor, sufficient to avoid unfair competitive advantage or potential bias (this time shall in no case be less than the duration of the initial production contract). DHS shall not unilaterally require the Contractor to prepare such specifications or statements of work under this contract.
(2) To the extent that the work under this contract requires access to proprietary, business confidential, or financial data of other companies, and as long as these data remain proprietary or confidential, the Contractor shall protect these data from unauthorized use and disclosure and agrees not to use them to compete with those other companies.
(End of clause)
SECURITY REQUIREMENTS

GENERAL
U.S. Citizenship & Immigration Services (USCIS) has determined that performance of this contract requires that the Contractor, subcontractor(s), vendor(s), etc. (herein known as Contractor), requires access to sensitive but unclassified information, and that the Contractor will adhere to the following.

SUITABILITY DETERMINATION
USCIS shall have and exercise full control over granting, denying, withholding or terminating access of unescorted Contractor employees to government facilities and/or access of Contractor employees to sensitive but unclassified information, based upon the results of a background investigation. USCIS may, as it deems appropriate, authorize and make a favorable entry on duty (EOD) decision based on preliminary security checks. The favorable EOD decision would allow the employees to commence work temporarily prior to the completion of the full investigation. The granting of a favorable EOD decision shall not be considered as assurance that a full employment suitability authorization will follow as a result thereof. The granting of a favorable EOD decision or a full employment suitability determination shall in no way prevent, preclude, or bar the withdrawal or termination of any such access by USCIS, at any time during the term of the contract. No employee of the Contractor shall be allowed unescorted access to a USCIS facility without a favorable EOD decision or suitability determination by the Office of Security & Investigations (OSI).

BACKGROUND INVESTIGATIONS
Contract employees (to include applicants, temporaries, part-time and replacement employees) under the contract, needing access to sensitive but unclassified information, shall undergo a position sensitivity analysis based on the duties, outlined in the Position Designation Determination (PDD) for Contractor Personnel, each individual will perform on the contract. The results of the position sensitivity analysis shall identify the appropriate background investigation to be conducted. All background investigations will be processed through OSI. Prospective Contractor employees shall submit the following completed forms to OSI through the COTR no less than 30 days before the starting date of the contract or 30 days prior to entry on duty of any employees, whether a replacement, addition, subcontractor employee, or vendor:

1. Standard Form 85P, “Questionnaire for Public Trust Positions”
2. DHS Form 11000-6, “Conditional Access to Sensitive But Unclassified Information Non-Disclosure Agreement”
3. FD Form 258, “Fingerprint Card” (2 copies)
4. Form DHS-11000-9, "Disclosure and Authorization Pertaining to Consumer Reports Pursuant to the Fair Credit Reporting Act"

5. Position Designation Determination for Contract Personnel Form

6. Foreign National Relatives or Associates Statement

Required forms will be provided by USCIS at the time of award of the contract. Only complete packages will be accepted by OSI. Specific instructions on submission of packages will be provided upon award of the contract.

Be advised that unless an applicant requiring access to sensitive but unclassified information has resided in the US for three of the past five years, OSI may not be able to complete a satisfactory background investigation. In such cases, USCIS retains the right to deem an applicant as ineligible due to insufficient background information.

The use of Non-U.S. citizens, including Lawful Permanent Residents (LPRs), is not permitted in the performance of this contract for any position that involves access to or development of any DHS IT system. USCIS will consider only U.S. Citizens for employment on this contract. USCIS will not approve LPRs for employment on this contract in any position that requires the LPR to access or assist in the development, operation, management or maintenance of DHS IT systems. By signing this contract, the contractor agrees to this restriction. In those instances where other non-IT requirements contained in the contract can be met by using LPRs, those requirements shall be clearly described.

**EMPLOYMENT ELIGIBILITY**

The Contractor must agree that each employee working on this contract will have a Social Security Card issued and approved by the Social Security Administration. The Contractor shall be responsible to USCIS for acts and omissions of his own employees and for any Subcontractor(s) and their employees to include financial responsibility for all damage or injury to persons or property resulting from the acts or omissions of the contractor's employees.

Subject to existing law, regulations and/ or other provisions of this contract, illegal or undocumented aliens will not be employed by the Contractor, or with this contract. The Contractor will ensure that this provision is expressly incorporated into any and all Subcontracts or subordinate agreements issued in support of this contract.

**CONTINUED ELIGIBILITY**

If a prospective employee is found to be ineligible for access to USCIS facilities or information, the COTR will advise the Contractor that the employee shall not continue to work or to be assigned to work under the contract.
USCIS reserves the right and prerogative to deny and/or restrict the facility and information access of any Contractor employee whose actions are in conflict with the standards of conduct, 5 CFR 2635 and 5 CFR 3801, or whom USCIS determines to present a risk of compromising sensitive but unclassified information to which he or she would have access under this contract.

The Contractor will report any adverse information coming to their attention concerning contract employees under the contract to USCIS OSI. The subsequent termination of employment of an employee does not obviate the requirement to submit this report. The report shall include the employees' name and social security number, along with the adverse information being reported.

OSI must be notified of all terminations/resignations within five days of occurrence. The Contractor will return any expired USCIS issued identification cards and building passes, or those of terminated employees to the COTR. If an identification card or building pass is not available to be returned, a report must be submitted to the COTR, referencing the pass or card number, name of individual to whom issued, the last known location and disposition of the pass or card.

SECURITY MANAGEMENT
The Contractor shall appoint a senior official to act as the Corporate Security Officer. The individual will interface with OSI through the COTR on all security matters, to include physical, personnel, and protection of all Government information and data accessed by the Contractor.

The COTR and OSI shall have the right to inspect the procedures, methods, and facilities utilized by the Contractor in complying with the security requirements under this contract. Should the COTR determine that the Contractor is not complying with the security requirements of this contract, the Contractor will be informed in writing by the Contracting Officer of the proper action to be taken in order to effect compliance with such requirements.

COMPUTER AND TELECOMMUNICATIONS SECURITY REQUIREMENTS
Security Program Background
The DHS has established a department wide IT security program based on the following Executive Orders (EO), public laws, and national policy:

- Executive Order 12958, Classified National Security Information, as amended.

DHS *Sensitive Systems Policy Publication 4300A* v2.1, July 26, 2004
DHS *National Security Systems Policy Publication 4300B* v2.1, July 26, 2004


• 5 Code of Federal Regulations (CFR) §2635, Office of Government Ethics, *Standards of Ethical Conduct for Employees of the Executive Branch*.


• National Institute of Standards and Technology (NIST) Special Publications for computer security and FISMA compliance.

**GENERAL**

Due to the sensitive nature of USCIS information, the contractor is required to develop and maintain a comprehensive Computer and Telecommunications Security Program to address the integrity, confidentiality, and availability of sensitive but unclassified (SBU) information during collection, storage, transmission, and disposal. The contractor's security program shall adhere to the requirements set forth in the DHS Management Directive 4300 IT Systems Security Pub Volume 1 Part A and DHS Management Directive 4300 IT Systems Security Pub Volume I Part B. This shall include conformance with the DHS Sensitive Systems Handbook, DHS Management Directive 11042 Safeguarding Sensitive but Unclassified (For Official Use Only) Information and
other DHS or USCIS guidelines and directives regarding information security requirements. The contractor shall establish a working relationship with the USCIS IT Security Office, headed by the Information Systems Security Program Manager (ISSM).

**IT SYSTEMS SECURITY**

In accordance with DHS Management Directive 4300.1 “Information Technology Systems Security”, USCIS Contractors shall ensure that all employees with access to USCIS IT Systems are in compliance with the requirement of this Management Directive. Specifically, all contractor employees with access to USCIS IT Systems meet the requirement for successfully completing the annual “Computer Security Awareness Training (CSAT).” All contractor employees are required to complete the training within 60-days from the date of entry on duty (EOD) and are required to complete the training yearly thereafter.

CSAT can be accessed at the following: http://otcd.uscis.dhs.gov/EDvantage.Default.asp or via remote access from a CD which can be obtained by contacting uscisitsecurity@dhs.gov.

**IT SECURITY IN THE SYSTEMS DEVELOPMENT LIFE CYCLE (SDLC)**

The USCIS SDLC Manual documents all system activities required for the development, operation, and disposition of IT security systems. Required systems analysis, deliverables, and security activities are identified in the SDLC manual by lifecycle phase. The contractor shall assist the appropriate USCIS ISSO with development and completion of all SDLC activities and deliverables contained in the SDLC. The SDLC is supplemented with information from DHS and USCIS Policies and procedures as well as the National Institute of Standards Special Procedures related to computer security and FISMA compliance. These activities include development of the following documents:

- **Sensitive System Security Plan (SSSP):** This is the primary reference that describes system sensitivity, criticality, security controls, policies, and procedures. The S SSP shall be based upon the completion of the DHS FIPS 199 workbook to categorize the system of application and completion of the RMS Questionnaire. The S SSP shall be completed as part of the System or Release Definition Process in the SDLC and shall not be waived or tailored.

- **Privacy Impact Assessment (PIA) and System of Records Notification (SORN).** For each new development activity, each incremental system update, or system recertification, a PIA and SORN shall be evaluated. If the system (or modification) triggers a PIA the contractor shall support the development of PIA and SORN as required. The Privacy Act of 1974 requires the PIA and shall be part of the SDLC process performed at either System or Release Definition.

- **Contingency Plan (CP):** This plan describes the steps to be taken to ensure that an automated system or facility can be recovered from service disruptions in the event of emergencies and/or disasters. The Contractor shall support annual
contingency plan testing and shall provide a Contingency Plan Test Results Report.

- **Security Test and Evaluation (ST&E):** This document evaluates each security control and countermeasure to verify operation in the manner intended. Test parameters are established based on results of the RA. An ST&E shall be conducted for each Major Application and each General Support System as part of the certification process. The Contractor shall support this process.

- **Risk Assessment (RA):** This document identifies threats and vulnerabilities, assesses the impacts of the threats, evaluates in-place countermeasures, and identifies additional countermeasures necessary to ensure an acceptable level of security. The RA shall be completed after completing the NIST 800-53 evaluation, Contingency Plan Testing, and the ST&E. Identified weakness shall be documented in a Plan of Action and Milestone (POA&M) in the USCIS Trusted Agent FISMA (TAF) tool. Each POA&M entry shall identify the cost of mitigating the weakness and the schedule for mitigating the weakness, as well as a POC for the mitigation efforts.

- **Certification and Accreditation (C&A):** This program establishes the extent to which a particular design and implementation of an automated system and the facilities housing that system meet a specified set of security requirements, based on the RA of security features and other technical requirements (certification), and the management authorization and approval of a system to process sensitive but unclassified information (accreditation). As appropriate the Contractor shall be granted access to the USCIS TAF and Risk Management System (RMS) tools to support C&A and its annual assessment requirements. Annual assessment activities shall include completion of the NIST 800-26 Self Assessment in TAF, annual review of user accounts, and annual review of the FIPS categorization. C&A status shall be reviewed for each incremental system update and a new full C&A process completed when a major system revision is anticipated.

**SECURITY ASSURANCES**

DHS Management Directives 4300 requires compliance with standards set forth by NIST, for evaluating computer systems used for processing SBU information. The Contractor shall ensure that requirements are allocated in the functional requirements and system design documents to security requirements are based on the DHS policy, NIST standards and applicable legislation and regulatory requirements. Systems shall offer the following visible security features:

- **User Identification and Authentication (I&A) – I&A** is the process of telling a system the identity of a subject (for example, a user) (I) and providing that the subject is who it claims to be (A). Systems shall be designed so that the identity of each user shall be established prior to authorizing system access, each system user shall have his/her own user ID and password, and each user is authenticated before access is permitted. All system and database administrative users shall have strong authentication, with passwords that shall conform to established DHS standards. All USCIS Identification and Authentication shall be done using the
Password Issuance Control System (PICS) or its successor. Under no circumstances will Identification and Authentication be performed by other than the USCIS standard system in use at the time of a systems development.

- **Discretionary Access Control (DAC)** – DAC is a DHS access policy that restricts access to system objects (for example, files, directories, devices) based on the identity of the users and/or groups to which they belong. All system files shall be protected by a secondary access control measure.

- **Object Reuse** – Object Reuse is the reassignment to a subject (for example, user) of a medium that previously contained an object (for example, file). Systems that use memory to temporarily store user I&A information and any other SBU information shall be cleared before reallocation.

- **Audit** – DHS systems shall provide facilities for transaction auditing, which is the examination of a set of chronological records that provide evidence of system and user activity. Evidence of active review of audit logs shall be provided to the USCIS IT Security Office on a monthly basis, identifying all security findings including failed log in attempts, attempts to access restricted information, and password change activity.

- **Banner Pages** – DHS systems shall provide appropriate security banners at start up identifying the system or application as being a Government asset and subject to government laws and regulations. This requirement does not apply to public facing internet pages, but shall apply to intranet applications.

**DATA SECURITY**

SBU systems shall be protected from unauthorized access, modification, and denial of service. The Contractor shall ensure that all aspects of data security requirements (i.e., confidentiality, integrity, and availability) are included in the functional requirements and system design, and ensure that they meet the minimum requirements as set forth in the DHS Sensitive Systems Handbook and USCIS policies and procedures. These requirements include:

- **Integrity** – The computer systems used for processing SBU shall have data integrity controls to ensure that data is not modified (intentionally or unintentionally) or repudiated by either the sender or the receiver of the information. A risk analysis and vulnerability assessment shall be performed to determine what type of data integrity controls (e.g., cyclical redundancy checks, message authentication codes, security hash functions, and digital signatures, etc.) shall be used.

- **Confidentiality** – Controls shall be included to ensure that SBU information collected, stored, and transmitted by the system is protected against compromise. A risk analysis and vulnerability assessment shall be performed to determine if
threats to the SBU exist. If it exists, data encryption shall be used to mitigate such threats.

- **Availability** – Controls shall be included to ensure that the system is continuously working and all services are fully available within a timeframe commensurate with the availability needs of the user community and the criticality of the information processed.

- **Data Labeling**. – The contractor shall ensure that documents and media are labeled consistent with the DHS *Sensitive Systems Handbook*. 
SOLICITATION/CONTRACT ORDER FOR COMMERCIAL ITEMS

1. ORDER NUMBER
RCIO-08-00010

2. CONTRACT NO.
08-10P-0216N

3. AWARD Effective Date
HSQDC-08-J-00037

4. ORDER NUMBER
HSHQDC-08-Q-00002

5. SOLICITATION NUMBER
HSQDC-08-J-00037

6. SOLICITATION ISSUE DATE
11/05/2007

7. FOR SOLICITATION INFORMATION CALL:
Janice Brinkley

8. OFFEROR
SILOSMASHERS INC
2677 PROSPERITY AVENUE
FAIRFAX VA 220314906

9. OFFEROR TO COMPLY TO COMPLETE BLOCKS 12, 17, 23, 24, 26

10. REQUISITION NUMBER
RCIO-08-00010

11. OFFER DUE DATE/LISTED TIME

12. CONTRACT NO.
GS-10F-0216N

13. EFFECTIVE DATE
HSHQDC-08-J-00002

14. ORDER NUMBER
HSHQDC-08-J-00037

15. REQUISITION NUMBER

16. NAME OF CONTRACTING OFFICER
Janice Brinkley

17. TELEPHONE NUMBER
202- (b(2) )

18. OFFER DUE DATE/LISTED TIME

19. DELIVERY FOR FOR DESTINATION UNLESS BLOCK IS MARKED

20. COURT OF RECORD

21. ACCOUNTING AND APPROPRIATION DATA

22. TOTAL AWARD AMOUNT (For Govt. Use Only)

23. SCHEDULE OF SUPPLIES/SERVICES

24. AMOUNT

25. DUNS NUMBER: 175955350000


This is a Time and Material Task order. The (Use Reverse and/or Attach Additional Sheets as Necessary) DATED YOUR OFFER ON SOLICITATION (BLOCK 9), INCLUDING ANY ADDITIONS OR CHANGES WHICH ARE SET FORTH HEREIN, IS ACCEPTED AS TO ITSELF.

AUTHORIZED FOR LOCAL REPRODUCTION
PREVIOUS EDITION IS NOT USABLE

STANDARD FORM 1440 (REV. 5) 02/2005
Prepared by GSA - FAR (48 CPR) 52.212
The total NOT-TO-EXCEED amount for this order is $31,475,836.77. The total level of effort for this order is 268,583 labor hours. The contractor's proposal Volume 1 entitled "Oral Presentation Slides" and Volume 2 entitled "Key Personnel Resumes", dated November 19, 2007 and December 10, 2007 is hereby incorporated by reference.

The following documents are hereby incorporated and made part of this order:

Attachment #1, Statement of Work, October 25, 2007;
Attachment #2, Security Requirements, December 17, 2007
Attachment #3, SiloSmashers Labor Rates, December 12, 2007
Attachment #4, Notice Regarding Organizational Conflict of Interest

Period of Performance: 01/28/2008 to 12/30/2012

Base Period - Program Management Support Services (PMSS)
Period of Performance January 10, 2008 through December 30, 2008. The total Not-To-Exceed amount for this period is $4,708,255.00. The total Level of Effort for this period is 43,091 Continued...
PRODUCT/DESCRIPTION: PROGRAM MANAGEMENT/SUPPORT SERVICES

DELIVERY: 01/28/2008

ACCOUNTING INFO:

Option Period Year 1 - Program Management Support Services (PMSS)

Period of Performance: December 31, 2008 through December 30, 2009. The total Not-To-Exceed amount for this period is $6,562,109.40. The total Level of Effort is 58,484 labor hours.

Amount: $6,562,109.40 (Option Line Item)

Product/Service Code: R408

Delivery: 12/31/2008

ACCOUNTING INFO:

Option Period Year 2 - Program Management Support Services (PMSS)

Period of Performance: December 31, 2009 through December 30, 2010. The total Not-to-Exceed amount for this period is $6,561,114.83. The total Level of Effort is 55,904 labor hours.

Amount: $6,561,114.83 (Option Line Item)

Product/Service Code: R408

Delivery: 12/31/2010

ACCOUNTING INFO:

Option Period Year 3 - Program Management Support Services (PMSS)

Continued...
Period of Performance: December 31, 2010 through December 30, 2011. The total Not-To-Exceed amount for this period is $6,724,729.38. The total Level of Effort is 55,584 Labor Hours. Amount: $6,724,729.38 (Option Line Item)
Product/Service Code: R408
Product/Service Description: PROGRAM MANAGEMENT/SUPPORT SERVICES
Delivery: 12/31/2010
Accounting Info:
( b(2) )
Funded: $0.00

Option Period Year 5 - Program Management Support Services (PMSS)
Period of Performance: December 31, 2011 through December 30, 2012. The total Not-To-Exceed amount for this period is $6,919,628.16. The total Level of Effort for is 55,520 Labor Hours.
Amount: $6,919,628.16 (Option Line Item)
Product/Service Code: R408
Product/Service Description: PROGRAM MANAGEMENT/SUPPORT SERVICES
Delivery: 12/31/2011
Accounting Info:
( b(2) )
Funded: $0.00

The ESTIMATED AMOUNT FOR THIS ORDER, INCLUDING OPTIONS IS NOT TO EXCEED $31,475,836.77. THIS OBLIGATION FOR THIS AWARD IS SHOWN IN BOX 26.

The Point of Contact for this Task Order:
Janice Smirnoff
Contracting Officer

Ola Wilson
Contracting Officer Technical Representative

Continued...
The contractor accepts this Task Order award by signing block 30a of this form. By signature of the Contracting Officer as set forth in Block 31A, this task order is hereby executed.

The total amount of award: $31,475,836.77. The obligation for this award is shown in box 26.

<table>
<thead>
<tr>
<th>ITEM NO (A)</th>
<th>SUPPLIES/SERVICES (B)</th>
<th>QUANTITY (C)</th>
<th>UNIT (D)</th>
<th>UNIT PRICE (E)</th>
<th>AMOUNT (F)</th>
</tr>
</thead>
</table>

The contractor accepts this Task Order award by signing block 30a of this form. By signature of the Contracting Officer as set forth in Block 31A, this task order is hereby executed.

The total amount of award: $31,475,836.77. The obligation for this award is shown in box 26.