SOLICITATION/CONTRACT/ORDER FOR COMMERCIAL ITEMS

Offeror to Complete Blocks 12, 17, 24, & 30

1. Requisition Number EDOCIO-04-000271	PAGE 1 OF 194

2. Contract No. GS35F4381G	3. Award/Effective Date Apr 26, 2005	4. Order Number BD05PO0908	5. Solicitation Number ED-04-Q-0013	6. Solicitation Issue Date Jul 15, 2004

7. For Solicitation Information Call:	a. Name Victor Cairo Victor_Cairo@ed.gov	b. Telephone Number (No collect calls) 202-245-6199	8. Offer Due Date/Local Time Oct 7, 2004 / 14:00 PM

9. Issued By   Code CPOA

Contracts & Acquisitions Mgt., Group A
U.S. Dept. of Education
550 12th Street, SW, 7th Floor
Washington, DC 20202-4210

10. This Acquisition is

[X] Unrestricted
[ ] Set-Aside ___ % for
[ ] Small Business
[ ] HubZone Small Business
[ ] 8(A)
NAICS: 541519
Size Standard: ___

11. Delivery for FOB Destination Unless Block is Marked.

[X] See Schedule

13a. This contract is a rated order under DPAS (15 CFR 700)

13b. Rating

12. Discount Terms
Discount: 0%
Days: 0
Net due: 30

14. Method of Solicitation
[X] RFQ   [ ] IFB   [ ] RFP

15. Deliver To Code CIO-RL	16. Administered By Code CPOA
Robert Leach Director of IT US Department of Education 7th & D Sts SW ROB-3 Room 4082 Washington, DC 20202	Contracts & Acquisitions Mgt., Group A U.S. Dept. of Education 550 12th Street, SW, 7th Floor Washington, DC 20202-4210

17a. Contractor/Offeror Code 00001238 Facility Code	18a. Payment Will Be Made By Code PAYMENT
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DRIVE LANHAM MD 207062295 Telephone No. (301) 794-2108 TIN: 952043126	U.S. Department of Education Fin. Trans, Pay Processing & Rptg Group 400 Maryland Avenue SW, Rm 4W242 Washington, DC 20202

17b. Check if Remittance is Different and Put Such Address in Offer. [ ]

18b. Submit Invoices to Address Shown in Block 18a Unless Box Below is Checked.
[X] See Addendum.

19. ITEM NO.	20. SCHEDULE OF SUPPLIES/SERVICES	21. QUANTITY	22. UNIT	23. UNIT PRICE	24. AMOUNT
0001	Category A	1	SE	7,457,765.84	7,457,765.84

25. Accounting and Appropriation Data

See Attached Schedule

26. Total Award Amount (For Govt. Use Only)
US 12,903,796.75

27a. Solicitation incorporates by reference FAR 52.212-1, 52.212-4, FAR 52.212-3 and 52.212-5 are attached. Addenda [ ] are [ ] are not attached

27b. Contract/Purchase Order incorporates by reference FAR 52.212-4, 52.212-5 is attached. Addenda [ ] are [ ] are not attached

[X] 28. Contractor is required to sign this document and return 3 copies to Issuing Office. Contractor agrees to furnish and deliver all items set forth or otherwise identified above and on any additional sheets subject to the terms and conditions specified herein.

[X] 29. Award of Contract: Reference. ___ Offer
Dated Oct 7, 2004 ___ . Your offer on Solicitation (Block 5), including any additions or changes which are set forth herein, is accepted as to items:

30a. Signature of Offeror/Contractor	31a. United States of America (Signature of Contracting Officer)
30b. Name and Title of Signer (Type or Print)	30c. Date Signed	31b. Name of Contracting Officer (Type or Print) James Hairfield James.Hairfield@ED.GOV	31c. Date Signed 04/26/05

32a. Quantity in Column 21 Has Been
[ ] Received   [ ] Inspected   [ ] Accepted, and Conforms to the Contract, Except as Noted: ___

32b. Signature of Authorized Government Representative	32c. Date	32d. Printed Name and Title of Authorized Government Representative
32e. Mailing Address of Authorized Government Representative		32f. Telephone Number of Authorized Government Representative
		32g. E-mail of Authorized Government Representative

33. Ship Number [ ] Partial [ ] Final	34. Voucher Number	35. Amount Verified Correct For	36. Payment [ ] Complete [ ] Partial [ ] Final	37. Check Number
38. S/R Account Number	39. S/R Voucher Number	40. Paid By		

41a. I certify this account is correct and proper for payment	42a. Received By (Print)
41b. Signature and Title of Certifying Officer	41c. Date	42b. Received At (Location)
		42c. Date Rec'd (YY/MM/DD) 42d. Total Containers

STANDARD FORM 1449 (REV. 4/2002)

Item No.	Supplies/Services	Quantity	Unit	Unit Price	Amount
	$ 1,221,969.27 BOC: 2572A PR #: EDOCIO-05-000192				

This page intentionally left blank.

Table of Contents

ED-05-PO-0908

This page intentionally left blank.

SECTION B – SUPPLIES OR SERVICES AND PRICES / COSTS

B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT (4/97)

A. The total fixed price of this contract for Category A services is $10,012,419.98. The not-to-exceed amount for Category C labor is $1,669,407.50. The ceiling for Category C hours is 26,133. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,221,969.27. During performance, actual hours by labor category and ODCs may vary from the contractor's estimate, however, contractor shall take appropriate steps to ensure that the ceiling price and amount of ordered hours stated is not exceeded without prior consent of the Government. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiated and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment 2.

B.2 ED 301-22 CONTRACT DEFINITION (4/97)

A. This is a firm fixed price, indefinite delivery contract, as defined under Subparts 16.202 and 16.5 of the Federal Acquisition Regulation.

B. This is a time and materials, indefinite delivery contract, as defined under Subparts 16.601 and 16.5 of the Federal Acquisition Regulation.

C. The contract is issued by the Contracting Officer in accordance with the procedures specified in this clause:

Fixed prices for Category A services[1] are to paid on a per unit basis (e.g. server and desktop) and on a per transaction basis (e.g., installation, decommission, etc.). Fixed price Category B services are to be paid on a per project basis. The Department of Education shall pay the Contractor, upon submission of proper invoices, the prices stipulated in the task order for work delivered or rendered and accepted. Unless otherwise specified, payment shall be made upon acceptance of any portion of the work delivered or rendered for which a price is separately stated in the task order. Non fixed price Category B and all Category C services shall be ordered on a time and materials basis and shall specify hour and price ceilings and otherwise set any necessary special conditions for reimbursable materials use. Hours shall be secured by worker

---

[1] Categories A through C are defined in the attached Performance Work Statement.

ED-05-PO-0908

classification and corresponding fixed comprehensive rates of charge (loaded labor rates). Loaded labor rates shall be as specified in the Pricing Schedule.

B.3 ED 301-21 CONTRACT AMOUNT INCREASE / DECREASE (4/97)

A. The Department of Education shall have the right to unilaterally increase the amount of the contract at any time in order to provide sufficient funds to cover the anticipated quantity of services or supplies for the remainder of the term. Additional funds shall be obligated on appropriate modifications signed by the Contracting Officer. Such funding modifications shall state the existing total contract amount, the amount of increased funding, and the new total contract amount.

B. The Department of Education shall also have the right to unilaterally decrease the amount of the contract in the same manner as above.

C. Category A services may be funded on a monthly basis while the Government is under a Continuing Resolution.

B.4 ED 301-27 MATERIALS REIMBURSEMENT (TIME AND MATERIALS CONTRACTS / TASK ORDERS) (4/97)

A. Labor exclusive direct costs (other direct costs), including expenses for materials, direct travel, lodging and subsistence and other necessary supportive items or services related to Time and Materials portions of the contract shall be reimbursed as directed.

B. No direct cost shall be reimbursed unless allowable under the cost principles of Part 31 of the Federal Acquisition Regulations. Reimbursement of other direct costs shall be governed by the incorporated clause entitled "Allowable Cost and Payment".

C. A fixed administrative fee shall be separately reimbursed. That shall apply as a set percentage of direct materials expenditures. The fixed administrative fee for this contract is as follows:

Fixed Administrative Fee 8.44%

D. The fixed administrative fee listed above include only costs allocated to direct materials in accordance with the contractor's usual accounting procedures consistent with FAR Part 31 and the contractor's master schedule contract.

E. This clause shall only apply to the reimbursement of costs incurred under time and materials task orders.

F. Any Other Direct Costs (ODCs) that exceed $2,500 must be approved in writing by the Contracting Officer.

B.5 TRAVEL

Long distance travel is anticipated during the performance of this contract. Since these costs cannot be accurately forecasted at this time, travel shall be on a cost reimbursable, non-fee-bearing basis only when requested by the Department of Education for Time and Materials priced services. The Contractor shall be reimbursed on the basis of actual costs incurred as described in clause B.4, when specifically requested and pre-approved by the Contracting Officer. The Contractor will not be reimbursed if the travel is not approved by the Contracting Officer.

SECTION C – DESCRIPTION / SPECIFICATIONS / WORK STATEMENT

C.1 SCOPE OF WORK
See Performance Work Statement (PWS) for EDNet Management Support Services, Attachment 1.

C.2 ED 302-5a TASK ORDER PROCEDURE (MAY 1997)
(Task Orders >= $25,000)

(a) Task orders shall be issued by the Contracting Officer in accordance with the procedures specified in this clause. Task orders may be issued on either a Fixed Price or Time and Materials basis.

(I) FIXED PRICE TASK ORDERS - Fixed price task orders shall include a schedule of deliverables and corresponding payment schedule. The Government shall pay the Contractor, upon submission of proper invoices or vouchers, the prices stipulated in the task orders for work delivered or rendered and accepted. Unless otherwise specified, payment shall be made upon acceptance of any portion of the work delivered or rendered for which a price is separately stated in the task order.

(II) TIME AND MATERIALS TASK ORDERS - Time and materials task orders shall specify price and hour ceilings and otherwise set any necessary special conditions for reimbursable materials use. Hours shall be secured by worker classification and corresponding fixed comprehensive rates of charge (loaded labor rates). Loaded labor rates shall be as specified in the Pricing Schedule.

(b) Initially, a Statement of Work for a proposed task order will be furnished to the Contractor as well as a request for a technical and cost proposal. The request will state whether the task order is to be fixed price or time and materials. Proposals shall be due 10 working days from the date of request. Technical and cost / price negotiations will be held if necessary. The labor categories, as defined in the Statement of Work and loaded labor rates as listed in the Pricing Schedule, shall be utilized by the Contractor when submitting proposals for task orders. The price for each task order shall be determined based on the estimated level of effort required to perform the work and the rates set forth in the Pricing Schedule.

(c) Each finalized task order will be signed by the Contracting Officer as a single party instrument, not requiring the Contractor's signature.

As a minimum, each task order will contain the following:

    1.   Date of the order;
    2.   Each task order will be numbered consecutively;
    3.   Contract number will be indicated on each task order;
    4.   The COR for each Task Order;
    5.   Period of performance will be indicated on each task order;

6.   The Statement of Work for the task shall be attached and the Contractor's proposal for the task shall be incorporated by reference. In case of a conflict between those, the former shall take precedence.

7.   Fixed Price task orders shall include the total firm fixed price, schedule of deliverables and payment schedule.

8.   Time and materials task orders shall include the total not-to-exceed amount, authorized hours of labor by labor classification and authorized dollar amounts for labor, materials and materials overhead.

(d) The contractor's acceptance of each task order shall be presumed by its commencement of work called for therein. If the Contractor finds any task order unacceptable for any reason, it shall contact the Contracting Officer within 24 hours after receipt of such task order and not begin the work required therein until the problem has been resolved.

(e) All task orders are subject to the terms and conditions of this contract. In the event of a conflict between a task order and this contract, the contract shall control.

(f) The Contractor shall not accept task orders which exceed the not-to-exceed amount of the contract.

(g) If at any time during the performance of a time and materials task order, the Contractor has reason to believe that the total price to the Government to complete the task order will be greater than the authorized amount, the Contractor shall notify the Contracting Officer, giving a revised estimate of the total price for performing the task and giving supporting reasons and documentation. If fewer hours or materials are required, only the hours and materials actually used shall be invoiced.

(h) Invoices for services ordered under task orders shall be listed by task order number and shall include for each task order:

- For fixed price task orders: Unit prices and quantities for each item for the period billed; the cumulative quantity of items or units for each deliverable; the cumulative amount billed for each item; the cumulative amount for the task order;

- For time and materials task orders: The number of billable hours by labor category and an itemization of other direct costs; the loaded labor rates; the cumulative quantity of hours for each labor category; the cumulative amount billed for each labor category; the cumulative amount for materials; and the cumulative amount for the task order. Contractor shall invoice only for labor hours actually worked. Contractor shall not invoice labor for holidays or holidays issued by executive order unless labor is ordered by the Government.

(i) Orders may be placed by electronic commerce methods. Orders may be placed via facsimile with telephone or written confirmation.

ED-05-PO-0908

(j) In the event any task is so urgent that time cannot be allowed to issue a task order in writing, the Contracting Officer may provide oral authorization for the Contractor to proceed. In such an event, the Contracting Officer will identify the contract number, the task order number, and state the cost. Oral authorization will be confirmed in writing through the issuance of a task order.

(k) In accordance with the incorporated clause 52.216-22 "Indefinite Quantity" or 52.216-21 "Requirements", the contract will be modified to extend the period of performance solely to allow completion of the task order if the task order was issued within the dates for issuing orders. An extension of the period of performance in accordance with 52.216-22 "Indefinite Quantity" or 52.216-21 "Requirements" will not extend the date for issuing orders shown in the incorporated clause 52.216-18, "Ordering".

(l) Materials use and reimbursement for task orders shall be governed by the incorporated clause entitled "Allowable Cost and Payment" at FAR 52.216-7.

C.3 ED 302-5b TASK ORDER PROCEDURE-WORK REQUESTS (MAY 1997)
Work Request Procedure (Task Orders) < $25,000)

Under general technical support tasks, work shall be performed through specific "Work Requests" that shall be made only by the Contracting Officer.

At a minimum, each specific Work Request shall contain the following:

1. A control number
2. A description of the specific work required in relation to the statement of work.
3. A list of the required deliverables.
4. An estimate of the number of hours for each personnel category.
5. Issue Date and Due Date.

The Contractor shall be allowed a maximum of 16 working hours to agree formally to a Work Request by signing and returning the Work Request document. The contractor shall submit a copy of each Work Request with their invoice to be paid for that request. All Work Requests are subject to the terms and conditions of the specific work request and the contract.

SECTION D – PACKAGING AND MARKING

ED 301-1 SHIPMENT AND MARKING (MARCH 1986)

A. The contract number shall be placed on or adjacent to all exterior mailing or shipping labels of deliverable items called for by the contract.

B. Ship deliverable items to:
U.S. Department of Education
550 12th Street, SW
7152
Washington, DC 20202

C. Mark deliverables for:
Victor Cairo

SECTION E – INSPECTION AND ACCEPTANCE

ED 304-1 INSPECTION AND ACCEPTANCE (FEBRUARY 1985)
Pursuant to the inspection clause, Section I, the Contracting Officer shall make final inspection and acceptance of all contracted items.

SECTION F – DELIVERIES OR PERFORMANCE

The period of performance shall be from May 1, 2005 to June 30, 2006, inclusive of all specified deliveries and/or task work.

SECTION G – CONTRACT ADMINISTRATION DATA

G.1 ED 306-5 CONTRACTING OFFICER'S REPRESENTATIVE (COR) (4/86)

A. The Contracting Officer's Representative (COR, a.k.a., COTR) is responsible for the technical aspects of the project, technical liaison with the Contractor, and any other responsibilities that are specified in the contract. These responsibilities include inspecting all deliverables, including reports, and recommending acceptance or rejection to the Contracting Officer.

B. Neither the COR nor any other government employee, except the Contracting Officer, is authorized to make any commitments or otherwise obligate the Department of Education or authorize any changes that affect the contract price, terms or conditions. Any contractor requests for changes shall be submitted in writing directly to the Contracting Officer or through the COR. No such changes shall be made without the written authorization of the Contracting Officer.

C. The name and address of the COR is:

Pandora Burge
U.S. Department of Education
550 12th Street, SW
9162
Washington, DC 20202
Telephone number - (202) 245-6425

The Department of Education at any time may change the COR, but notification of the change, including the name and address of the successor COR, shall be provided to the Contractor by the Contracting Officer in writing.

G.2 ED 306-8 CONTRACT ADMINISTRATOR (2/85)
(Note to Offerors. Offerors shall designate one individual as the administrator for this order and provide the information indicated below)

The following individual is designated by the Contractor for prompt contract administration.

NAME: Raymond Glass

TITLE: Sr. Contracts Administrator

ADDRESS: Federal Sector Group

7700 Hubble Drive

Lanham, MD 20706

TELEPHONE: (301) 794-2018

FAX: (301) 794-9553

E-MAIL ADDRESS: rglass3@csc.com

SECTION H –

H.1 EDAR 3452.243-70 KEY PERSONNEL (8/87)

The personnel designated in this contract as key personnel are considered to be essential to the work being performed. Prior to diverting any of the specified individuals to other programs, or otherwise substituting any other personnel for specified personnel, the contractor shall notify the Contracting Officer and the COR reasonably in advance and shall submit justification (including proposed substitutions) in sufficient detail to permit evaluation of the impact on the contract effort. No diversion or substitution shall be made without the written consent of the contracting officer; provided, that the contracting officer may ratify a diversion or substitution in writing and that ratification shall constitute the consent of the contracting officer required by the clause. The contract shall be modified to reflect the addition or deletion of key personnel.

H-2 ED 307-2 KEY PERSONNEL DESIGNATION (3/85)

In accordance with the clause entitled "Key Personnel", the following key personnel are considered to be essential to the work being performed:

David Hegland, Program Manager
TBD, Chief Technology Architect
Jerry Ryznar, Deputy Program Manager for Operations
George Altiery, Service Delivery Manager
Wayne Peters, Transition Manager
Mike Schutta, Transformation Manager
Christian Lunde, Project Manager
Dennis Watson, Quality Manger

H.3 INVOICING

The contractor shall submit the original and one (1) copy of invoices to the address below:

> U. S. Department of Education
> Contract and Purchasing Operations
> 550 12 Street, SW
> Room 7152
> Washington, DC 20202-4210
> ATTN: Victor Cairo

The final invoice for this contract shall be clearly marked "FINAL INVOICE" and shall be submitted within three (3) months of contract expiration.

H.4 ED 317-1 ACCOMMODATION / ACCESSIBILITY FOR THE DISABLED (10/99)

The Department of Education (ED) considers universal accessibility to information a priority for all its employees and external customers, including individuals with disabilities. Under Sections 504 and 508 of the Rehabilitation Act of 1973 (29 U.S.C. sections 794 and

794d, as amended), ED must ensure the accessibility of its programs and activities, specifically its obligation to acquire and use accessible electronic and information technology. ED maintains the manual, "Requirements for Accessible Software Design," to convey the accessibility needs of the Department to the developers and suppliers of computer applications. To comply with the provisions of this clause, the contractor may use the edition of the ED manual "Requirements for Accessible Software Design" in effect at the date of award of this contract or any more recent edition. A copy of the most recent edition of the manual may be found at www.ed.gov/fund/contract/apply/clibrary/software.html.

A. Software delivered to or developed for ED - Except as provided in paragraph B or C of this clause, all software delivered to or developed for ED, under this contract, for use by ED's employees or external customers must meet all the requirements of the ED manual "Requirements for Accessible Software Design." However, in accordance with paragraph C of this clause, the contracting officer may waive a particular requirement of the ED Manual, provided that ED's use of the software shall meet the requirements of Sections 504 and 508 of the Rehabilitation Act of 1973 (29 U.S.C. sections 794 and 794d, as amended).

B. Software enhanced or modified for ED - Any enhancements and other modifications, made under this contract to software for use by ED's employees or external customers, are subject to the requirements of paragraph A of this clause, regardless of where or how the software was first developed. Except as otherwise specified elsewhere in the contract schedule, the contractor is only required to ensure that enhancements or modifications (not other, preexisting features or components) of the software fully comply with the accessibility requirements of paragraph A. However, the contractor is encouraged point out any preexisting features or components that do not meet accessibility requirements and to suggest solutions to ensure the software complies.

C. Waiver of requirements – It is recognized that new technologies may provide solutions that are not envisioned in or consistent with the provisions of the manual "Requirements for Accessible Software Design." Also, compliance with certain requirements of the manual may not be feasible for the particular software required. In such extraordinary circumstances, the contracting officer may grant a waiver, in writing, to any requirement of the manual or of this clause if it furthers a public interest of ED and shall not significantly impair ED's ability to ensure accessibility of its programs and activities to all its employees and external customers, including individuals with disabilities. To request a waiver, the contractor shall notify the contracting officer in writing, listing the specific accessibility requirements that would not be met and explaining how the accessibility of a particular feature can be achieved by alternative means or why it is not feasible to make a feature of the software accessible.

D. Condition of payment – The contractor agrees that compliance with the provisions of this clause upon delivery of the software to ED is a condition of payment under this contract.

E. The contractor shall comply with Section 508 of the Rehabilitation Act of 1973, as amended 29 U.S.C. § 794 (d), the Federal Acquisition Regulation (FAR) 48 CFR Parts 2, 7, 10, 11, 12, and 39 [FAC 97-27; FAR Case 1999-607], and the Access Board's EIT Accessibility Standards at 36 CFR part 1194 as well the Department of Education Requirements for Accessible EIT Design, http://gcs.ed.gov/coninfo/clibrary/software.htm

In addition since the Access Board's EIT Accessibility Standards Subpart D – Information, Documentation, and Support, 1194.41 Information, documentation, and support requires that:

a) Product support documentation provided to end-users shall be made available in alternate formats upon request, at no additional charge

b) End-users shall have access to a description of the accessibility and compatibility features of products in alternate formats or alternate methods upon request, at no additional charge; and

c) Support services for products shall accommodate the communication needs of end-users with disabilities, the basic deliverable requirement in each PWS shall contain the requirement that the contractor deliver, in addition to any hardcopy, all documentation and manuals in an electronic format compatible with the Assistive Technology currently in use at the Department of Education. This shall provide the Department the capability to reproduce the documentation in an accessible format as needed.

F. In addition to required printed hard copy, all printed and/or multimedia deliverables shall be delivered in an electronic format compatible with the Assistive Technology currently in use by the Department of Education to enable accessibility by the disabled. Multimedia deliverables shall meet the federal accessibility requirement as defined in the Access Boards' EIT Accessibility Standards at 36 CFR part 1194 Subpart B -- Technical Standards, 1194.23 Telecommunications products.

H.5 SECURITY CLEARANCE AND USER ID REQUESTS

The offeror shall provide only fully qualified personnel for the work performed under this contract and they must also have the appropriate Department 5c or 6c Security investigation clearance prior to being eligible for billing the government. According to Department policy (OM: 5-101, Sec III (Policy), part 4), every effort must be made to minimize and where possible eliminate, the number of non-U.S. Citizens employed in High Risk level positions; this applies to all contractors and sub-contractors.   However, the Department recognizes there is, from time to time, a compelling reason that may exist to grant a non-U.S. Citizen High Risk access. In those circumstances where a non-U.S. Citizen possesses a unique or unusual skill or expertise urgently needed by the Department, but a suitable U.S. Citizen is not available, a non-U.S. Citizen may be assigned to a High Risk level position provided: they are Lawful Permanent Residents of the United States; they have resided continuously in the United States for a minimum of three (3) years; the head of the Principal Office, or his/her designee that owns the system / information / network approves the assignment in writing, and the written

ED-05-PO-0908

approval is filed with the Contracting Officer before requesting a preliminary screening and/or investigation.

Contractor staff proposed to perform work under this contract shall be subject to ED investigation criteria and shall complete ED's security training requirements[2] prior to receiving access to the Department of Education's network. Contractor staff working without a final clearance does so on a conditional basis while obtaining the required clearance. The ED investigation includes, at a minimum, the following items:
- Investigation of criminal record
- Reference checks
- Check for defaulted student loans
- Security clearances

OM:5-101 (http://connected1.ed.gov/po/om/executive/print/acs_om_5_101.doc) defines security levels. ED assigns the security level appropriate for each labor category, commensurate with the duties and system access of the position. The security level also dictates when new or replacement staff may begin to perform work under this contract relative to the submission of the security clearance paperwork. The security levels and work rules include:
- **High Risk (Level 6C)** - An employee cannot assume high-risk positional duties until the security investigation is completed and approved by ED. (**An interim 6C clearance is available, upon approval by the OM Personnel Security Office, this can normally be effected within 4 days**). Employees selected for these positions can work in a lower-level position until the clearance is approved, see below.
- **Moderate Risk (Level 5C)** - An employee can start working moderate risk positional duties upon submission of the security clearance paperwork to the OCIO CSO through the COR.

  Low Risk (Level 1C) - An employee can start working low risk positional duties upon submission of the security clearance paperwork to the OCIO CSO through the COR." **It is anticipated that no Level 1C's will be accessing our Network**

The contractor shall:
- Ensure, at the Project Manager level, that the security clearance, User ID paperwork and EDNet Security Awareness training required by ED is accurately and properly completed in full and submitted to ED no later than with the submission of a resume for additional or replacement personnel
- Obtain its supply of security clearance forms directly from the OCIO CSO
- Reproduce as needed the ED / CCF User ID request form (88-01) for this specific project
- Remove any individual from their position for whom ED disapproves and withdraws their clearance and immediately revoke their access to all ED systems.

Clearance Submission Guidelines

---

[2] Described in the Handbook for Information Technology Security Policy.
ED-05-PO-0908

The contractor shall submit security paperwork for any position requiring an ED clearance based on the <u>Handbook for Information Technology Security Policy</u> and the guidelines contained herein. The security matrix below, details the forms that contractor staff shall complete to request processing of a security clearance.

Clearance Forms Required for Positions

Form	Title	Copies	High Risk	Moderate Risk	Low Risk
SF-306	Federal Employment Form (as used for background check, Application for Federal Employment (Rev. 6-88); complete items 6, 17, 19, 25~28, 36, 38~44, 45 if applicable	2	X	X	X
SF-85P	Questionnaire for Public Trust Positions (Rev. Sept 1995)	2	X	X	
FD-258	Fingerprint Card	1 original	X	X	X
SF-85	Questionnaire for Non-Sensitive Positions (Rev. Sept 1995)	2			X

In the submission of security clearance paperwork, the contractor shall:

    a. Assure the clearance level sought for the employee is based upon the criteria established by ED

    b. Assure that all contractor staff without a clearance complete all required forms, as detailed in the Matrix above

    c. Assure that all contractor staff with current or previous clearances complete additional forms as required to meet all requirements

    d. For employees with current or previous clearances requiring no additional paperwork, complete a memo, on company letterhead with an authorized signature, with the following:
- Full name
- Date and place of birth
- Social Security Number
- Level of security clearance
- Employer Name
- Date of investigation (at time of investigation)
- Agency completing the investigation
- Contract Number

    e. For employees with current or previous clearances requiring additional paperwork, forward the completed additional paperwork to the contractor's Project Manager. This primarily concerns upgrading to a higher security level.

    f. Ensure that the proper forms are accurate and complete before forwarding the forms in sealed envelopes, through the COR, to the OCIO CSO.

g. Notify the employee's manager of the security investigation results.

h. Remove the employee from performing work under this contract in the event of a clearance denial and revoke all User IDs.

H.6 REMOVAL FROM PROJECT ACCESS
When employees are removed from positions, for any reason, the contractor shall:
- Revoke all access authorizations
- Retrieve all specific keys and badges
- Change the combinations on all locks to which the employee had access
- Review the employee's obligations to the organization
- Notify appropriate ED security officials of the removal action.

For all access terminations, the contractor shall:
- Follow the Checklist for Employee Termination
- Assure that the departing employee either completes all assigned tasks or briefs the replacement on the requirements and status of ongoing tasks
- Determine the employee's access termination date
- Immediately notify the assigned ADP Systems Manager(s) if access termination is for cause and request an immediate revocation of access
- Complete the Manager's Checklist for Employee Termination and forward the checklist to the Project Manager
- Review with employee their obligation to protect related data
- Assure that the employee completes the Access Termination Statement.

The Project Manager shall:
- Notify ED of the access termination action on the employee
- Notify the assigned ADP Systems Managers of the access termination date.

H.7 ED 307-13 DEPARTMENT SECURITY REQUIREMENTS (3/05)[3]
The Contractor and its subcontractors shall comply with Department Security policy requirements as set forth in:

A. The Statement of Work of this contract;
B. The Privacy Act of 1974 (P.L. 93-579, U.S.C. 552a);
C. The U. S. Department of Education, Handbook OCIO-1, Handbook for Information Technology Security Policy (October 2003);
D. The U.S. Department of Education, ACS Directive OM:5-101, Contractor Employee Personnel Security Screenings (March 2005).

---

[3] A complete list of all security information is located at: http://www.ed.gov/about/offices/list/ocio/legislation.html; the aforementioned laws and guidelines govern the operation of the Office of the Chief Information Officer.

The Contractor may request copies of the above referenced documents by contacting the Contract Specialist at telephone number (202) 245-6199 or via e-mail at Victor.Cairo@ED.GOV.

The Contractor shall include this provision in any subcontract(s) awarded pursuant to this contract.

(END OF CLAUSE)

H.8 ED 307-15 WITHHOLDING OF CONTRACT PAYMENTS – SECURITY (4/05)
Notwithstanding any other payment provisions of this contract, failure of the contractor to submit required forms, responses or reports when due; failure to perform or deliver required work, supplies, or services; or, failure to meet any of the requirements of the contract, to include all requirements as specified in Clause 307-13 Department Security Requirements (March 2005) ,will result in the withholding of payments under this contract in such amounts as the contracting officer deems appropriate, unless the failure arises out of causes beyond the control, and without the fault of negligence, of the contractor, as defined by the clause entitled "Excusable Delays or Default", as applicable. The Government shall promptly notify the contractor of its intention to withhold payment of any invoice or voucher submitted. Payment will be withheld until the failure is cured, a new delivery schedule is agreed upon, or payment is made as part of a termination settlement.

(END OF CLAUSE)

H.9 EDAR 3452.215-33 ORDER OF PRECEDENCE (08/87)
Any inconsistency in this contract shall be resolved by giving precedence in the following order:
 (a) The Schedule to include GSA Schedule Contract #GS-35F-4381G
 (excluding the work statement or specification)
 (b)The contract clauses (Section I)
 (c) Any incorporated documents,exhibits, or attachment,excluding the work statement or specifications and the contractor's proposal,representations, and certifications,
 (d) The work statement or specifications, and
 (e) The contractor's proposal,as amended, including representations and certifications.

(END OF CLAUSE)

H.10 GOVERNMENT FURNISHED EQUIPMENT AND INFORMATION
ED will furnish each individual assigned to tasks under the EDNet contract proper identification (access badge) to allow entry to and departure from Government facilities. ED will furnish workspace and equipment (personal computers, telephones, miscellaneous office supplies) suitable for the performance of EDNet tasks to on-government-site contractor personnel. ED will not be responsible for providing the contractor with cellular phones and Blackberry devices, nor paying for those services.

ED will provide the contractor with all existing engineering drawings and configuration documentation as Government-furnished information (GFI). ED will retain ownership of all GFI provided to the contractor, and will assume ownership of all documentation and deliverables submitted to ED by the contractor in performance of EDNet tasks.

H.11 52.217-8, OPTION TO EXTEND SERVICES (AUG 1989)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed six (6) months. The Contracting Officer may exercise the option by written notice to the Contractor within the period specified in the Schedule.

(Note: Notice shall be given 30 days prior to contract completion.)

H.12 52.217-9, OPTION TO EXTEND THE TERM OF THE CONTRACT (MAR 2000)

(a) The Government may extend the term of this contract by written notice to the Contractor within 30 days of contract expiration; provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 60 days before the contract expires. The preliminary notice does not commit the Government to an extension.

(b) If the Government exercises this option, the extended contract shall be considered to include this option clause.

(c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 128 months

(d) Option Period 1: July 1, 2006 - June 30, 2007
Option Period 2: July 1, 2007 - June 30, 2008

H.13 FAR 52.219-8 UTILIZATION OF SMALL BUSINESS CONCERNS (OCT 2000)

(a) It is the policy of the United States that small business concerns, veteran-owned small business concerns, service-disabled veteran-owned small business concerns, HUBZone small business concerns, small disadvantaged business concerns, and women-owned small business concerns shall have the maximum practicable opportunity to participate in performing contracts let by any Federal agency, including contracts and subcontracts for subsystems, assemblies, components, and related services for major systems. It is further the policy of the United States that its prime contractors establish procedures to ensure the timely payment of amounts due pursuant to the terms of their subcontracts with small business concerns, veteran-owned small business concerns, service-disabled veteran-owned small business concerns, HUBZone small business concerns, small disadvantaged business concerns, and women-owned small business concerns.

(b) The Contractor hereby agrees to carry out this policy in the awarding of subcontracts to the fullest extent consistent with efficient contract performance. The Contractor further agrees to cooperate in any studies or surveys as may be

conducted by the United States Small Business Administration or the awarding agency of the United States as may be necessary to determine the extent of the Contractor's compliance with this clause.

(c) Definitions. As used in this contract--

A. "HUBZone small business concern" means a small business concern that

B. appears on the List of Qualified HUBZone Small Business Concerns maintained

C. by the Small Business Administration.

D. "Service-disabled veteran-owned small business concern"--

    (1) Means a small business concern--

        (i)   Not less than 51 percent of which is owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more service-disabled veterans; and

        (ii)   The management and daily business operations of which are controlled by one or more service-disabled veterans or, in the case of a veteran with permanent and severe disability, the spouse or permanent caregiver of such veteran.

    (2) Service-disabled veteran means a veteran, as defined in 38 U.S.C. 101(2), with a disability that is service-connected, as defined in 38 U.S.C. 101(16).

E. "Small business concern" means a small business as defined pursuant to Section 3 of the Small Business Act and relevant regulations promulgated pursuant thereto.

F. "Small disadvantaged business concern" means a small business concern that represents, as part of its offer that--

    (1) It has received certification as a small disadvantaged business concern consistent with 13 CFR Part 124, Subpart B;

    (2) No material change in disadvantaged ownership and control has occurred since its certification;

    (3) Where the concern is owned by one or more individuals, the net worth of each individual upon whom the certification is based does not exceed $750,000 after taking into account the applicable exclusions set forth at 13 CFR 124.104(c)(2); and

    (4) It is identified, on the date of its representation, as a certified small disadvantaged business in the database maintained by the Small Business Administration (PRO-Net).

G. "Veteran-owned small business concern" means a small business concern--

    (1) Not less than 51 percent of which is owned by one or more veterans (as defined at 38 U.S.C. 101(2)) or, in the case of any publicly owned business, not less than 51 percent of the stock of which is owned by one or more veterans; and

    (2) The management and daily business operations of which are controlled by one or more veterans.

H. "Women-owned small business concern" means a small business concern--

(1) That is at least 51 percent owned by one or more women, or, in the case of any publicly owned business, at least 51 percent of the stock of which is owned by one or more women; and

(2) Whose management and daily business operations are controlled by one or more women.

(d) Contractors acting in good faith may rely on written representations by their subcontractors regarding their status as a small business concern, a veteran-owned small business concern, a service-disabled veteran-owned small business concern, a HUBZone small business concern, a small disadvantaged business concern, or a women-owned small business concern.

H.14 AWARD TERM PROVISIONS

This is a performance-based contract that directly links the contractor's performance in achieving SLAs, performance standards and acceptable quality levels with the opportunity to obtain additional performance periods (award terms).

The performance evaluation process shall operate as follows:

o An award term determination is comprised of two (2) successive six (6) month evaluations that are averaged to obtain an annual score.

o For the award term decisions beginning at the conclusion of option period one, the contractor must receive a rating of "Superior" to earn additional award term periods.

o The Performance Evaluation Board (PEB) may elect to recommend an additional award term for performance less than Superior provided that the performance during the current evaluation period is Satisfactory AND cumulative ratings to date (including the current evaluation period) would result in an average rating of Superior.

o No official award term determination shall be made during the contract's base period. The contractor's performance during the period shall be evaluated and the results furnished to the contractor.

o No official SLA disincentive determinations shall be made during the contract's base period. The contractor's performance during the period shall be evaluated and the results furnished to the contractor.

o Failure to earn an award term at the end of any performance evaluation period eliminates eligibility for award of future award terms.

o Although the ability to be awarded additional performance periods ends at the conclusion of Award Term 5, the contractor's performance shall continue to be evaluated and rated. Those results shall be documented in past performance reports and considered by ED in future procurement decisions.

o Award of all Option Periods and Award Terms is subject to the availability of sufficient funds.

The award team period summary is as follows:

Contract Period	Evaluation Period	Superior Performance During the Evaluation Period Results in Award of the Following Additional Performance Period
Transition Period	May 1, 2005 - June 30, 2005	Not applicable
Base Period	July 1, 2005 - June 30, 2006	Not applicable (dry run evaluation)
Option Period One	July 1, 2006 - June 30, 2007	July 1, 2008- June 30, 2009
Option Period Two	July 1, 2007 - June 30, 2008	July 1, 2009 - June 30, 2010
Award Term 1	July 1, 2008 - June 30, 2009	July 1, 2010 - June 30, 2011
Award Term 2	July 1, 2009 - June 30, 2010	July 1, 2011 - June 30, 2012
Award Term 3	July 1, 2010 - June 30, 2011	July 1, 2012 - June 30, 2013
Award Term 4	July 1, 2011 - June 30, 2012	July 1, 2013 - June 30, 2014
Award Term 5	July 1, 2012 - June 30, 2013	July 1, 2014 - June 30, 2015
Award Term 6	July 1, 2013 - June 30, 2014	None
Award Term 7	July 1, 2014 - June 30, 2015	None

1. Performance Evaluation Board:
   ED shall create a Performance Evaluation Board (PEB) comprised of selected managers and the COR. The PEB shall evaluate the Contractor's performance under this contract and develop a numerical rating for that performance. That rating shall be taken into account as part of ED's decision to award additional performance periods. The COR shall be the evaluation coordinator and submit observation reports and other performance data to the PEB.

2. Performance Evaluation Process:
   The contractor shall provide a performance evaluation report reflecting progress on all SLAs currently in effect. The performance evaluation process shall contain the following steps:
   a. Performance shall be rated at six (6) month intervals throughout the life of the contract.

   b. The annual rating for each evaluation period shall be comprised of an average of the two six (6) month ratings.

   c. An annual performance-rating plan shall be sent to the contractor thirty (30) days in advance of the beginning of the next annual performance period. The contractor may submit comments concerning the plan within fifteen (15) days of its receipt. If ED chooses to revise the plan on the basis of the contractor's comments, revisions shall be sent to the contractor in advance of the performance period.

   d. At the conclusion of the six (6) month rating period, COR shall collect performance evaluation results from appropriate ED staff and submit the

necessary information to the PEB for final rating. The PEB shall also consider the contractor's self-assessment of performance against the rating plan, provided it is received by COR by the 15th of the month following completion of the rating period.

e. The PEB shall complete each six (6) month rating process no later than one (1) month after the rating period ends and submit the rating to the Chief Information Officer (CIO) or designee for review and approval.

f. Upon completion of the second six (6) month rating period, the CIO or designee shall review and approve the average ratings that shall determine award term eligibility.

g. If the CIO or designee-approved rating is high enough to rate an award term, the documentation shall be forwarded to the Contracting Officer who shall execute an appropriate modification to the contract. In all other cases, the CO shall submit the rating results to the contractor.

For example, each contract performance year consists of two (2) six (6) month performance periods in which SLA data is collected and reported to PEB. The PEB collects data from key customers, customers (end users) and IT management, as discussed in Section H.14 Award Term Provisions, point 4 The Annual Performance Rating Plan (AARP), subsection c (the following section). This score is added to the SLA score and a total computed. Each six (6) month total from both of the years performance periods are average to arrive at a yearly score which is applied to the Overall Ratings Table (see Section H.14 Award Term Provisions, point 4 The Annual Performance Rating Plan (AARP), subsection d).

Rating Category	Measurement Period 1	Measurement Period 2	Average
SLAs	45 of 50	47 of 50	46 of 50
Small Business Goals	5 of 5	5 of 5	5 of 5
Exceeded Small Business Goals	0 of 2	2 of 2	1 of 2
Major Continuous Improvement Projects	8 of 8	6 of 8	7 of 8
Customer Satisfaction (Manager Survey)	5 of 5	4 of 5	4.5 of 5
Customer Satisfaction (Independent Survey)[4]	20 of 20	15 of 20	17.5 of 20
OCIO Senior Management	8 of 10	9 of 10	8.5 of 10
Total	91 of 100	88 of 100	89.5 of 100

3. The Annual Performance Rating Plan (APRP):

---

[4] If the Independent Customer Satisfaction Survey occurs annually, the score from the first measurement period shall be used in the second measurement period. For example if 20 points were scored in the first measurement period, the same score of 20 points shall be used in the second measurement period.

The APRP may be adjusted from year to year to emphasize / de-emphasize various components of contractor performance. However, each plan shall meet the following conditions:

a. The APRP shall provide for assigning a maximum total of one hundred (100) points for the contractor's performance during the six (6) month evaluation period.

b. Fifty (50) of the one hundred (100) points shall measure the contractor's performance in meeting selected objective SLAs from Section IV, Performance Standards and Acceptable Quality Levels, of the PWS:

> - This APRP section shall detail **the points to be deducted (disincentives)** from the overall fifty (50) points for each failure to meet the designated acceptable quality levels or subcontracting goals.

> - Contractor is to assign points to be deducted to the SLAs listed in Section IV. Once this is agreed to by ED, this shall be the scoring system that shall be used in the APRP for this set of fifty (50) points.

c. The remaining fifty (50) points shall be scored by the PEB based upon input from key customers, end users and IT management. This portion of the APRP will:

> - Identify the rating categories, their components, and the points assigned to each category.

> - Initial rating categories include (but are not limited to the following:

>> I. Small business goals contained in the contractor's approved subcontracting plan – Total Seven (7) Points (Reporting Requirements must be met without fail for the service provider to be eligible to earn these points.)
>>> • Met goals five (5) points
>>> • Exceeded goals two (2) points

>> II. Major Continuous Improvement Projects – Total Eight (8) Points
>>> • Active participation with verifiable productivity improvements of ED employees five (5) points
>>> • Refinement of SLAs from measurement period to measurement period, three (3) points

>> III. Customer Satisfaction – Total Twenty-five (25) Points
>>> • Touch Survey zero (0) points

- Managers' Survey five (5) points[5]
- Independent Customer Satisfaction Survey twenty (20) points
  - If no Customer Satisfaction Survey occurs during the measurement period (e.g., annual frequency), the most recent, Customer Satisfaction Survey will be reused for that measurement period see Section IV – Customer Satisfaction (Independent Survey) of the PWS.
  - Points shall be awarded on a sliding scale, see Section IV – Customer Satisfaction (Independent Survey) of the PWS.

IV. OCIO Senior Management - Total Ten (10) Points
- Management Discretion ten (10) points[6]

d. Point scores from both areas shall be combined and an overall rating developed as follows:

---

[5]Total managers survey score for the measurement period shall be averaged over six (6) months (i.e. sum of all managers scores/number of measurement periods). See the Manager Survey SLA for more details (Section IV of the Performance Work Statement).

[6] OCIO Senior Management point assignment shall take into consideration CMMI level improvements.

Overall Rating Table

Rating	Point Range	Description
Unacceptable	0-49	Performance of 49 and below is indicative of serious mismanagement, negligence and/or incompetence. Continued performance at this level will require Education to consider terminating the order for default. • **Not eligible for award**
Substandard	50-69	Performance between 50 and 69 requires the Contractor to establish a deficiency correction plan and schedule to take the necessary corrective actions. Implementation of the plan and schedule will be tracked by the COR and Contracting Officer. • **Not eligible for award**
Satisfactory	70-84	Performance between 70 and 84 is satisfactory with 84points being the expressed level of satisfactory performance that can be expected from a good Contractor. • **Not eligible for award**
Superior	85-93	Performance is significantly above satisfactory in all service areas. • **THIS IS THE MINIMUM TARGET LEVEL FOR CONTRACTOR PERFORMANCE (Eligible for Award Term One through Award Term Five)**
Outstanding	94-100	All areas of performance are superior and there are significant indications of creativity, ingenuity, initiative and/or excellent performance under adverse conditions. • **Eligible for award for Award Term One through Award Term Five**

e. Review Process:

The contractor may request an internal review of an unfavorable award term determination. The request shall be submitted in writing to the Contracting Officer within fifteen (15) days of notification of the award term decision. Contractor disagreements with the subjective ratings assigned by the PEB are not subject to review. The Contracting Officer shall conduct a review and issue a final decision concerning the matter.

H.15 SERVICE LEVEL AGREEMENT MODIFICATION PROCESS

Purpose and Intent

It is recognized that, over the course of the contract, there are innovation factors and process improvements that will enable the Service Provider (SP) to provide incrementally better services to the Department of Education (ED or the Department) over time. As a result, the Department seeks to benefit from standard innovations, application of best practices, and process changes that can be leveraged from the provider's experience into the ED environment.

ED recognizes that not all performance standards are ideally suited for continuous improvement, and that there are a myriad of external factors that will cause the importance of individual service levels and performance standards to vary over time. It is also recognized that this language is to read in consonance with other terms and

ED-05-PO-0908

scope (e.g. Benchmarking, Balanced Scorecard, Governance, etc) and intended to be a collaborative process between ED and the Service Provider.

Subsequent to Transition, both ED and the Service Provider will convene periodically to establish which service levels of the 43 performance standards will be subject to continuous improvement, or change. ED or the service provider may periodically recommend changes to specific service measurements that are subject to this term and condition and, as part of the Balanced Scorecard Measure and Changes Clause, introduce new candidates for measure.

For purposes of clarification and example, measurements may change for reasons similar to the following:

✓ As data is gathered and the provider reports findings and analysis, both ED and the Service Provider may determine that a performance standard is not as meaningful as originally thought and should be changed or eliminated.

✓ As data is gathered and the provider reports on findings and analysis, both ED and the Service Provider may determine that the act of measuring a particular performance standard is a non-value added step, and the performance measure should be changed or eliminated.

✓ Results of Customer Satisfaction Surveys yield insight into more significant measures of mission and customer relationship management, and measures are added or emphasis on select performance standards will increase.

✓ Data and analysis yield information that indicates revising the frequency for different measures of performance.

✓ Changes in technologies or practices require introduction of new measures not previously used.

As such, the Parties agree to adopt the concept of continuous improvement and that the Performance Standards may be modified during the term of this Agreement. However, ED acknowledges that some changes may impact cost and introduce variability. In order to minimize these, ED will incorporate service level changes (see "Supplemental Process" and diagram below) as part of the governance and change management process. This process shall address the need for changes, implications, prioritization, and will communicate changes based on reasons similar to those cited above. The Service Provider shall participate in the process and will be expected to provide insight on impact, priorities, Return on Investment (ROI), and other salient points.

Notwithstanding, Service Levels may be added, deleted or changed during the term of the contract to ensure that the Service Levels accurately reflect the requirements of the Department of Education. Changes to service levels may also be made to reflect

changes within ED's IT environment, or as a result of changes to the technologies used to support the Department.

Assumptions

Assumption 1: The Parties acknowledge that achievement of Service Levels set at 100% cannot be improved.

Assumption 2: The incremental rate of change, at which a service level can be improved, slows as 100% of the SLA is approached.

Service Level Management Process

The high-level process for introducing new service measurements, or for changing current service measurements is outlined below. As described above, the purpose of this process is to evaluate the meaningfulness and effectiveness of then current, or future measures—so as to:

- ✓ Ensure that measures remain aligned with ED's mission and desire to increase customer satisfaction
- ✓ Balance the cost and effort of measuring selected areas of performance with results
- ✓ Retire or add measures as may be determined appropriate based on an analysis

Throughout the contract life the parties may determine to evaluate changes to existing measures, or add new measures. These will be termed "experimental measures" and will follow the steps below:

1. Both ED and the Service Provider will determine a starting period for measurement and determine the appropriate systems and personnel responsible for performing the experimental measures.
2. Formal meetings will be conducted between ED and the Service Provider. Both ED and the Service Provider can propose service level candidates that may need to be adjusted.
3. For purposes of Test and Evaluation (T&E), the Service Provider will perform the experimental measures for two consecutive quarters from the agreed starting period. [Note: T&E shall run in parallel with any other existing measures and does not relieve the contractor from responsibility for those service requirements].
4. The Service Provider will provide results of the experimental measures. The frequency of measures and reporting, of such, will be agreed to by both parties, but will follow customary, or industry standard for such measures.

5. At the end of the test and evaluation period the Service Provider shall provide an Impact Analysis showing the impact, benefits and cost of changing or adding measures. At a minimum, the Service Provider shall provide impact on personnel (e.g. skills, competencies needed), systems (e.g. investment needed for rollout), and business case (e.g. ROI).

Notional SLA Improvement Measurement Process

Q1	Q2	Q3	Q4...

Decision Point

Experimental Measures

Contracted Measures

Old, Changed, New Measures
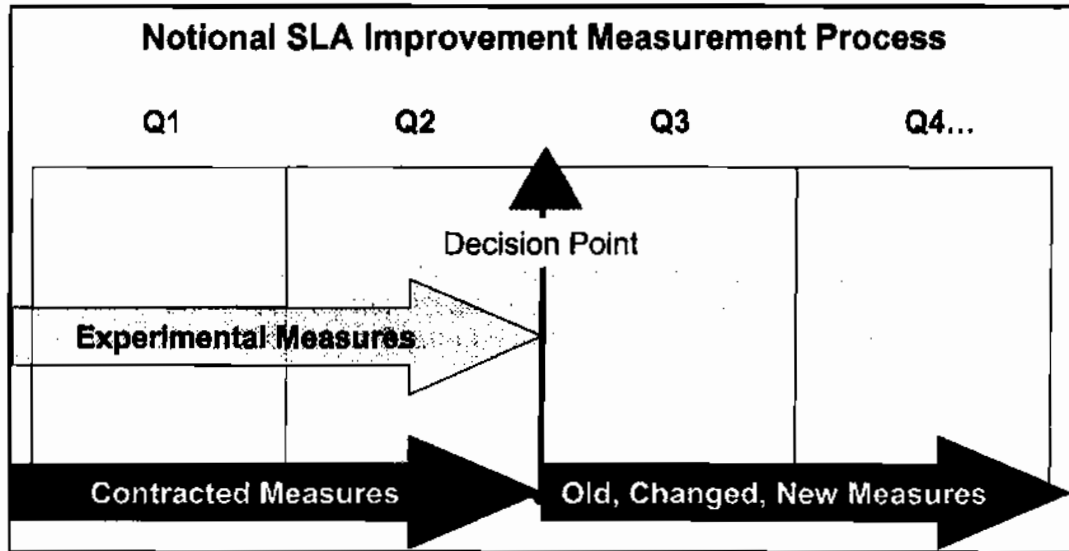
Example: ED and Service Provider meet and agree that a new measure would increase customer satisfaction by providing greater control over work management.

ED and the Service Provider agree on the parameters and means for conducting experimental measures. At the end of the second consecutive quarter from the start of the experimental measure, the Service Provider shall provide an Impact Analysis.

ED will review the analysis and provide a determination, which may include further analysis or experimentation. If the determination is made to proceed, the experimental measures shall replace old measures, reflect changes / augmentations to remaining measures, or add new measures. Any such change will be accomplished via formal contract modification.

Performance Monitoring Tools

It is not anticipated that changes in the monitoring tools will drive changes in Service Levels; rather, the need to collect and accurately reflect the performance data should drive the development or change in performance monitoring tools.

The Service Provider shall measure its performance against the Service Levels on a continuous, real time basis (not using merely a sampling of its performance) and report on such performance on a calendar-month basis.

For each performance standard the Service Provider will provide a report in accordance Section IV of the PWS. The Service Provider may also provide access to information that may include real-time information for the Dashboard application. At ED's discretion additional Ad-Hoc reports may be requested from the Service Provider.

Exclusions

Not all performance standards contained in section IV of the PWS are appropriate for inclusion in the continuous improvement process. Examples of performance standards that may not be appropriate for continuous improvement include time and material tasks, installations, moves, adds, changes, customer satisfaction surveys.

Both ED and the Service Provider shall identify and agree on the initial set of excluded services that shall be excluded from the service level modification process. If agreement cannot be reached, ED and the Contractor may engage a mutually agreed upon 3rd party to review the list of exclusions and the provider rationale. Notwithstanding, the contracting officer shall have final determination as to those items that may or may not be subjected to the process.

H.16 SUBCONTRACTOR REPORTING
Contractor must report on its subcontracting plan progress monthly. The monthly report should be the equivalent of the material contained in a SF 294 with the goal and actual basis being on the total contract value. The report to the contracting officer is due the tenth (10th) business day of each month. (i) The failure of the Contractor or subcontractor to comply in good faith with—

(1) The clause of this contract entitled "Utilization Of Small Business Concerns;" or

(2) An approved plan required by this clause, shall be a material breach of the contract.

H.17 EARNED VALUE MANAGEMENT SYSTEM
The Contractor shall use an Earned Value Management System and process for Category B and Category C (time and materials project-based) work in accordance with OMB, ANSI / EIA-748-A and other applicable regulations throughout the life of the contract. This process shall result in monthly reports by project reflecting expenditures for the Budget Cost of Work Performed, Actual Cost of Work Performed and Actual Cost of Work Scheduled. The Contractor shall provide a plan to implement an Earned Value Management System before award and must implement the system within 90 days after award.

H.18 REDACTED PROPOSALS (DECEMBER 1998)
The contractor shall provide a redacted copy of its successful technical proposal to the Contracting Officer within five (5) days after contract award. The redacted proposal shall be suitable for release by the Government under a Freedom of Information Act (FOIA) request. The redacted proposal shall be submitted in an electronic format that is readable by Microsoft Office applications.

ED-05-PO-0908

SECTION I

I.1 CLAUSES INCORPORATED BY REFERENCE
FAR 52.252-2 (FEB 1998)

I.2 SOCIECONOMIC GOALS
FAR 52.219-8
FAR 52.219-9, Alternate II
FAR 52.219-16

ED 306-4, SUBCONTRACTING REPORTS--SMALL BUSINESS AND SMALL DISADVANTAGED BUSINESS CONCERNS(APRIL 1984)
The Contractor shall submit a report for subcontracting under this particular contract and a summary report on subcontracts in all contracts between the Contractor and the Department of Education which contain subcontract goals for awards to small business and small disadvantaged business concerns. The Contractor shall submit subcontracting reports on Standard Forms 294 and 295. The reports shall be submitted semi-annually and annually respectively in accordance with the General Instructions on the reverse side of the forms.

Copies (1 Original & 1 Copy) of these reports shall be delivered to:
U. S. Department of Education
Contract and Purchasing Operations
550 12 Street, SW
Room 7152
Washington, DC 20202-4210
ATTN: Victor Cairo

1

I.3 SUBCONTRACTS
52.244-2, SUBCONTRACTS (AUG 1998)--ALTERNATE II (AUG 1998)
(a) "Definitions." As used in this clause-- "Approved purchasing system" means a Contractor's purchasing system that has been reviewed and approved in accordance with Part 44 of the Federal Acquisition Regulation (FAR).

"Consent to subcontract" means the Contracting Officer's written consent for the Contractor to enter into a particular subcontract.

"Subcontract" means any contract, as defined in FAR Subpart 2.1, entered into by a subcontractor to furnish supplies or services for performance of the prime contract or a subcontract. It includes, but is not limited to, purchase orders, and changes and modifications to purchase orders.

(b) This clause does not apply to subcontracts for special test equipment when the contract contains the clause at FAR 52.245-18, Special Test Equipment.

ED-05-PO-0908

(c) When this clause is included in a fixed-price type contract, consent to subcontract is required only on unpriced contract actions (including unpriced modifications or unpriced delivery orders), and only if required in accordance with paragraph (d) or (e) of this clause.

(d) If the Contractor does not have an approved purchasing system, consent to subcontract is required for any subcontract that--

(1) Is of the cost-reimbursement, time-and-materials, or labor-hour type; or

(2) Is fixed-price and exceeds--

(i) For a contract awarded by the Department of Defense, the Coast Guard, or the National Aeronautics and Space Administration, the greater of the simplified acquisition threshold or 5 percent of the total estimated cost of the contract; or

(ii) For a contract awarded by a civilian agency other than the Coast Guard and the National Aeronautics and Space Administration, either the simplified acquisition threshold or 5 percent of the total estimated cost of the contract.

(e) If the Contractor has an approved purchasing system, the Contractor nevertheless shall obtain the Contracting Officer's written consent before placing the following subcontracts:

_____

_____

_____

(f)

(1) The Contractor shall notify the Contracting Officer reasonably in advance of placing any subcontract or modification thereof for which consent is required under paragraph (c), (d), or (e) of this clause, including the following information:

(i) A description of the supplies or services to be subcontracted.

(ii) Identification of the type of subcontract to be used.

(iii) Identification of the proposed subcontractor.

(iv) The proposed subcontract price.

(v) The subcontractor's current, complete, and accurate cost or pricing data and Certificate of Current Cost or Pricing Data, if required by other contract provisions.

(vi) The subcontractor's Disclosure Statement or Certificate relating to Cost Accounting Standards when such data are required by other provisions of this contract.

(vii) A negotiation memorandum reflecting--

(A) The principal elements of the subcontract price negotiations;

(B) The most significant considerations controlling establishment of initial or revised prices;

(C) The reason cost or pricing data were or were not required;

(D) The extent, if any, to which the Contractor did not rely on the subcontractor's cost or pricing data in determining the price objective and in negotiating the final price;

(E) The extent to which it was recognized in the negotiation that the subcontractor's cost or pricing data were not accurate, complete, or current; the action taken by the Contractor and the subcontractor; and the effect of any such defective data on the total price negotiated;

(F) The reasons for any significant difference between the Contractor's price objective and the price negotiated; and

(G) A complete explanation of the incentive fee or profit plan when incentives are used. The explanation shall identify each critical performance element, management decisions used to quantify each incentive element, reasons for the incentives, and a summary of all trade-off possibilities considered.

(2) If the Contractor has an approved purchasing system and consent is not required under paragraph (c), (d), or (e) of this clause, the Contractor nevertheless shall notify the Contracting Officer reasonably in advance of entering into any

(i) cost-plus-fixed-fee subcontract, or

(ii) fixed-price subcontract that exceeds either the simplified acquisition threshold or 5 percent of the total estimated cost of this contract. The notification shall include the information required by paragraphs (f)(1)(i) through (f)(1)(iv) of this clause.

(g) Unless the consent or approval specifically provides otherwise, neither consent by the Contracting Officer to any subcontract nor approval of the Contractor's purchasing system shall constitute a determination--

(1) Of the acceptability of any subcontract terms or conditions;

(2) Of the allowability of any cost under this contract; or

(3) To relieve the Contractor of any responsibility for performing this contract.

(h) No subcontract or modification thereof placed under this contract shall provide for payment on a cost-plus-a-percentage-of-cost-basis, and any fee payable under cost-reimbursement type subcontracts shall not exceed the fee limitations in FAR 15.404-4(c)(4)(i).

(i) The Contractor shall give the Contracting Officer immediate written notice of any action or suit filed and prompt notice of any claim made against the Contractor by any subcontractor or vendor that, in the opinion of the Contractor, may result in litigation related in any way to this contract, with respect to which the Contractor may be entitled to reimbursement from the Government.

(j) The Government reserves the right to review the Contractor's purchasing system as set forth in FAR Subpart 44.3.

(k) Paragraphs (d) and (f) of this clause do not apply to the following subcontracts, which were evaluated during negotiations:

Accelerated Solutions, Inc.
CompuCom
(End of clause)

52.244-5, Competition in Subcontracting

I.4 INSPECTION
52.246-2
52.246-4
52.246-6

I.5 PAYMENTS UNDER TIME AND MATERIALS AND LABOR HOUR CONTRACTS
FAR 52.232.7

I.6 PAYMENTS UNDER FIXED-PRICE RESEARCH AND DEVELOPMENT CONTRACTS
FAR 52.232-2

I.7 CHANGES
52.243-1, Alternate II
52.243-3

I.8 TERMINATION
FAR 52.249-2
FAR 52.249-6, Alternate V
FAR 52.249-8

I.9 PRIVACY ACT
The clauses at FAR 52.224-1 (APRIL 1984) entitled "Privacy Act Notification" and FAR 52.224-2 (APRIL 1984) entitled "Privacy Act" are incorporated herein by reference

(No additional Clauses are required for this order)

SECTION J – LIST OF ATTACHMENTS

ATTACHMENT	DESCRIPTION
1	PWS for EDNet Management Support Services
2	Pricing Schedule
3	FIPS and FED STDS, Applicable Laws and Directives
4	Computer Sciences Corporation's Technical Proposal dated October 7,2004 and revisions dated February 14, 2005, March 16, 2005, March 30, 2005, and April 25, 2005 is incorporated by reference
5	Computer Sciences Corporation's Small Business Subcontracting Plan

This page intentionally left blank.

ATTACHMENT 1 – PERFORMANCE WORK STATEMENT

I. Introduction

This task order shall acquire IT support services needed to meet ED's needs and to migrate to an IT Service Capability Maturity Model Integration (CMMI) Level 3 service environment. The services and solutions provided by the contractor to support EDNet shall meet the objectives of the OCIO in a cost-effective manner. Currently, ED has six areas of IT services:

- Production Server
- Messaging
- End User
- Networking
- Security
- Assistive Technology

The contractor shall provide Category A work (Firm Fixed Price per Unit Services) at a minimum of CMMI Level 3 on day one of the contract improving to CMMI Level 4 within five (5) years. All work shall be governed by improving service levels, described in Section IV of the Performance Work Statement (PWS), Performance Standards and Acceptable Quality Levels. All personnel shall conform to ED security policy, including training and paperwork requirements.

Principle Objectives

ED's Office of the Chief Information Officer (OCIO) Information Technology Division (ITD) has three objectives:

- To **immediately improve all services** that ITD provides to its customer base, as measured by meeting Service Level Agreements (SLAs) and ongoing independent third party Customer Satisfaction surveys.

- To **immediately lower the cost and demonstrate better service** through the adoption of CMMI Level 3 processes and competence.

- To **continuously lower costs and improve customer satisfaction** going forward for all ITD provided services.

A. Category A (Firm Fixed Price per Unit Services)

The contractor shall provide firm fixed price managed services billed on a per unit basis at a minimum of CMMI Level 3 on day one progressing to Level 4 within three to five (3-5) years. The contractor is responsible for all processes used in the completion of this work and shall have the capacity to handle multiple critical operational issues at one time.

- Maintain the **production servers**.
- Provide **messaging services** including but not limited to E-mail and Blackberry (or equivalent).
- Support **end users** and their hardware and software, including assistive technology (deskside).

B. Category B (Fixed Price / Time and Materials Project Services)

The contractor shall provide resources, including but not limited to Subject Matter Expert (SME) and Business Executive Expertise, on a fixed price and/or time and materials basis to support any IT projects; all projects shall follow ITD's CMMI Level 3 Product Development Process (PDP). Category B Support shall be acquired in accordance with the task order / work order procedures outlined in Section C – SUPPLIES OR SERVICES AND PRICES / COSTS of the RFQ. The Contractor shall use an Earned Value Management System and process for Category B (time and materials project-based) work in accordance with OMB, ANSI / EIA-748-A and other applicable regulations throughout the life of the contract. This process shall result in monthly reports by project reflecting expenditures for the Budget Cost of Work Performed, Actual Cost of Work Performed and Actual Cost of Work Scheduled. The Contractor shall provide a plan to implement an Earned Value Management System before award and must implement the system within 90 days after award[7].

ITD is responsible for maintaining the PDP, but the contractor shall provide personnel with demonstrable skills, competence and experience necessary for working within a CMMI Level 3 process environment. This includes providing qualified project managers and business management executives. All Project Managers acquired under this task shall be Project Management Institute (PMI) or equivalently certified and be responsible for managing ITD approved projects. Business management executives shall be responsible for managing *tiger teams*[8], compromised of SMEs and personnel from various technical disciplines, among other things for short to medium duration tasks. Category B shall be the preferred method for ED to acquire SMEs; therefore it is important that the service provider demonstrates its depth and breadth in technical expertise in areas governed by this contract (e.g., Customer Service, IT Infrastructure, Enterprise Architecture, Email Architecture, etc.).

C. Category C (Sustaining Time and Materials Support)

The contractor shall provide qualified labor on a time and materials basis for continuous staffing of services whose processes will be managed by ED for the following:

- Perform **management services**.
- Maintain **networking services**.
- Provide **security services**[9].
- Support ED with its **clearinghouse** capabilities.
- Maintain a **roster of security-approved personnel** available to ED on an emergency basis.

Presently, these services are performed within processes that are at either CMMI Level 1 or 2; the contractor shall assist ITD in improving these processes to CMMI Level 3 within three (3) years and CMMI Level 4 within eight (8) years of the start of the contract. The contractor shall support, an Earned Value Management System for all Category C work (time and materials and project based) in accordance with OMB regulations[10]. The contractor shall provide ED with personnel who are capable of, and have had prior experience in working within CMMI Level 3 environments.

---

[7] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

[8] Tiger Teams are cross functional teams performing focused and tightly scoped projects.

[9] Security Services are cross functional in nature and cut across all of the other service areas.

[10] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

ED-05-PO-0908

Section III, Scope of Work, provides greater detail concerning the products that constitute these three Categories.

Productivity Improvement

Any time a process moves from CMMI Level 3 to CMMI Level 4, ED shall benefit from an increase in the quality of service delivered to its approximately 6,000 internal customers. ED enjoys a high ratio of professional staff to clerical staff. Therefore, as customer service improves, as a result of the service provider's process improvements, ED's customer base shall experience a commensurate increase in productivity.

ED also recognizes that a successful service provider shall capture savings through increased internal labor productivity as more of Category A processes are migrated from CMMI Level 3 to CMMI Level 4. ED's share of the benefits shall be reflected in improved quality of service associated with the functions and processes of ED customer (end user) operations.

IT Service Capability Maturity Model Integration Process

In order to achieve ITD's objectives, the contractor shall conform to the following methodologies. First, the concept of IT Service Capability Maturity Model Integration[11] as defined by ED.

Table 1.   CMMI Levels

IT Service Capability Maturity Model Integration Level[12]	Definition
IT Service CMMI Level 0	**Unaware**, no awareness of a need to improve IT service delivery.
IT Service CMMI Level 1	**Initial Phase**, IT service delivery is characterized as ad hoc, and occasionally even chaotic. Few processes are defined, and success depends on individual effort and heroics.
IT Service CMMI Level 2	**Repeatable**. Basic service management processes are established. The necessary discipline is in place to repeat earlier successes on similar services with similar service levels.
IT Service CMMI Level 3	**Defined**. The IT service processes are documented, standardized, and integrated into standard service processes. All services are delivered using approved, tailored versions of the organization's standard service processes.
IT Service CMMI Level 4	**Quantifiable Managed**. Detailed measurements of the IT service delivery process and service quality are collected. Both the service processes and the delivered services are quantitatively understood and controlled.
IT Service CMMI Level 5	**Optimization**. Continuous process improvement is enabled by quantitative feedback from the processes and from piloting innovative ideas and technologies.

Category A support shall be provided at CMMI Level 3 immediately upon contract award and therefore ED expects that this support shall be provided at a lower cost than is currently experienced today. Category B and C's services are expected to be consumed at the same general rate in the first year of the contract and therefore shall be no more expensive than today's costs.

However, as indicated above, the contractor is expected to migrate Category C services (currently CMMI Level 1) to Category A, CMMI Level 3. Accordingly, the contractor shall provide a comprehensive migration plan and (upon ED's approval) execute it.

---

[11] Based, in part, upon research from http://www.itservicecmm.org.
[12] Ibid.

Product Development Process

ITD shall use the Product Development Process, described below, as its management tool in monitoring product progress at all levels of the CMM.

ITD shall use the Stage-Gate® methodology[13] to manage the Product Development Process. ITD considers all IT services and projects to be products and shall manage them accordingly, fulfilling the role of gatekeeper. "The Stage-Gate® process is an operational roadmap for driving new product projects from idea to launch — a blueprint for managing the new product process — improving effectiveness and efficiency.

How It Works

Product development begins with an idea and ends with the successful launch of a new product. The steps between these points can be viewed as a dynamic process. Stage-Gate® divides the process into a series of activities (stages) and decision points (gates).

Stages

Each stage contains a set of defined concurrent activities, incorporating industry best practices. Activities during each stage are executed in parallel to enhance speed to market. This is further enhanced by the use of cross-functional teams all working towards the same goals.

Gates

Gates are the decision points where senior managers decide whether to continue funding a project. The outcome of the decision is to Go, Kill, Hold, or Recycle the project. Gates also act as "quality control" checkpoints, which evaluate among other things:

- Have the deliverables been executed in a quality fashion?

- Is the project attractive from an economic and business standpoint?

- Is the information sufficient to make a decision?

- Is the action plan and request for resources sound?"[14]

II. Description of Current Operations

ITD is responsible for the full life-cycle management of EDNet, the Department's primary IT service delivery infrastructure comprised of network hardware, software and equipment. EDNet is the technical vehicle through which ED employees use many critical information resources and reach out to ED's customers. EDNet provides desktop services including a standard office automation software suite, enterprise-wide e-mail, desktop computers and peripherals. EDNet also houses an intranet (ConnectED), a presence on the Internet (ED.gov), and many custom business applications and information systems. EDNet includes enterprise level backup, recovery, archiving, storage / retrieval systems and security. EDNet is supported on a 7x24x365 basis[15].

---

[13] Developed by Dr. Robert G. Cooper. http://www.stage-gate.com/research.html.

[14] http://www.stage-gate.com/research.html.

[15] Applies to server, security and network support.

ED-05-PO-0908

The primary data center for EDNet, which houses the majority of EDNet's mission-critical systems, is being relocated in late 2004 from its current location at the Regional Office Building 3 in Washington, DC to a new facility in the Washington, DC metropolitan area in Oxon Hill, Maryland. In addition to the primary data center, EDNet has three secondary data centers in the Washington, DC area, and a disaster recovery and backup center, the Disaster Recovery Facility (DRF), in Kennesaw, Georgia. The primary and backup data centers support multiple ED offices located in Washington, DC and across the country.

As a Federal agency General Support System, EDNet is responsible for following and maintaining a current Disaster Recover Plan (DRP) to reconstitute the IT infrastructure required to support mission-critical functions during a disaster. The DRF facility has been designed to be a robust, compatible, secure, and scalable warm backup facility to the primary data center. Redundant connections have been provided to most ED locations to ensure maximum network availability. DRF interconnects with the Headquarters and regional facilities to provide connectivity in the event of a significant disruption of service and as a contingency for other services. The infrastructure in the DRF has been sized for expansion to provide warm backup and disaster recovery services to applications sponsored by other ED Principal Offices (POs), and offers additional expandability for future requirements. Such expansion shall be completed and funded incrementally as needed. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time.

EDNet currently includes:

- Program management, engineering, network and server operations, disaster recovery, database administration, messaging, telecommunications, multimedia and video teleconferencing;

- Providing nationwide IT office relocations;

- Providing cabling support;

- Supporting IT refreshes including new IT equipment and asset management;

- Maintaining a surplus IT equipment clearinghouse;

- Assistive technology engineering;

- Providing customer services including project assurance, project management, helpdesk and deskside support for approximately 6,000 users located in over 20 sites across the Nation; and

- Supporting regional operations including regional deskside support, records management, information management and other activities as needed.

EDNet Critical Functions are described in Appendix B.

III. Scope of Work
The contractor shall provide ED with top quality professional IT services to manage, support, and continuously improve EDNet. The detailed description of services for each functional area are included within this (Section III Scope of Work) and Appendix F – Detailed Work Descriptions. The contractor shall provide support services, and comply with ED's enterprise architecture, for, but are not limited to, the following:

All Categories

- Support shall be provided on a 24x7x365 basis[16];

- The Contractor shall provide weekly status briefings to senior management;

- ED's Investment Review Board (IRB), Technical Review Board (TRB) and Configuration Change Review Board (CCRB) processes (e.g., equipment entering the EDNet environment, etc.);

Category A

- User account management and administration including: user space allocations; changing customer's e-mail account's user name; creation and maintenance of e-mail distribution lists, moving files and account information within ED; changing account privileges; adding and deleting accounts; maintaining print queues; coordinate the transfer of account information anytime a customer's move (physical or organizational) would require information to be transferred to a different ED system;

- Data center operations including: server room management, surveillance of systems operations, backups and file restores, and management of: servers, server farms, load balancers, gateways, and firewalls;

- Assistive technology deskside support;

- Desktop image development and testing;

- Software version maintenance;

- EDNet customer services, Helpdesk support, including enterprise-wide systems including office automation software suite (e.g., word processing, spreadsheet, database, presentation / graphics, etc.), e-mail, Internet / intranet systems, video conferencing, Cisco AVVID infrastructure (to include IP Telephony, Broadcast Video over IP and associated AVVID applications) and hardware, to approximately 6,000 users;

- National and Regional operations deskside support, including Desktops, peripherals, appliances, and devices, such as PC's, laptops, palmtops and other personal digital assistants, printers, scanners, and PC peripherals;

- Small nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs); and

- IT refresh support, including new IT equipment, asset management database administration.

Category B

- Systems engineering services;

- Introduction of radically new technology (e.g., switching desktop from windows based technology to a different technology);

- Application packaging, testing and delivery; and

- Large nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs).

Category C

- Product assurance;

- Program management to include overall management, measurements, dashboard development and maintenance, staffing, planning, accounting, budgeting, tracking, reporting, and administrative support;

---

[16] This does not include helpdesk support. Helpdesk support is provided each workday, see Workday Appendix J, hours for Helpdesk operations are 0700 until 2200 EST and Deskside Support is 0700 until 1900 local time. *During the month of September and the first week of October the workweek is extended to include Saturday and Sunday.*

ED-05-PO-0908

- Security support, including vulnerability management, malicious and mobile code identification, containment and eradication, penetration testing and log auditing;

- Network operations and management support of ED personnel and equipment including server operations (including NCES), INET (internet and intranet) operations, custom applications, change management / certification & accreditation, security operations, converged communications, and networking including internetworking services, telecommunication services, multimedia / Video teleconferencing services, and wire and cable management (installation and maintenance);

- Assistive Technology engineering (testing, compliance, etc.); and

- Clearinghouse support, including IT equipment (hardware and software) surplus, disposal and redistribution.

The contractor shall provide support as the IT service delivery infrastructure changes in scope and complexity, as determined by ED. ED reserves the right to include additional work deemed as within the general scope of this contract. The contractor understands that the volume of work could decrease or increase at any point during the life of the EDNet Management Contract. For example, the number of ED offices or locations could change at any time.

The contractor shall be required to support ED's customer accounts by managing Windows, Macintosh, Unix or other technology as covered by the then current ED Product Support Plan. The contractor shall provide timely, courteous and competent responses to its customers' requests.

The contractor shall provide support in the form of, but not limited to, answering questions concerning problem resolution for ED's standard COTS and some specialized applications for its customers. The contractor shall coordinate the transfer of information from Tier 0 / 1 to Tier 2 and Tier 3 services[17], some of which shall be provided by the contractor, ED, various third party vendors and Original Equipment Manufactures (OEMs).

The contractor shall provide subject matter expertise as a resource to be consumed by ITD's Product Development Process or continuing IT operations. This service can take the form of, but is not limited to, providing short term or continuous support for defined projects, such as performing a cost benefits analysis, architectural review, implementation planning QA, feasibility study, and application programming. Additionally, the contractor shall coordinate with and transfer to, any knowledge developed or required to the appropriate ED employees. The contractor shall perform project and time management, while meeting predefined objectives.

Finally, the contractor shall provide a set of processes and practices that bring server, messaging and user services immediately upon award of task to CMMI Level 3. The contractor shall actively migrate additional technical operational products through the Capability Maturity Model, using *Kaizen*[18], lean manufacturing[19] principles, and/or Six Sigma[20]. Supporting ED's management requires the ability, on the

---

[17] Tier 0 / 1 – self-help and basic helpdesk services, Tier 2 advanced helpdesk services and Tier 3 SME and OEM helpdesk services.

[18]*Kaizen* is a process improvement methodology that considers human resources as the most important company asset, believes that processes must evolve by gradual improvement rather than radical changes, and believes that improvement must be based on statistical/quantitative evaluation of process performance.

[19] Lean methods create a continual improvement-based, waste elimination culture that involves workers at all levels of the organization and is based upon three objectives 1) Reduce production resource requirements, 2) Increase manufacturing velocity and flexibility, and 3) Improve quality and eliminate defects.

[20] Six Sigma is a rigorous and disciplined methodology that uses data and statistical analysis to measure and improve a company's operational performance by identifying and eliminating "defects" in

ED-05-PO-0908

part of the contractor, to perform excellent, consistent and timely work, and to support executive level decisions through presentations to ED's management. The contractor shall include root cause costs as a part of doing business to be borne by the contractor and shall work with ED to define processes and report formats in order to define the events that drive this requirement.

ED recognizes that the migration to Managed Services is a mature business practice used by many organizations to ensure responsive and competitive operations. The contractor shall work with ED to implement an IT infrastructure that is consistent with industry best practices and the contractor shall provide a comprehensive, best value solution. The contractor shall provide support services for, but not limited to, the following of EDNet include Category A (FFP per Unit Services), Category B (FFP / T&M Project Services) and Category C (Sustaining T&M Support):

Transition In Plan
The Service Provider shall provide a comprehensive Transition In Plan that shall be used for the first two (2) month's at ED and will integrate with the incumbent's Transition Out Plan. This Transition In Plan should complement the incumbent's Transition Out Plan and include, at a minimum:
- Identification of Risks and Risk Mitigation
- Level of Effort
- Schedule (including milestones)
- Resource Allotments
- Dependencies
- Costs

Appendix I contains the elements the contractor can expect from the Transition Out Plan.

Transition Out

Sixty (60) days prior to the expiration or termination of the contract, the contractor shall provide a Transition Out Plan. The offeror shall present a detailed plan for any Transition Out tasks, regardless of precipitating reasons. The Transition Out Plan shall be constructed so as to require no more than 60 days from termination notification to phase-out completion. The plan shall include procedures to minimizing impact on contract performance. Transition Out Plans shall include provisions for completion of all contractor responsibilities.

The Offeror's Transition Out Plan shall:
- Present procedures for retaining the required staffing level including key personnel necessary to provide complete contractual support through the expiration of the contract.
- Include a work breakdown structure and cost estimate.
- Include a training plan and schedule for each activity covered by the contract.
- Describe in detail how responsibility and accountability will be relinquished for all government-furnished equipment.

---

manufacturing and service-related processes. Commonly defined as 3.4 defects per million opportunities, Six Sigma can be defined and understood at three distinct levels: metric, methodology and philosophy.
ED-05-PO-0908

The offeror shall coordinate its activities with other contractors to effect smooth and orderly transitions at the beginning and the end of contract periods. The offeror shall remove all contractor-owned equipment, tools, parts and belongings from the Government-furnished spaces by midnight of the last day of the contract.

Enterprise Email / Messaging Architecture

The Service Provider shall provide a stable enterprise email system capable of supporting ED's user communities. The architecture shall accommodate system availability and reliability as describe the Service Level Agreements in Section IV.

An annual Email Architectural Fee shall be charged to ED. This annual fee is to cover the development and upkeep of ED's email architecture. The architecture shall accommodate a 6,500 customer email base with the following identified needs, it is understood that ED's needs will continue to evolve over time and this list shall be understood to be a starting point, not an exhaustive list:

- 24x7 Uptime within SLA limits (see Section IV of the PWS)
- Appropriate Redundancy to maintain SLAs
- Disaster Recovery Planning to meet SLA
- Backup and Restore Capabilities on a mailbox, post office, server and system level
- Email Message Disk Space Management
- Email Message Archiving that meets Federal Regulations
- SPAM filtering
- Remote Connectivity from PCs and the Web
- Wireless Email Access
- Access through handheld devices, such as but not limited to, PDAs and Blackberry devices
- Integration with VoIP voicemail messaging
- Strategy for incorporating Instant Messaging
- Virus Scanning capabilities for incoming, outgoing and internal messaging
- Secure Messaging (Encryption) for both internal and external messages

The Service Provider shall provide an architecture that shall place stability of operations above other considerations. The existing email system is described under Category A of the PWS.

Expected Investment in Tools

The Service Provider shall provide a description of which tools shall be introduced, how the tools shall be introduced, and how those tools shall improve customer satisfaction and/or ED's productivity. The Service Provider shall make an investment in these tools, and if the Service Provider chooses, a line item charge may be included in the cost proposal. This line item may include any additional yearly maintenance charges. It is

understood that ED will own <u>intellectual property to all data</u>, the software and the licensing of these tools[21]. These tools include:

    (1) Management Information Dashboard.
- Offeror shall provide a tool that provides a daily snapshot of how ED and the offeror are delivering IT operations, historical information, trend analysis and correlation, summary of challenges, and recommendations as needed, in a format that is viewable by all stakeholders (e.g., web site, reports, etc.).

    (2) Performance Monitoring Tools
- Performance monitoring tools shall be used to measure IT infrastructure performance, IT infrastructure uptime, and keep track of security metrics. Service provider shall list what tools shall be used to manage performance.

    (3) Project Management Tools
- Project management tools are required to provide, among other things, budget variance reports (project over-run and under-run metrics), resource usage, task usage, milestone reports, and comply with OMB and other regulatory earned value requirements[22]. Service provider shall list what tools shall be used to manage projects.

    (4) Communication Tools
- Contractor shall provide, at their expense, appropriate use of communication tools for their staff that will interface with ED's current communication environment. This is inclusive of, but not limited to:
  a. Cellular Phone Hardware and service
  b. Blackberry Hardware
  c. Personal computers required for remote support

Major IT Issue Handling
A major issue is defined as any IT event that affects more than 50 employees (e.g., email outage, virus attack, VoIP outage, security event, etc.). All major events shall follow the escalation procedure, root cause analysis and customer communication procedure described below.

Escalation Procedure
The Service Provider shall follow an escalation procedure when responding to major issue(s). The service provider's escalation procedure shall conform to or exceed the following guidelines:

- Notify the appropriate ITD Manager or designee within fifteen (15) minutes of becoming aware of any major IT issues. Notification shall occur via voice communication. If the ITD Manager or his/her designee is unavailable the service provider shall immediately notify the Directory of IT or his/her designee.

Customer Communication
The Service Provider shall provide communications directly to the affected customer (end-user) base once OCIO management has been informed for all major IT issues. Communications shall take the form of informational web updates via ConnectED, voice mail and/or email, as appropriate. All communications regarding IT issues shall be approved by a Service Provider manager and ED prior to release and shall include at a minimum an explanation of the problem and anticipated resolution time.

---

[21] ED will own all licenses and tools that are listed as a line item in the Cost Proposal worksheet, but not tools provided by the offeror at no charge to ED. At ED's option "free" software and licenses may be purchased from the offeror at GSA or better rates. **All data is the intellectual property of ED.**
[22] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

ED-05-PO-0908

Root Cause Analysis

The Service Provider shall perform root cause analyses for all major issues. Once root cause has been determined an alternative analysis shall be performed, followed by a plan for remedy, which shall be presented for OCIO executive review and decision. Remedies shall be tracked and an update shall be provided to OCIO executive management providing expected results measured against actual results. For Category A work, the cost of this process shall be borne by the service provider.

Category A (Firm Fixed Price per Unit Services)

The Contractor shall:

Support the production servers environment

Provide Hardware and Software support for the **server infrastructure** on ED's behalf, managing delivery, configuration, installation, and systems administration in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- Server and Software Installation / Refresh Process

- Ongoing Server and Software Maintenance Process

- Server and Software Install, Moves, Adds and Changes (IMACs)

- Server and Software Disposal and License Recovery

- Data protection, backup, and recovery in accordance with SLAs

- See Table 6 for additional detail

Systems include approximately 520 servers (including the disaster recovery facility), 32 administration accounts, including 6 Domain Controllers and 6 Exchange Administration accounts, approximately 400 applications and approximately 16+ TB of disk storage. See Table 2 for geographic locations and a complete inventory and description of technology to be supported

Maintain production servers

The contractor shall perform server support operations, which include server, data center, server image management, helpdesk call center support, network systems monitoring, Tier 2 support including remote management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images for Windows and Unix systems[23].

- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

---

[23] As this contract has a potential ten-year life span, it is expected that the Product Development Process has the potential to introduce new operating platforms and systems.

ED-05-PO-0908

Hardware and Software Equipment Inventory / Service Criticality

The following table depicts the current equipment inventories of servers[24], see Table 2, grouped by equipment type and criticality of service. Each table is arranged with Type of equipment on the "Y-Axis" and Criticality[25] on the "X-Axis". Within each block the location and number of equipment is displayed.

Table 2. Server Inventory*

Criticality / Equipment Type	(1) Standard Server O&M (No DR Required)	(2) Mission Supportive Systems (Second Wave DR)	(3) Mission Critical Systems (DR Required)	(4) Critical Infrastructure / Service (DR Required)	Totals
	60	136	50	108	
	9	26	4	8	
	0	6	26	15	
	0	2	0	1	
	1	0	0	2	
	0	0	1	8	
	0	0	0	11	
	0	3	0	31	

*Note that the numbers of servers / equipment change frequently.

Maintain messaging services including E-mail and Blackberry

Provide a process for managing all **messaging services** in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- E-mail, blackberry (or equivalent), PDAs, and storage services
- Remote and Mobile customer support
- Data protection and recovery in accordance with SLAs
- Exchange Central administration and maintenance for approximately 50 users

The Messaging System includes approximately 6,000 accounts and mailboxes utilizing approximately 500 GB of data (95 percent of accounts are size restricted to 100 MB) and approximately 500 Blackberries[26].

Provide Messaging Services including E-mail and Blackberry

The contractor shall perform messaging services operations, which include messaging monitoring, Spam filtering, anti-virus scanning and blocking of the messaging systems, disaster recovery of the messaging

---

[24] As of June 2004.

[25] Criticality is defined as Level 1 – No Disaster Recovery (DR) Required, Level 2 – Second Wave DR, Level 3 – DR Required, and Level 4 – DR Required.

[26] As Blackberry usage is expected to grow, this number may not be accurate at the start of the new contract.

ED-05-PO-0908

system, messaging systems management, helpdesk call center support, Tier 2 support including remote management of customer e-mail accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Include Tier 0 / 1, helpdesk support, simple network systems monitoring, Tier 2 support including remote access, management for some COTS applications (anti-virus), account administration and operate and maintain the interface with other Tier 2 and Tier 3 support organizations, for all supported messaging systems (Blackberry, Microsoft Exchange or equivalent).

- Maintain ED's messaging system, including their Blackberry (or equivalent) solution.

- Continually integrate industry best practices for messaging tools and technologies that enhance the productivity of the customer, thereby driving down messaging support costs for ED.

- Provide enhanced technologies that identify and eliminate potential causes of problems and speed resolution times, thus improving ED employees' productivity.

Messaging Account Inventory[27]

Complete inventory grouped by service type is provided in Table 3.

Table 3.   Messaging

Type of Service	Number of Users
	6,000
	500
	50

The contractor's solution shall, at a minimum, provide the features shown in Table 4.

---

[27] As of June 2004.

Table 4. Features

Features
An **Integrated account management** solution.
Maintenance and day-to-day **operations of ED's messaging systems.** Ensuring systems performance, reliability and accessibility.
Anti-virus and Spam solution compatible with ED's messaging environment.
Remote connectivity through AS 5300, Virtual Private Networks (VPN), Outlook Web Agent (OWA), and Firepass.
Ability to **restore a single customer's mailbox.**
Appropriate **disaster recovery** planning and execution.
Ownership of problems from identification to solution / resolution.
Seamless **problem distribution** and **problem resolution** management support.

Maintain Customers (End Users) and their Equipment

Provide Hardware and Software support for the **end user infrastructure** on ED's behalf, managing delivery, configuration, installation, and accounts in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- PC and Software Installation / Refresh Process

- Ongoing PC and Software Maintenance Process

- PC, software, and cabling Install, Moves, Adds and Changes (IMACs)

- PC and Software Disposal and License Recovery

- Data protection and recovery in accordance with SLAs

- Remote and Mobile customer support, including approximately 800 cell phones and 500 PDAs

- Peripherals management, including printers and print queues

- Asset Management

- Assistive Technology Deskside Support

- See Table 6 for further detail

PC systems including approximately 5,500 PCs, 2,000 laptops, and less than 75 Macintosh PCs, laptops or other devices. Accounts include approximately 6,000 Active Directory, Macintosh and Unix accounts utilizing approximately 4 TB of data storage. See Table 5 for user priority, 90 percent of all customers (end users) are located in the Washington DC area. Hardware descriptions of typical PCs are located in Appendix B and software descriptions are located in Appendix C.

Support Customers (End Users) and their Hardware and Software

The contractor shall perform customer (end user) support operations, which include deskside equipment and peripherals (including printers and assistive technology), deskside image management, helpdesk call center support, Tier 2 support including remote desktop management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images, including but not limited to, Windows and Macintosh systems.

- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

Hardware and Software Equipment Inventory / Service Priority

The following table depicts the equipment inventories of customers (end users), see Table 5, grouped by software tier type and priority of service. Each table is arranged with Tier of software on the "Y-Axis" and Priority[28] on the "X-Axis". Within each block the location and number of equipment is displayed. Software tiers are detailed in Appendix C. The typical computer system that shall be supported by the contractor is also detailed in Appendix C.

Table 5. End-User Equipment Inventory[29]

END USER SUPPORT	Priority 3 (Standard Service)	Priority 2 (30 Minute response, warm hand offs for escalation)	Priority 1 (Immediate deskside dispatch)	TOTAL[30]
	4,781	198	26	
	589	0	0	
	294	0	0	

*See Appendix C

Since many of the customer (end user) solutions rely upon the production server environment the features from both have been combined into a single table to avoid arbitrary distinctions. The contractor's solution shall, at a minimum, provide the features shown in Table 6 for both the server and end user environments.

---

[28] Priority is defined as Level 3 – Standard Service, Level 2 – 30 minute response and warm handoff for escalation, and Level 1 – Immediate deskside dispatch.

[29] The tier distribution has been estimated from ED inventory data.

[30] ED understands the distribution of employee volume across tiers 1-3 does not match typical industry norms and will work with the service provider to achieve an industry normal distribution between tiers 1-3.

ED-05-PO-0908

Table 6.   Server and End User Features

Features
Automated Asset Management – Electronically supported life cycle driven asset management process. Automated asset management consists of electronically supported procurement, automated inventory, and centralized data repository that are available to financial, administrative, technical planners, system administrators, and the helpdesk. Managed data within the asset management system consists of contract terms (maintenance contracts), hardware inventory, software inventory, accounting, maintenance records, change history, support history, and other technical and financial information. At a minimum, Electronic tools are integrated; so that all input is shared and never repeated between tools and constituencies can view the data in a consistent and up-to-date database or databases. The objective is to optimize assets to lower costs with a proactive lifecycle approach that views IT assets as a portfolio. Vendor may be requested to use Government-furnished property. Vendor shall provide information portability between government- and vendor-furnished property. *All intellectual property resides with the Government.*
Automated Software Distribution – the ability to install software on a client device without having to physically visit each device. Techniques involve either push, the more advanced method where the server drives the upgrade, or pull, where the customer drives the upgrade by running an installation script from a centralized server.
Virus Detect and Repair – software system that actively monitors and detects virus intrusions, alerts system operators and users to such events, and provides automated eradication and damage repair to the extent possible. The software shall protect both clients and server systems. Automatic updates of the virus detection and repair capability must be available and maintained. The software system shall be fully integrated with processes and policies that provide manual intervention when needed, support for remote / mobile users, and include policies for file / disk sharing and downloads.
Systems Management – automated event management system that proactively and reactively notifies system operators of failures, capacity issues, traffic issues, virus attacks and other transient events. The tools allow monitoring of system status, performance indicators, thresholds, notification of users, and dispatch of trouble tickets. Systems Management provides optimal system performance, quicker resolution of problems, and minimizes failures. Automated solutions are used in support of distributed computing operations processes and policies for performance and failure detection and correction, as well as optimization.
Server Based Client Image Control – the ability for a desktop administrator to create a client specific configuration of applications, settings, and privileges on a server. These can then be automatically downloaded to a specific address or set of addresses on the network; therefore, configuring the clients initially, and ultimately standardizing the maintenance of configurations. A client agent is used to synchronize the server and client images for change management.
Scalable Architecture – technology infrastructures that can logically and physically increase in performance and capacity with continuity to meet reasonable growth and change over time. A scalable architecture contains a strategic migration plan for continuous growth and progress.
Fault Tolerance – systems recognize component failures and provide automatic and seamless switching to redundant components, eliminating downtime.
Automated Backup and Restore – provides for backup of the data stored on network servers, as well as desktop and mobile clients. Automated backup and restore does not necessarily provide state management, but enables files to be backed up on a regular basis (without user intervention) and to be stored off-site. If a disaster or loss of files shall occur, the data is available on a backup medium and can be fully restored. Protection shall be the ability of the entire file system to be restored to a new machine, in the event that the failure required hardware replacement.
Automated Helpdesk Problem Management and Resolution – allows calls to the helpdesk to be

ticketed, escalated, dispatched, and closed. Systems include call management, problem management, and resolution supported by a knowledge database. The knowledge database provides a record of all problems and documentation on typical issues and utilized resolutions.

At a minimum, an integrated system of tools is in place. Call tracking, escalation and resolution systems are integrated with voice response, e-mail, phone, remote control, asset data and user profiling repositories. Proactive problem elimination is the goal, however reactive problem resolution is the norm. Service levels have been escalated and metrics have been automated into regular management reports. Customer satisfaction is the objective.

Enterprise Policy Management – managed technical environment in which a network or desktop administrator can control, with rules-based logic, which applications, settings, network resources, databases, and other IT assets a user can use. This environment is defined by user ID and is not necessarily machine specific. It is typically implemented by user profiles maintained at the server and synchronized with the client device that a user is logged onto.

Enterprise policy management precludes the user from making changes to the system, such as introducing unauthorized software or changing settings that may cause conflict with other system resources. As well, a managed environment controls the ease of use of the desktop, providing a common set of applications and access for groups of users or individuals. In this manner, the user is presented only with the tools they have been trained on and need for the job, and assures that changes are managed.

Change Management – the procedure, policies, and tools established to monitor client computers and other network assets to assure that unauthorized changes are not being implemented. It also affirms that a database of changes is available so that changes can be easily recognized during troubleshooting activities.

At a minimum, procedures are supplemented with technology and process controls that automate and enforce the change management procedures.

Data Security Management – the logical protection of organizational data from corruption, theft, or compromise. Data security management involves user identification and authorization, proper controls on downloading and uploading files and data, firewalls, and other technology barriers to prevent unauthorized access, theft, and corruption.

Service Level Tracking and Management – service levels are tracked and managed. The metrics contained in Section IV, Performance Standards and Acceptable Quality Levels, are specific, measurable and meaningful.

Ownership of problems from identification to solution / resolution.

Seamless problem distribution and **problem resolution** management support.

Maintain Helpdesk Support for all Category A products
Provide a **single point of contact** (SPOC) to act as the primary interface to the thousands of customers that use various enterprise applications (e.g., E-mail), desktop and server hardware, Commercial off the Shelf Software (COTS) as well as custom developed applications, including but not limited to:

- First level problem and user request support including effective troubleshooting and resolution for those problems and requests that can be resolved remotely.

- Effective troubleshooting, triage, assignment and dispatch for those problems and requests that require second or third level support including support delivered at the customer's location.

The contractor shall provide all server, end user and messaging support including helpdesk operations subject to specific expectation level process maturity, SLAs and continuous improvement going forward. ED's helpdesk receives, on average, 6,700 calls per month.

Helpdesk Support

The contractor's server, end user and messaging operations, shall include Tier 0 / 1 helpdesk support, simple network systems monitoring, Tier 2 support including remote desktop management for defined number COTS applications and operation and maintenance of the interface with other Tier 2 and Tier 3 support organizations, for all supported hardware and software. The contractor shall:

- Maintain a SPOC for all systems for customers to obtain resolution of all IT problems and/or technical issues including Tier 0 / 1, 2 and 3 helpdesk service.

- Continually integrate industry best practices for helpdesk tools and technologies that enhance the productivity of the helpdesk agents, thereby driving down helpdesk support costs for ED.

- Provide enhanced technologies that speed resolution times or proactively eliminate end-user problems, thus improving ED employee's productivity.

Helpdesk User Priorities

Below are the definitions of the different Helpdesk user categories and priorities:

- **Priority 1 Customers (Users)** – Senior executive for the Department of Education (Secretary of Education and direct reports)

- **Priority 2 Customers (Users)** – Direct reports to Secretary's direct reports

- **Priority 3 Customers (Users)** – Remainder of the Department of Education users

Helpdesk Call Volumes

Complete history of call volumes for EDNet's Helpdesk from June 2002 until January 2004, see Table 7.

Table 7. Monthly Helpdesk Call Volumes

Month Year	January	February	March	April	May	June	July	August	September	October	November	December	Totals
2002	-	-	-	-	-	6,724	7,318	8,643	6,175	6,205	6,800	4,942	
2003	6,353	5,415	7,697	7,366	6,687	6,789	7,102	8,178	7,527	7,794	5,867	5,490	
2004	4,879												

The contractor's solution shall, at a minimum, provide the features shown in the Table 8.

Table 8. Features

Features
A **single point of contact** for problem and service requests.
Ownership of problems from identification to solution / resolution.
Seamless **call distribution** and **call management** support.

Category B (Fixed Price / Time and Materials Project Services)

Maintain **availability of subject matter experts (SMEs)** as needed number of defined projects per year. The contractor shall:

- Be responsible for maintaining two personnel rosters. The first comprised of qualified Business Executives and the second comprised of Qualified Personnel[31] that may or may not be working on the contract that ED can pull from in the case of a critical operational issue.
    - Business Executives may be called to lead tiger teams[32], compromised of personnel from various technical disciplines, among other things for short to medium duration tasks.
    - Personnel may be called to support: customer service improvement events, virus attack, system-wide problem resolution, serious email issues, market analysis, security, wireless solutions, computer forensics, load testing, data center expertise including: infrastructure, moves, cabling, HVAC, electrical / UPS, equipment, maintaining a technology roadmap, training, etc.
    - Both rosters shall be composed of personnel who have successfully completed ED's security requirements, including ED's security training and security paperwork.
    - It is expected that operational personnel shall be available within twenty-four (24) hours and Subject Matter Experts (SME) shall be available within two (2) weeks upon a request for assistance from ED.
- Use an Earned Value Management System that complies with OMB and any other relevant regulatory requirements to provide earned value information to ED for use in its reporting requirements.
- Provide resources for approximately 36,000 hours per year who are to be used at ED's discretion in executing ITD's Product Development Process outlined in Section I, Introduction.

Most projects shall occur within the Washington DC area, See Appendix A for a detailed list of Washington DC area locations. Some example projects include major moves (100 regional staff from one building to another), or an enterprise software upgrade from one version to the latest version (i.e., Exchange 2000 to Exchange 2003). Category B will be the preferred method for ED to acquire SME during the lifetime of this contract.

The contractor shall provide SMEs in a variety of technical fields, including, but not limited to, project management, business management, technical architecture (i.e., network, web, database, application development, etc.), security architecture, product experts, programmers conversant in the most current computer languages, network engineering, etc. The contractor shall assign resources to work within ED's Product Development Process and provide personnel with demonstratable skills, competence and experience necessary for a CMMI Level 3 process environment. The contractor shall at a minimum:

- Provide capable personnel who are able to perform the work as determined by projects' needs
- Maintain personnel with minimal turnover, defined as less than twenty (20) percent turnover during the lifetime of any specific Category B project

---

[31] Qualified Personnel shall have security paper work and training completed before being added to the roster.
[32] Tiger Teams are cross-functional teams performing focused and tightly scoped projects.

- Fill all vacancies within ten (10) business days
- Invoice on a per project basis
- Provide a yearly audit of all Project activity
- Comply with OMB and other regulatory earned value requirements[33]
- Meet the acceptable quality levels for relevant Category B service, see Section IV Performance Standards and Acceptable Quality Levels

The contractor's solution shall, at a minimum, provide the features shown in Table 9.

Table 9. **Features**

Features
An **integrated project management** solution.
Provision of SME and/or Business Executives appropriate for each project.
Ownership of problems from identification to solution / resolution.
Management of projects to scope, schedule and budget.

Category B Support Areas

Projects, which includes Project Management of tasks as assigned and provision of SMEs, shall be provided on a managed project basis. The contractor shall:

- Provide cost estimates and proposals on a project-by-project basis prior to project commencement.
- Manage projects using an OMB compliant earned value management system[34].
- Continually integrate industry best practices for project management tools and technologies that enhance the productivity of the customer, thereby driving down project oversight support costs for ED.
- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee's productivity.
- See detailed descriptions of tasks in Appendix F.

Provision of SMEs, the contractor shall provide:

- Business Management – Executive roster of qualified staff to lead tiger teams[35], compromised of SMEs and personnel from various technical, program and budget disciplines, among other things for short to medium duration tasks.
- Information Management – Expertise to supplement ED's Information Assurance program using state of the art processes, policies and equipment.
- Enterprise Strategy – Expertise to supplement IT Strategy initiatives, including IT Investment Management (ITIM), Enterprise Architecture (EA), business case

---

[33] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.
[34] Ibid.
[35] Tiger Teams are cross-functional teams performing focused and tightly scoped projects.

ED-05-PO-0908

development, OMB300 submission, portfolio management, records management, IT market analysis, etc.

- SMEs in a variety of technical, administrative and program fields.

Category C (Sustaining Time and Materials Support)

Demonstrate **availability of qualified personnel** for continuous staffing of IT processes managed by ED. The contractor shall:

- Manage projects using an OMB compliant earned value management system[36].

- Provide qualified staffing not to exceed 160,000 hours per year (expected to steadily decrease for the term of the contract as worked is moved under Category A).

See Appendix A for geographic locations of ED offices, most continuous support staff shall be located in the Washington DC area.

The contractor shall provide Qualified Personnel who shall meet the continuous day to day demands of the ITD Implementation / Transition Plan and ongoing daily operations. Tasks described here are outside of the scope of tasks described in Categories A and B. All intellectual property developed while meeting Category C objectives shall be the sole property of the Government. The contractor shall, at a minimum:

- Provide capable personnel who are able to cover the work schedule as determined by ED

- Maintain personnel with minimal turnover, defined as less than ten (10) percent attrition per year

- Fill all vacancies within ten (10) business days

- Track attendance and hours in accordance with Government regulations at the project level

- Invoice on a monthly basis at the project level

- Provide a yearly audit of all time and material activity at the project level

- Furnish level of effort estimates for any new task items at the project level

- Provide any required earned value detail to ED for its reporting requirements at the project level

- Meet the acceptable quality levels for relevant Category C service, see Section IV Performance Standards and Acceptable Quality Levels

The contractor's solution for all Category C services shall provide, at a minimum, the features contained in Table 10. Features.

---

[36] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

ED-05-PO-0908

Table 10. Features

Features
Provision of qualified personnel appropriate for each task.
Ownership of problems from identification to solution / resolution.
Management of tasks to scope, schedule and budget.

Category C Support Areas

Program Management, which includes overall management, measurements, dashboard development and maintenance, staffing, planning, accounting, budgeting, tracking, reporting, and administrative support. The contractor shall:

- Provide articulate and highly trained personnel trained in standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.

- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / Full Time Equivalents (FTEs) to meet these tasks are: 10 to 12 per year.

Ongoing Project Management, which includes Scheduling, Administrative Support, and Other Tasks as assigned are expected to provide continuous project management support for the Project Management Office. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.

- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / Full Time Equivalents (FTEs) to meet these tasks are: 2 to 4 per year.

Server Operations, which include Project Management of tasks, INET, Change Management, Data Base Administration, Security Operations, Custom Application Support, Other Tasks as assigned, and are expected to provide Disaster Recovery support on a continuous basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.

- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 29 to 31 per year.

NCES Support, which includes support of NCES' server operations components by providing technical expertise in the Microsoft Windows, Linux, and F5 BigIP infrastructure. This expertise shall be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills. The contractor shall:

- Provide database maintenance.

- Provide Server and Microsoft IIS support.

- Provide ad hoc custom application support.

ED-05-PO-0908

- Support the Department's mission critical Security Operations.
- Provide Web development and programming support.
- Provide design for new systems, applications, and databases as required.
- Act as point of contact for other developers working with NCES.

The initial expected level of effort / FTEs to meet these tasks are: 2 to 4 per year.

Product Assurance, which include Project Management of tasks, Independent Review and Testing, Improvement Analysis and other tasks as assigned are expected to be provided on a continuous support basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- Detailed descriptions of tasks are provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 2 to 4 per year.

Converged Communications and Networking, which includes Project Management of tasks, Network Services, Telecom, Video Teleconferencing (VTC), Multimedia, other tasks as assigned, and are expected to provide networking, telecom, and multimedia video teleconferencing operations on a continuous support basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 24 to 26 per year.

Engineering and Lab Support Operations, which include Assistive Technology Engineering (testing, compliance, etc.), Technical Writing, Enterprise Architecture, Technical Review Administration and Project Management of tasks as assigned and is expected to provide lab support operations on a continuous basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 8 to 10 per year.

Enterprise Lifecycle Management Support (ELMst) Clearinghouse, which include PCs R Us, Project Management of tasks and other duties as assigned on a continuous basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 3 to 5 per year.

CMMI Process
All successful solutions shall describe in detail how they shall move the Department closer to its goal of process maturity and improved customer service by providing:

ED-05-PO-0908

- Proven industry standard processes, enabling ED to reach a minimum of CMMI Level 3 on day one of the contract in server, desktop and messaging services support.

- An outline of a continuous process to migrate Category C — CMMI Level 1 products to CMMI Level 2 within a year, from CMMI Level 2 to Category A — CMMI Level 3 within three (3) years, and move Category A — CMMI Level 3 products to CMMI Level 4 within three to five (3-5) years.

IV. Performance Standards and Acceptable Quality Levels
Below are listed the Performance Standards and Acceptable Quality levels for the Department of Education EDNet Support Services.

Disincentives for Not Meeting Performance Standards
Each performance period ED and the service provider shall select some specific SLAs that shall be scored, and shall be a factor in issuing a new term[37].

Management Information Dashboard
The first step in running an agency on sound business principles is correctly and consistently collecting the necessary metrics. By automating this process through the use of a management information dashboard, ED managers can make the most efficient and effective use of their resources. Information rolls up to the CIO / senior management who view all active projects and initiatives and drill down to details about specific initiatives and assets.

The SLAs listed in this section shall be measured and rolled up to this management information dashboard to provide management with the necessary metrics to run operations. The dashboard, as well as the SLAs, shall be adjusted over time as processes continue to improve.

Sample metrics to be gathered are listed below. Service provider shall provide additional metrics (with rationale), as needed:
- Total operating costs, fixed and variable, shall enable managers to gain a quick understanding of the overall health of the organization for funding needs.

- A total count of personnel provides an understanding of the staff needed to support the mission.

- EDNet is critical to providing customers (whether internal or external) with timely information, so reporting on network utilization, outages, etc will provide a quick status check of the network.

- Customer satisfaction is a crucial component of an organization's ability to ensure that it is delivering value to its end users.

Benchmark
ED has the option to execute the benchmarking clause as outlined in Appendix H of the PWS, to determine that the fees, service and service levels contained within this contract are among the industry's competitive rates and service levels for such services.

---

[37] As discussed in Section H.14 Award Term Provisions, SLAs that are missed shall deduct some predefined number of points from 50 (the starting score).

ED-05-PO-0908

General Service Levels

General SLAs apply equally to all categories of work undertaken by the service provider, with the most important being Customer Satisfaction followed by Security and Asset Management. As these areas often overlap between service categories, they have been highlighted to indicate their importance.

Customer Satisfaction

Customer satisfaction shall be measured in three ways. First "touch" surveys shall be used on every helpdesk call that generates a trouble ticket. Second a monthly managers survey shall be performed where the service provider and ED can discuss any perceived problems with the level and quality of service being provided. Finally, an independent third party customer satisfaction survey shall be performed semi-annually for the first two (2) years of the contract, assuming all surveys return positive results the frequency shall be moved to annually for the remainder of the contract.

Customer Satisfaction (Touch Survey)

Service Name: Customer Satisfaction (Touch Survey)
Service Description: Measures performance of service provided to customer (end-user). Used to identify customer's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve customer / management satisfaction and service performance.
Performance Standard: 100% of customers receive surveys.
Responsibilities: Measure Customer Satisfaction on a daily basis by sending "touch" surveys to all customers that have logged a trouble ticket (requested service). Service Provider shall be responsible for creating the survey questions, with ED approval. The questions shall be a limited number of Yes / No questions. For example: (1) Are you satisfied with the explanation of your problem? Y/N   (2) Are you satisfied with the service? Y/N   (3) Are you satisfied with the result? Y/N
Assumptions: Survey shall be completed via direct voice contact or via e-mail. Customers shall take part on a volunteer basis.
Frequency: Measure Daily and Report Monthly
Measurement Period: 24 hours a day 365 days a year.
How Measured: The following formula is valid for the daily reporting periods. Number of customers who received surveys / total number of helpdesk calls = "% Service Level Attained"
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Customer Satisfaction (Touch Survey) Deliverables: Monthly report. Reports shall provide a monthly roll-up of any daily reports into a plain-English format, highlighting all failures and trends. The statistics shall be tracked so that percentage totals can be compared month to month. For example: January Q1 75% Yes, 25% No, Q2 …   February Q1 85% Yes, 15% No, Q2 …
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Customer Satisfaction (Manager Survey)

Service Name: Customer Satisfaction (Manager Survey)
Service Description: Measures performance of service provided to ED based upon management's perception. Used to identify management's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve management satisfaction and service performance.   All ITD managers are responsible for filling out the Customer Satisfaction Manager Surveys.
Performance Standard: 100% of the IT managers receive surveys. General upward trend shall be observed over the measurement periods.
Responsibilities: Measure Manager Satisfaction on a monthly basis by sending a short web based survey to all

managers.
Assumptions: Survey shall be completed via web survey form. Managers shall take part on a volunteer basis, and a **non-response constitutes a very satisfied response.**
Frequency: Measure Weekly and Report Monthly
Measurement Period: 12 months a year.
How Measured: The following formula is valid for the monthly reporting periods. Number of responses with a very satisfied or satisfied rating / total number of surveys= "% Service Level Attained"
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Customer Satisfaction (Manager Survey) Deliverables: Monthly report. Reports shall provide a monthly roll-up into a plain-English format, highlighting any failures, problems and trends. The report shall also list possible remedies for any problems identified.
Disincentive: Five (5) points - However, for scoring purposes, this survey shall not be considered an SLA. It shall be considered to be part of the 2nd set of 50 points in the Annual Performance Review Plan, which is based on qualitative feedback from managers.
Notes: Results shall be posted on private (intranet) manager accessed ED web site for management review and comment.

Customer Satisfaction (Independent Survey)

Service Name: Customer Satisfaction (Independent Survey)
Service Description: Measures performance of service provided to customer (end-user). Used to identify customer's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve customer / management satisfaction and service performance.

Performance Standard: 100% customer satisfaction, to be determined by the following:
 	
(1) Baseline customer satisfaction survey, to be performed by independent third party during base year one (1) of the contract, is determined.
 	
(2) Customer dissatisfaction (defined as scores below 4, on a 5 point scale with 5 being high) is reduced by 10% per measurement period until 0% is reached (100% customer satisfaction when measuring 4 or 5)
 	
    - Penalties will be assessed using sliding scale 1
 	
(3) Once 100% customer satisfaction has been achieved (100% 4 or 5 ratings), a baseline will be established based upon measurement of rating 5 only
 	
(4) Customer dissatisfaction (defined as scores below 5, on a 5 point scale with 5 being high) is reduced by 5% per measurement period until 0% is reached (100% customer satisfaction when measuring 5)
 	
    - Penalties will be assessed using sliding scale 2
 	
(NOTE: Customer Satisfaction process shall not start until one (1) year after contract initiation)

Responsibilities: Measure Customer Satisfaction by contracting an independent third party to develop and administer the surveys to all customers that receive ITD services.
Assumptions: Survey shall be completed via a web interface. Customers shall take part on a volunteer basis. Survey shall be developed by an independent third party with input from both the Service Provider and ED.
Frequency: Measure and Report Semi-Annually, switching to Annually after the first two (2) years successful performance of the contract.
Measurement Period: Semi-annually, switching to Annually after the first two (2) years successful performance of the contract. When the customer satisfaction survey moves from a semi-annual frequency to an annual frequency the most recent survey scored will be used for the measurement period in question. For example:

During Option Year 1, two customer satisfaction surveys shall be performed, resulting in a score for each measurement period. During Award Year 3, a single customer satisfaction survey shall be performed, that score will be used for the measurement period in which it was performed and the following measurement period (Award Year Measurement Period 1 and Award Year Measurement Period 2).

How Measured: Formula is determined by an independent third party, but shall be statistically significant and all data shall be validated and normalized.

Sources: Independent third party maintained tool that provides documentation capabilities to meet the reporting requirements.

Customer Satisfaction (Independent Survey) Deliverables: Semi-Annual / Annual report. Reports shall provide a roll-up of all monthly reports into a plain-English format, highlighting any problems and trends, and comparing ED against industry averages. This information shall be presented to both the Service Provider and ED in a presentation format and include any recommendations for improvement.

Disincentive: 20 points – However, for scoring purposes, this survey shall not be considered an SLA. It shall be considered to be part of the 2nd set of 50 points in the Annual Performance Review Plan, which is based on qualitative feedback from managers.

Penalties for Customer Satisfaction shall be applied using sliding scale 1 (satisfaction defined as 4 or 5) and than scale 2 (satisfaction defined as 5).

1) **Scale 1** – Customer Dissatisfaction is defined as anything below a 4 on a 5 point scale

Customer Dissatisfaction Decrease	Points
10% or greater	20 points
09% or greater	18 points
08% or greater	16 points
07% or greater	14 points
06% or greater	12 points
05% or greater	10 points
04% or greater	08 points
03% or less	0 points

For example:
The contract begins with an initial satisfaction (a 4 or 5) rating of 40 percent, leaving 60 percent of customers dissatisfied (less than 4 or 5). The service provider is responsible for decrease the percentage of dissatisfied customers by 6 percent (10 percent of 60 percent). After a measurement period, the service provider reduces dissatisfaction by 7 percent. Using scale 1, the service provider can determine that all 20 potential points are accrued. If the service provider only reduced dissatisfaction by 4.8 percent, an 8 percent decrease, only 16 points would be accrued.

2) **Scale 2** – Customer Dissatisfaction is defined as anything below a 5 on a 5 point scale

Customer Dissatisfaction Decrease	Points
5% or greater	20 points
4% or greater	18 points
3% or greater	16 points
2% or greater	14 points
1% or greater	12 points
0% or less	0 points

For example:

The contract has progressed to a satisfaction (5) rating of 40 percent, leaving 60 percent of customers dissatisfied (less than 5). The service provider is responsible for decrease the percentage of dissatisfied customers by 3 percent (5 percent of 60 percent). After a measurement period, the service provider reduces dissatisfaction by 7 percent. Using scale 2, the service provider can determine that all 20 potential points are accrued. If the service provider only reduced dissatisfaction by 2.5 percent, a 1.5 percent decrease, only 14 points would be accrued.

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

This survey will not be conducted by the Service Provider or ED.

Security

Security consists of five SLAs that are intended to keep the ED synchronized with all ED and Federal Government security mandates and alerts, and provide appropriate notification in the event of a security event.

Notification of Security Event

Service Name: Acceptable time to notify ED of a Security Event
Service Description: Measure performance of the service provider to inform ED of any Security events within fifteen (15) minutes of their occurrence. The Service Provider and ED shall determine the appropriate list of personnel to be notified, based upon severity and criticality of the event. A Security Event is defined as any IT event that affects more than 50 employees resulting from a malicious attack (e.g., spoof attack, virus attack, SPAM, Intrusion, unauthorized access to financial or HR material, etc.).
Performance Standard: 100% notification within fifteen (15) minutes of event's discovery. Updates every hour until events are resolved, or as noted by ED security point-of-contact.
Responsibilities: The service provider shall follow the chain of command for reporting according to ED's guidelines.
Assumptions: Notification shall occur after a security event is discovered.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Security Events reported within fifteen (15) minutes / total number of Security Events = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Notification of Security Event Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

CERT / FedCIRC Alerts

Service Name: Acceptable Time to Respond to CERT / FedCIRC Alert.
Service Description: Measures performance of the service provider to respond to CERT / FedCIRC Alerts.
Performance Standard: 100% response to alert (within CERT / FedCIRC alert task specifications), and creation of impact on EDNet within four (4) hours of release.
Responsibilities: Service Provider shall respond to CERT / FedCIRC alerts, including the initiation of the testing process and notification of the appropriate ED personnel. Generate after action report ten (10) days after each event, or as stated by ED.
Assumptions: The service provider shall be responsible for gathering CERT / FedCIRC alerts.

ED-05-PO-0908

Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of CERT-FedCIRC alerts responded to with within CERT-FedCIRC alert task specifications and creation of impact on EDNet within 4 hours of release / total number of CERT-FedCIRC alerts = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
CERT / FedCIRC Alerts Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

CERT / FedCIRC Tasks

Service Name: Acceptable Time to Complete CERT / FedCIRC Tasks.
Service Description: Measures performance of the service provider to respond to CERT / FedCIRC Tasks.
Performance Standard: 100% creation with 24 hours of a suggested action plan to re-mediate. 100% plan execution within seven (7) days of creation.
Responsibilities: Service Provider shall complete CERT / FedCIRC alert tasks within the specified timeframes of the alerts. Generate after action report ten (10) days after each event, or as stated by ED.
Assumptions: CERT / FedCIRC alerts have been tested against ED's configurations. No changes shall be made until all the proper testing is completed.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of CERT-FedCIRC tasks action plans created within 24 hours and completed within seven (7) days / total number of CERT-FedCIRC tasks = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
CERT Tasks Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Anti-Virus Update (Software Version)

Service Name: Acceptable Time from Anti-Virus Update Release to Full Distribution
Service Description: Measures performance of the service provider to update ED's infrastructure with the latest tested anti-virus updates.
Performance Standard: 48 hours after government CCRB approval. No production version is to be more than one (1) version behind from current vendor release at any time.
Responsibilities: Service Provider shall complete the anti-virus update for ED's entire infrastructure at least 48 hours from government CCRDB approval, and ensure that the production version of the anti-virus software is current by at least one (1) version.
Assumptions: Updates have been tested against ED's configurations. No changes shall be made until all the proper testing is completed.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Updates completed within specifications and number of cases where virus version is out of date / total number of Updates = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Update Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Virus File Release (Signature Files)

Service Name: Acceptable Time to Release Virus definitions Update
Service Description: Measures number of virus definitions that are not updated.
Performance Standard: 100% within 24 hours of virus update release to both client and servers that are connected to the network.
Responsibilities: Update Virus Release Files as designated by ED and ensure software is working properly by completing any manufacturer and/or ED designated tests.
Assumptions: Service Provider is responsible for retrieving updates from ant-virus software provider.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Releases completed within specifications / total number of Releases = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Release Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Virus Penetrations of Network

Service Name: Number of virus penetrations to the network that cause a network outage.
Service Description: Measures number of virus penetrations to the network that cause a network outage.
Performance Standard: Zero (0) downtime due to virus of worm (email borne or otherwise) infiltration on EDNet.
Responsibilities: Prevent virus penetration to ED network.
Assumptions: The latest version of anti-virus software signature files (virus definitions) must include the virus / worm impacting EDNet (the virus / worm must be detectable by latest commercial signature files). If the virus / worm is contained in a new virus signature file that has been released, but not updated as per the 24 hour Virus File Release (Signature Files) SLA, no points shall be deducted.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Network downtime associated with virus penetrations within specifications
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Release Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Issue Escalation Management

Emergency Management involves the timeliness of an emergency response and following the appropriate escalation procedure outlined in Section III Scope of Work of the PWS.

Issue Escalation Management

Service Name: Acceptable Time to Communicate a Major Emergency Event
Service Description: Measures time the service provider takes to respond to a major emergency event (to IT Management and employees).

A major issue (emergency event) is defined as any IT event that affects more than 50 employees (e.g., email outage, virus attack, VoIP outage, etc.).
Performance Standard: ITD Manager or designee is notified within fifteen (15) minutes of becoming aware of any major IT issues 100% of the time. Communication to customers to be determined based on response from Director of IT or designee.
Responsibilities: Service Provider shall provide notification to Director or IT when a major emergency event occurs, and will provide communication to the Department based on the direction received from IT Management. Notification to the Director must occur via voice communication. If the Director of Information Technology or designee is unavailable the service provider is to notify the Chief Information Office or designee.
Assumptions: The service provider shall be responsible for gathering the major emergency event status.
Frequency: Measure Monthly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of major emergency events communicated to Director of IT within 15 minutes / total number of major emergency events = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Emergency Management Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Asset Management

Asset Management is intended to provide ED with a complete an accurate count of its IT inventory, warranties and to be used in its IT refresh cycle.

Asset Management Accuracy

Service Name: Asset Management – Hardware and/or Software Inventory Accuracy
Service Description: Ensure that asset information is timely and accurate so that ED may better leverage its capabilities with regards to purchasing, service contracts and refresh of technology. This applies to assets owned by ED and managed by service provider. This activity includes the tracking, reporting, and disposal, as required, of resources and general-purpose computer assets, vendor coordination and administering licenses for System Software and maintenance agreements of the assets.
Performance Standard: 95% accuracy of asset management system.
Responsibilities: Keep asset management system accurate and up to date.
Assumptions: The service provider is responsible for maintaining the asset management system.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Assets Accurately Inventoried / total number of Assets Inventoried = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Asset Management Accuracy Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Category A Service Levels

Category A work is all firm fixed price with the service provider in control of the people, process and technology, as such these SLAs are meant to ensure that ED receives the desired level of service from this relationship.

Production Services

The following five SLAs are to provide ED with a robust production server infrastructure. The server infrastructure includes both Messaging and Web Services servers.

Server Availability - Criticality 1

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 1 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction. *Note:* includes all Criticality 1 production servers within EDNet.
Performance Standard: 99.6% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. The service provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 1 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period -- scheduled down time) = "service level attainted", and compare against Performance Standard (99.6%). Example: Server X (a single Criticality 1 server) was down for 45 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance. Daily Availability = ((24 Hours * 7 Days) - 1 Hour - 45 minutes) / ((24 Hours * 7 Days) -- 1 Hour) = 99.55% uptime for Server X, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None Note: This disincentive is based on downtime per Criticality 1 server - i.e. server downtime shall not be averaged across all servers.
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server Availability - Criticality 2

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 2 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction. *Note:* includes all Criticality 2 production servers within EDNet.
Performance Standard: 99.6% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.

Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 2 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.6%).   Example: Server X (a single Criticality 2 server) was down for 45 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance.   Daily Availability = (24 Hours - 1 Hour - 45 minutes) / (24 Hours – 1 Hour) = 99.55% uptime for Server X, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low   Note: This disincentive is based on downtime per Criticality 2 server - i.e. server downtime shall not be averaged across all servers.
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server Availability - Criticality 3

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 3 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction.   Note: includes all Criticality 3 production servers within EDNet.
Performance Standard: 99.9% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 3 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.9%).   Example: Server X (a single of Criticality 3) was down for 30 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance.   Daily Availability = (24 Hours - 1 Hour - 30 minutes) / (24 Hours – 1 Hour) = 99.7% uptime for Server X, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium   Note: This disincentive is based on downtime per Criticality 3 server - i.e. server downtime shall not be averaged

across all servers.

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server Availability - Criticality 4

Service Name: Production Server Availability

Service Description: At a "server" level, measures Criticality 4 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction.

Note: includes all Criticality 4 production servers within EDNet.

Performance Standard: 99.9% Availability.

Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.

Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.

Frequency: Measure Weekly and Report Monthly.

Measurement Period: 24 hours per day seven days a week.

How Measured: Measure each Criticality 4 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.9%).

Example: Server X (a single Criticality 4 server) was down for 30 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance.

Daily Availability = (24 Hours - 1 Hour - 30 minutes) / (24 Hours – 1 Hour) = 99.7%, uptime for Server X, thus the SLA is missed for this particular server.

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: High

Note: This disincentive is based on downtime per Criticality 4 server - i.e. server downtime shall not be averaged across all servers.

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Messaging Availability

Service Name: Messaging Server Availability

Service Description: The percent of time that the messaging / exchange server is available for normal business operations. Includes Microsoft Exchange and Blackberry (or equivalent).

Performance Standard: 99.9% Availability

Responsibilities: Maintain Messaging Server in good operating condition so standard / normal ED activities can take place within defined time frames.

Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.

Frequency: Measure and Report Monthly.

Measurement Period: 24 hours a day 365 days a year.

How Measured: Measure each server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level

attainted", and compare against Performance Standard (99.9%).

Example Messaging Server was down for 30 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance.

Daily Availability = (24 Hours - 1 Hour - 30 minutes) / (24 Hours – 1 Hour) = 99.7%, uptime for the Messaging Server, thus the SLA is missed for this particular server.

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Messaging Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: High.

In addition, if a mail server is down more than four (4) hours that impacts over 5% of the total Department's customers, 50% of the annual Email Architecture Fee shall be refunded **PER INSTANCE**[38].

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server System Restoration (Non-Disaster Recovery)

Service Name: System Restoration in Non-Disaster Recovery Situations.

Service Description: Complete process of restoring systems when notified by ED end user or become aware of failure through self-analysis or helpdesk. Includes NT and UNIX servers, and the restoration of production data.

Performance Standard:
Criticality 1 Server Restore - System, including application, restoration completed within twelve (12) hours from time of notification by ED (Helpdesk), 100% of the time.

Criticality 2 Server Restore - System, including application, restoration completed within eight (8) hours from time of notification by ED (Helpdesk), 100% of the time.

Criticality 3 and 4 Server Restore - System, including application, restoration completed within four (4) hours from time of notification by ED (Helpdesk), 100% of the time.

Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide service provider easy access to required areas to perform file restorations.

Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.

Frequency: Measure Daily and Report Monthly.

Measurement Period: 24 hours a day 365 days a year.

How Measured: Systems Restored within SLA timeframe / Total Number of System Restores = "Service Level Attained".

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

System Restoration (Non-Disaster Recovery) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive:
Criticality 1 Server restore - None

Criticality 2 Server restore - Low

Criticality 3 Server restore - Medium

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

---

[38] See Attachment II Cost Proposal worksheet.

ED-05-PO-0908

Disaster Recovery

Service Name: ED Authorized Disaster Recovery
Service Description: Complete process of implementing the DRP when notified by the appropriate ED management or become aware of failure through self-analysis or helpdesk. Includes NT and UNIX servers, and the restoration of production data.
Performance Standard: 12 hours until completion from time of notification by ED, 100% of the time.
Responsibilities: Maintain DRF as per ED requirements and be available to perform testing and validation of DRP. ED to provide service provider easy access to required areas to perform DRP.
Assumptions: ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to DRF.
Frequency: Measure Monthly and Report Quarterly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Disaster Recovery Events within SLA timeframe / Total Number of Disaster Recovery Events = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Disaster Recovery Deliverables: Quarterly report. Reports shall provide a roll-up of all monthly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Timeliness of Backups

Service Name: Timeliness of Backups.
Service Description: Percentage of time that the backups are performed on time. *Note:* The backups must be free from errors and omissions.
Performance Standard: 100% of backups are performed when scheduled.
Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide Service Provider easy access to required areas that allow for completion of duties. ED will provide to the service provider the backup schedule[39].
Assumptions: That incremental backup are completed nightly, full backups monthly and a copy of the tapes is rotated off-site monthly. This represents ED's minimum acceptable backup schedule, backups are kept in accordance with ED's archival policy.
Frequency: Measure Monthly and Report Quarterly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Times Backups were performed before the Deadline / Total Number of Backups Performed = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Timeliness of Backups Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

End User Support

The End User Support SLAs are broad in scope requiring that all background systems needed in order to provide customer service are also in proper order and functioning. It is possible that End User Support SLAs could be triggered because of a network or server mishap; in such cases the End User Support

---

[39] See Roles and Responsibilities in Appendix G.

ED-05-PO-0908

SLAs in addition to the other SLAs (i.e., Production Server, Network, etc.) could come into effect. *The service provider is responsible for all SLAs triggered by an event.*

Installation

Service Name: Installation.
Service Description: Acceptable time required to install a new desktop system upon appropriate request from ED. Note: Normally more than fifteen (15) installations at once are considered a project and are based on agreed timeframe.
Performance Standard: One (1) business day from time system scheduled for installation, 100% of the time.
Responsibilities: Install and test system, and remove shipping cartons to ED designated area.
Assumptions: ED shall provide access to facilities as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to facilities.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Installation completed <= SLA business day / Total Number of Installs within Measurement Period = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Installation Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Any transaction that includes more than fifteen (15) units shall be considered a "project' and shall be completed as a separate function with separate pricing and service level commitment.

Moves, Adds or Changes (MACs)

Service Name: Moves, Adds or Changes (MACs).
Service Description: Acceptable time required to move, add or change software or hardware a desktop system upon appropriate request from ED. *Note:* Normally a group of more than fifteen (15) MACs at once is considered project and is based on an agreed upon timeframe.
Performance Standard: One (1) business days, 90% of the time, from time of notification by ED for standard and non-standard product(s), for less than 15 employees, and not to exceed Three (3) business days.
Responsibilities: De-install system, Move system, reinstall or Add / Change appropriate hardware or software to ED designated destination and validate that system is able to "communicate" with the network.
Assumptions: ED shall provide access to facilities as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to facilities.
Frequency: Measure and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: MACs completed <= One (1) of SLA business day / Total Number of MACs within reporting period = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Moves, Adds or Changes (MACs) Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Any transaction that includes more than fifteen (15) units shall be considered a "project" and shall be completed

as a separate function with separate pricing and service level commitment.

Establish Individual User Accounts (including E-mail)

Service Name: Establish Individual User Accounts (including E-mail).
Service Description: Acceptable time for creation of access authorizations and codes for ED or service provider that as representatives of the ED or service provider for user access to systems.
Performance Standard: Four (4) business hours until completion from time of notification by ED, 100% of the time (assuming not more than 20 accounts per day)
Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.
Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: IDs created within SLA timeframe / Total Number of IDs created = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Establish Individual User Accounts (including E-mail) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Systems requiring accounts include: Network, Email and Remote Access (Citrix) accounts.

EDNet Password Reset

Service Name: EDNet Password Reset.
Service Description: Reset end user EDNet password, authorizations based on end user request.
Performance Standard: Fifteen (15) minutes 95% of the time, 100% password resets within two (2) business hours.
Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.
Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of EDNet Password Resets within SLA timeframe / Total Number of Password Resets = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Password Reset Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

File Restoration (Non-Disaster Recovery)

Service Name: File Restoration (Non-Disaster Recovery).
Service Description: Begin process of restoring files when notified by ED end user or become aware of failure through self-analysis or contact center.

ED-05-PO-0908

Performance Standard: Eight (8) hours from the time the tape arrives, 90% of the time (assuming normal ED tape retention policy and volume of file being restored allows an 8 hours restore), not to exceed seventy two (72) hours.
Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide service provider easy access to required areas that allow for appropriate data back-up capabilities.
Assumptions: Upon arrival of tapes, files shall be restored within the eight (8) hour window.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Files Restored within SLA timeframe / Total Number of Files Restored = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
File Restoration (Non-Disaster Recovery) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Disable User Accounts (Including E-mail)

Service Name: Disable User Accounts (Including E-mail).
Service Description: Acceptable time for deletion of access authorizations and codes for ED or service provider.
Performance Standard: One (1) business hour, from time of notification by ED, 100% of the time.
Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.
Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: IDs Deleted within SLA timeframe / Total Number of IDs Deleted = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Disable User Accounts (Including E-mail) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Helpdesk

The Helpdesk SLAs are intended to provide a minimum standard of service expected by ED. All of the following SLAs deal with the customer's experience while using ITD's services, and as such are of great importance to ED.

Priority 1 Customer Support

Service Name: Priority 1 Customer Support
Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 1 Customers.
Performance Standard: First contact within fifteen (15) minutes, and two (2) hours until resolution, 99% of the time, 100% within eight (8) hours. *Note:* Any resolution time requirements less than four (4) business hours shall require "HOT" spares.
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.

Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.

Frequency: Measure Weekly and Report Monthly

Measurement Period: Business hours.

How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained".

Note: This includes notification, escalation and restoration of service.

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Priority 1 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: High

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Priority 1 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.

Priority 2 Customer Support

Service Name: Priority 2 Customer Support

Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 2 Customers

Performance Standard: First contact within thirty (30) minutes, and four (4) hours until resolution, 95% of the time, 100% resolution within twelve (12) hrs.

Note: Any resolution time requirements less than four (4) business hours shall require "HOT" spares.

Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.

Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.

Frequency: Measure Weekly and Report Monthly.

Measurement Period: Business hours.

How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained".

Note: This includes notification, escalation and restoration of service.

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Priority 2 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: Medium

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Priority 2 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.

Priority 3 Customer Support

Service Name: Priority 3 Customer Support

Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 3 Customers

Performance Standard: First contact within one (1) business hour, and twelve (12) business hours until resolution, 90% of the time, 100% within 24 hours.

Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.

ED-05-PO-0908

Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Business hours.
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained".   *Note:* This includes notification, escalation and restoration of service.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Priority 3 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.   Priority 3 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.

Helpdesk Call Answer

Service Name: Helpdesk Call Answer.
Service Description: Answer time is the number of seconds it takes any representative of ED to connect with service provider's contact center representative.
Performance Standard: 90% of calls shall be answered < 30 seconds by live person that is front-end directed by ACD.
Responsibilities: Answer all calls with a live person during the service activity definition timeframe while providing ACD front-end director activity.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Calls Answered in < 30 seconds / Total Calls = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Helpdesk Call Answer Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.   Service Provider shall provide a telephone number staffed by technical professionals during required time frames. ED calls designated toll free number and has all required data, including "entitlement data" ready for call activity.

Call Abandonment Rate

Service Name: Call Abandonment Rate.
Service Description: The call abandonment rate is the proportion of calls that come into the service provider's Helpdesk, which either hang up or are disconnected before the service provider's agent answers the phone.   *Note:* There is a "wrong immediate hang up" exclusion so they will not be included in this metric.
Performance Standard: <3% of calls abandoned, after initial fifteen (15) seconds of hold time.
Responsibilities: Recording and managing calls that are abandoned to less than prescribed service level.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring

ED-05-PO-0908

and reporting.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Abandoned Calls (calls that have entered the queue and "hang up") / Total Calls = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Call Abandonment Rate Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Service Provider provided ACD system has capability of tracking and reporting all abandoned calls.

First Call Resolution

Service Name: First Call Resolution.
Service Description: The desired percentage of total contacts planned for resolution at this level. First contact completion applies when the first person the customer reaches either answer the question, resolve the problem, or dispatch service when appropriate. Warm transfers and callbacks shall be considered second or greater contact.
Performance Standard: 40% for the first two months with 5% monthly increases until first call resolution rate equals 70%. Once 70%, a 1% monthly increase shall be observed until the first call resolution rate equals 85%, 95% of the time.
Responsibilities: Provide required assistance (non-technical and technical) to satisfy ED end-user needs on the initial call to the helpdesk.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting. Technical dispatch counts as first call resolution and is subject to response times as follows: Priority 1, fifteen (15) min.; closure two (2) hrs. 99%, 100% resolution eight (8) hrs. Priority 2, thirty (30) min.; closure four (4) hrs. 95%, 100% resolution twelve (12) hrs. Priority 3, two (2) hrs.; closure twelve (12) hrs. 90%, 100% resolution twenty-four (24) hrs.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of calls resolved on the first call / total calls = "Service Level Attained"
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
First Call Resolution Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Service Provider provided system has capability to track and report out of compliance activities.

Follow-On Calls due to Problem Repeated after Initial Fix Failed

Service Name: Follow-On Calls due to Problem Repeated after Initial Fix Failed.
Service Description: This is a measure of quality. It tracks repeat calls, or the number of calls initiated by an end user to correct the same problem that had been closed as resolved.
Performance Standard: 10% for the first two months with a 1% reduction per month until 5% is achieved, 99% of the time.
Responsibilities: Provide required assistance (non-technical and technical) to satisfy ED end-user needs on

ED-05-PO-0908

follow-on calls to the helpdesk.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Repeat Calls / Total Calls = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Follow-On Calls due to Problem Repeated after Initial Fix Failed Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Service provider provided system has capability to track and report out compliance activities.

Call Center Availability

Service Name: Call Center Availability.
Service Description: The percent of time that the Call Center environment is available for normal business operations. *Note:* This includes IVR.
Performance Standard: 99.9% Availability.
Responsibilities: Maintain Call Center environment in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to the call center environment as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to the call center environment.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Total Available Hours / by Total Hours in measurement period = "Service Level Attainted".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Call Center Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. SLA is defined as the availability of the call center environment (telephone / PBX, voice mail, ACD, IVR, etc.) to the customer.

Category B Service Levels

Category B work are fixed duration projects with a clear beginning and end. Each project shall be bid in a firm fixed price / time and materials manner by the service provider, after which SLAs shall be used to ensure that budget, schedule and quality are maintained.

Project Management

The Project Management SLAs are intended to insure that all work in this category is performed in a professional, timely and consistent manner. All three SLAs are concerned with the quality and variance to budget and schedule of the work provided.

Variance to Budget (Time and Materials task orders only)

Service Name: Variance to Budget (if applicable)

ED-05-PO-0908

Service Description: Total cost to complete program requirements shall come in at the budgeted cost.
Performance Standard: Total shall be at or below budget for projects, 95% of the time. No more than 10% above budge.
Responsibilities: Maintain project plan in good operating condition so proposed activities can take place within defined budgets.
Assumptions: The service provider shall meet all project management requirements detailed in Appendix F.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total Budget for the program – Actual Cost of the program / Total Budget for the program.   *Note:* This would need to take into consideration change requests required by ED.
Sources: Baseline Project Plan.
Variance to Budget Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Variance to Schedule

Service Name: Variance to Schedule.
Service Description: Completed program requirements shall be delivered at scheduled time.
Performance Standard: Total shall be on or ahead of Schedule for projects, 95% of the time.
Responsibilities: Maintain project plan in good operating condition so proposed activities can take place within defined schedules.
Assumptions: The service provider shall meet all project management requirements detailed in Appendix F.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total Schedule Time for the program – Actual Time of the program / Total Scheduled Time for the program.   *Note:* This would need to take into consideration change requests required by ED.
Sources: Baseline Project Plan.
Variance to Schedule Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Deliverable Quality

Service Name: Deliverable Quality.
Service Description: Deliverable Quality is composed of two parts, Reports and Deliverables. This measure is utilized by ITD to measure, at a business function level, the ability of the service provider to perform required services, while achieving the desired result of driving service provider behavior towards a reduction of performance errors.
Performance Standard: 100% of deliverables shall meet the performance standards identified in the task order, or the work shall be redone.
Responsibilities: Provide deliverable to ED that meet the expectations of quality.
Assumptions: The service provider has clearly understood ED's requirements and has solicited feedback when required. Ed shall provide consistent instructions to the service provider.
Frequency: Measure Monthly and Report Quarterly.
Measurement Period: Project initiation until project completion.
How Measured: Number of Deliverables Completed in accordance with performance standards / Total Number of Deliverables = "Service Level Attained".

ED-05-PO-0908

Sources: Baseline Project Plan.
Deliverable Quality Deliverables: Quarterly report. Reports shall provide a roll-up of all monthly reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Category C Service Levels

Category C work is Time and Material operations. The service provider is expected to supply qualified personnel who shall implement ED's processes and achieve the service levels encapsulated within each SLA below.

Network

The following four SLAs govern the operations of the network infrastructure (i.e., LAN, MAN, LAN, VoIP, etc.) at ED and as such are a critical component of the overall service provided to ED's customers.

Move, Add, Change or Delete Telecom – 1 to 25 Software

Service Name: Move, Add, Change or Delete Telecom (IP and non-IP Telephony) – 1 to 25 Software.
Service Description: Average time to complete a move, add, change or delete for network system that only requires a change that can be completed by software.
Performance Standard: One (1) business day, 100% of the time.
Responsibilities: Service Provider - Maintain all telecomm equipment in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Deskside Support business hours (business days).
How Measured: Average of the time taken to perform function for each request. Each request is the time from request approval to completion of the request.   Example (time for a +b + c / 3 = average time to complete).   This can be subject to availability service levels or a maximum number of requests as well.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Move, Add, Change or Delete Telecom – 1 to 25 Software Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.   Over 25 Software MACs shall be completed on an agreed-upon timeframe.

Move, Add, Change or Delete Telecom – 1 to 25 Hardware & Wire

Service Name: Move, Add, Change or Delete Telecom – 1 to 25 Hardware & Wire.
Service Description: Average time to complete a move, add, change or delete for network system that only requires a change that can be completed by hardware / wire.
Performance Standard: Five (5) business days, 100% of the time.
Responsibilities: Service Provider –shall maintain all telecomm equipment in good operating condition so standard / normal ED activities can take place within defined time frames. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm

systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Deskside Support business hours.
How Measured: Average of the time taken to perform function for each request. Each request is the time from request approval to completion of the request. Example (time for a +b + c / 3 = average time to complete) This can be subject to availability service levels or a maximum number of requests as well.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Move, Add, Change or Delete Telecom – 1 to 25 Hardware & Wire Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Over 25 Hardware & Wire MACs shall be completed on an agreed-upon timeframe.

Network Availability

Service Name: Network Availability.
Service Description: The percent of time that the network, including LAN, WAN, Internet, Intranet and VoIP, is available for normal business operations. Includes voice and data as well as the equipment infrastructure.
Performance Standard: 99.9% Availability.
Responsibilities: Maintain network in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems. Availability excludes maintenance windows.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours per day 365 days per year.
How Measured: Measure network availability, (total hours available during measurement period excluding scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.9%). Example Network was down for 15 minutes during the measurement period. "Daily Availability" = (22.75 Hours) / (24 Hours – 1 Hour) = 98.91%.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Network Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. SLA is defined as the availability of the network to the customer.

Response Time – Network

Service Name: Response Time – Network.
Service Description: Time required for a packet to go between an end user demarcation point and the host site front-end processor or similar device.
Performance Standard: 0.5 second.
Responsibilities: Maintain network in good operating condition so standard / normal ED activities can take place within defined time frames.

ED-05-PO-0908

Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours per day 365 days per year.
How Measured: Time required for a packet to go between an end user demarcation point and the host site front end processing or similar device.
Sources: Web enabled tool supplied by service provider that shall use a tool or agent to measure the time increment.
Response Time – Network Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Quality Assurance Process

The Quality Assurance SLAs are intended to provide insight into how the Quality Assurance Process works and to provide enough detail for other business units within ED to successful schedule quality assurance's participation in projects, etc. Therefore the SLAs described below are heavily customer focused and are explicit rather than implicit SLAs captured under the Production Server and End User Support SLAs.

Variance to Schedule (Quality Assurance)

Service Name: Variance to Schedule (Quality Assurance).
Service Description: Products shall complete the Quality Assurance process within the scheduled timeframe.
Performance Standard: The Quality Assurance process shall be completed within 1 business day for Minor Testing Request (i.e., configuration changes) and ten (10) business days for Integration Testing (i.e., updates and upgrades) of submission 95% of the time. Note: Major system changes (i.e., new applications, etc.) would be scheduled on a case-by-case basis.
Responsibilities: Maintain Quality Assurance process in good operating condition so standard / normal Quality Assurance activities can take place within defined time frames.
Assumptions: The service provider shall meet all project management requirements as detailed in Appendix F.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total scheduled time for the program – Actual time of the program / Total Scheduled Time for the program. Note: This would need to take into consideration change requests and out of scope elements required by the ED.
Sources: Baseline Project Plan.
Variance to Schedule (Quality Assurance) Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Custom Report Creation

The Custom Report Creation SLAs are intended to provide assurances of quality for reports (ex. Reports in Fox Pro, etc.) created for business units.

Mean Time to Repair – Applications

Service Name: Mean Time to Repair – Applications.
Service Description: Time to Restore Functionality of Application.
Performance Standard: six (6) hours, 95.5% of the time, 100% repair within one (1) business day.
Responsibilities: Resolve problem and have "broken application" up and running within designated timeframe.

ED-05-PO-0908

Assumptions: ED shall provide access to applications as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Problems Resolved <= SLA hours / Total Number of Problems = "Service Level Attained". Note: This includes notification, escalation and restoration of service.
Sources: Service Provider maintained web enabled tool that provides documentation capabilities to meet the reporting requirements.
Mean Time to Repair – Applications Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Availability – Custom Reports

Service Name: Availability – Custom Reports.
Service Description: The percent of time that the application is available for normal business operations.
Performance Standard: 99.5% Availability.
Responsibilities: Maintain application in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to applications as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total Available Hours / by Total Hours in measurement period = "Service Level Attained". Example 24 Hours * 30 Days (average days in a month) = "Monthly Available" to define if "Service Level Attained".
Sources: Service Provider maintained web enabled tool that provides documentation capabilities to meet the reporting requirements.
Availability – Custom Reports Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. SLA is defined as the availability of the Custom Report to the customer.

V. Period of Performance

This contract, issued against the GSA Schedule 70 contract shall have one (1) base period, two (2) option periods, and up to seven (7) award terms (see Section H.14 Award Term Provision) thereafter. A sixty (60) day transition period from the current task order to this new contract shall occur from the date of award of this contract. Full operation of this contract must begin sixty (60) days following award. Accordingly, the performance periods are as follows:

Begin	End	Period
May 1, 2005	June 30, 2005	Transition Period
July 1, 2005	June 30, 2006	Base Period
July 1, 2006	June 30, 2007	Option Period One
July 1, 2007	June 30, 2008	Option Period Two
July 1, 2008	June 30, 2009	Award Term One
July 1, 2009	June 30, 2010	Award Term Two
July 1, 2010	June 30, 2011	Award Term Three

ED-05-PO-0908

July 1, 2011	June 30, 2012	Award Term Four
July 1, 2012	June 30, 2013	Award Term Five
July 1, 2013	June 30, 2014	Award Term Six
July 1, 2014	June 30, 2015	Award Term Seven

VI. Site of Performance

The primary location of work shall be in the Headquarters Data Center Facility in the Washington, D.C. metropolitan area in Oxon Hill, MD. However, all services provided under the contract shall be available to all offices in ED headquarters located in Washington, DC, its metropolitan data facility, and all regional and sub-regional offices, as appropriate. The contractor shall provide the same level of service in the regional and sub-regional offices as at the Headquarters locations, unless exempted from doing so by the Contracting Officer's Representative (COR).

The ED enterprise includes, but is not limited to, the following headquarter locations in the Washington, DC area:

- Federal Regional Office Building 6, 400 Maryland Avenue, SW, Washington, DC
- Headquarters Data Center Facility, Oxon Hill, MD
- Union Center Plaza, 830 First Street, NE, Washington, DC
- Capital Place, 555 New Jersey Avenue, NW, Washington, DC
- Mary E. Switzer Building, 330 C Street, SW, Washington, DC
- 1990 K Street, NW, Washington, DC
- L'Enfant Plaza, 2100 Corridor, SW Washington, DC
- 2100 M Street, NW, Washington, DC
- Connecticut Avenue, NW, Washington, DC
- 800 North Capitol Street, NW, Washington, DC
- 1255 22nd Street, NW, Washington, DC
- 400 Virginia Avenue, SW, Washington, DC
- Metro Center, NW, Washington, DC
- 1775 I Street, NW, Washington, DC
- 525 School Street SW, Washington, DC
- 7100 Old Landover Road, Landover, MD
- Potomac Center Plaza South, 550 12th Street, SW, Washington, DC

Plans are being made for consolidating several of the buildings in the Headquarters area, thus reducing the number of buildings in which ED resides and operates. Current estimates for building moves for the Headquarters buildings are as follows:

- Employees in Mary E. Switzer (MES), non-Operations OCIO staff from Regional Office Building (ROB), and CFO employees from ROB shall be moved to Potomac Center Plaza South, 550 12th St. SW, Washington, DC (to be completed by 08/30/04).
- Operations OCIO staff move to new Primary Data Center in Oxon Hill, MD (to be

completed late 2004)

- MES shall be remodeled and ED employees from K Street, North Capitol Street, and other outlying buildings are scheduled to be moved into MES permanently, thus consolidating number of ED Headquarter buildings to approximately 5 (FB6, UCP, Potomac Center, MES, and Oxon Hill Data Center) (to be completed 2006-2008)

Regional Office locations across the United States include, but are not limited to:

- Boston, MA
- New York, NY
- Philadelphia, PA
- Atlanta, GA
- Chicago, IL
- Dallas, TX
- Kansas City, MO
- Denver, CO
- San Francisco, CA
- Seattle, WA

The contractor shall be required to support ED's Cleveland, OH sub-regional office, other sub-regional, temporary office sites throughout the United States, and its territories as needed. The services described in this section shall be performed by the contractor at ED offices where required, as directed by the COR. In addition, ED may have a future need for support in international locations.

EDNet's primary locations are detailed in Appendix A.

VII. Additional Contractor References
Below are the additional contractor references that are located at the end of this PWS:

Location	Title	Purpose
Appendix A	EDNet Primary Locations	Provides the Department of Education's primary business locations.
Appendix B	Current IT Service Delivery Infrastructure (EDNet) Environment	Provides current EDNet environment details.
Appendix C	Software	Provides the desktop software supported and licensed by ED.
Appendix D	Communication	Provides the technical information about EDNet communications.
Appendix E	EDNet Backup Architecture	Provides the EDNet backup architecture.
Appendix F	Detailed Work Descriptions	Provides detailed work descriptions of Category B and C work.
Appendix G	Roles and Responsibilities	Provides roles and responsibilities of the service provider and ED.
Appendix H	Benchmark	Benchmarking clause.
Appendix I	Incumbents' Transition Out Plan	Basic elements of the Incumbents'

			Transition Out Plan.
Appendix J	List of Definitions		Glossary of definitions used in the RFQ and PWS.

Appendix A: EDNet Primary Locations

EDNet is located in several locations throughout the country, see exhibit 4. The two primary locations are the Headquarters Data Center and FB6 located in Washington, DC. These two primary locations house the majority of hardware, servers, system software, telecommunication devices, and routers. There are nine other locations in the Washington, DC, metropolitan region that house some EDNet equipment, see exhibit 4 for a list of the DC Metro locations. The EDNet mailing address follows:

U.S. Department of Education
ED Network
6710 Oxon Hill Rd.
Oxon Hill, MD 20745-1121

Exhibit 4: Primary and Secondary Metro Locations of EDNet Facilities

EDNet Location—Primary (Short Name Identifier)	Address

EDNet Location—Primary (Short Name Identifier)	Address
FB6	U.S. Department of Education Federal Building 6 (FB6) 400 Maryland Avenue, SW Washington, DC 20202
HQD[40]	U.S. Department of Education 6710 Oxon Hill Rd. Oxon Hill, MD 20745-1121
MES	U.S. Department of Education Mary E. Switzer (MES) Building 330 C Street, SW Washington, DC 20202
CP	U.S. Department of Education Capitol Place 555 New Jersey Avenue, NW Washington, DC 20202
I Street	U.S. Department of Education 1775 I St., NW Washington, DC 20006
K Street	U.S. Department of Education 1990 K Street, NW Washington, DC 20006
L'Enfant Plaza	U.S. Department of Education 2100 Corridor L'Enfant Plaza Washington, DC 20202
Old Post Office Pavilion	U.S. Department of Education Old Post Office Pavilion 1100 Penn Avenue, NW Washington, DC 20002
School Street	U.S. Department of Education 525 School Street, SW Washington, DC 20407
UCP	U.S. Department of Education Union Center Plaza (UCP)-3 830 First St., NE Washington, DC 20002
Virginia Ave.	U.S. Department of Education

[40] HQD is currently located at ROB 3, 7th & D Streets, SW, Washington, DC. HQD is scheduled to move late in 2004.

ED-05-PO-0908

EDNet Location—Primary (Short Name Identifier)	Address
	400 Virginia Ave, SW Washington, DC 20202
North Capitol Street	National Assessment Governing Board (NAGB) 800 North Capitol Street, NW Washington, DC 20202
PCS	U.S. Department of Education Potomac Center Plaza South 550 12th St. SW, Washington, DC 20202

The DRF is ED's alternate site that provides EDNet disaster recovery and backup functionality and capabilities. Its location and address is provided in Exhibit 5.

Exhibit 5: DRF

EDNet Location—Backup (Short Name Identifier)	Address
ED DRF	U.S. Department of Education 200 Chastain Center Blvd. Suite 250 Kennesaw, GA 30144

There are ten (10) regional sites, one (1) satellite office in Cleveland, and four (4) Office of the Inspector General (OIG) district offices that house some of the EDNet hardware components; they are listed in Exhibit 6.

Exhibit 6: ED Regional, Satellite, and District Offices

ED Office	Address

ED Office	Address
U.S. Department of Education Region I–Boston	McCormack Post Office and Court House Room 700 Boston, MA 02109
U.S. Department of Education Region II–New York	75 Park Place, 12th Floor New York City, NY 10007
U.S. Department of Education Region III–Philadelphia	Wannamaker Building 100 Penn Square East Suite 507 Wannamaker Building Philadelphia, PA 19107
U.S. Department of Education Region IV–Atlanta	61 Forsyth Street, SW Room Suite 19T5540 Atlanta, GA 30303-3104
U.S. Department of Education Region V–Chicago	111 North Canal Street Room Suite 109T554 Chicago, IL 60606
U.S. Department of Education Satellite Office–Cleveland	Bank One Center, Suite 750 600 Superior Avenue East Cleveland, OH 44114-2611
U.S. Department of Education Region VI–Dallas	1999 Bryan Street Room 82610 Dallas, TX 75201
U.S. Department of Education Region VII–Kansas City	8930 Ward Parkway, 2nd Floor Kansas City, MO 64114
U.S. Department of Education Region VIII–Denver	1244 Speer Boulevard Room 332 Denver, CO 80204-3582
U.S. Department of Education Region IX–San Francisco	50 United Nations Plaza Market Street Room 508 San Francisco, CA 94102
U.S. Department of Education Region X–Seattle	915 2nd Avenue Room 2852 Seattle, WA 98174
U.S. Department of Education OIG District Office Satellite Office	500 I Street 9-200 Sacramento, CA 95814
U.S. Department of Education OIG District Office Satellite Office	Federal Building and Courthouse 150 Carlos Chardon Ave., Rm. 747, Box 772 Hato Rey, PR 00918-1721
U.S. Department of Education OIG District Office Satellite Office	501 W. Ocean Blvd., #1200 Long Beach, CA 90802
U.S. Department of Education OIG District Office Satellite Office	9050 Pines Boulevard Suite 270 Pembroke Pines, FL 33024

Appendix B: Current IT Service Delivery Infrastructure (EDNet) Environment

EDNet is the infrastructure that supports primary IT services for ED and is considered a GSS. EDNet serves as the chief communications link between Headquarters' offices and the various regional and satellite offices.

EDNet primarily consists of circuits, routers, switches, servers, and wireless messaging services, along with printers, workstations, and in many cases, telephones that provide real-time communication within the entire Department. EDNet serves the Department with critical information resources and reaches out to the Department's customers on the following:

- Metropolitan Area Network / Wide Area Network (MAN / WAN)
- Messaging System (Exchange)
- File and Print Services via LAN
- IP Telephony System (e.g., Voice over Internet Protocol (VoIP) services, including unified messaging services)
- TTY Telephone Services (NTS-NexTalk)
- Wireless Messaging Services (e.g., Blackberry or equivalent wireless handheld devices)
- Connectivity to and presence on the Internet (ED.gov)
- Intranet ConnectED (i.e., connectivity and approved information for internal ED users)
- Standard desktop and office automation software suite
- Desktop computers and peripherals
- Custom business applications and information systems

The general EDNet environment consists of:

- Approximately 6,000+ desktop systems, 90 percent of which are Intel-based systems running Microsoft's Windows 2000 Professional and developmental installs of Windows XP operating systems. The remaining 10 percent are Apple Macintosh or Unix-based systems. EDNet has approximately 520 Servers including Intel-, Sun- and DEC Alpha-based architectures running, predominantly Windows 2000 / NT, Solaris, True64 and RedHat Linux. Unix-based systems represent the smallest percentage of the total population of servers at around 10 percent.
- Approximately 500 laptops, of which 95 percent are Intel-based systems running Microsoft's Windows 2000 operating system. The remaining systems are Apple Macintosh.
- Remote access computing is supplied mainly thorough dial-up / VPN and Citrix Terminal servers running on both Windows NT (legacy–scheduled to be retired) and Windows 2000. A move to Firepass is scheduled for 2004.

- Approximately 500 PDAs, of which 60 percent are running the Windows CE-based operating system. The remaining 40 percent are PalmOS-based operating systems.
- Approximately 800 cellular phones.

Computing resources used by employees of the ED community are grouped into four distinct groups according to use:

Dedicated and Shared Workstations:

- Kiosks
- Shared laptops
- Training rooms

Data Centers:

- HQ Data Center, Washington, DC metropolitan area in Oxon Hill, Maryland
- Disaster Recovery Facility (DRF) in Kennesaw, Georgia

There are also server rooms at the following locations:

- FB6
- UCP
- K Street

There are also LAN Closets in each facility that houses the network and telephone backbone equipment that is managed and operated by the NCC and Cabling Team (number of closets):

- FB6 (30)
- L'Enfant Plaza (1)
- 800 North Capitol Street (2)
- 400 Virginia Avenue (1)
- Metro Center (1)
- 1775 I Street (1)
- 525 School Street (1)
- 7100 Old Landover Road (2)
- K Street (8)
- CP (7)
- UCP (11)
- ROB3 (5)
- MES (7)
- Potomac Center Plaza South

Remote Users Served By:

- Dial-up Remote Access Services
- VPN tunneling (broadband)
- F5 Firepass
- Web portals (e.g., OWA)
- Citrix

Personal Computing Environment

ED's personal computing (PC) environment includes desktops, laptops, and single-user handheld devices such as PDAs, Blackberry, digital cellular phones with web-based capabilities, and similar technologies. *All Desktop and Laptops are on a four (4) year refresh cycle.*

Typical Intel Desktop, Approximately 5,500

- Processor: P4 2.8 GHz with 512 KB Cache, 800 Front Side Bus (FSB)
- Memory: 512 MB DDR SDRAM
- Hard Drive: 40 GB EIDE
- Optical Drive: 48X DVD-CDRW Combo Drive
- Floppy Drive: 1.44 MB 3.5"
- Video: 64 MB, nVidia, GeForce 4MX
- Audio Internal AC97 Audio (Sound Blaster Compatible)
- LAN Card internal Intel Gigabit 10 / 100 / 1000
- Speakers

Typical Intel Laptop, Approximately less than 2,000

- Processor: 1.6 GHz
- Memory: 512 MB SDRAM
- Hard Drive: 40 GB
- Optical Drive: 8X CD-RW / DVD-ROM
- Floppy Drive: USB External 1.44 MB 3.5"
- Video: 14.1-inch Active Matrix TFT / 1024X768
- Modem: Internal 56 Kbps with V.90 support
- LAN Card: Internal 10 / 100 / 1000 Ethernet

Typical Apple MAC Desktop, Approximately less than 50

- Apple Power Mac G4
- Processor: 1.25 GHz PowerPC G4
- Memory: 512 MB DDR333 SDRAM
- Hard Drive: 80 GB Ultra ATA / 66
- Optical Drive: DVD-ROM / CD-RW
- Video: ATI Radeon 9000 Pro
- LAN Card: 10 / 100 / 1000 BASE-T

ED-05-PO-0908

Typical Apple PowerBook G4 Laptop, Approximately less than 25

- Processor: 867 MHz with 1 MB L3 Backside Cache
- Memory: 512 MB SDRAM
- Hard Drive: 40 GB Ultra ATA
- Optical Drive: DVD-ROM / CD-RW
- Video: 15.2-inch Active Matrix / 1152X768
- Modem: Internal 56 Kbps V.90
- LAN Card: Internal 10 / 100 BASE-T Ethernet

Appendix C: Software

Standard software offerings in use by employees of the ED community are grouped into three distinct groups, Tier 1 is the standard ED software load, Tier 2 consists of any user with one or more of the Tier 2 Software and Tier 3 are any software not included within Tier 1 or 2. Software can be added, moved or deleted to tiers at the beginning of each contract period (e.g., Base, Option or Award years).

Tier 1 – Standard Image Applications

Applications Included in the Standard Image

1. Acrobat Reader 5.0.5 dated 09/24/2001
2. Adobe Acrobat Reader 5.0.5
3. Appropriate DVD and CD-burning software as provided with the PC from the manufacturer.
4. Citrix ICA 4.20.727
5. Dragon System NaturallySpeaking 5.0 and newer
6. EDCAPS Applications
   a) Travel Manager
      i. Geico Travel Manager
      ii. Travel Administration
   b) Reports (Cognos Impromptu)
   c) Loans (Nortridge)
   d) Grants & Payments
   e) Finance & Budget
      i. FMSS-OF
      ii. OFA
   f) Contracts & Purchasing (Comprizon.Buy)
7. Freedom Scientific JAWS for Windows 4.xx and newer
8. Internet Explorer 6.0 SP1
9. MS Publisher 2002
10. NexTalk / NTS, NXI Communications NTS 3.42 and newer
11. Norton AntiVirus Corporate Edition Ver. 7.6
12. Office 2000 SR-1a SP3 (Word, Excel, PowerPoint, Access and Outlook)
13. Real Player 8 Intranet Edition
14. Windows 2000 Professional SP4
15. Windows Media Player 9
16. WinZip 7.0 SR-1
17. ZoomText Xtra Level 2 7.06 and newer

Tier 2 – Non-Standard, but Supported Software

Applications not Included in the Standard Image

1. ACL Software
2. Adobe Acrobat 5.0
3. Adobe Acrobat 6.0
4. Adobe Capture 4.0
5. Adobe Design Collection 7
6. Adobe Framemaker
7. Adobe Illustrator
8. Adobe InDesign 2.0
9. Adobe Pagemaker 7.0
10. Adobe Photoshop 6.0
11. Adobe Photoshop 7.0
12. Adobe Photoshop 7.0 Mac
13. Adobe Premiere
14. Adobe Printshop 7.0
15. AMD 2000
16. ATS 9.0c
17. ATS Tracking System Concurrent Usage
18. Attachmate myEXTRA! 7.0
19. AutoCad 2002
20. AutoCad 2004
21. BCS 9.0a
22. Brio Designer
23. BRIO Insight 6.6.4 (not on IG server)
24. Broderbund Printshop Deluxe 6.0
25. Camtasia Studio
26. Card Scan
27. CCM
28. Check Free
29. CheckFree RECON-Plus 7.1
30. ClearEdits Software
31. Cognos
32. Contribute
33. CorelDraw 11
34. Correspondence
35. Crystal Decisions
36. Crystal Decisions Info 7.5
37. Dragon Naturally Speaking
38. EDICS
39. Enfocus Pitstop Pro 6
40. eWebEditPro 2
41. Exceed
42. FASB Software
43. FOIA
44. FOLIO Builder 4.2(not on IG server)
45. FOLIO Views 4.2 (not on IG server)

46.	Freebalance	78.	OIG Web Site
47.	Full Shot	79.	Omni-Page v. 11
48.	GPAS	80.	Omni-Page v. 12
49.	HEAT 6.4 (not on IG server)	81.	Oros
50.	Homesite	82.	Pell Grant MIS Reports
51.	IAS	83.	PEPS 6
52.	ICTS 9.0d	84.	PuTTY 0.53b (not on IG server)
53.	Idea Single User Full Addition	85.	Qdesigner
54.	Igrafix	86.	Quark Express
55.	Inspiration	87.	Quicken Deluxe 2004
56.	Intelligent Consensus 2000 ver. 2.6 (not on IG server)	88.	Rational Software
		89.	Respond 3.50
57.	Inventory 9.0a	90.	RFFFlow v. 4
58.	LEO (FBI) Documentation	91.	SAS System 8.02 (not on IG server)
59.	LOS 7.00.02	92.	Scansoft
60.	Lotus Notes 1-2-3	93.	Scansoft Omni Pro 12
61.	Lotus Notes 4.6	94.	Siebel Thin Client 5.6.0.18 (not on IG server)
62.	Lotus Notes Developer		
63.	Macromedia Coldfusion	95.	SPSS
64.	Macromedia Dreamweaver	96.	SQL 7 Tools (not on IG server)
65.	Macromedia Dreamweaver Mac	97.	Survey Solutions
66.	Macromedia Fireworks	98.	Survey Tracker
67.	Macromedia Fireworks Mac	99.	TeamMate
68.	Macromedia Homesite	100.	TeamMate 2000 R6
69.	Monarch Pro 5.02 (not on IG server)	101.	Teamsite
70.	MS FrontPage	102.	Toad v. 7
71.	MS Office Mac	103.	Toast 6.0 for Macs
72.	MS Project Professional	104.	TRAINING
73.	MS Project Standard	105.	TRAINS
74.	MS Visio Pro	106.	TTRS
75.	MS Visio Standard	107.	Visual C
76.	NONFED	108.	WP Office 11
77.	Norton Antivirus 9.0 Mac		

Supported Server Software
Standard enterprise applications

1.	Access 97 and 2000	11.	Lotus Notes
2.	Active Directory	12.	Oracle Enterprise Edition 8.0.5
3.	C++	13.	Panagon
4.	CheckFree	14.	Ptech
5.	COBOL / SPSS	15.	SAS
6.	ColdFusion 4.5	16.	SQL / IIS
7.	Delphi	17.	Team Mate
8.	Extra Attachmate	18.	Visual Basic
9.	FoxPro	19.	WinDSX
10.	Hummingbird / TRIM		

Tier 3 – Other Software

Tier 3 consists of all other software not covered in Tiers 1 or 2.

Appendix D: Communications

ED's data communications network currently utilizes a design with these major components:

- MAN. The DC metro area sites are connected via Verizon's ATM network with Permanent Virtual Circuits (PVCs) connecting to the Headquarters Data Center and UCP as communications hubs, with Sprint's network serving as a backup.

- WAN. Nationwide sites are connected via Sprint's ATM network with PVCs connecting to the Headquarters Data Center and DRF as communications hubs. DRF also has a PVC direct to UCP.

- OC3 Circuits. At the time of this writing, ED utilizes two (2) OC3 circuits (one point-to-point POS and one shared ATM) to carry TCP / IP traffic between data centers in HQ and DRF. The circuit is currently used for carrying TCP / IP based data traffic. The circuit on each end is connected to a Cisco 7200 router using an ATM interface.

- Extranet. Various Extranet partners connect to ED via dedicated leased lines. Leased lines connect to the Headquarters Data Center and, in some cases, DRF.

- Internet. The Headquarters Data Center and DRF each have a high speed Internet connection.

- Modems. ED currently has approximately 200 analog voice lines within the Centrex connected to analog modems, and 16 PRI lines outside of the Centrex connected to digital modems and Cisco remote access servers. This equipment supports TCP / IP based access from the local calling area.

- Satellite Downlink Services. None at this time.

The following diagram is a high-level representation of EDNet connectivity to the Headquarters Data Center, the DRF, and regional offices. Please note that regional office circuits are fractional DS-3's. Primary client access to the proposed mass storage solution shall be via ATM WAN network to the Headquarters Data Center during normal operation, and to DRF during DRP. Data replication traffic shall be via dedicated OC-3 circuit from the Headquarters Data Center to DRF. Note that dedicated OC-3 circuit from the Headquarters Data Center to DRF while dedicated to the Department's traffic is not for exclusive access of mass storage solution, and must share bandwidth with existing and future applications, including but not limited to VoIP, Enterprise backups, Exchange, IPTV, Video conference, client communications, administrative, and Internet access.

Exhibit 1: EDNet Connectivity

Network diagram showing Sprint ATM Network and Sprint Frame Relay Network. Labels include:

ROB3 Washington, DC — **DRF** Kennesaw, GA

DS3 ATM with UBR PVCs to DRF and ROB3

There is a 100 Mbps PCR/50 Mbps SCR PVC and a 155 Mbps OC-3 Packet-over-Sonet connecting ROB3 and DRF

Green PVCs are active, Blue are being installed, and RED are Proposed

T1 Frame Relay sites with FRF8 PVCs to DRF and ROB3

Left side sites (ATM Network): Boston, Cleveland, Kansas City, San Francisco, New York, Seattle, Denver, Chicago, Dallas, Atlanta, Philadelphia — connected via DS3. OC3c, OC3 PoS labels at top. OC3 / UCP at bottom.

Right side sites (Frame Relay Network): Wash DC - NFL, Wash DC - Virgina, Wash DC - NAGB, Wash DC - Metro, Wash DC - School, Wash DC - L'Enfant, Sacramento CA - OIG, Plantation FL - OIG, Long Beach CA - OIG, San Juan PR - OIG. Gateway labels shown.

Multimedia Information Technology Resources (MMIS) Services

ED Video Teleconferencing (VTC) system provides real-time VTC capability among Headquarters and regional offices. The teleconferencing facilities at each regional office can transmit and receive video, audio, and graphics signals. The ED network (EDNet), an integrated and centrally managed all-digital network, provides the connectivity between each facility. ED VTC sites operate as full-service, near full-motion, digital VTC facilities. These facilities support simultaneous video and audio communications to provide for the interactive exchange of information between persons at two or more locations. Additionally, graphics, data, phone bridging, and other features may be supported. All features implemented in the VTC facility shall interoperate with other VTC facilities.

At the time of this writing, the Video Operations Center (VOC) is located in the Headquarters region (Washington, DC); however, there are plans to move it to the DRF location. The VOC does all the scheduling for the ED VTC. The VOC is also responsible for the setup of each conference and the maintenance of the OCIO-managed VTC systems. The operations personnel at the VOC control each OCIO-managed VTC facility. The rooms are monitored and scheduled through the VOC. These rooms are furnished with a 50-inch Plasma screen, Polycom (VTC equipment), and desktop computer with an electronic whiteboard. These rooms support up to 12 personnel per site. The VOC remotely controls, monitors, and operates each OCIO-managed facility. The VOC technicians are responsible for powering up the system to full operational status and ensuring the security of the OCIO-managed facility. Connectivity between various locations in the enterprise and the Media Center are through the EDNet infrastructure.

Telemetry Control and Monitoring

ED's physical infrastructure also utilizes EDNet bandwidth for physical plant and security services, utilizing a number of telemetry and control functions. Sensing and control devices, located in various buildings throughout the enterprise provide the ability to:

- Monitor, regulate and control environmental services (e.g., temperature, lights)
- Monitor alarms and entries (e.g., UPS status, water alarms)
- Provide card key access entry protection
- Security camera monitoring

Physical Infrastructure

The Department has installed a universal infrastructure to support its present and future communication environment. This infrastructure is intended to support all forms of communications within buildings, and between buildings. The principles used to design the infrastructure included: wire once, ability to use today's and future electronics, each faceplate is independent of others, each building is independent of others, container capacity is larger than initial needs. Owing to the Department's growth and the age of some buildings, capacity of the infrastructure has been reached in certain physical locations. As personnel move to new buildings, the infrastructure shall be updated as part of the budget and implementation plan for the move. For those buildings that are not scheduled for physical moves, infrastructure refresh shall be scheduled as funding becomes available.

IP Telephony and Video Broadcast Services

IP Telephony communications is provided to approximately 1,900 users in the Enterprise. Presently the Department uses a combination of legacy twisted pair copper wire and EDNet infrastructure. Presently the EDNet infrastructure uses a combination of twisted pair copper wire and multi-mode fiber-optic cable as the voice communication medium.

In addition, ED has an on-premises CISCO Unity voice-mail system, connected via Cisco AVVID infrastructure, with mailboxes hosted on Microsoft Exchange 5.5 (with Exchange 5.5 being migrated to Exchange 2000 in 2004) and Exchange 2000. The voicemail system makes voicemail available to employees, on-site and off-site. It also implements a few automated attendant applications. This system provides message-waiting notification through the telephone switch and/or e-mail notification for new message(s). This AVVID implementation provides a unified messaging capability so that users can retrieve voice mails (via wave files) through a Microsoft Outlook interface.

Applications supporting IP Telephony and Video broadcast services include, but are not limited to:

- Cisco ICD
- Cisco Soft Phone
- Cisco IPTV
- Real Server & Helix
- Polycom Video stations
- Cisco Conference Connection
- InformaCast

Non-IP based Telephony Services

The Telecommunications Services Group utilizes the GSA / FTS 2001 contract vehicle to include, but not limited to, dedicated circuits (ATM, Frame Relay, OC3, DS3, PRI, and T1) using VBR and CBR traffic shaping and (QoS) and analog and ISDN voice terminals with Siemens-Xpressions PhoneMail System.

ED-05-PO-0908

Additionally, a telecommunication automated tracking database is used for inventory tracking and enhanced accountability of telecom assets. New telecommunication service offerings include Blackberry / cellular phone units or equivalent.

Appendix E: EDNet Backup Architecture

The current EDNet backup architecture is based on a two-master model deployed at both the Headquarters main Data Center in Washington, DC and the DRF backup site in Kennesaw, GA.

The HQ site consists of:

- 1 Master Server
- 2 dedicated Media Servers in DC
- 1 dedicated Media Server in DRF for purposes of tape duplication
- 1 ADIC Scalar 1000 in DC containing:
    - 12 IBM LTO tape drives
    - 3 ADIC SNC3000 Storage Network Controllers
- A portion of the Scalar 1000 in DRF consisting of:
    - 4 IBM LTO tape drives
    - 1 ADIC SNC3000 Storage Network Controllers

The DRF site consists of:

- 1 Master Server
- 1 dedicated Media Server
- 1 ADIC Scalar Distributed Library Controller (to handle library partitioning)
- A portion of the DRF Scalar 1000 consisting of:
    - 10 IBM LTO tape drives
    - 3 ADIC SNC3000 Storage Network Controllers

Robotic control of the Scalar 1000 physically located in DC is via a direct SCSI attachment from the Master Server.

Robotic control of the Scalar 1000 physically located in the DRF is as follows:

- Direct SCSI attachment from the SDLC Server to the Scalar 1000
- SCSI attachment from the DRF Master Server to the SDLC Server to control the DRF site portion of the scalar 1000
- From the Media Server in DRF belonging to the HQ NBU site to the SDLC via IP using Distributed AML Server (DAS) software for control of the HQ site portion of the Scalar 1000

Communication between the Master and Media Servers and the tape drives is by means of Compaq Fibre Channel HBAs connected to the SNC3000 units via a Brocade SilkWorm 12000 SAN Switch in each physical location.

The component breakdown of NetBackup infrastructure is:

- Veritas NetBackup Data Center 4.5

ED-05-PO-0908

- NDMP available
- Shared Storage option
- Library based tape drive option
- Vault option
- Advanced Reporter option
- Global Data Manager option
- MS Exchange agents
- MS SQL Server agents
- Open Transaction Manager
- Inline Tape Copy option
- ADIC Scalar 1000 one each at the Headquarters Data Center and DRF
- Multiple SNC 3000s at each site
- Scalar Distributed Library Controller, only in DRF
- Scalar robot is direct SCSI attached
- IBM LTO tape drives firmware 25D4

Exhibit 2: ED Overall NetBackup Logical Architecture

DoED Overall NetBackup
Logical Architecture
(simplified)
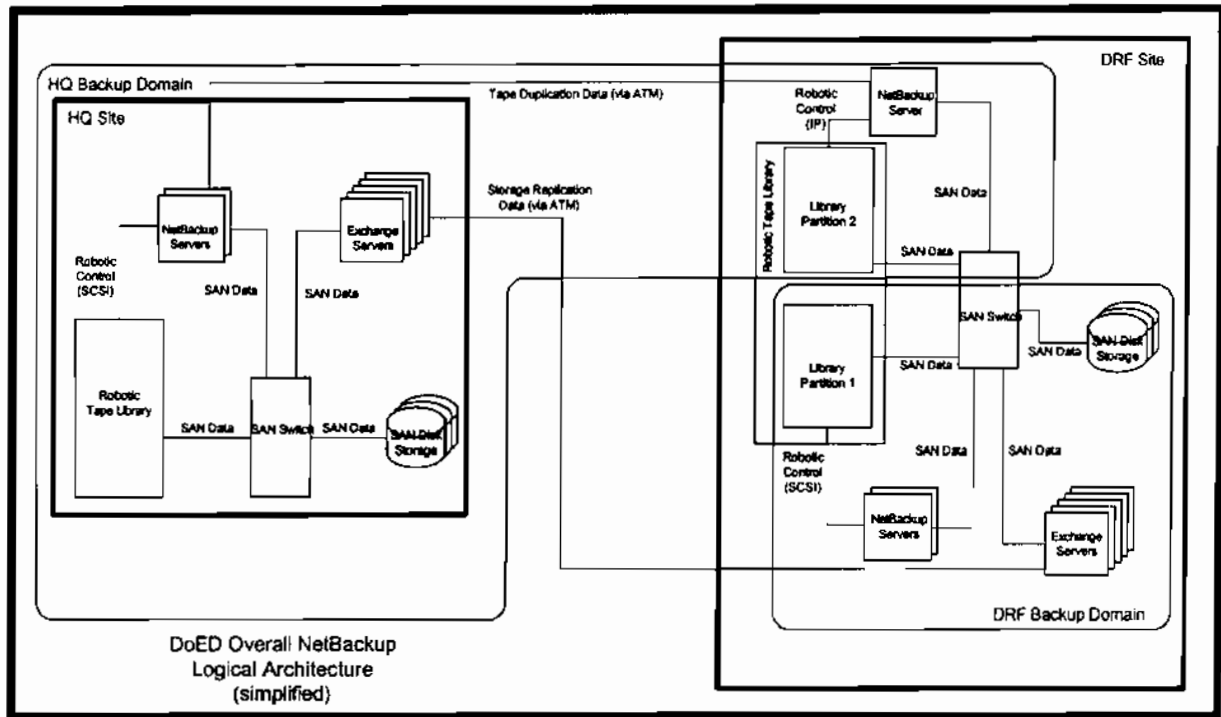
Exhibit 3: ED HQ NetBackup Architecture
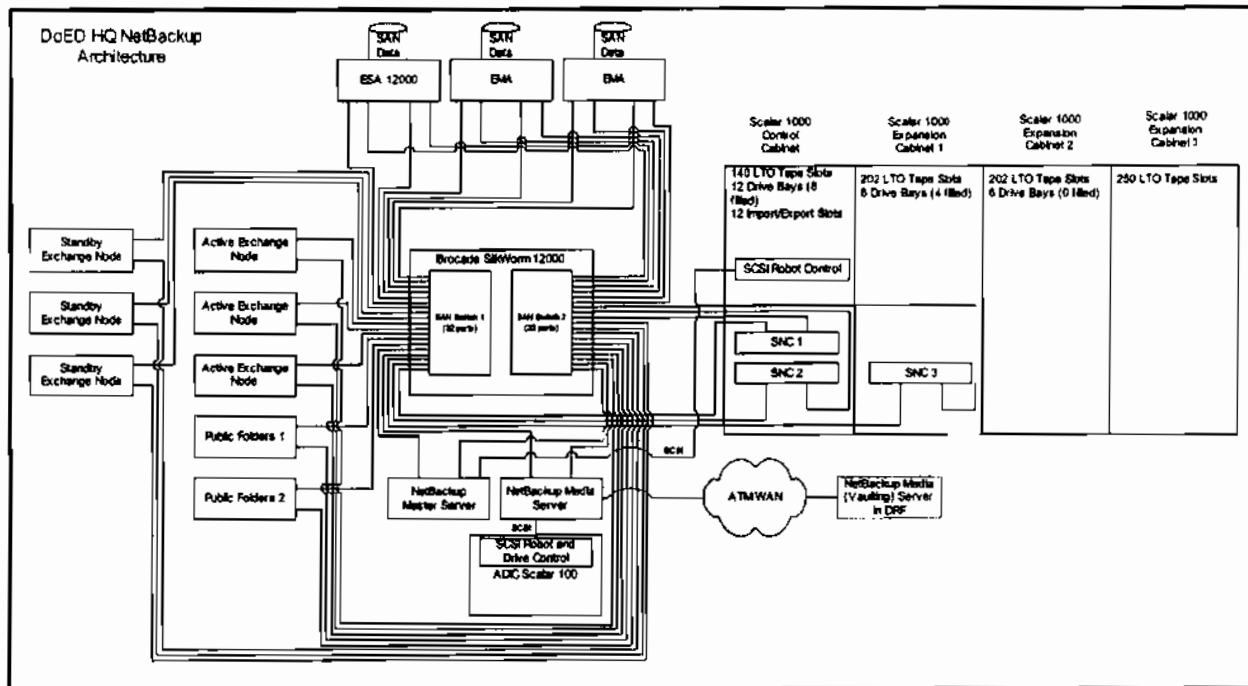
Exhibit 4: ED DRF NetBackup Architecture

Appendix F: Detailed Work Descriptions

Category B Tasks

Projects

Task Area Provides Project services for ITD.

Desired Outcome: To provide quality IT projects for the Department of Education organizations by providing effective, best practice project management support for the successful implementation of projects, products, services and features on to EDNet and in compliance with ED's Enterprise Architecture. The primary goal is to provide base-level improvement in project completion against schedule and budget estimates, while delivering the expected functionality with world-class quality.

Description of Services: Provide PMI or equivalently certified[41] experienced project managers and subject matter experts (SME) who follow and implement "best practice" project management methodologies, along with the various security and configuration controls of EDNet, help to insure that applications, systems and emerging technologies meet certification and accreditation standards of, but not limited to the U.S. Office of Management & Budget (OMB 130), National Institutes of Standards and Technologies (NIST), Clinger-Cohen Act, FISMA, GPRA, FAR, and Privacy Act, for an as needed number of ITD defined projects per year. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time. Resources required shall be used at ED's discretion in executing ITD's Product Development Process outlined in Section I, Introduction. Most projects shall occur within the Washington DC area, See Appendix A for a detailed list of Washington DC area locations.

The contractor shall provide SMEs in a variety of technical and business fields, including, but not limited to, technical architecture (e.g., network, web, database, application development, etc.), product experts, programmers conversant in the most current computer languages, network engineering, IT investment management, business case development, portfolio management, technology market analysis, OMB 300 development, etc. The contractor shall assign resources to work within ED's Product Development Process and provide personnel with demonstratable skills, competence and experience necessary for a CMMI Level 3 process environment.

The contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services; assisting in the analysis and selection of vendor-provided products and services. The contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the ITD mission. The contractor shall assist FTE management in the proper budgeting and financial management of ITD programs and projects; assist in the development of bills and materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a project so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) demonstrate conformance with both departmental and federal standards for the management planning, tracking and controlling of projects and tasks.

The contractor shall provide an integrated project solution, provision SMEs appropriate for each project, take ownership of problems from identification to solution / resolution, and manage all projects to scope, schedule and budget.

---

[41] Equivalently Certified is defined by OMB as "Experienced managing projects of similar size and scope, within ten (10) percent of baseline cost, schedule and performance goals, as the project to which currently assigned OR a government project management certification or a commercial certification such as the Project management Institute (PMI), AND dedicated to the project or program on a full-time basis."

ED-05-PO-0908

Some example projects include major moves (100 regional staff from one building to another), or an enterprise software upgrade from one version to the latest version (i.e., Exchange 2000 to Exchange 2003).

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires approximately 36,000 hours per year[42].

Performance Requirements Summary:

Project Management

- Manage projects to ensure they are within scope, budget and on schedule.
- Manage projects using OMB's earned value discipline[43].
- Provide master scheduling capabilities to rollup projects for a resource allocation and alerts.
- Provide SMEs as appropriate throughout the life of the project.
- Provide risk / issue / action item tracking and management.

---

[42]Subject to change.
[43] See OMB, ANSI/EIA-748-A, Planning, Budgeting, Acquisition and Management of Capital Assets.
ED-05-PO-0908

Category C Tasks

Management Services: Program Management

Task Area Provides overall Program Management services for ITD.

Desired Outcome: To ensure that all work performed is successful in achieving the task's purpose, goals and objectives; on schedule, within budget, thoroughly documented, and in accordance with performance specifications, requirements and standards; coordinated with other tasks; integrated with other tasks performed under this contract; integrated with efforts outside of this contract but related to ED's IT service delivery infrastructure; and consistent with ED's strategic goals, objectives and mission.

If a team of contractors is awarded this contract, the team-lead contractor shall be responsible for ensuring that successful program management is achieved for this contract. Therefore, the team-lead contractor shall be ultimately responsible for ensuring that the purpose, goals, objectives, requirements and service standards of the task are achieved. The contractor shall receive the Contracting Officer's approval prior to subcontracting or "teaming" any portion of the contract to another contractor.

Description of Services: Provide qualified and experienced staff who follow, implement and support "best practice" program management methodologies. Program management includes overall management, measurements, dashboard development and maintenance, staffing, planning, accounting, budgeting, tracking, and reporting for the entire EDNet contract. This office shall interact with focal points across service areas.

The Contractor shall provide internal communications planning services, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the mission. The Contractor shall assist FTE management in the proper budgeting and financial management of projects and programs; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a program so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) or Product Development Process (PDP) demonstrate conformance with all relevant departmental and federal standards for the management planning, tracking and controlling of programs and tasks.

The contractor shall provide a draft Program Management project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance. The plan will address all elements contained in the QASP for EDNet management, and shall include:

- A single Program Manager (PM) to manage the entire task effort
- Project managers across each service area who shall work with the PM to provide management and direction in accordance with ED guidance for services provided under all three categories of work
- PM and Project Manager roles and responsibilities
- Transition Management including Contract Phase-In and Phase-Out Plans
- Staffing management to include security processing
- Quality control
- Performance management and surveillance including SLA metrics, reporting, development of management dashboard, ongoing quality process, and content measure evaluation
- Financial management, Total Cost of Ownership, qualitative benefits, reporting and price performance support
- Budgeting support to include budget formulation, funding requirements and projections, monitoring, reporting and tracking expenditures
- Cost benefit analysis support
- Customer satisfaction surveys

- Information Technology Investment Management support
- Planning support
- Administrative support for procurement, staffing and other business related functions.
- Document management and maintenance (standards, policies, procedures, and operations guides) support
- Risk management
- Logistics support
- Meeting support
- Program documentation support
- Reports, oral presentations and other deliverables

Estimated Workload: This work currently requires between 10 to 12 FTEs per year.

Performance Requirements Summary:

Program Management:

The contractor shall:

- Provide overall contract, program management, staffing support, planning support, quality control support, performance surveillance support, budgeting support, analysis support, performance monitoring and metrics, reporting, administrative support, logistics support, meeting support, standards development and support, documentation, reports and other deliverables.

- Manage projects using OMB's earned value discipline[44].

- Provide ongoing support for overall contract management and reporting.

---

[44] Ibid.

ED-05-PO-0908

Management Services: Ongoing Project Management

Task Area Provides ongoing Project Management support services for ITD.

Desired Outcome: To provide quality ongoing IT project management support for the Department of Education organizations by providing effective, best practice project management support for the successful implementation of products, services and features on to EDNet. The primary goal is to provide base-level support in project completion against schedule and budget estimates, while delivering the expected functionality with world-class quality.

Description of Services: Provide qualified and experienced project management support personnel and PMI or equivalently certified[45] project managers, as needed, who follow and implement "best practice" project management methodologies, along with the various security and configuration controls of EDNet, help to insure that applications, systems and emerging technologies meet certification and accreditation standards of, but not limited to the U.S. Office of Management & Budget (OMB 130), National Institutes of Standards and Technologies (NIST), Clinger-Cohen Act, FISMA, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the ITD mission. The Contractor shall assist FTE management in the proper budgeting and financial management of ITD programs and projects; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a project so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) demonstrate conformance with both departmental and federal standards for the management planning, tracking and controlling of projects and tasks.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 2 to 4 FTEs per year.

Performance Requirements Summary:

Project Management

- Support the management of projects to ensure they are within scope, budget and on schedule.

- Provide master scheduling services for all projects, allowing for the rollup of projects for a resource allocation and alerts.

- Manage projects using OMB's earned value discipline[46].

- Provide ongoing support for risk / issue / action project tracking and management.

---

[45] Equivalently Certified is defined by OMB as "Experienced managing projects of similar size and scope, within ten (10) percent of baseline cost, schedule and performance goals, as the project to which currently assigned OR a government project management certification or a commercial certification such as the Project management Institute (PMI), AND dedicated to the project or program on a full-time basis."
[46] See OMB OMB, ANSI/EIA-748-A, Planning, Budgeting, Acquisition and Management of Capital Assets.

ED-05-PO-0908

Management Services: Product Assurance

Task Area Provide Product Assurance services for ITD.

Desired Outcome: To provide product assurance functions to ensure that projects are managed within scope, budget and schedule. Level of quality and customer satisfaction is commensurate with the constraints of budget and schedule

Description of Services: To provide independent review and testing of work products, provide process audits to ensure processes and procedures are being followed and providing recommendations with the audit results. Perform data collection and analysis of that data to provide information on performance measurements and metrics and provide recommendations for improvements. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services and assist in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the Product Assurance mission. Assist in performing and analyzing process audits, creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of Product Assurance programs and projects; assist in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 2 to 4 FTEs per year.

Performance Requirements Summary:

Independent Review & Testing

- Exam work products to verify compliance with established plans, standards and procedures

- Conduct system testing to ensure requirements are met and system performs in accordance with specifications

- Process Validation

- Systems Development Life Cycle (SDLC), Standard Operating Procedures (SOPs), testing processes being followed

- Audits & Assessment

Improvement Analysis

- Data collection and analysis of service metrics
- Recommendations for long term improvements

Network Services: Server Operations

Task Area: Develops Plans and Programs for the Operation, Maintenance, and Enhancement of Server operations, intranet and extranet administration.

Desired Outcome: The Server Operations (SO) division shall develop plans, directives, policies and procedures in support of the efficient use and management of server operations, Database Administration, Customer Applications, Security, Change Management and Disaster Recovery resources, including a full range of server, network and messaging recovery services, facilities, and equipment for any part of Server Operations not captured within the firm fixed price portion of the contract.

Description of Services: The Contractor shall provide business process and analysis, project management, financial management and administration support, and policy and planning services in support of management and use of SO resources. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business case, business requirements, technical reports, and white papers in support of the SO mission. The contractor shall assist in analyzing customer satisfaction surveys, and create and publish online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of SO programs and projects; assist in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires 32 to 34 FTEs a year[47].

Performance Requirements Summary:

Server Operations

- **Provide database administration and general administrative support** on SQL server, Oracle, Hummingbird, Project server and Lotus Notes applications throughout the Department. This includes Monitoring of ORACLE databases, Monitoring of SQL Databases, Insure all scheduled jobs have completed successfully, Stay current with available Security Patches and fixing vulnerabilities, Work with other Server operation teams to optimize their application databases. Provide support to helpdesk technicians on Custom Application Errors.

- **Provide ad hoc custom application support** to customers on specialize applications, including programming and limited time database admin support per request. Also assist and familiarize ED developers with standards and best practices in the Department.

---

[47] Includes FTEs associated with National Center for Education Statistics (NCES).

ED-05-PO-0908

- **Support the Department's mission critical Security Operations** component by providing technical expertise in the use of intrusion detection & prevention systems (e.g. Entercept and CISCO IDS) integrated with Net Forensics Security Information Management Console to monitor firewall activities, router ACL violations, enterprise anti-virus alerts and emerging internet threats. Ensure that EDNet continues to operate in a safe computing environment by following published Incident Handling Response Standard Operating Procedures (SOPs). The contractor shall be responsible for vulnerability scanning and associated activities. This expertise is to be utilized in daily operations support of the local facility, production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulations drills.

- Provide support for the evolution, development, and maintenance of **Intrusion Detection Surveillance (IDS) products and services.** The Contractor shall have responsibility that the IDS systems are managed and controlled in accordance with approved policies, standards and procedures. The Contractor shall ensure that changes to the production system's infrastructure are applied with proper planning, testing and notification and that negative impacts to the customer or the production environment are minimized as a result of changes to the system.

<u>Disaster Recovery</u>

- **Network** – The Contractor shall support the Department's mission critical networking component by providing technical expertise in the Cisco, Cisco VoIP, Cisco ACS, Cisco PIX, Cisco VPN, Symantec SEF, Microsoft DNS services, Solaris DJBDNS, MRTG, CA Unicenter and Windows 2000 infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore connectivity during disaster recovery efforts and simulation drills.

- **Servers** – The Contractor shall support the Department's mission critical server operations component by providing technical expertise in the Microsoft Windows and Sun Solaris infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

<u>Change Management</u>

- **Provide continuous support of systems operation** to including development and maintenance of all Standard Operating Procedures (SOPs) in support of the EDNet system, development and maintenance of all Memorandums of Understanding (MOUs) between the EDNet owners and Principal Office systems housed on the network, maintain expert knowledge of the Federal Information Security Management Act (FISMA) and all applicable security regulations to include ED security training, NIST guidance and OMB A-130, maintain and complete the annual NIST self-

evaluation, serve as the EDNet librarian of all SOPs for all teams that support EDNet, ensure that SOPs, plans, and related documentation are in compliance with FISMA, and monitor all EDNet teams for such compliance.

- **Provide Configuration Management Plan support**, by being responsible for change management to include running the Change Control Review Board, the CCRB tracking system, attending all Technical Review Boards (TRBs) and Security Review Board (SRB) meetings to ensure proper integration of all of the review boards as well as ensuring continued compliance with FISMA requirements, and specifically Certification & Accreditation compliance. The CM team shall also be responsible for administering and record keeping of all Technical Review Boards to include ensuring compliance with the TRB process, and shall assist EDNet staff and Program Office Coordinators in aligning with those processes.

- **Maintenance of the system's baseline configuration** capture and documentation, provide analysis and consultation ensuring the configuration compliance against the baseline continues to be maintained, and performing Configuration Identification, Configuration Change Control, Configuration Status Accounting, and CM Audits.

- **Provide and maintain Change Control, Documentation and NIST / FISMA / C&A Compliance.**

National Center for Educational Statistics (NCES) Support

The Offeror shall support NCES' mission critical server operations components by providing technical expertise in the Microsoft Windows, Linux, and F5 BigIP infrastructure. This expertise shall be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

- **Provide database maintenance and administration** of Microsoft SQL system including monitoring and maintenance of SQL Databases that are used with the NCES Web Site. Insure all scheduled jobs have completed successfully. Maintain SQL backups. Stay current with available Security Patches and vulnerability patching.

- **Provide Server and Microsoft IIS support**, including monitoring and maintenance of IIS servers that compose the NCES Web Site. Insure all scheduled jobs have completed successfully, stay current with available Security Patches and fixing vulnerabilities. Configure and maintain NCES' Compaq Storage Area Network (SAN). Configure and maintain F5 BigIP load balancers and Linux IDS server. Configure and maintain NCES' backup system. Administer various other applications such as WebTrends, Verity UltraSeek, IPCheck, SNORT, Microsoft Site Server, Microsoft SQL 2000, ESRI GIS Mapping System, and other systems as needed.

- **Provide ad hoc custom application support** to outside developers on specialized applications, including programming and limited time database admin support per request. Also assist and familiarize developers with ED and NCES' standards and best practices.

- **Support the Department's mission critical Security Operations.** Work with other Server Operations Teams to insure that all systems are in compliance with ED standards (e.g., up to date on security patches, run periodic scans to determine if any vulnerabilities exist, etc.).

- **Provide Web development and programming support**, including new applications as well as maintaining legacy applications using VBScript, JavaScript, HTML, ASP, and Style Sheets. Provide video editing as well as web based video presentation. Develop multimedia applications using Macromedia Flash. Design web graphics using Adobe Photoshop and Illustrator. Create animations using Cinema 4D. Provide support for the NCES Graphing tool.

- **Provide design for new systems, applications, and databases** as required.

- **Act as point of contact for other developers working with NCES.**

Network Services: Converged Communications and Networking

Task Area: Develops Plans and Programs for the Operation, Maintenance, and Enhancement of Converged Communications and Networking.

Desired Outcome: The Converged Communications and Networking (CCN) division shall develop plans, directives, policies and procedures in support of the efficient use and management of network, telecommunications, and multimedia resources, including a full range of voice, video and data services, facilities, and equipment, including Smartnet equipment.

Description of Services: The Contractor shall provide business process and analysis, project management, financial management, administration support, and policy and planning services in support of management and use of telecommunications resources, to include, but not limited to a full range of voice, video and data communications. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services; assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the CCN mission. Assist in developing and analyzing customer satisfaction surveys, and creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of CCN programs and projects; assist in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires 24 to 26 FTEs a year.

Performance Requirements Summary:
OCIO Converged Communications and Networking consists of three major groups that provide operations, maintenance and customer support services to ED employees and staff throughout headquarters and regional office locations.

Network Services
The Network Services Group supervises, monitors, and maintains the U.S. Department of Education Service Delivery Infrastructure Network (EDNet) to deliver a full range of voice, video, and data communications solutions and services, including Smartnet. The Network Control Center (NCC) is the focal point for network troubleshooting; firewall, router, switch and network device management; IP telephony and unified messaging; performance monitoring; and coordination with affiliated networks. NCC technicians perform Helpdesk (Tier 2 and 3) customer service and provide access control and information security support services.

- **Provide Network Monitoring Services** through the continuous monitoring of network availability and services. The Contractor shall provide network-monitoring services to include, but not limited to, responding to and remedying network alerts, monitoring network traffic, publishing usage reports, coordinating circuit outages and installations, etc.

ED-05-PO-0908

- **Provide Network Configuration Management Services** by maintaining the identification, documentation, and reports for network elements and appliances, including their versions, constituent components and relationships for EDNet network hardware, network management software and associated documentation. The Contractor shall provide network configuration management services to include, but not limited to, maintaining IP schema database, maintaining router access control listing (ACL), etc.

- **Provide IP Telephony Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the IP telephony system, IP-based Private Branch Exchange (IP PBX) hardware equipment, software applications and services, including features, such as advanced call routing, voice mail, contact centers, etc., that can be utilized. The Contractor shall deploy and maintain the call routing and dial plans for Cisco IP phone solutions that utilize advanced call routing, voice mail, contact centers, etc. The Contractor shall seek to leverage audio and video conferencing solutions that help the agency increase productivity and business communications by employing the latest advances in computer networking and multimedia. The Contractor shall deploy IP phone solutions are standards-based, including protocols such as H.323, MGCP, and employ the appropriate bandwidth and traffic shaping through Quality of Service (QoS) to provide high-quality voice transmission. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Integrated Call Distribution Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the Cisco Integrated Call Distribution (ICD) system hardware, software applications and services, including features, such as the customer response applications (CRA) editor, Interactive Voice Response (IVR), Auto Attendant (AA), historical reporting and recording session services. The Contractor shall develop and maintain ICD scripts based on individual customer requirements that offer increased productivity and customer service. The Contractor shall create and maintain VoiceXML applications that leverage speech recognition technology to support end-user requirements. The Contractor shall be equipped to handle standard and advanced troubleshooting tasks. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Unified Messaging Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the Cisco Unity unified messaging system hardware, software applications and services, including integration with Microsoft Exchange. The Contractor shall develop and maintain user profiles and

access control for phone and web-based applications such as Unity ActiveAssistant. The Contractor shall provide Tier 1 (customer service), including answering frequently asked questions, training end-users, Helpdesk and other network services group personnel on the capabilities and functionality of the system. The Contractor shall develop and maintain user profiles based on individual customer requirements that offer increased productivity and customer service. The Contractor shall be equipped to handle standard and advanced troubleshooting tasks. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

Telecommunications Services

- The Telecommunications Services Group:

  - Centrally manages the acquisition of telecommunications resources, including equipment, facilities and services to ensure that these resources are acquired in a manner that is most effective for the government.

  - Maintains accurate billing and accountability of telecommunications resources, including circuit-switched and dedicated data circuits, local and long distance services, voicemail platforms, audio and data conferencing solutions, calling card, pagers, cell phones and wireless handhelds. Designs, installs, maintains and repairs telecommunications equipment and services or coordinates these services.

  - Compiles statistics and prepares necessary system reports and forms. Maintains system administration of the Telecommunications Automated Tracking System (TATS), which is used to request, approve, order receive and issue telecom resources and serves as a robust reporting tool.

  - Coordinates agency use and support of national security and emergency preparedness (NS / EP) telephone networks and services.

  - Provides Helpdesk (Tier 2 and 3) customer service support.

  - Coordinates contracts and maintenance level agreements with the GSA Federal Technology Services (FTS) Division and the telecommunications service providers.

- **Provide Telecommunications Processing Services** by responding quickly and accurately to requests for telecommunications services submitted from each Principal Office. The Contractor shall provide order processing services to include, but not limited to, reviewing requests submitted by authorized Principal Office personnel for telephone / fax services, voicemail services, wireless services, etc.

- **Provide Telecommunications Billing and Inventory Services** by maintaining an accurate inventory and billing records for all telecommunications resources (i.e., equipment, facilities and services). The Contractor shall provide inventory management and billing services to include, but not limited to, maintaining an accurate and complete record of all telecommunications assets billed to the agency; reconcile billing statements from vendor-supplied documentation and electronic files, monitoring system traffic, etc.

- **Provide Telecommunications Programming and Database Management Services** by maintaining assist FTE telecom staff with the identify, planning, testing, executing, controlling and closing of the functionality and enhancements to the agency's Telecommunications Automated Tracking System (TATS) application. The Contractor shall provide support services to include, but not limited to, maintaining integrity of the TATS program application layer and database layer; develop business requirements and associated documentation to support the development of enhancements to system functionality; develop test plans and associated test scripts; etc.

- **Provide Analog / ISDN Voicemail Services** by maintaining reliable and secure voicemail platforms for headquarters and regional office locations. The Contractor shall provide voicemail administration services to include, but not limited to, maintaining access control, responding to and remedying system alerts, monitoring system traffic and load, publishing usage reports, coordinating voicemail outages and installations, performing user problem troubleshooting, etc.

- **Provide GSA FTS Contract Transition Services** by developing and execute a project plan to ensure a smooth transition from the GSA FTS2001 contract vehicle to the GSA FTS Networx contract vehicle. The Contractor shall assist FTE telecom staff in developing a transition plan to ensure the smooth and orderly transition from the General Services Administration (GSA) Federal Telecommunications System (FTS) 2001 contract vehicle to the FTS Networx contract vehicle in support of a full range of voice, video and data communications services.

Multimedia Services Group

The Multimedia Services Group operates and maintains the Department's audio-visual equipment, most notably the 57 custom room and Video Teleconferencing Center (VTC) systems throughout headquarters and regional offices. Additionally, remotely manages the regional VTC facilities to include security, orientation, and provide Helpdesk (Tier 1, 2 and 3) customer service support and reservations for VTC resources. Maintains the accountability of multimedia resources, including ad-hoc voice mail delivery system for the Office of the Secretary, implementation of IP / TV for the enterprise, ISDN circuit-switched network for VTC. Designs, installs, maintains audio-visual and VTC equipment and services. Support for audio-visual production and equipment for the EDNet network and other non-EDNet systems, including the Secretary's conference room and auditorium facilities. Performs standard and advanced troubleshooting and calibration. Develops closed captioning for video communications in compliance with Section 508 Accessibility standards. Supports the cable television and satellite television services and head-end equipment.

- **Provide Audio-Visual Support Services** by providing services, including but not limited to: video production services and audio visual support for the agency, handle audiovisual and communication equipment repairs for educational activities and special events located throughout agency buildings in greater Washington, DC area. The Contractor shall provide support services to assist in the design, installation, testing, operations and maintenance of agency audio-visual equipment and facilities as needed. The Contractor shall perform video production and editing, including open and closed-captioning, of content used for such services as online learning, training films, and executive-level broadcast messages. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Video Teleconferencing (VTC) Services** by providing design, installation, testing, operations and maintain a full range of video teleconferencing products and services that increase business communications and reduce unnecessary travel costs as needed. The Contractor shall maintain and optimize the current architecture to support video teleconferencing and recommend new and alternate solutions that maximizes the benefits of converged video, data and audio conferencing for users. The Contractor shall provide primary customer support (i.e., Helpdesk) services to handle requests and schedule the bridging of multipoint VTC sessions across the enterprise and outside the enterprise to "off-net" VTC endpoints. The Contractor shall provide standard and advanced troubleshooting of VTC equipment and serve as a liaison with product vendors, such as Polycom. The Contractor shall provide services to schedule and install desktop video conferencing systems with the end-users across multiple Washington, DC area locations and coordinate the deployment of these services remotely with technicians to regional office locations. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Cable Television (CATV) Services** by providing design, installation, testing, operation and maintain equipment, facilities and services that support cable television (CATV) and IP-based television (IP / TV) services (or video telephony) to multiple locations throughout the Washington, DC area and regional office locations as needed. The Contractor shall provide standard and advanced troubleshooting of Cisco video broadcast over IP (IP / TV) equipment, maintain archived content on servers, and develop and maintain the ability to provide video on demand (VOD) services. The Contractor shall develop associated standard operating procedures to support the proper operation, maintenance and security of the system(s).

Network Services: Engineering

Task Area Provide Engineering services for ITD.

Desired Outcome: Provide ongoing Engineering support including writing, enterprise architecture and technical reviews.

Description of Services: The Engineering division shall develop and maintain plans, directives, policies and procedures in support of the efficient use and management of enterprise network research, development and engineering. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, and assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the Engineering mission. Assist in developing and analyzing customer satisfaction surveys, and creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of Engineering programs and projects; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The Contractor shall provide resources to occasionally perform rapid application development[48] and development of prototypes using the SDLC process.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 8 to 10 FTEs a year.

Performance Requirements Summary:

- Technical Writing
- Development Lab Technician
- Development Lab Manager
- Technical Enterprise Architect
- Technical Review Administration
- Assistive Technology Engineering (testing, compliance, etc.)

---

[48] The Rapid Application Development (RAD) methodology was developed in response to the need for quickly delivering systems. An application development approach includes small teams (generally 2 – 6 developers) using joint application development (JAD) and iterative-prototyping techniques to construct interactive systems of low to medium complexity within short time frames (generally 60 to 120 days).

ED-05-PO-0908

Clearing House Services: Enterprise Lifecycle Management Support (ELMst) Clearinghouse

Task Area Provide Enterprise Lifecycle Management Support (ELMst) Clearinghouse services for ITD.

Desired Outcome: The Enterprise Lifecycle Management Support (ELMst) Clearinghouse shall develop plans, directives, polices and procedures to facilitate the Department's surplus IT equipment for disposal or disbursement to schools of technology equipment and disbursement of IT equipment meeting the minimum EDNet specifications for the ED's PCs R Us Program[49].

Description of Services: The contractor shall provide program and project management, administrative support, and documentation development in support of business processes that represent a systematic approach to effectively manage the disposal and disbursements of IT equipment to schools and disbursement of IT equipment meeting the minimum EDNet specifications for the Department of Education's PCs R Us.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 3 to 5 FTEs per year.

Performance Requirements Summary:
The Contractor shall:

- Operate and manage a central processing and secure storage facility surplus IT equipment.

- Be held accountable for all IT assets and participate in the annual physical inventory and reconciliation process.

- Provide regional surplus inventory management following the department guidelines for surplus / disposal of IT assets.

- Coordinate DOA replacements for the first 30-days of receipt.

- Evaluate IT Equipment (desktops, laptops, monitors, and printers for redeployment via the Department's "PCs R US Program.

- Install and test the EDNet standard configuration for all desktops identified for PCs R Us.

---

[49] PCs R Us is an ED Program that reuses ED surplus IT equipment that meets EDNet's minimum technical specifications.

ED-05-PO-0908

Appendix G: Roles & Responsibilities

This section defines the proposed roles and responsibilities of each party involved in the sourcing relationship. The Contractor shall review these roles and responsibilities, and requests update to them (if approved by ED). The following definitions apply to key concepts discussed in this section:

- **Roles**: The party (e.g., ED or Service Provider) accountable for performing the responsibilities described.

- **Responsibilities**: The description of activities assigned to either ED or the Service Provider roles. The responsibilities include the updating, maintain, etc. of all processes involved.

Cross Functional Roles & Responsibilities

Cross Functional Roles and Responsibilities spread across all functional towers (e.g., Distributed Computing, Network, Helpdesk, etc.) at ED. Many of the specific categories of roles and responsibilities (e.g., Planning and Analysis, Asset Acquisition and Management, etc.) are repeated in each tower. The difference is that the cross functional tower is at an enterprise level, while the repeated roles and responsibility at the tower level delve into topic related detail.

Planning & Analysis (Enterprise Level)

Planning and analysis services are the research of new technical trends, products and services, such as hardware components, system software, and transmission facilities that offer opportunities to improve the efficiency and effectiveness of the "service area" infrastructure, as well as for competitive business advantage. It is also critical to proactively mitigate risks.

Table 11. Planning and Analysis Roles and Responsibilities

Planning and Analysis Roles and Responsibilities	SP	ED
Define ED business, functional, availability and Disaster Recovery (DR) service requirements at the enterprise level		X
Define services and standards for planning and analysis activities		X
Participate in defining services and standards for planning and analysis activities	X	
Review and approve services and standards for planning and analysis activities		X
Recommend policies and procedures to implement planning and analysis activities	X	
Review, authorize, and approve policies and procedures		X
Continuously monitor technical trends through independent research; document and report on products and services with potential use for ED	X	
Perform feasibility studies for the implementation of new technologies that best meet ED business needs and meets cost, performance and quality objectives	X	
Define enterprise-level project management policies, procedures and requirements including project feasibility analysis, cost benefit analysis, scheduling, costing, resource planning, communication planning, procurement, risk management, quality management and HR management	X	
Perform project-level management function	X	

ED-05-PO-0908

Planning and Analysis Roles and Responsibilities	SP	ED
Perform project management oversight and liaison function to the business and customers		X
Conduct annual technical and business planning sessions to establish standards, architecture and project initiatives	X	
Participate in annual technical and business planning sessions to approve standards, architecture and project initiatives		X
Conduct regular planning for technology refresh and upgrades and create bill of material	X	
Participate in regular planning and approve technology refresh, upgrades and bill of material		X
Conduct semiannual technical reviews and provide recommendations for improvement and upgrade	X	

Requirements Definition (Enterprise Level)

Requirements definition services are the activities associated with the assessment and definition of user functional, performance, availability, maintainability and Disaster Recovery needs and the required security requirements to meet user, ED, client and government policy requirements. These requirements drive the technical design for the environment.

Requirements definition is performed at both the enterprise level and for each major system or upgrade to be installed within the enterprise.

Table 12.   Requirements Definition Roles and Responsibilities

Requirements Definition Roles and Responsibilities	SP	ED
Define requirements determination standards (for example, support processes and procedures)		X
Participate in defining requirements determination standards	X	
Ensure requirements are met within security policies	X	
Conduct interviews, group workshops, and surveys to determine user functional, performance, availability, maintainability and Disaster Recovery (RTO, RPO) requirements. Ensure adherence to ED system development life cycle procedures		X
Participate in appropriate requirements gathering focus groups and panels	X	
Provide the service provider with written information in sufficient detail pertaining to the requirements definition to enable the service provider to create the appropriate requirements documentation		X
Document all requirements in agreed to formats (e.g., system specifications, data models, network design schematics).	X	
Approve all requirements documents.		X
Define system acceptance test criteria.	X	
Review and approve all system acceptance test criteria		X

Design Specifications (Enterprise Level)

Design specification services are the activities and deliverables that translate user and information system requirements into detailed technical system specifications.

Table 13. Design Specifications Roles and Responsibilities

Design Specification Roles and Responsibilities	SP	ED
Develop and document technical design plans and environment configuration based on ED standards, architecture and functional, performance, availability, maintainability, security and DR requirements.	X	
Determine system upgrade, replacement and/or conversion requirements including hardware, software and IT infrastructure.	X	
Approve system upgrade, replacement and/or conversion requirements including hardware, software and IT infrastructure.		X
Review design plans through coordination with the appropriate ED technology standards group and design architects.	X	
Approve design plans through coordination with the appropriate ED technology standards group and design architects.		X
Conduct site surveys for design efforts as required.	X	
Provide design documentation for service provider-provided non-proprietary products and services.	X	
Approve design documentation for service provider-provided non-proprietary products and services.		X

Asset Acquisition and Management (Enterprise Level)

Acquisition services (as agreed between the service provider and ED) are the activities associated with the pricing, evaluation (technical and costing), selection, acquisition, and ongoing management of new and upgraded hardware (including Blackberries and Cell Phones) and software.

Table 14. Asset Acquisition and Management Roles and Responsibilities

Asset Acquisition and Management Roles and Responsibilities	SP	ED
Establish acquisition policies and procedures to agreed set of vendors (by ED).	X	
Review and approve acquisition policies and procedures		X
Develop and maintain list of pre-approved suppliers	X	
Approve selected, strategic vendors		X
Develop and issue asset acquisition bid requests as required and approved by ED	X	
Demonstrate that best efforts are being pursued to obtain best pricing (e.g., use of pooled government procurement mechanisms)	X	
Establish audit procedures to ensure compliance with best practices		X
Assist in periodic audits of procurement procedures	X	
Evaluate proposals against clearly defined objective criteria	X	
Negotiate contracts for service provider-purchased / leased hardware and software	X	
Negotiate contracts for ED purchased / leased hardware and software		X

Asset Acquisition and Management Roles and Responsibilities	SP	ED
Ensure that all new assets requests comply with established ED IT standards and architectures	X	
Support the asset ordering, procurement and delivery processes in compliance with ED procurement and acceptance processes	X	
Procure hardware / software (e.g., Government DAR, etc.)	.	X
Manage and track purchase orders and service orders	X	
Co-ordinate delivery and installation of new products and services, as required	X	
Ensure that new assets comply with established ED IT standards and architectures	X	
Review and approve selection of hardware to be installed in ED facilities and software to be installed on ED hardware		X
Define acceptance process		X
Review and approve acceptance process		X
Adhere to ED acceptance process	X	
Establish, update, and maintain an asset inventory database and system configuration charts.	X	
Review and approve asset inventory tracking methodology		X
Configure and Install assets	X	
Track all ED assets (location, asset ID, serial number, finances) and ensure service contracts are in force as needed to meet SLAs	X	
Track and advise ED in a timely manner of expiration and renewal requirements for client-owned network devices / software licenses	X	
Provide asset inventory reports as requested	X	
Provide ability for direct end-user inquiry into the asset database	X	
Periodic review / audit asset inventory management procedures		X
Terminate, dispose of, and relocate assets as needed / specified ED. Provide disposition reports as needed and ensuring that all ED policies are followed as it pertains to destruction of hard disks and other storage products.	X	

Engineering / Development (Enterprise Level)

Engineering / development services are the activities associated with the engineering and development of the technical infrastructure, tools and utilities that enhance the "service area" environment.

Table 15. Engineering / Development Roles and Responsibilities

Engineering / Development Roles and Responsibilities	SP	ED
Establish engineering / development policies and procedures	X	
Participate in engineering / development policies and procedures, as appropriate		X
Perform engineering functions required to implement design plans for additional or new products and services	X	
Perform engineering functions required to implement facilities and leasehold improvements (Provider-managed premises)	X	

Engineering / Development Roles and Responsibilities	SP	ED
Perform engineering functions required to implement facilities and leasehold improvements (ED -managed premises)		X
Conduct engineering / development impact and risk analysis to current environment	X	
Manage engineering / development efforts using formal project management tools and methodologies	X	
Conduct development reviews and provide results to ED	X	
Review and approve engineering / development plans and procedures where there is an impact on other ED entities / facilities / third-party agreements		X

Integration and Testing (Enterprise Level)

Integration and testing services are the activities that ensure that all individual ED infrastructure components configured with or added to the infrastructure work together cohesively to achieve the intended results.

Table 16. Integration and Testing Roles and Responsibilities

Integration and Testing Roles and Responsibilities	SP	ED
Develop integration and testing policies and procedures	X	
Review and approve integration and testing policies and procedures and deliverables		X
Conduct integration and security testing for all new and upgraded equipment, software or services to include unit, system, integration and regression testing	X	
Evaluate all new and upgraded equipment, software or services for compliance with ED security policies, regulations and procedures	X	
Recommend user acceptance test and load test guidelines	X	
Approve all user acceptance and load test procedures for new and upgraded equipment, software or services		X
Perform all user acceptance and load test testing for new and upgraded equipment, software or services	X	
Stage new and upgraded equipment, software or services to smoothly transition into existing environment	X	
Perform modifications and performance-enhancement adjustments to ED system software and utilities as a result of changes to architectural standards	X	
Test new releases of supported hardware and software to ensure conformance with ED Service Level Requirements (SLRs)	X	
Coordinate with ED IT staff with managing in-house integration test laboratory facilities	X	
Provide integration testing facility	X	
Perform configuration management and change control activities	X	
Review and approve change control results		X

Capacity Management (Enterprise Level)

Capacity management is responsible for ensuring that the capacity of the IT infrastructure matches the evolving demands of the business in the most cost-effective and timely manner. The process encompasses the monitoring of performance and throughput of IT services and supporting IT components, undertaking tuning activities, understanding current demands and forecasting for future requirements, influencing the demand for resources in conjunction with Financial Management and developing a capacity plan which shall meet demand and SLAs.

Table 17. Capacity Management Roles and Responsibilities

Capacity Management Roles and Responsibilities	SP	ED
Identify future business requirements that shall alter capacity requirements.		X
Assess impact and requirements for new capacity when adding, removing or modifying applications	X	
Establish comprehensive capacity management planning process at the enterprise, system and IT component level taking into account current and new requirements.	X	
Review and approve capacity management planning process		X
Define, develop and implement tools that allow for the effective monitoring / trending of IT infrastructure, applications and IT components performance and resource utilization.	X	
Continually monitor IT resource usage to enable quick identification of capacity issues and provides trending information to allow for forecasting future capacity requirements.	X	
Assess incidents / problems and make appropriate capacity IT changes to improve service performance.	X	
Perform tuning activities that enable optimized use of existing IT resources and minimize ED costs to deliver services at agreed to service levels (may require coordination with external service providers as in the case of telecom)	X	
Ensure adequate capacity exists within the IT environment to meet SLR requirements taking into account daily, weekly and seasonal variations in capacity demands	X	
Proactively provide predictive capacity forecasts through the use of modeling, trending, base-lining and other techniques to allow ED to properly budget for IT services	X	
Develop scenarios for addressing capacity constraints and define associated costs, risks and benefits of each.	X	
Review scenarios for addressing capacity constraints and approve scenario that best addresses ED needs		X

Implementation and Migration (Enterprise Level)
Implementation and migration services are the activities associated with the installation of new and upgraded hardware and system software components.

Table 18. Implementation and Migration Roles and Responsibilities

Implementation and Migration Roles and Responsibilities	SP	ED
Define equipment migration and redeployment policies and procedures	X	
Review and approve equipment migration and redeployment policies and procedures		X
Notify service provider of equipment migration and redeployment plans		X
Conduct pre-installation site surveys, as required	X	
Install enhancements to technical architecture or services provided	X	
Install new or enhanced functions or features, hardware, software, peripherals and configurations	X	
Coordinate implementation and migration support activities with ED IT staff and service provider-provided Helpdesk	X	
Provide technical assistance to ED during conversion, as requested	X	
Install infrastructure as required	X	
Perform data migration, excluding conversion, by electronic or manual methods as a result of implementation or migration	X	
Perform appropriate tests on all installs, moves, adds and changes	X	
Conduct user acceptance tests	X	
Approve user acceptance tests results		X
Provide ED IT with training on new products and services on request	X	
Provide end-user training for new products and services on request	X	

Incident & Problem Management (Enterprise Level)

Incident and problem management includes the activities associated with restoring normal service operation as quickly as possible and minimize the adverse impact on business operations, thus ensuring that the best possible levels of service quality and availability are maintained. 'Normal Service operation' as defined here as service operation within SLA limits"[50].

Problem Management also includes minimizing the adverse impact of incidents and problems on the business that are caused by errors in the IT infrastructure, and to prevent the recurrence of Incidents related to those errors. In order to achieve this goal, Problem Management seeks to get to the root cause of incidents and then initiate actions to improve or correct the situation.

Table 19. Incident & Problem Management

Incident and Problem Management Roles and Responsibilities	SP	ED
Define Incident and Problem management policies and procedures.	X	
Define operational turnover requirements such as "runbook" documentation, training materials, procedural manuals, SOP, etc.	X	

---

[50] ITIL has been used to define functional area definitions, roles and responsibilities.

ED-05-PO-0908

Incident and Problem Management Roles and Responsibilities	SP	ED
All problem management issues are to be resolved 100% without government involvement.	X	
Approve Incident and problem management policies, procedures and operational turnover requirements.		X
Establish operations and service management quality assurance and control programs	X	
Approve operations and service management quality assurance and control programs		X
Perform quality assurance and quality control programs	X	
Develop policies for the use of remote control tools for Helpdesk use in maintenance and troubleshooting		X
Develop plans and procedures for the use of remote control tools in accordance with defined policies	X	
Coordinate user support activities with the Consolidated Helpdesk	X	
Establish incident / problem classification by severity, impact and priority. Establish incident / problem workflow, escalation, communication and reporting processes. Tie workflow and escalation processes to Service Level Objectives and targets for Level 1 to Level N support functions.	X	
Review and approve incident / problem classification, prioritization and workflow, communication, escalation and reporting processes.		X
Provide, configure and operate incident and problem management system	X	
Provide ED access to incident and problem tracking system to allow for incident / problem monitoring and ad hoc reporting	X	
Respond to user inquiries, requests, and incidents and problems. Manage workflow, escalation, tracking and reporting activities	X	
Manage entire incident / problem lifecycle including detection, diagnosis, repair and recovery. Confirm user requirements were met and end user satisfaction	X	
Manage efficient workflow of incidents including the involvement of third party providers.	X	
Enter all inquires, requests and incidents into trouble ticketing system and categorize, prioritize and capture all relevant information in a consistent format.	X	
Perform Root Cause Analysis of problems, document findings and take corrective actions. Resolve problem and/or substantiate that all reasonable actions have been taken to prevent future reoccurrence	X	
Periodically review the state of open problems and the progress being made in addressing problems.		X
Participate in problem review sessions and provide listing and status of problems categorized by problem impact.	X	
Communicate system status notifications as defined in escalation and workflow processes (via ConnectED , email, and/or phone)	X	
Implement Self-Service and other tools that enable end users to perform preliminary problem diagnosis and troubleshooting and minimize the need to call the helpdesk.	X	

ED-05-PO-0908

Incident and Problem Management Roles and Responsibilities	SP	ED
Measure usefulness of Service tools and continually improve tools to maximize tool value	X	
Review and approve improvements to Self Service		X
Conduct Periodic reviews of the effectiveness of Self Service capabilities and usage		X
Ensure all problem tickets are closed in compliance with service level requirements and that no open tickets are closed without proper authorization and satisfactory resolution.	X	
Issue reports on IT service area performance and problem status and incident trends.	X	
Identify possible product enhancement opportunities for improved operational performance and potential cost savings.	X	
Approve projects to implement operational improvements		X
Ensure configuration databases have been modified to reflect any modifications to configuration items and ensure appropriate change management processes are followed	X	
Establish customer satisfaction surveys and periodically capture, monitor and report on satisfaction.	X	
Participate in customer satisfaction survey planning and development process. Approve survey content and process of data collection and reporting		X

Operations (Enterprise Level)

Operations services are the activities associated with providing a stable IT infrastructure and to effectively and efficiently perform operation procedures to ensure IT services meet service level targets and requirements.

Table 20. Operations Roles and Responsibilities

Operations Roles and Responsibilities	SP	ED
Define operations policies and procedures.	X	
Establish Enterprise System Management tools to monitor the IT infrastructure, diagnose events and assist in resolution of problems	X	
Install and configure Enterprise system management tools in such a fashion that problems, issues and events are properly identified and reported according to prescribed service levels	X	
Perform event management monitoring of IT services to detect abnormal conditions or alarms, log abnormal conditions, analyze the condition and take corrective action	X	
Manage hardware, software, peripherals, and services to meet service levels and minimize ED resource requirements	X	
Interface with Technical Support Team, Incident & Problem Management Team and third party provides in problem resolution without government intervention or involvement	X	
Establish scheduling tools for managing / automating job execution, job workflow processes, file exchange functions and print management	X	

Operations Roles and Responsibilities	SP	ED
Monitor progress of scheduled jobs and identify and resolve issues in scheduling process	X	
Define operational documentation requirements (Run Books, Contact Lists, Operations scripts etc. etc.)	X	
Ensure appropriate inventories of equipment (spares, tools, etc. etc.) are available in support of problem resolution in order to meet prescribed service levels	X	
Perform routine verification tasks to ensure processes and procedures are being adhered to in supporting operations	X	
Develop operational reports (Daily, Weekly, Monthly) that provides status of operational activities, production issues, and key operational metrics	X	
Review and approve operational reports		X
Define storage management backup and recovery tools	X	
Manage backup media inventory (Tape, Disk, Optical and other media type) including the ordering and distribution of media	X	
Perform backup and associated rotation of media, and archive as offsite as per ED policy.	X	
Ensure ongoing capability to recover archived data from media as specified (backwards compatibility of newer backup equipment)	X	
Test backup media to ensure incremental and full recovery of data is possible and ensure system integrity	X	
Perform quarterly random server restores for each supported platform to test backup procedures for integrity validation	X	
Reconcile off site tape storage inventory monthly	X	
Recover files, file system or other data required from backup media as required or requested by ED or as a result of helpdesk requests	X	
Provide recovery and backup requirements and updates as they change		X

Maintenance (Enterprise Level)

Maintenance services are the activities associated with the maintenance and repair of hardware and software to include "break-and-fix" services. Installed platform and product version levels are not to be more than one version behind the current commercial release, unless coordinated with the ED architectural standards committee.

Table 21. **Maintenance Roles and Responsibilities**

Maintenance Roles and Responsibilities	SP	ED
Define maintenance and repair policies and procedures.	X	
Review and Approve maintenance and repair policies and procedures.		X
Define dispatch requirements and point-of-service locations		X
Ensure appropriate maintenance coverage for all in-scope assets	X	
Provide centralized maintenance and break / fix support defined locations		X
Dispatch repair technicians to the point-of-service location if necessary.	X	
Perform diagnostics on hardware, software and peripherals (as appropriate).	X	

Maintenance Roles and Responsibilities	SP	ED
Install manufacturer field change orders, service packs, firmware, and software maintenance releases, etc.	X	
Perform software distribution and version control, both electronic and manual. (ED states role & responsibility ownership would depend on the platform)	X	
Replace defective parts and systems, including preventive maintenance, according to the manufacturer's published mean-time-between failure rates.	X	
Conduct maintenance and parts management and monitoring during warranty and off-warranty periods.	X	
Perform routine system management on support applications such as system tuning.	X	
Perform maintenance on peripherals and special purpose devices.	X	
Track hardware and software maintenance agreements, provide reports / notification to ED on what to maintain and purchase.	X	

Technical Support (Enterprise Level)

Technical support services are the activities associated with providing technical resources required for the tuning of system software and utilities for optimal performance. Also included is expertise to provide Level 2 and Level 3 technical assistance for the service provider Helpdesk, support for ED customers (end users), other ED IT professionals, external third-party entities using / providing ED IT applications / services and ED field locations.

Table 22. Technical Support Roles and Responsibilities

Technical Support Roles and Responsibilities	SP	ED
Define technical support policies and procedures		X
Participate in defining and approve technical support policies and procedures	X	
Test, install, and tune technical environment hardware, software, peripherals and services	X	
Provide technical assistance as requested for Tier 2 end-user and production support as requested ED and/or service provider-provided Helpdesk	X	

Monitoring and Reporting (Enterprise Level)

Service Level monitoring are the activities associated with monitoring of IT delivery and support services to assess how services are being delivered with respect to SLAs. The service provider shall report system management information (e.g., performance metrics, and system accounting information) to the designated ED representative in a format agreed to by ED.

Table 23. Service-Level Monitoring and Reporting Responsibilities

Service Level Monitoring Roles and Responsibilities	SP	ED
Approve and document SLRs and reporting cycles		X

Service Level Monitoring Roles and Responsibilities	SP	ED
Measure, analyze, and provide management reports on performance relative to requirements	X	
Document service-level requirements and agreements	X	
Develop service level improvement plans where appropriate	X	
Review and approve improvement plans		X
Implement improvement plans	X	
Report on service performance improvement results	X	
Co-ordinate SLA monitoring and reporting with designated ED representative and third-party vendors, as required	X	
Provide appropriate SLA metrics and measures of performance with designated ED representative	X	
Review and approve SLA metrics and performance reports		X

Account Management (Enterprise Level)
The service provider shall perform services and activities associated with the ongoing management of the service environment.

Table 24. Account Management Roles and Responsibilities

Account Management Roles and Responsibilities	SP	ED
Develop and document Account Management reporting procedures	X	
Approve Account Management reporting procedures		X
Develop a "user" service catalog which defines services offering in a format that is easily understood by the user	X	
Develop a detailed "IT" service catalog which details services offered including all service options, pricing, installation timeframes, order process (new, change & remove service) and prerequisites.	X	
Develop a service ordering process that clearly defined to the end-user how to order, change or delete services.	X	
Approve a service ordering process that clearly defined to the end-user how to order, change or delete services.		X
Develop a process to approve service ordering.		X
Develop and document criteria and formats for Administrative, Service Activity and Service Level reporting	X	
Develop and implement Customer Satisfaction program for tracking the quality of service delivery to end users	X	
Approve Customer Satisfaction program and monitor results.		X
Measure, analyze and report system and service performance relative to requirements	X	
Prepare performance and other service level reports and provide as scheduled	X	
Prepare and provide activities reports and others as defined	X	
Prepare reports on statistics and trends as requested / as defined	X	
Perform Operations and other audits periodically	X	

Account Management Roles and Responsibilities	SP	ED
Perform review of all audits.		X

Configuration Management (Enterprise Level)

Configuration management activities are to provide a logical model of the infrastructure or a service by identifying, controlling, maintaining and verifying versions of configuration items in existence. The goal being to account for all IT assets and configurations, provide accurate information on configurations and provide a sound basis for Incident, Problem, Change and Release Management and lastly to verify configuration records against the infrastructure and correct any exceptions.

Table 25.   Configuration Management Roles and Responsibilities

Configuration Management Roles and Responsibilities	SP	ED
Define configuration management policies, and procedures.	X	
Approve configuration management policies, and procedures.		X
Establish configuration management data structure(s) for managing configuration items while supporting existing CCRB process. Configuration include hardware, software, associated documentation including version control notes, operation documentation etc. etc.	X	
Select, install and maintain configuration management tools	X	
Enter / upload configuration data into configuration data base(s)	X	
Establish process for tracking configuration changes by date, time, individual(s) performing change, purpose of change, and description of change. Tracking must also include state of configuration items (Development, Test, Production, Retired)	X	
Establish process interfaces to problem & incident management, change management, technical support, maintenance and financial accounting processes.	X	
Establish appropriate authorization controls for modifying configuration items. Verify compliance with software licensing. Establish appropriate physical and logical separation between development, test and production.	X	
Establish guidelines for physical and logical separation between development, test and production and the process for deploying and back out of configuration items	X	
Establish configuration baselines as reference points for rebuilds, and providing ability to revert to stable configuration states	X	
Establish procedures to respond upon ED request to configuration data or vulnerability remediation inquires resulting from audits or other security inquiries.	X	
Respond upon ED request to configuration data or vulnerability remediation inquires resulting from audits or other security inquiries.	X	
Attend upon ED request any security or configuration meeting along with any requests for CM or security focused groups.	X	
Establish process for verifying the accuracy of configuration items, adherence to configuration management process and identifying process deficiencies.	X	

Configuration Management Roles and Responsibilities	SP	ED
Provide ED configuration management reports as required and defined by ED.	X	
Review and approve configuration management processes and provide recommended changes to meet ED business needs and any specific client, internal audit or regulatory requirement.		X
Audit configuration management process and accuracy of configuration data.		X

Change and Release Management (Enterprise Level)

Change and release management processes and activities are inter-related and complementary. A high level description of each is provided below.

Change Management (CM) activities are to ensure that standardized methods and procedures are used for efficient and prompt handling of all changes, in order to minimize the impact of change upon service quality and consequently to improve the day-to-day operations of the organization. CM covers all aspects of managing the introduction and implementation of all changes not only in any of the IT system themselves, but also in any of the management processes, tools, and methodologies designed and utilized to support the IT systems. The CM process includes the following process steps:

- Request process
- Recording / Tracking process
- Prioritization process
- Responsibility Assignment process
- Impact Assessment process
- Review / Approval process
- Implementation process
- Verification (test) process
- Release process
- Closure process

Release Management activities take a holistic view of a Change to an IT service and shall ensure that all aspects of a release, both technical and non-technical are considered together. The goals are to plan and oversee the successful rollout of software and hardware, design and implement efficient procedures for distribution and installation of Changes. The activities also ensure changes are traceable, secure and that only correct, authorized and tested versions are installed, ensure controlled change and configuration processes are utilized. Exact execution and back-out plan are understood, and master copies of new versions are secured in definitive software library and configuration databases are updated.

Table 26.   Change and Release Management Roles and Responsibilities

Change and Release Management Roles and Responsibilities	SP	ED
Define change and release management policies, and procedures.	X	
Establish change classifications (impact, priority, risk) and change authorization process.		X
Establish release management policies, procedures and processes including operational turnover procedures, back out plans, training requirements etc. etc.	X	
Participate in the development and approve change management and release management procedures and policies		X
Approve change and release management procedures and policies		X
Document and classify proposed changes to the environment, analyze cost, risk impact of those changes and establish release management plans for major changes	X	
Develop and maintain a schedule of planned changes and provide to ED for review upon a predetermined frequency as requested by ED	X	
Determine change logistics	X	
Schedule and conduct change management meeting to include review of planned changes and results of changes made	X	
Authorize and approve scheduled changes or alter the schedule of any or all change requests		X
Review release management details and alter as appropriate to meet the needs of ED (back out plan, go / no go decision)	X	
Notify affected clients of change timing and impact	X	
Implement change and adhere to detailed release plans	X	
Modify configuration, asset management items, service catalog (if applicable) to reflect change	X	
Perform operational turn-over procedures	X	
Verify that change met objectives and did not have other negative impacts	X	
Monitor changes and report results of changes to ED.	X	
Establish and exercise user acceptance tests as required	X	
Approve user acceptance tests as required		X
Perform quality control audits and approve change control results		X

Knowledge Transfer and Ongoing Training (Enterprise Level)

Training services are the activities associated with the improvement of skills through education and instruction for service provider's staff, including those transitioned from ED to the service provider. The service provider shall participate in any initial and on-going training delivered by ED as required that would a learning opportunity about ED's business and technical environment. In addition, formal training may be provided for ED retained technical staff for the express purpose of exploitation of the functions and features of the computing infrastructure. Delivery methods may include classroom style, computer-based, individual, or other appropriate means of instruction.

Table 27.   Knowledge Transfer and Training Activities Roles and Responsibilities

Training Activities Roles and Responsibilities	SP	ED
Develop and document Training requirements and policies	X	
Participate in development, review and approve training requirements		X

Training Activities Roles and Responsibilities	SP	ED
Develop and document procedures that meet Training requirements and adhere to defined policies	X	
Approve Training procedures		X
Develop program to instruct ED personnel on the provision of service provider services (e.g., "rules of engagement", requesting services, etc.)	X	
Approve service provider developed training program		X
Develop, implement and maintain a Knowledge Database	X	
Develop training program to instruct service provider personnel on the business and technical environment in ED's environment		X
Develop and implement knowledge transfer procedures to ensure that more than one individual understands key components of the business and technical environment	X	
Participate in ED delivered instruction on the business and technical environment	X	
Develop and document training requirements that support the ongoing provision of services, including refresher courses as needed and instruction on new functionality	X	
Take training classes as needed to remain current with systems, software, features and functions for which Helpdesk support is provided in order to improve service performance (e.g. First Call Resolution)	X	
Provide training when substantive (as defined between the ED and service provider) technological changes (e.g., new systems or functionality, etc.) are introduced into the ED environment to facilitate full exploitation of all relevant functional features	X	
Assist in the coordination and development of basic training for ED end-users	X	
Participate in the training of Helpdesk personnel on the ED business and technical environments, to be paid by service provider.		X

Documentation (Enterprise Level)

The service provider shall provide the documentation services and activities associated with developing, revising, maintaining, reproducing, and distributing information in hard copy and electronic form.

Table 28. Documentation Roles and Responsibilities

Documentation Roles and Responsibilities	SP	ED
Define documentation requirements and formats	X	
Participate in defining documentation requirements and formats as appropriate		X
Establish and execute effective QA measures to validate all SOP documents created and updated. All documents are to pass successful test by technically proficient QA staff prior to submittal to ED.	X	
Provide output in agreed format for support of activities throughout the life cycle of services as appropriate	X	

Technology Refreshment and Replenishment (Enterprise Level)

Technology refreshment and replenishment (TR&R) are the activities associated with modernizing the IT infrastructure on a continual basis to ensure that the system components stay current with evolving industry standard technology platforms.

Table 29. Technology Refreshment and Replenishment Roles and Responsibilities

TR&R Roles and Responsibilities	SP	ED
Recommend and establish TR&R life-cycle management policies, procedures, and plans appropriate for support of ED business model	X	
Approve TR&R policies, procedures, and plans		X
Manage, maintain, and update as necessary, the approved TR&R policies, procedures, and plans and tied to CCRB	X	
Perform the necessary tasks required to fulfill the TR&R plans	X	
Provide management reports on the progress of the TR&R plans	X	
Periodically review the approved TR&R plans to ensure they properly support ED business requirements		X

Security (physical / logical access to systems) – (Enterprise Level)

Security management services include physical and logical security of ED assets, virus protection, and other security services in compliance with ED Security requirements.

Table 30. Security Roles and Responsibilities

Security Roles and Responsibilities	SP	ED
Recommend security requirements, standards, procedures and policies	X	
Approve security requirements, standards, procedures and policies		X
Assist in developing security standards, policies, and procedures	X	
Implement security plans consistent with ED security policies	X	
Review and Approve security plans		X
Document industry security best practices and provide recommendations for ED security policies and procedures	X	
Establish detailed processes and procedures for adding, changing, enabling / disabling and deleting Log-on / security-level access of ED employees, agents and subcontractors	X	
Approve detailed processes and procedures for adding, changing, enabling / disabling and deleting Log-on / security-level access of ED employees, agents and subcontractors		X
Perform log-on / security-level access changes as detailed in processes and procedures	X	
Maintain physical security of assets at ED facilities		X
Maintain logical security of assets at all locations	X	
Provide, maintain, and administer anti-virus software and anti-virus pattern updates to eliminate potential virus infection of LAN and end user devices	X	
Conduct periodic virus checks	X	
Conduct periodic security checks per requirements.	X	
Establish firewall / Intrusion Detection requirements and configurations	X	
Approve firewall / Intrusion Detection requirements and configurations		X
Install, configure, operate and maintain firewall / Intrusion Detection equipment to ED specifications	X	
Report security violations to ED. Service provider has the responsibility for isolating violations to a specific application or access point. Service provider is also responsible for tracking violations to a specific MAC address, port address, and UserID where applicable.	X	

Security Roles and Responsibilities	SP	ED
Address and resolve all non-personnel related security violations internal to ED		X
Resolve security violations that originate outside of the hosted network(s). Specifics examples include DOS attacks, spoofing, Web exploits	X	
Actively participate in industry standard security forums and users groups. Demonstrate the ability to remain up to date with current security trends, threats, and common exploits.	X	
Review all security patches relevant to the IT environment and classify the need, speed in which the security patches shall be installed. Develop systematic approach for installing security patches taking into account risk factors and working with other support staff to ensure that all supported platforms and application types are adequately tested as to minimize production impact	X	
Review and approve approach for installing security patches.		X
Ensure that all LAN servers and operating systems current with vendor security patches that are required to address vulnerabilities specific to the system	X	
Perform real-time monitoring of firewall / intrusion detection events and take appropriate action to remedy vulnerabilities. Periodically review logs for anomalies. Report security events to ED	X	
Establish a daily schedule to manually monitor critical and DMZ servers log files for critical events and intrusion attempts not monitored by automated methods.	X	
Approve proposed schedule to manually monitor critical and DMZ servers log files for critical events and intrusion attempts not monitored by automated methods.		X
Maintain and perform periodic audits		X

IT Continuity, Availability and Disaster Recovery Services (Enterprise Level)

The service provider must demonstrate that it shall consistently meet or exceed ED business continuity / disaster recovery requirements.

Table 31. IT Continuity, Availability and Disaster Recovery Roles and Responsibilities

IT Continuity, Availability and Disaster Recovery Roles and Responsibilities	SP	ED
Define ED Disaster Recovery Strategy, requirements, scenarios and establish recovery time / position objectives and resiliency / redundancy requirements for IT infrastructure and systems		X
Perform Disaster Recovery (DR) education, awareness and staff training		X
As needed, assist ED in other business continuity and emergency management activities.	X	
Develop detailed Disaster Recovery plan to achieve DR requirements	X	
Establish processes to ensure DR plans are kept up to date and reflect changes in ED environment	X	
Review & Approve Disaster Recovery plan		X
Establish DR test requirements and test schedule	X	
Approve DR test criteria, requirements and test schedule		X
Perform scheduled DR tests	X	
Coordinate involvement of users for DR testing		X

II Continuity, Availability and Disaster Recovery Roles and Responsibilities	SP	ED
Participate in DR tests		X
Track and report DR test results, along with a "lessons learned" document to ED	X	
Incorporate "lessons learned" observances into final documents within 30 days of DR test.	X	
Review & approve Disaster Recovery testing results		X
Conduct DR test review meeting to determine improvements to processes and procedures	X	
Recommend data (File System, Database, Flat Files etc. etc.) replication, backup and retention requirements	X	
Approve data (File System, Database, Flat Files etc. etc.) replication, backup and retention requirements		X
Review & approve Disaster Recovery testing results		X

Network

The network roles and responsibilities listed below are specific towards the network functional tower. The roles and responsibilities that are repeated from the Cross Functional section above are reviewed at a lower level as it relates to network in this section.

Environment and Facilities Support

The service provider shall perform services and activities associated with maintaining environmental requirements at locations designated.

Table 32. **Environmental and Facilities Support**

Environmental and Facilities Support Roles and Responsibilities	SP	ED
Identify requirements for ED Environment and Facilities support		X
Develop and document procedures for Environment and Facilities Support	X	
Approve Environment and Facilities Support procedures		X
Monitor the ED environmental systems (i.e., HVAC, electrical power, computer room power distribution switches, generator switch gear, generator, battery and UPS, FM200 fire suppression, cable plant, network connectivity, telecommunications, raised floor, security, fire proof vault environmental etc.) in rooms housing computing hardware and network devices	X	
Maintain EPA standards for in-ground diesel fuel storage tank and attain annual re-certification with State of Georgia and Cobb County		X
Complete annual support and maintenance contracts for all infrastructure equipment		X
Manage all facility requirements for personnel (AC, heat, lights, plumbing, janitorial, network printers, fax, security with Federal Protection Agency, proximity access		X
Ensure fireproof vault integrity is maintained environmentally (AC, heat and humidity) and required tape storage racks are available; tapes are available and retrievable as needed		X
Develop and recommend improvement plans for ED facilities as needed to maintain an effective and secure computing environment	X	
Approve improvement plans		X
Implement or coordinate the implementation of all approved upgrades and installations	X	

Environmental and Facilities Support Roles and Responsibilities	SP	ED
Coordinate activities of all personnel (i.e., Provider employees and others) working in equipment locations (e.g., Data Center, distributed equipment rooms, network equipment closets)	X	
Ensure that facilities support activities conform to the requirements of defined change control processes	X	

Planning and Analysis

Planning and analysis services and activities, as well as roles and responsibilities are presented in Cross Functional section of this PWS.

ED is designated the responsible party for performing tasks which would be performed by a circuit provider or other third party where ED has retained provisioning or management responsibility (constant three-way communication shall be maintained with the circuit provider, on-site service provider support, and ED).

Table 33. Planning and Analysis Roles and Responsibilities

Planning and Analysis Roles and Responsibilities	SP	ED
Define services and standards for LAN services	X	
Review and approve services and standards for LAN services		X
Recommend service provider services and standards for WAN services	X	
Review and approve services and standards for WAN services		X
Perform business liaison function to ED operational units		X
Perform business liaison function to network carrier for capacity planning and analysis		X
Perform technical planning assistance with ED IT technical staff for capacity and performance for LAN / WAN services	X	

Asset Acquisition and Management

Asset acquisition and management services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities section of this PWS.

Table 34. Asset Acquisition and Management Roles and Responsibilities

Asset Acquisition and Management Roles and Responsibilities	SP	ED
Establish acquisition policies and procedures and negotiate all contracts with telecommunications circuit providers for all circuits as defined by GSA / FTS.		X
Recommend WAN circuits, equipment and services as defined by ED's requirements.	X	
Order of recommended WAN circuits, equipment and services as defined by service provider (GSA / FTS2001)		X
Configure LAN / WAN (hardware, software) prior to installation, as appropriate	X	
Ownership of router / switch configuration files and IP addressing schemas		X

Network Engineering / Development

Engineering and Development services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 35.   Network Engineering Roles and Responsibilities

Network Engineering Roles and Responsibilities	SP	ED
Develop network engineering, testing and integration procedures that meet requirements and adhere to defined policies	X	
Approve engineering, testing and integration procedures		X
Prepare network engineering plans and schedules to support new and enhanced applications, architectures and standards	X	
Review and approve network engineering plans and schedules		X
Review network service provider service offerings for ED's services environment		X
Coordinate implementation and migration support activities with the Helpdesk and other ED entities	X	
Coordinate the scheduling of all changes to the network environment through defined Change Control processes	X	
Conduct pre-installation site surveys, as applicable. Coordinate with ED and affiliated entities, and public carriers, as required	X	
Recommending, enhancing and upgrading existing network monitoring and management tools (that is, asset management tracking, network monitoring software)	X	
Recommending, enhancing and upgrading existing service delivery points (that is, routers, switches, network premise wiring).	X	

Provisioning
Provisioning services are the ordering of telecommunication circuits based on bandwidth requirements. Re-provisioning can occur based on new bandwidth requirements as needed.

Table 36.   Provisioning Roles and Responsibilities

Network Provisioning Roles and Responsibilities	SP	ED
Develop and document network provisioning requirements and policies within TATS		X
Develop and document procedures for provisioning and administration that meet requirements and adhere to defined policies within TATS	X	
Approve provisioning and administration procedures		X
Provide capacity planning assistance to develop network resource requirements projections	X	
Coordinate ordering and procurement of network circuits from public carriers		X
Manage the efforts of public carriers (and other third parties) to meet defined schedules, project plans, etc.	X	
Ensure that all new circuits, devices and software provisioned are included in configuration management documentation	X	
Provide estimates for assets and services not included in the scope of this PWS	X	
Develops the technical circuit order for ED processing.	X	

Integration and Testing

ED-05-PO-0908

Integration and testing services and activities, as well as roles and responsibilities, are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 37. **Integration and Testing Roles and Responsibilities**

Integration and Testing Roles and Responsibilities	SP	ED
Define services and standards for LAN services	X	
Review and approve services and standards for LAN services		X
Recommend services and standards for WAN services	X	
Ensure that all individual networking communications components configured with or added to the infrastructure work together properly as a cohesive networking environment, performing all of the intended functions		
Adjustment to ED's network infrastructure as a result of changes to architectural standards or discovered security vulnerabilities	X	
Manage the network's integration test environment	X	

Implementation and Migration
Implementation and Migration services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 38. **Integration and Testing Roles and Responsibilities**

Integration and Testing Roles and Responsibilities	SP	ED
Install of new and upgraded hardware, system software components and transmission facilities.	X	
Perform network upgrades as a result of new and enhanced applications and architectures	X	
Install new or enhanced hardware items, components, peripherals, premise wiring, and configuration and system management tools	X	
Install new or enhanced network configurations, including switches, routers, VPN appliances, Wireless LANs, Firewalls, and transmission facilities defined in WAN services	X	
Perform migration of data, either electronic or manual, for network system management repositories, address tables, Management Information Bases (MIBs), and other network management elements	X	
Install wiring and cabling, as required	X	

Circuit Support Services
During the term of the contemplated contract period, all network circuitry services shall continue to be provisioned and managed by the public carriers directly contacted by ED.

ED expects the service provider to manage the circuit provider using the same processes, procedures and tools as if the service provider was providing the service directly.

Network Operations and Administration
Operation and Administration services and activities, as well as roles and responsibilities are presented Appendix G - Cross Functional Roles and Responsibilities of this PWS. In addition,

Table 39. Network Operations and Administration Roles and Responsibilities

Network Operations and Administration Roles and Responsibilities	SP	ED
Provide LAN (LAN / virtual LAN [VLAN]) communications, including all network traffic originating from desktop devices, file and print servers, application servers, database servers, peripherals, firewall / routers, other network devices and other user premise devices. This service ends at the interface to the edge device at the WAN.	X	
Develop and document network administration requirements and policies	X	
Develop and document procedures for administration that meet requirements and adhere to defined policies	X	
Approve administration procedures		X
Maintain IP addressing schemes, router and switch configurations, routing tables, VPN configurations, etc.	X	
Manage user accounts (ED and affiliated entities) as needed for accessing and using network resources, including logon user-id and password maintenance	X	
Ensure that network administration activities are coordinated through defined change control processes	X	
Perform network systems management and troubleshooting (for example, performance, problem, change and capacity monitoring)	X	
Bandwidth management	X	
Provide protocol usage statistics (for example, identify top talkers by protocol)	X	
Work with public carriers and other circuit providers to implement new or upgraded Network networks	X	
Manage and perform network disaster backup and recovery	X	
Work with public carriers and other circuit providers to perform any operations activities.	X	
Managing router / switch configurations, firewalls, Internet Protocol (IP) addresses and related services (that is, DNS / DHCP)	X	
Providing volume / metric data for services, as agreed with ED	X	
Asset management, including software licenses	X	
Physical (for example, equipment) and logical (for example, IP address change) IMACs, including Voice over IP (VoIP) IMACs.	X	
Managing and maintaining all Network Service computing resources (that is, hardware, operating system software and applications) that are required to provide Designated Services.	X	
Audit operations and administration polices for compliance with ED security policies		X
Perform day-to-day network operations and administration activities	X	
Perform system backups and handle per established procedures	X	
Conduct network related DR testing as agreed upon	X	

Network Monitoring and Reporting

Monitoring and Reporting (includes RCA reports) services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 40. Network Monitoring and Reporting Roles and Responsibilities

Network Monitoring and Reporting Roles and Responsibilities	SP	ED
Develop and document requirements and policies for network monitoring and problem management	X	
Develop and document network monitoring and problem management procedures, including escalation thresholds, that meet requirements and adhere to defined policies	X	
Assist and approve network monitoring and problem management procedures		X
Provide and implement tools for monitoring network devices and traffic	X	
Implement measures for proactive monitoring and self-healing capabilities to limit outages to the network	X	
Monitor network twenty-four hour per day, seven days per week	X	
Identify network problems involving circuits, hardware, software and others (such as wiring) and resolve in accordance with Service-Level Requirements (SLRs). Coordinate activities with the Helpdesk. Escalate as required.	X	
Coordinate resolution of circuit problems with third parties, including public carriers, ISP and City / County affiliates using the network	X	
Provide on-site staff in ED as required (e.g., to perform maintenance and problem resolution activities)	X	
Provide technical assistance (e.g., respond to inquiries) as needed to the helpdesk, end users and external entities using ED network	X	
Track and report status of network activities and problems, and report to ED.	X	
Ensure that all network monitoring and problem resolution activities conform to defined Change Control procedures	X	

Network Performance Management

The service provider shall perform services and activities associated with managing the performance of the network environment.

Table 41. Network Performance Management Roles and Responsibilities

Network Performance Management Roles and Responsibilities	SP	ED
Develop and document network performance requirements and projections	X	
Develop and document performance management procedures that meet requirements and adhere to defined policies	X	
Approve performance management procedures		X
Perform tuning to maintain optimum performance across the network	X	
Manage network resources, devices and traffic to meet defined availability and performance SLRs	X	
Provide technical advice and support to the application maintenance and development staffs as required	X	
Evaluate, identify and recommend configurations or changes to configurations which shall enhance network performance	X	
Develop improvement plans as appropriate	X	
Authorize improvement plans		X
Implement improvement plans. Coordinate with third-party carriers and "trusted partners" as required	X	

Configuration Management / Change Control

Configuration management / change control services and activities, as well as roles and responsibilities, are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 42. Change Management Roles and Responsibilities

Change Management Roles and Responsibilities	SP	ED
Establish change requirements (circuits, switches, communications processors, interface equipment, termination equipment, user access)		X

Documentation

Documentation services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

In addition, types of documents include:

- Network system specifications and topologies (for example, router configurations, firewall policies, routing diagrams / IP addressing tables, hardware / software listings, etc.)
- End-user documentation

VPN Services

VPN services are those activities associated with managing dedicated site-to-site VPN connectivity as defined in Section 1.1.3 of this Schedule.

Table 43. VPN Services Roles and Responsibilities

VPN Services Roles and Responsibilities	SP	ED
Provide managed services for dedicated site to site VPN connectivity on a shared public IP network	X	
Provide technical drawings and documentation	X	
Review and approve VPN network design documents		X
Provide remote access gateways at the ED facilities	X	
Provide full IP connectivity and browser-based client access	X	
Provide monitoring and testing of the VPN network	X	
Submit rule changes for the VPN network		X
Implement rule changes for the VPN network	X	
Review and approve VPN baseline alerts and thresholds		X
Provide general management reporting on VPN services that include at minimum: availability, bandwidth utilization, performance, root cause analysis, usage by user, user billing, mean time to repair reporting, and helpdesk metrics.	X	

Security Firewall Management Services (FMS)

Firewall Management Service protects ED's networks by providing the following types of capabilities: firewall engineering and management, access control list engineering and management, security monitoring, compliance with ED's policies and standards, helpdesk support (levels 1-3), and backup / restore services. Firewall engineering includes but is not limited to:

ED-05-PO-0908

- All testing shall be done on a separate test environment, isolated from ED's entire network environment. Network security risk analysis and reports are required.
- All technology selections must be reviewed and approved by ED prior to use in production environments.
- All aspects of the FMS are open to ED audits and review. The frequency of which is to be set by ED.

Table 44. **Security Firewall Services Roles and Responsibilities**

Security Firewall Services Roles and Responsibilities	SP	ED
Perform firewall engineering and firewall security design	X	
Assess firewall security and propose alternative security designs	X	
Review and approve firewall security designs		X
Perform and report on firewall security risk assessments	X	
Review and approve firewall risk assessments		X
Recommend firewall policies		X
Approve firewall policies		X
Provide services in conformance to firewall policies	X	
Maintain Access Control Lists (ACL) in accordance with ED Policies	X	
Review and approve firewall ACL policies		X
Provide general management reporting on VPN services	X	
Procure firewall technology (hardware, software)	X	
Perform firewall vendor negotiations and management	X	
Select firewall technology	X	
Review and Approve firewall technology selection		X
Develop test plans	X	
Review test plans		X
Install, test, implement and deploy Firewall technology	X	
Develop Firewall rules	X	
Approve Firewall rules		X
Create engineering design	X	
Perform Firewall engineering and management	X	
Engineer and manage access control list	X	
Perform security monitoring	X	
Provide Helpdesk level one, two and three support	X	
Provide backup and restore services	X	
Configure firewall hardware and software	X	
Provide the necessary security to create specific zones, limiting access to specific IP / port combinations and in certain zones down to the VLAN level using VACLs. Non-approved traffic shall be dropped and logged, unless a logging exception is granted.	X	
Review the firewall application, appliance operating system, and other supporting software are done quarterly to determine if patches are required to the environment. Any critical patches shall be scheduled for immediate application, in accordance with ED's standard change control procedures.	X	

Security Firewall Services Roles and Responsibilities	SP	ED
Provide monthly reports on availability, number of requests, and rule / object counts are made available to management. Quarterly reports on firewall interface availability are sent to the network design team.	X	

Security Intrusion Detection Services

This service provides both NIDS (Network-based Intrusion Detection Service) and HIDS (Host-based Intrusion Detection Service). The Helpdesk shall provide level-one support for this area while the service provider provides level-two and level-three support.

NIDS shall have the ability to capture and analyze all network traffic that passes its sensors looking for current attack signatures. HIDS shall have the ability to identify changes to selected files. The review of the previous day's alerts must occur in accordance with the specified service levels depending upon the severity. ED Information Security and/or the business unit involved must be notified.

There must be an automated process in place to notify ED Information Security within the time specified in the service level regardless of the day-of-week or time-of-day for the most serious alerts [NIDS and HIDS]. Examples include, but are not limited to [NIDS] "successful user privilege gain", [NIDS] "successful administrator privilege gain", and [HIDS] key binary file changes.

ED's requires HIDS to address all Intel-based, Windows, Linux and Sun servers. HIDS shall have the ability to identify changes to selected files and notify a control group of the changes within one hour.

The service must capture at least 99.9% of all network traffic that passes it's sensors and provisions for retaining a three day window of all captured network traffic.

Table 45. Security Intrusion Detection Services Roles and Responsibilities

Security Intrusion Detection Services Roles and Responsibilities	SP	ED
Provide Intrusion Detection & Prevention Services	X	
Review and Approve Intrusion Detection & Prevention Services technology selection		X
Develop policies and standards for intrusion detection	X	
Review and approve policies for intrusion detection		X
Develop rules of engagement for intrusion detection	X	
Approve rules of engagement for intrusion detection		X
Implement intrusion detection agents and capabilities	X	
Perform NID and HID sensor tuning as required	X	
Monitor for intrusion detection in accordance with ED policies	X	
Provide management reporting on IDS services	X	

Security Penetration Tests and Scans

This service identifies the susceptibility of ED's network hosts to a specific attack or suite of attacks targeting all ED Internet address space as well as all ED Intranet

address space. Helpdesk provides level-one support; service provider provides level-two and level-three support.

It is ED's objective to continue being a leader in Information Security. In pursuit of this objective, ED expects the service provider to maintain and expand the leadership position ED currently has in penetration tests and scans. This service identifies the susceptibility of ED's network hosts to a specific attack or suite of attacks targeting all ED Internet address space as well as all ED Intranet address space. Helpdesk provides level-one support; Network Security Services provides level-two and level-three support.

In the case of an Internet penetration test, the final report shall contain the results of previous testing for existing and/or closed vulnerabilities, recently detected vulnerabilities and the corrective action for closing detected vulnerabilities. The sequence of penetration testing shall be based on a published monthly schedule and shall test for all current vulnerabilities.

Intranet penetration test reporting responsibilities are the same as with an Internet test along with a coordinated notification as specified by ED Information Security. ED Information Security shall stipulate the specific attack or suite of attacks to test for and the timeframe of the penetration test.

Penetration testing shall test for all current vulnerabilities as well as all past known vulnerabilities that are known to the scanner being used. No penetrations attempts are to disrupt the production environment during core business hours and all business owners are to be notified prior to start of testing. After hours aggressive penetration testing shall be approved by ED.

ED Information Security shall stipulate, for Intranet penetration testing, the specific attack or suite of attacks to test for and the timeframe of the test. Normally, this testing occurs during the business day and is used to identify internal, vulnerable systems.

Intranet penetration test reporting responsibilities don't differ from an Internet test along with a coordinated notification as specified by ED Information Security.

Table 46. Security Penetration Tests and Scans Roles and Responsibilities

Security Penetration Services Roles and Responsibilities	SP	ED
Provide security penetration and scan services	X	
Review and Approve Intrusion Detection & Prevention Services technology selection		X
Establish policies for security penetration testing and scanning		X
Conduct security penetration testing and scanning	X	
Provide reporting on security penetration testing and scanning results	X	
Develop recommendations for improved security		
Review and approve recommendations for improved security		X
Provide penetration security and scanning reporting	X	

Security Vulnerability Management Services

The Vulnerability Management service provides a periodic assessment of the infrastructure in accordance with an existing risk management policy as specified by ED Information Security. Other services that may be utilized include:

- The actual planning and performance of penetration tests and vulnerability assessments

- The engineering and implementation of the systems necessary to enable the ongoing monitoring and detection of incidents

- Technical support of the system development life cycle.

It is ED's intent to expand this technical support service to include all ED sites. The Helpdesk provides level-one support, while Network Security Services provides level-two and level-three support.

The Vulnerability Management service also determines the security risks of new projects, prior to deployment. In addition, this service identifies the susceptibility of ED's network hosts to a suite of current vulnerabilities. Scheduled scans, which could be potentially damaging to the service environment and that might result in the compromise of an ED system, shall not be conducted.

However, when the Vulnerability Management service is used to determine the security risks of new projects, "potentially damaging scans" are permitted to get a complete risk assessment. ED approval must be explicitly obtained in advance of any such testing.

Scans are run locally per subnet based on a published monthly schedule. Scans are to be run against all IP's in a subnet and not against known addresses so new system can be discovered. Scans may be run during production hours as long as no activity being perform has ANY effect on production systems or EDNet. Test that behave more aggressively may run between 22:00 EST on the scheduled business day and complete, on or before 5:00 EST, the following business day. In the event a test does not complete during the one-day window, the test must be stopped at 5:00 EST and resumed during the next business day test window (22:00 EST). By limiting testing windows to business days (Monday - Friday) the schedule, jointly set by ED and the service provider, shall allow for tests that shall take multiple days to complete, by scheduling multiple day testing to start on a Friday.

When the service is used to determine the security risks of a new system or project, the scan and the results of that scan must be delivered to the requestor within two day's of the request. If appropriate, included in the scan request shall be the scan window (start and stop time). No new systems or updates to a system may be connected to EDNet without a fully successful security scan being performed on the system and all vulnerabilities found are fully mitigated, with the results documented and approved by ED through the SRB / CCRB or other approved process.

Upon completion of each subnet scan, a report shall be generated that contains the results of previous testing (existing and/or closed vulnerabilities), newly detected

vulnerabilities and the corrective action for closing the detected vulnerabilities. In addition, all false positives and systems patch levels are to be tracked and documented and made available to ED monthly.

Upon completion of the scheduled monthly scans, a Monthly summary report by ED site shall be generated that contains all closed vulnerabilities, and all open vulnerabilities with their date of detection.

Table 47. Security Vulnerability Management Services Roles and Responsibilities

Security Vulnerability Management Services Roles and Responsibilities	SP	ED
Provide security vulnerability and testing services	X	
Review and Approve Intrusion Detection & Prevention Services technology selection		X
Recommend ED security risk policies	X	
Approve ED security risk policies		X
Conduct scheduled vulnerability scans of ED IT environment. These scans shall include a mix of three different OS scanners, database scanning and war driving and other technologies to detect unauthorized wireless access points	X	
Determine the security risk of new projects	X	
Approve the identified security risks of new projects		X
Provide reporting on security vulnerability services	X	
Review and approve security reporting		X

Security Engineering Services

Security Engineering Services are those activities associated with supporting an established security framework. These activities also include support for information infrastructure protection and analysis as it is applied to ED's project management, operations plans, application systems, and comprehensive policies and procedures.

The service provider Security Engineering Services shall work with the various ED business, application and support teams to protect ED. The efforts and responsibilities are varied and dependent on the requirements of each specific project or request. The Security Engineering service also interfaces with ED Information Security, all of the related security services, such as Firewall Management, Intrusion Prevention, Penetration, etc. and many of the other services in the IT organization. For projects, Security Engineering acts as the interface between the customer (internal or external) and the other security-related services.

Security Engineering Services provides the necessary support to ensure ED's networks and assets are protected. Security Engineering functions include but are not limited to:

- For all Security Engineering Service areas listed above, it is expected that Security Engineering be available during core business operating hours, unless previously scheduled. Third Level Support – Security Engineering must be available 24x7 for any escalated security support issues.
- Weekly review of current firewall rules / ACLs. Quarterly firewall architecture assessment and security review and gap analysis of firewall / routable devices.

- Incident Response – Security Engineering must be available 24x7 for any issues that require security incident response support.
- Project Support – Occasionally, Security Engineering must be available during conversions or implementations. Off-hours support may be required dependant upon the business unit requirements.
- With in 30 days of the new quarter, the service provider must deliver a completed document, summarizing the previous quarters review findings and suggestions for improvement.

Table 48. Security Engineering Roles and Responsibilities

Security Engineering Services Roles and Responsibilities	SP	ED
Participate in all TRB and CCRB meeting and provide security expertise as an aide in the decision making process	X	
Provide security engineering services as defined in this section	X	
Participate in Operational Readiness Testing efforts. This requirement varies by project.	X	
Consult with other IT teams to develop and implement a standard architecture for access control points, such as firewalls and ACLs.	X	
Participate in product evaluations to evaluate the security stance of the product (i.e. portal).	X	
Produce logical network data flow diagrams for each application assessed.	X	
Support the Firewall Admin team in reviewing firewall rules, ACL entries, etc. to ensure access control points follow ED standards and practices.	X	
Respond to ad hoc requests, such as firewall changes and/or ideas for new products / applications.	X	
Support of third-party external assessments, such as those done for Internet-facing applications.	X	
Exception handling management, which includes: documenting and understanding the exception request, identifying the impact of the exception, performing risk analysis of the exception, working with the Security Management and the business owner to understand and accept the risk or do what is necessary to mitigate the risk.	X	
Hold internal security review with appropriate security and engineering teams to review the specific design and application requirements for each project to ensure all existing ED security practices and requirements are met.	X	
Attend project-related meetings as necessary, including but not limited to project status meetings, requirements gathering, designs reviews, and implementation planning.	X	
Participate in support of security threats such as newly discovered vulnerabilities, viruses, etc.	X	
Provide third-level security technology support (Firewall / ACL) or other tools used or supported by the group. (Ex: VPN, SSH). Root Cause Analysis support and participation for problems or issues that may occur in the environment.	X	
Provide support for internal, external or customer-based security audits and assessments as required. (Responding to customer surveys or audit questionnaires, supporting on-site customer evaluations, providing documentation based on specific customer requests, etc.)	X	
Interface with vendors and/or customers as needed by the business units in support of specific requests / problems. Troubleshooting issues or evaluating new connectivity / products / etc.	X	

ED-05-PO-0908

Security Engineering Services Roles and Responsibilities	SP	ED
Participate with team members and technical groups in process improvements, project / initiative task handoffs between the various teams or project prioritization / coordination.	X	
Consult with other IT teams to develop standards on tools to assess the level of host security on specific systems and provide support in making configuration changes as necessary.	X	
Participate in testing and implementation of host security.	X	
Participate in testing and implementation of data integrity products.	X	
Review firewall architecture and rules	X	
Participate and approve security architecture and rules review		X
Provide firewall assessment	X	
Review security rules for all routable devices	X	
Security policy review and gap analysis	X	
Provide recommendations for improved security policies and architecture	X	
Review and approve recommendations for improved security		X
Provide general management reporting security engineering services, for example: Monthly reports detailing all current efforts and progress towards deliverables being worked including the business unit, project name, the estimated project timeframe and hours assigned to the project.	X	

Security Incident Management Services

Security Incident Management Services are those activities associated with providing the initial review of security incidents and assisting ED with internal audits. This service acts as a collection point to review all incidents reported by all other security services (e.g., NIDS, HIDS, penetration testing, scanning, firewall, etc.).

A security incident is defined as:

- Any real or suspected adverse event in relation to the security of ED systems or computer networks

- Network or host activity that potentially threatens the security of ED systems

- The act of violating an explicit or implied security policy

- Attempts (either failed or successful) to gain unauthorized access to a system or its data

- Malicious connectivity disruption or denial of service

- The unauthorized use of a system for the processing or storage of data

- Changes to system hardware, firmware, or software characteristics without the owner's knowledge, instruction, or consent

Table 49. Security Incident Management Roles and Responsibilities

Incident Management Services Roles and Responsibilities	SP	ED
Provide initial review (level 1) of security incidents and the determination if escalation to ED Information Security	X	

Incident Management Services Roles and Responsibilities	SP	ED
Assist in the identification / removal from the network of any PC virus / worm infected ED system	X	
Train desktop support staff in the identification / removal from the network of any PC virus / worm infected ED system	X	
Provide the expertise to decide if an automated alert received from a security services device (i.e., from: NIDS, HIDS, penetration testing, etc.) represents a "false positive" or possible incident to be investigated.	X	
During virus / worm attacks, provide the expertise to identify / remove infected ED systems.	X	
Participate in providing identification / removal of virus / worms 7x24 with 1-hour response after initial contact.	X	
Provide technical expertise for virus / worm identification / removal (level 3 support). **Note:** Service Provider-provides only level 1 incident support by determining if a "false positive" exists.	X	
Once becoming aware of a security incident from any source, ED Information Security must be notified in accordance with ED security policies and service levels.	X	
Recommend best practices based security audit policies	X	
Approve security audit policies		X
Participate in and provide technical expertise for security audits / reviews. This service also provides verbal and/or written responses to internal audits and reviews on the current security services deployed. ED Information Security shall notify service provider, at a minimum, two weeks in advance of an internal audit or review so that the appropriate technical resources are available.	X	
Participate in CIO Council specially called security meetings and other similar meetings to provide institutional and industry expertise as requested by ED.	X	
Prepare incident security reporting as requested by ED	X	
Submit security reports to appropriate federal authorities		X

Security Audit and Logging Services

Security Audit and Logging services are those activities associated with a central repository of both application-specific (CheckPoint, DNS, FTP, Iplanet, etc.) log files and system-specific log files.

It is ED's objective to archive sufficient historical data to readily identify vulnerable systems and system events surrounding a security incident.

The service must be able to identify, by system, failed components of the applicable security audit configuration. All log files shall be maintained in accordance with ED policies and as specified in the service levels.

Table 50. Security Audit and Logging Roles and Responsibilities

Security Audit & Logging Services Roles and Responsibilities	SP	ED
Provide a central repository for both application specific and system specific log files	X	
Recommend security audit policies	X	

ED-05-PO-0908

Security Audit & Logging Services Roles and Responsibilities	SP	ED
Approve security audit policies		X
Maintain logs files in accordance with ED policies and service levels	X	
Provide periodic reports which list failed audit components	X	
Periodic review of audit reports		X

Distributed Computing

The distributed computing roles and responsibilities listed below are specific towards the distributed computing functional tower. The roles and responsibilities that are repeated from the Cross Functional section above are reviewed at a lower level as it relates to distributed computing in this section.

General Roles and Responsibilities

The following tables describe more specifically the roles and responsibilities required in providing Distributed Computing services:

Table 51. Desktop / Customer (end user) Infrastructure Provisioning

Desktop / End user Infrastructure Provisioning	SP	ED
Provide desktop and laptop computers	X	
Review and Approve desktop and laptop computer acquisitions		X
Provide network-attached servers, storage devices and peripherals	X	
Review and Approve network-attached servers, storage devices and peripherals acquisitions		X
Procure locally attached printers, storage devices and miscellaneous peripherals including blackberry devices and sell phones	X	
Review and Approve locally attached printers, storage devices and miscellaneous peripherals including blackberry devices and cell phone acquisitions		X
Provide software	X	
Review and Approve software acquisitions		X
Provide network interface adapters	X	
Review and Approve network interface adapters acquisitions		X
Procure hardware / software (e.g., Government DAR, etc.)		X

Table 52. Desktop / Customer (end user) Capabilities Roles and Responsibilities

Desktop / End user Capabilities Roles and Responsibilities	SP	ED
Define Desktop / end user capability requirements outlined in this section		X
Define services and standards for supporting the desktop / end user capabilities	X	
Participate in defining and approve services and standards for supporting the desktop / end user capabilities		X
Provide processing services	X	
Provide input / output services	X	
Provide storage services	X	
Provide personal productivity and office automation services	X	
Provide support for desktop applications services	X	
Provide intranet services	X	

Desktop / End user Capabilities Roles and Responsibilities	SP	ED
Provide standalone desktop services	X	

Distributed Computing Support Services

Distributed Computing support services are defined as all life cycle activities associated with the provision of the services described in the previous section. Support services include:

Planning and Analysis

Planning and analysis services are the activities associated with the research of new technical trends, products and services, such as hardware components and system software that offer opportunities to improve the efficiency and effectiveness of the technical distributed computing infrastructure. It is also critical for the proactive mitigation of vulnerabilities.

Table 53. Planning and Analysis Roles and Responsibilities

Planning and Analysis Roles and Responsibilities	SP	ED
Define ED business, functional, availability and DR service requirements at the enterprise level		X
Define services, procedures and standards for planning and analysis activities	X	
Participate in defining services, procedures and standards for planning and analysis activities		X
Review and approve services, procedures and standards for planning and analysis activities		X
Investigate and document new products and services, such as hardware components and system software	X	
Perform operational planning for capacity and performance purposes	X	
Conduct feasibility studies for the implementation of new technologies, as mutually agreed	X	
Perform routine day-to-day project management and estimation	X	
Conduct regular technical and business planning sessions to recommend standards, architecture and project initiatives	X	
Conduct security planning and analysis (including risk analysis) of new technologies	X	
Review and approve planning and analysis studies and recommendations		X
Conduct semi-annual technical reviews	X	
Conduct semi-annual workshops on industry trends and best practices	X	
Participate in semi-annual technical reviews and workshops		X
Plan for disaster recovery in accordance with ED's policies	X	
Conduct security planning in accordance with ED's policies	X	

Requirements Definition

Service provider shall provide requirements definition services on a project-by-project basis. These services are the activities associated with the assessment of user needs and requirements that are used to determine technical design.

Table 54. Requirements Definition Roles and Responsibilities

Requirements Definition Roles and Responsibilities	SP	ED
Conduct interviews, group workshops and survey	X	
Participate in interviews, group workshops and survey		X
Meet with requirements groups and representatives	X	
Determine software upgrade conversion requirements	X	
Document requirements in agreed-to formats	X	
Define system acceptance criteria	X	
Review and approve system acceptance criteria		X

Design Specification

Design specification services are the activities and deliverables associated with the translation of user requirements into detailed technical system specifications. Such activities include obtaining ED oversight and approval through coordination with the appropriate architectural or technical oversight authority.

Table 55. Design Specifications Roles and Responsibilities

Design Specification Roles and Responsibilities	SP	ED
Develop and document technical design plans and environment configuration based on ED standards, architecture and functional, performance, availability, maintainability, security and DR requirements.	X	
Recommend system upgrade, replacement and/or conversion requirements including hardware, software and IT infrastructure.	X	
Review and approve system upgrade, replacement and/or conversion requirements including hardware, software and IT infrastructure.		X
Review and gain approval of the design plans with the appropriate ED technology standards group and design architects.	X	
Conduct site surveys for design efforts as required.	X	
Provide design documentation for service provider-provided products and services.	X	
Review and Approve design documentation for service provider-provided products and services.		X

Asset Acquisition and Management

Asset acquisition and management services are the activities associated with the RFP development, evaluation, selection, and acquisition of new and upgraded hardware and software.

Table 56. Asset Acquisition and Management Roles and Responsibilities

Asset Acquisition and Management Roles and Responsibilities	SP	ED
Recommend acquisition policies and procedures to agreed set of vendors	X	
Approve acquisition policies and procedures		X
Approve selected, strategic vendors		X
Develop and issue asset acquisition bid requests as required and approved by ED		X
Rate supplier proposals		X
Negotiate supplier contracts where designated by ED		X
Procure assets (hardware and software) adhering to ED financial policies		X

Asset Acquisition and Management Roles and Responsibilities	SP	ED
Manage / track purchase and service orders	X	
Co-ordinate delivery and installation of new products and services, as required	X	
Ensure compliance with established ED IT standards and architectures	X	
Adhere to ED acceptance process	X	
Establish, update, and maintain an asset inventory database and system configuration charts.	X	
Review and approve asset inventory tracking methodology		X
Install assets	X	
Track all ED assets (location, asset ID, serial number, finances) and ensure service contracts are in force as needed to meet SLAs	X	
Track and advise ED in a timely manner of expiration, warranties and renewal requirements for client-owned network devices / software licenses	X	
Terminate, dispose of, relocate assets as needed / specified by ED	X	
Report on asset inventory as needed	X	
Conduct semi-annual audit of all in-scope assets	X	
Participate in and review semi-annual audit results and asset inventory management procedures		X

Engineering / Development / Software Deployment and Management Services
The service provider shall perform the software deployment and management services and activities associated with the provision and/or development of technical infrastructure tools and utilities that enhance custom or third-party software solutions operating in the distributed computing environment according to ED specifications.

Table 57. Software Deployment / Management Roles and Responsibilities

Software Deployment / Management Roles and Responsibilities	SP	ED
Establish software deployment / management policies and procedures	X	
Participate in establishing software deployment / management policies and procedures		X
Review and approve software deployment / management policies and procedures		X
Provide necessary utilities / tools to maintain and ensure compliance with agreed-upon software deployment / management policies and procedures	X	
Manage deployment efforts using formal project management tools and methodologies	X	
Conduct development reviews and provide results to ED	X	
Review and approve results of development reviews		X
Propose standard image specifications	X	
Review and approve standard image specifications		X
Load and maintain standard images, specified by ED, for ED distributed computing end user workstation configurations	X	
Load and maintain builds for standard ED distributed applications	X	
Provide and administer a software distribution facility	X	
Create end user desktop environment to ED specified state including base build plus all end user specific features, functions and applications	X	
Load and maintain the presentation of desktop application shortcuts based on a defined user group security	X	

Software Deployment / Management Roles and Responsibilities	SP	ED
Develop, implement, and maintain scripts to automate standard ED distributed computing device processes	X	
Develop, implement, and maintain macro programs for ED standard distributed computing applications and processes	X	
Execute any post installation user specific features.	X	

Integration and Testing

Integration and testing services are the activities that ensure that all ED infrastructure components in the Distributed Computing environment (including application installation or upgrades and other distributed components) work properly together as a cohesive system. In addition, the service provider must ensure that the system performs all of the intended functions.

Table 58.   Integration and Testing Roles and Responsibilities

Integration and Testing Roles and Responsibilities	SP	ED
Perform integration and in-house development tests	X	
Stage systems before implementation	X	
Perform modifications and performance enhancement adjustments to system software and utilities as a result of changes to architectural standards	X	
Manage the distributed computing integration test lab facility	X	
Conduct configuration management and change control	X	

Implementation and Migration

Implementation and Migration services are the activities associated with the installation of new and upgraded hardware and system software components, including commercial and custom developed applications, software suites and utilities.

Table 59.   Implementation and Migration Roles and Responsibilities

Implementation and Migration Roles and Responsibilities	SP	ED
Perform distributed computing upgrades as a result of new and enhanced applications and architectures	X	
Install new or enhanced networking hardware, software, peripherals, and configurations, including NICs	X	
Perform data migration, by either electronic or manual methods	X	
Install wiring and cabling from distributed devices to the network point-of-presence, where applicable	X	
Conduct pre-installation site audits for customizing, moving, installation or removing of devices	X	

Incident and Problem Management

Incident and Problem Management services and activities are defined as Level 2 and Level 3 break / fix support. The service provider shall provide such services and cooperate fully with the Helpdesk as a key responsibility in the problem management process.

Operations and Administration

Operations and administration services are the activities associated with the provisioning and day-to-day management of the installed systems and software environment.

Operations for centralized and remote workstations, laptop computers and servers, including:

- Providing storage and access to personal data or data not residing in a central data repository

- Providing data storage, as well as access to data residing in a centralized repository (i.e., data located on file servers), which may be located in either ED local facility or its enterprise operations center

- Providing data backup and recovery for personal and organizational data stores located on ED file servers, with and without end user involvement

- Providing disaster recovery and contingency operations support (i.e., information assurance) in accordance with ED policies, which are specified in a separate document to be formalized in conjunction with service provider during transition planning stage

- Providing secure remote console access to off-site servers, where applicable, for select ED staff and vendors

- Providing controls, access, and management services for local and centralized enterprise input and output resources (e.g., scanners, printers, files, etc.)

- Providing input / output processing support for activities such as loading media, sending and receiving of batch electronic file transmissions (e.g. FTP, etc), printing, etc.

- Providing a common suite of centralized workstation tools, as approved by ED, that shall allow users to produce, communicate and function within ED's systems environment. These common tools include a standard office automation suite, e-mail, calendaring, news service access and display, Web browser, collaboration and document sharing, etc.

- Providing capacity management, monitoring and support of the local computing resources used for applications (i.e., disk space, processing services, etc.)

- Performing and supporting hardware and software IMACs, re-installations, updates and downloads with a minimum of business disruption and per ED's change control process

- Assuming responsibility and taking action for any data or application migration that is necessary due to any hardware or software IMACs and re-installations

- Providing resource and information assurance / security services and support (e.g., intrusion prevention and detection, anti-virus protection, etc.) in accordance with ED's security policies

- Provide tools and services to monitor and prevent receipt of e-mail spam

ED-05-PO-0908

- Providing support for internal and external financial audits.

Administration activities include:

- Managing user accounts, disk space quotas and access control (OS, database, middleware, file systems, disk space, etc.)

- Providing billing allocation reporting (e.g., charge-back) for the designated service, as required and defined by ED

- Providing hardware and software asset management, including inventory management, support for centralized warranty and license management, configuration control of workstation and network applications to include automatic electronic distribution of changes, modifications and version updates of supported applications (i.e., applications distribution), and hardware / software redeployment, decommissioning (including the wiping of hard drives), sale to employees, and/or donations.

- Monitoring, documenting, and reporting on physical (e.g., equipment) and logical (e.g., Internet Protocol [IP] address) IMACs and re-installations, regardless of the number of users, instances or systems.

Table 60. Operations and Administration Roles and Responsibilities

Operations and Administration Roles and Responsibilities	SP	ED
Provide input processing support for activities such as loading media, receiving batch electronic file transmissions, etc.	X	
Provide intranet and server services for Web pages and applications	X	
Perform LAN / Domain / OS administration support activities for all listed managed servers, which includes, but is not limited to, IP addressing, file and print sharing, logon user-id and password maintenance, etc.	X	
Provide tools and services to monitor and prevent receipt of e-mail spam	X	
Mount and remove tape volumes as needed	X	
Maintain a tape library, tape management system and transport tapes to production area as needed	X	
Define backup / recovery requirements		X
Define file / database ownership and retention requirements		X
Perform periodic incremental and full tape backups	X	
Exchange backup tapes with off-site storage facility	X	
Purchase and manage paper / forms / consumables inventory for printers		X
Install, move, add, change and support network and non-network attached printers	X	
Install consumables for printers	X	
Install paper / forms for printers	X	
Remove desktop / end user device print jobs and place in output bins, courier and/or mail as instructed	X	
Distribute desktop / end user device print jobs to user locations	X	

Operations and Administration Roles and Responsibilities	SP	ED
Define automated output distribution requirements	X	
Maintain automated output distribution tables.	X	
Approve change control results		X

Maintenance

Maintenance services are the activities associated with the maintenance and repair of hardware and software, to include "break-and-fix" services for the ED locations identified in Appendix A.

Installed platform and product version levels are not to be more than one version behind the current commercial release, unless otherwise authorized by ED's architectural standards committee. This includes any open source, commercial product patch, "bug fix," service pack installation or upgrades to the current installed version.

Table 61.   Maintenance Roles and Responsibilities

Maintenance Roles and Responsibilities	SP	ED
Dispatch repair technicians to the point-of-service location, where necessary	X	
Perform diagnostics on distributed computing hardware and software	X	
Install manufacturer field change orders, service packs, firmware and software maintenance releases, BIOS upgrades, etc. and documenting these changes per the change control process	X	
Software distribution and version control, both electronic and manual	X	
Replacement of defective parts and systems, including for preventative maintenance as prudent	X	
Maintenance and parts management and monitoring during warranty and off-warranty periods.	X	

Technical Support

Technical support services are the activities associated with the tuning of system software and utilities for optimal performance. Also included is technical assistance for the ED helpdesk, support for end users, other IT professionals, external entities using ED IT services and ED field locations.

Table 62.   Technical Support Roles and Responsibilities

Technical Support Roles and Responsibilities	SP	ED
Define technical support policies and procedures	X	
Participate in defining and approve technical support policies and procedures		X
Test, install, and tune technical environment hardware, software, peripherals and services	X	
Manage hardware, software, peripherals, and services to meet service levels and minimize ED resource requirements	X	
Provide technical assistance as requested for Tier 2 end-user and production support as requested by ED and/or service provider-provided Helpdesk	X	

Monitoring and Reporting

Monitoring and reporting services are the activities associated with ongoing health checks, status reporting and problem management (ongoing surveillance, tracking, escalation, resolution and tracking of problems) of distributed computing services, including the LAN. Problem management activities described within this document require the service provider to coordinate activities with the helpdesk. In addition, the service provider is responsible for publishing reports on actual service level performance.

Configuration Management / Change Control

Configuration management / change control activities include all the life-cycle services required to appropriately manage and document changes (e.g., version control, profiles, security plans, etc.) to the existing distributed computing environment. All changes must conform to ED's change management process.

Table 63. Configuration Management / Change Control Roles and Responsibilities

Configuration Management / Change Control Roles and Responsibilities	SP	ED
Define configuration management and change control processes		X
Establish change requirements for in-scope equipment and software	X	
Review and approve change requirements		X

Training

Training services are the activities associated with the improvement of skills and transfer of knowledge through education and instruction. Delivery methods include classroom-style and computer-based training for standard COTS applications (shrink wrap), including new employee training, upgrade classes and specific skills.

Table 64. Training Activities Roles and Responsibilities

Training Activities Roles and Responsibilities	SP	ED
Provide training for ED personnel to improve "how-to-use" skills related to distributed computing systems and applications, as needed by ED	X	
Provide ED Intranet-based training course catalog and training schedules	X	
Provide ED Intranet-based online class registration	X	
Approve class registration		X
Track and report on training activities	X	
Maintain copies of training materials and software manuals on ED Intranet	X	
Provide distributed computing support for classrooms, labs and electronic learning events, as applicable and as needed by ED	X	

Documentation

Documentation services are the activities associated with developing, revising, maintaining, reproducing, and making available information electronically, such as via the intranet, etc. The types of documents include:

- System specifications and documentation, end-user profiles

- End-user documentation

- Self-help resources

- Site and system security plans
- LAN diagrams
- Standard operating procedures
- Change / configuration management documentation.

Technology Refreshment and Replenishment

Technology refreshment and replenishment are the activities associated with modernizing the IT infrastructure on a continual basis to ensure that the system components stay current with evolving industry standard technology platforms.

Technology refreshments may be funded on a project-by-project basis.

Table 65. Technology Refreshment and Replenishment Roles and Responsibilities

Technology Refreshment and Replenishment Roles and Responsibilities	SP	ED
Develop, implement and manage appropriate technology refreshment and replenishment procedures and plans in alignment with ED's architectural and system standards	X	
Review and approve technology refreshment and replenishment procedures and plans		X
Replace / upgrade hardware and software with appropriate newer technology	X	
Infuse and refresh both service provider and retained IT staff skills (as appropriate) on a regular basis, with respect to new technologies being implemented	X	
Coordinate with ED architecture teams to obtain the appropriate approvals for architecture and system changes	X	
Review and approve architecture and system changes		X

Security (physical / logical access to systems) / Policy

Security services are the activities associated with safeguarding ED distributed computing assets from unauthorized access, loss and the introduction of viruses or other unintended software.

Table 66. Security / Policy Roles and Responsibilities

Security / Policy Roles and Responsibilities	SP	ED
Document industry security best practices and provide recommendations for ED security policies and procedures	X	
Recommend security requirements based on industry best practices	X	
Approve security requirements		X
Authorize and approve log-on / security-level access of client employees, agents and subcontractors		X
Maintain physical security of assets at ED facilities		X
Maintain logical security of assets at all locations	X	
Provide, maintain, and administer anti-virus software and anti-virus pattern updates to minimize potential virus infection of LAN and end user devices	X	
Conduct periodic security checks per requirements	X	

Security / Policy Roles and Responsibilities	SP	ED
Report security and policy violations to ED	X	
Isolate violations to a specific application, port or access point	X	
Track violations to a specific MAC address, port address, and UserID where applicable and take measures per policy	X	
Resolve security and policy violations internal to ED		X
Provide coordinated resolution with ED and ED's Internet Service Provider to resolve violations that originate outside of the hosted network(s). Specifics examples include DOS attacks, spoofing, Web exploits.	X	
Actively participate in industry standard security forums and users groups. Demonstrate the ability to remain up to date with current security trends, threats, and common exploits.	X	
Ensure that all LAN servers and operating systems accessible from any outside network are current with vendor security patches, according to the change management processes.	X	

Custom Services
The service provider shall provide special services, including installation / deployment, maintenance, support, break / fix, software and other technical training, upgrades, etc.

- VIP Support—Includes all levels of support for designated ED VIPs. This can include support in the home or other remote locations
- Walk-in Support—(e.g., remote users temporarily in ED offices)
- Periodic Events — (e.g., ED annual and interim meetings, etc.)

Helpdesk

The Helpdesk roles and responsibilities listed below are specific towards the distributed computing Helpdesk tower. The roles and responsibilities that are repeated from the Cross Functional section above are reviewed at a lower level as it relates to Helpdesk in this section.

Service Descriptions and Roles and Responsibilities
Helpdesk Services are those services required to coordinate and respond to requests, inquiries and notifications made directly by authorized end-users. These Helpdesk Services include the provision of a Single-Point-of-Contact (SPOC) for the logging, tracking, reporting and resolution of IT problems for ED end-users and ED clients.

The Helpdesk provides end-to-end ownership of all requests for service, including those that may need to be referred / escalated to more specialized entities for resolution (whether that entity be ED, a vendor or a designated third party). The Helpdesk provides self-help facilities to enable users to service themselves using automated tools. In addition, it shall own and manage the root cause analysis process to understand and implement appropriate measures to prevent recurring problems / trends. Helpdesk Services include the following operations and activities, which shall be performed in accordance with the Roles and Responsibilities specified in the tables below.

The Helpdesk must be available during business hours – every workday, see Workday Appendix J, hours for Helpdesk operations are 0700 until 2200 EST and Deskside

Support is 0700 until 1900 local time. *During the month of September and the first week of October the workweek is extended to include Saturday and Sunday.* Whether the helpdesk is located on ED premises or at an off-site location, the service provider is to supply local (or toll-free) telephone lines in adequate quantity to handle call volumes, system(s) to record call information, and electronic interfaces to systems for monitoring and reporting. The Helpdesk will initially only require English language support.

Helpdesk support services include the following life-cycle activities.

General Responsibilities
Overall service provider responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 67. **General Responsibilities**

General Responsibilities	SP	ED
Set up the Helpdesk, including implementation of systems necessary to document, track and manage end-user request for services, inquiries and problem notifications;	X	
Provide a single point of contact for and coordinating all requests for service in the service areas supported under the terms of the Agreement;	X	
Provide expert assistance to inquiries on the features, functions and usage of all systems and software in use in the City / County;	X	
Problem identification, escalation, resolution and closure including performance of Root Cause Analysis on selected events; and	X	
Perform administration services such as creating, changing and deleting user accounts.	X	
Create customer satisfactions surveys to be used to capture customer feedback (touch point survey) and managers feedback (manager survey)	X	
Approve customer satisfactions surveys to be used to capture customer feedback (touch point survey) and managers feedback (manager survey)		X

The Helpdesk specific Roles and Responsibilities itemized in the above table relate directly to the Helpdesk Support Services as defined in the following sections.

Planning and Analysis

Planning and analysis services and activities, as well as roles and responsibilities are presented Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 68. **Planning and Analysis Roles and Responsibilities**

Planning and Analysis Roles and Responsibilities	SP	ED
Performing operational planning for Helpdesk capacity and performance purposes	X	
Determining transitional plan & issues regarding facilities, layout & integration with other non-consolidated Helpdesks.	X	
Perform analysis of ED environment to identify the appropriate sets of skills, training, and experience needed by Helpdesk staff	X	
Establish problem management and ED reporting standards and policies	X	
Identify and recommend Helpdesk solution that best meets ED business needs and expense / service–level expectations	X	

Planning and Analysis Roles and Responsibilities	SP	ED
Establish problem escalation and ED reporting standards and policies		X
Recommend standards	X	
Approve standards & design		X
Perform Helpdesk capacity monitoring and planning	X	
Perform Helpdesk staffing analysis to ensure Helpdesk is staffed with personnel having the appropriate sets of skills, training, and experience	X	
Design Helpdesk layout	X	
Install / test / maintain Helpdesk facilities	X	

Asset Acquisition and Management

Asset acquisition and management services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 69. Asset Acquisition and Tracking Roles and Responsibilities

Asset Acquisition Roles and Responsibilities	SP	ED
Develop and document asset management policies relevant to providing helpdesk services	X	X
Review and Approve asset management policies relevant to providing helpdesk services		X
Develop and document asset management methodology and procedures	X	
Review and Approve asset management methodologies and procedures		X
Review and approve selection of hardware to be installed in ED facilities and software to be installed on ED hardware		X
Support the asset ordering, procurement.	X	
Manage the delivery processes		X
Negotiate contracts for service provider-purchased / leased helpdesk hardware and software (shall be ED owned)		X
Review and Approve contracts for service provider-purchased / leased helpdesk hardware and software (shall be ED owned)		X
Maintain the records necessary to track, manage and support warranty services of all helpdesk assets	X	
Procure hardware / software (e.g., Government DAR, etc.)		X

Operations and Administration

Operation and Administration services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

The following tables identify the roles and responsibilities that service provider and ED shall perform, and that are associated with planning and analysis activities specific to this Schedule.

Single Point of Contact

The following table identifies the roles and responsibilities that service provider and ED shall perform, and that are associated with the types of calls the single point of contact (SPOC) shall support.

ED-05-PO-0908

Table 70. SPOC Call Roles and Responsibilities

SPOC Call Roles and Responsibilities	SP	ED
Problem tracking and first-level resolution for all trouble calls, including those related to desktop, Local-Area Network (LAN), Data Center, Wide-Area Network (WAN), applications and phone switch availability requests.	X	
Facilities-related issues, such as HVAC, security, etc. if the Helpdesk is located at service provider location.	X	
IMACs, including all IMACs for distributed computing, network LAN and WAN, voice and Data Center environments.	X	
"How-to" and Tier 2 assistance for ED Defined Commercial Off-the-Shelf (COTS) applications included in its standard distributed computing platform images (intermediate to expert user population).	X	
Expert assistance with the feature function and usage of shrink-wrapped software applications. Examples of shrink-wrapped software applications consist of office suites, Web browsers, and anti-virus software.	X	
Coordination for employee user account administration, activation, changes and terminations, including: Password / account setup and reset (various ED system platforms), Remote access connectivity (for example, Virtual Private Network [VPN]), E-mail accounts, User Ids, Password resets, Remote paging devices, Voicemail administration, Telephone lines, Secure ID cards, Catalog quotations	X	
User account administration, including password resets, chargeback and billing.	X	
End-to-end ownership for problem identification, escalation, resolution and closure	X	
End-to-end ownership of user change activity, including coordination with facilities, physical security and telecommunications units	X	
Company policy and best practices support	X	

Helpdesk Administration

The following table identifies the roles and responsibilities that the service provider and ED shall perform, and that are associated with Helpdesk Setup and Administration activities.

Table 71. Helpdesk Administration Roles and Responsibilities

Helpdesk Administration Roles and Responsibilities	SP	ED
Staff and maintain a single point of contact (SPOC) helpdesk for all ED end-user requests for assistance for all in-scope areas	X	
Identify Helpdesk Administration requirements and policies		X
Develop and document procedures which meet requirements and adhere to defined Helpdesk policies	X	
Approve Helpdesk Administration procedures		X
Develop transition plan, including the management of issues regarding facilities, layout & integration within the City / County	X	
Provide SPOC call-in access via a toll-free number for all in-scope locations and business regions	X	
Provide a system to document, manage and track all requests for service, problem reports and inquiries regardless of the means by which the request is submitted (e.g., telephone, email, fax, direct online input by end-users, etc.)	X	
Receive and answer ED calls	X	

Helpdesk Administration Roles and Responsibilities	SP	ED
Provide Helpdesk coverage 7 days / week, 24 hours / day 365 days / year	X	
Provide additional resources as needed during planned critical events	X	
Monitor and track all requests for service to closure. Escalate within service provider organization and ED as required	X	
Provide on-line capability for user to review status of requests for service	X	
Track the number of calls including abandoned calls; implement processes to minimize call abandonment	X	
Create and maintain contact list(s)	X	
Issue broadcasts or other notices to provide status updates as required	X	
Prepare and issue service request and incident reports as needed	X	
Select and implement software and hardware (e.g. IVR) needed to collect, track and manage requests for service received by the helpdesk.	X	
Develop and execute procedures for conducting end-user satisfaction surveys according to service level requirements		X
Maintain a continuous improvement program that improves helpdesk services	X	

Service Request and Trouble Ticket Management

Service Request and Trouble Ticket Management includes escalation to second-level specialists through a well-defined process, including the primary provider's resources, third parties, such as hardware and software suppliers, other third-party service providers and as well as ED's internal technical support resources.

The following table identifies the roles and responsibilities that service provider and ED shall perform, and that are associated with Service Request and Trouble Ticket Management activities.

Table 72. Service Request and Trouble Ticket Management Roles and Responsibilities

Service Request and Trouble Ticket Management Roles and Responsibilities	SP	ED
Identify and describe priorities, response and resolution targets for service calls and requests of differing impacts		X
Develop procedures to receive and respond to ED calls for service according to defined prioritization and resolution targets. Ensure that response to requests is based on priority and impact rather than the method used to notify the helpdesk (e.g., telephone, email, fax, direct input to service request system by end-users, etc.).	X	
Develop procedures for the escalation of problems which cannot be resolved without service dispatch	X	
Restore and/or resolve inquiry / problem within prescribed time limits, if possible, otherwise escalate to appropriate Level 2 resource	X	
Identify problem characteristics and, where possible, root cause	X	
Monitor and respond to service request submitted via e-mail	X	
Assist Users or Operations with Output problems	X	
Provide first point of contact for all service requests and problem notifications.	X	
Categorize, prioritize and log all IT inquiries / problems / requests entry into trouble ticket system	X	

Service Request and Trouble Ticket Management Roles and Responsibilities	SP	ED
Determine inquiry / problem request / resolution requirements	X	
Provide resolution within prescribed time limits for inquiries / problems which do not require service dispatch	X	
Escalate problem for field service dispatch or assign to other technical support personnel as needed	X	
Notify ED and vendor management as required	X	
Issue broadcast messages regarding system status	X	
Implement self-help features that enable end-users to perform preliminary problem diagnosis and troubleshooting	X	
Monitor problems until problem resolution	X	
Monitor and track all trouble tickets to closure and end-user satisfaction	X	
Ensure that recurring problems which meet defined criteria are reviewed using Root Cause Analysis processes	X	
Verify acceptance of services by contacting the end-user to confirm results and level of satisfaction	X	
Ensure that inventory and configuration management records are updated to reflect completed service request (IMACs, and others)	X	
Work with service provider operational and technical staff, and ED, to identify solutions that minimize the need to call the helpdesk	X	

Remote Desktop Management

Remote Desktop Management services are those services required to manage desktop devices and software over the network. This includes maintaining and troubleshooting the desktop operating system and supported desktop applications electronically to minimize the need to dispatch technical personnel.

The following table identifies the roles and responsibilities that service provider and ED shall perform, and that are associated with Remote Desktop Management activities.

Table 73. Remote Desktop Management Roles and Responsibilities

Remote Desktop Management Roles and Responsibilities	SP	ED
Develop policies for the use of remote control tools for maintenance and troubleshooting		X
Develop plans and procedures for the use of remote control tools in accordance with defined policies	X	
Utilize remote controls to diagnose and troubleshoot desktop device problems from remote locations	X	
Diagnose the problem and when possible implement corrective actions to resolve the problem. Resolution consists of: performing logical configurations changes and updating files such as drivers with more recent releases. If resolution is not possible dispatch to the correct support organization.	X	
Assist in enabling the enforcement of compliance to standards and the appropriate optimization at the desktop.	X	
Manage the problem through to resolution	X	
Document desktop system configuration, network configuration, and inventory of software to be supported	X	
Utilize remote controls to manage and update desktop system software, and to maintain configuration and inventory information	X	

ED-05-PO-0908

Remote Desktop Management Roles and Responsibilities	SP	ED
Utilize remote control tools to manage and enforce compliance with standards	X	

User Administration

The following table identifies the roles and responsibilities that service provider and ED shall perform, and that are associated with User Administration activities.

Table 74.   User Administration Services Roles and Responsibilities

User Administration Services Roles and Responsibilities	SP	ED
Develop and document requirements and policies regarding User Administration	X	X
Develop and document procedures for User Administration which meet requirements and adhere to defined policies	X	
Approved procedures for User Administration Services		X
Document and track requests for user account activation, changes and terminations	X	
Create, change and delete user accounts per requests	X	
Coordinate as necessary with other specialized areas to manage user accounts	X	
Reset passwords as required	X	

Installs, Moves, Adds, Changes (IMACs)

IMAC services are those services related to management of requests for modification to the environment. This includes routing requests to the Helpdesk where the support team gathers the business requirements, provides authorization, logs the request and facilitates fulfillment. In addition, all authorized IMAC requests are passed automatically to the support team depending upon the location and the product or service being requested.

The following table identifies the roles and responsibilities that service provider and ED shall perform, and that are associated with Installs, Moves, Adds, and Changes activities.

Table 75.   Installs, Moves, Adds and Change Management Roles and Responsibilities

Installs, Moves, Adds and Changes Roles and Responsibilities	SP	ED
Receive and track requests for IMACs	X	
Confirm the requirements and scope of the IMAC request	X	
Contact the user and schedule an appropriate, agreed time for the work to take place	X	
Approve IMAC schedule		X
Verify completion of IMACs by contacting the user to confirm satisfaction	X	

Self Help

Self Help refers to automated / electronic means made available directly to end users to assist in fulfilling various service requests, including password resets, problem diagnosis and resolution, etc. This includes Interactive Voice Response (IVR);

out-of-prime time voice messaging with guaranteed callback response, intranet-based automated self-help, etc.

Table 76. Self Help Roles and Responsibilities

Self Help Roles and Responsibilities	SP	ED
Identify Requirements for Self Help capabilities		X
Implement self-help capabilities that enable end-users to perform password resets and other administrative functions	X	
Ongoing monitoring of effectiveness of Self Help	X	
Develop recommendations for and implement improvements to Self Help capabilities	X	
Review and approve improvements to Self Help		X
Periodic review of the effectiveness of Self Help capabilities and usage		X

Monitoring and Reporting Services

Monitoring and Reporting services and activities, as well as roles and responsibilities are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 77. Monitoring and Reporting Roles and Responsibilities

Monitoring and Reporting Roles and Responsibilities	SP	ED
Define Helpdesk service level requirements (SLRs)		X
Document service-level requirements and agreements	X	
Monitor problems until problem resolution	X	
Record, track and update problem ticket information using the problem tracking and reporting tool	X	
Notify ED and vendor management as required	X	
Issue broadcast messages regarding system status as needed	X	
Measure and analyze performance relative to requirements and agreements	X	
Develop improvement plans where appropriate	X	
Authorize improvement plans where appropriate		X
Implement improvement plans	X	
Report on service-level results (monthly summary)	X	
Report on Helpdesk statistics and trends as requested (e.g., service request volumes and trends by types of users)	X	
Report on preventative maintenance	X	
Report on trends in service requests indicating a need for training	X	
Audit results & operations periodically		X

Change Management / Change Control

Change management / change control activities include all the life cycle services required to appropriately manage and document changes (for example, version control, profiles, security plans, etc.) to the existing Helpdesk environment.

Change management / change control services and activities, as well as roles and responsibilities, are presented in Appendix G - Cross Functional Roles and Responsibilities of this PWS.

Table 78. Management / Change Control Roles and Responsibilities

Change Management / Change Control Roles and Responsibilities	SP	ED
Develop and document change management procedures relevant to helpdesk changes. Ensure that procedures address changes, which cannot be scheduled.	X	
Review and approve change management plan, policies and procedures		X
Document proposed changes to helpdesk systems and their impact.	X	
Develop and maintain a schedule of planned changes and provide to ED for review	X	
Review scheduled changes and approve or alter the schedule of any or all change requests		X
Ensure that all changes are coordinated in conformance to the requirements of the change management plan	X	
Issue appropriate notice announcing change and schedule	X	
Implement change and conduct change acceptance test(s) as required	X	
Monitor changes and report the status to ED. Verify that change met objectives and did not have other, negative impacts	X	
Conduct user acceptance tests as required.		X

Root Cause Analysis

Root Cause Analysis (RCA) services are those activities associated with the process of understanding or preventing recurring problems and/or trends, which could result in problems.

Table 79. Root Cause Analysis Roles and Responsibilities

Root Cause Analysis Roles and Responsibilities	SP	ED
Identify requirements and policies for Root Cause Analysis (RCA), such as events that trigger a RCA		X
Develop procedures for performing a RCA that meet requirements and adhere to defined policies	X	
Approve RCA procedures	X	
Conduct proactive tend analysis to identify recurring problems	X	
Track and report the consequences of repetitive problems or failures	X	
Flag all Severity Level 1 and Severity Level 2 Incidents as requiring Root Cause Analysis	X	
Ensure that appropriate resources within service provider are assigned as may be necessary to identify and remedy the failure, and track and report on any consequences of the failure	X	
Identify root cause of Severity 1 and Severity 2 level problems or failures and recommend appropriate resolution action, where / whenever possible,	X	
Track and report on progress of all Severity 1 and Severity 2 level problems that are escalated to Level 2 support to ensure that Root Cause Analysis is performed and reported on (incident reports / trouble tickets to remain open until Root Cause Analysis report is completed and submitted).	X	
Provide ED with a written report detailing the cause of and procedure for correcting such failure; provide updates on a monthly basis until closure	X	
Substantiate to ED that all reasonable actions have been taken to prevent recurrence of such failure.	X	
Develop and implement solutions to recurring problems identified by proactive trend analysis	X	

Root Cause Analysis Roles and Responsibilities	SP	ED
Review and approve actions for resolution of problems as reported in Root Cause Analysis recommendations		X

Training

Training services are the activities associated with the improvement of skills through education and instruction for the provider's staff. In addition, training shall include the development of a knowledge database by the service provider.

Table 80. Training Roles and Responsibilities

Training Roles and Responsibilities	SP	ED
Establish training plans and procedures where requested	X	
Participate in defining and approve requested training plans and procedures		X
Provide training for service provider personnel on ED specific infrastructure in order to improve service level performance of the service provider (e.g. First Call Resolution)		X
Provide training for ED personnel to improve "how-to-use" skills related to IT service area systems and applications	X	
Development and implementation of Knowledge Database system	X	
Provide advanced training, as agreed, to ED technical groups to facilitate full exploitation of all relevant functional features	X	

Appendix H: Benchmark

I. Benchmarker

The Benchmark will be conducted by an independent industry-recognized benchmarking service provider ("Benchmarking Company") designated by Service Recipient (SR) and agreed to by Service Provider (SP). Qualifications are that the Benchmarker (i) be independent, (ii) have demonstrable experience in performing information technology benchmarks, (iii) agree to maintain the confidentiality of all data, and (iv) not be a direct competitor of the SP. The SP and SR acknowledge that the following companies are acceptable to perform as the Benchmarker for the engagement: Gartner, Inc. and other companies that are mutually acceptable to the SR and SP.

II. Definition of Benchmark

With SR's direction and cooperation, and as a part of the Services, SP shall conduct a benchmarking program that shall enable SR to compare the Fees, Services and Service Levels set forth in this Agreement with, and to ensure that said Fees, Services and Service Levels are among, the industry's competitive rates and service levels for such Services.

The Benchmarker will "normalize" all data to obtain relevant comparisons for purposes of the Benchmark. Factors related to general normalization to be taken into consideration by the Benchmarker may include: (i) geographic location of the peer companies; (ii) industry differences affecting information technology costs; (iii) economies of scale; (iv) workload and complexity factors (including operating environment). In addition, factors related to normalization for outsourced services may include: (i) the services levels offered; (ii) duration and nature of the contractual commitment; (iii) volume of services being provided; (iv) contractual terms, conditions and allocation of risk; (v) amount of investment made by the SP in the customer's equipment and personnel (vi) appropriate overhead; and (vii) provisions to ensure the unique factors of each deal are taken into account by the Benchmarker and appropriate adjustments will be made for out-of-scope deliverables, however method of delivery is not a unique factor unless SP is contractually obligated to the SR for a unique delivery requirement.

SP shall have no obligation to provide any of its proprietary data or data with respect to its other customers.

III. Benchmarking Costs

SR shall pay all fees and charges paid to such Benchmarking Company.

IV. Benchmarking Procedure

SR may request a benchmark for either (i) any Service Tower(s) or (ii) the totality of the Services, at any time after the first year of the Term, provided that a benchmark cannot be undertaken more than one time in any rolling one (1) year period. Upon designation of the benchmark timing, a date will be set by both parties that any necessary pricing changes will be in effect and if required due to a longer than expected benchmark time frame the pricing would be retroactive to the predefined date. In addition, the Parties shall meet with the Benchmarker for the purpose of agreeing upon a detailed plan (including time deadlines for provision of data by SP) for implementing the Benchmark. SP agrees that shall it fail to provide data or otherwise comply in a timely manner in accordance with the agreed plan, SP shall have a grace period of seven (7) days in which to provide such data or compliance, after which SR's monthly invoice from SP for Services shall be reduced by 1%, of the average of the previous 12 monthly invoices, for each day of such failure by SP. If the failure exceeds 90 days, SR may terminate the total Agreement or relevant Service Tower(s). In connection with any such termination, SR shall be liable for the reasonable and actual out-of-pocket expenses incurred by SP for employee severance or relocation expenses but shall not otherwise be liable for any Termination Fees or other cost, expense, penalty or

ED-05-PO-0908

liability whatsoever (except that SR shall pay for any invoices received for Services performed prior to such termination for the applicable Service Towers being terminated).

Within fifteen (15) days of the Benchmark Notice Date SR and SP will meet to jointly review the Benchmark results. If the report of the Benchmarking Company concludes that the then-current SP's aggregate Fees for an IT Service Tower(s) is greater than 105% of the Benchmarking Companies market-based aggregate fees for such Service Tower(s), then either:

Option 1:

(i) Within 30 days after the Benchmarking Company provides its report to the Parties, SP shall notify SR in writing if SP has elected to accept the determination of the Benchmarking Company, and, if SP so elects to accept such determination, SP shall promptly reduce the applicable Fees to not more than 105% of such market-based aggregate fees; or

(ii) If benchmarking (i) discloses material variations between SP's charges and/or quality standards, and prevailing market standards and (ii) the parties cannot agree to an appropriate adjustment of the affected service level(s) and/or charges within a reasonable period, then SR, with 90 days notice, may terminate the total Agreement or relevant Service Tower(s). In connection with any such termination, SR shall be liable for the reasonable and actual out-of-pocket expenses incurred by SP for employee severance or relocation expenses but shall not otherwise be liable for any Termination Fees or other cost, expense, penalty or liability whatsoever (except that SR shall pay for any invoices received for Services performed prior to such termination for the applicable Service Towers being terminated). For purposes of this paragraph, "material variation" between SP's charges and prevailing market standards shall mean that relevant SP charges exceed benchmarked rates by six percent (6%) or more.

Option 2:

If the results show that SP's charges exceed benchmark results by five percent (5%) or more, SP and SR agrees to negotiate in good faith to address any pricing differences to the benchmarked market price. SR and SP would have mutual option to terminate the agreement with 90 day notice given negotiations do not meet their expectations. The terminating party shall be liable for the reasonable and actual out-of-pocket expenses incurred by the other party for employee severance or relocation expenses but shall not otherwise be liable for any Termination Fees or other cost, expense, penalty or liability whatsoever (except that SR shall pay for any invoices received for Services performed prior to such termination for the applicable Service Towers being terminated).

V. General Agreement of Cooperation

The Parties acknowledge that the Benchmark definition and procedure described in this Schedule will require further definition and clarification as the Parties begin actual implementation of the Benchmark. The Parties shall cooperate with the utmost good faith to reach reasonable and timely agreements on such further definition and clarification. To the extent that the Benchmarker reasonably establishes that certain definitions, procedures and methodologies are widely used in information technology benchmarking, the Parties agree to generally rely on the Benchmarker's definitions, procedures and methodologies for guidance in reaching agreement. Furthermore, the Parties acknowledge that in reaching the final results of the Benchmark the Benchmarker will be required to exercise its professional

judgment and discretion in certain matters and, assuming such judgments are within established industry practices for information technology benchmarking, the Parties will defer to the conclusions of the Benchmarker.

SP acknowledges that SR views the Benchmark procedure described in this Schedule as a critical inducement to SR's agreement to many of the terms of this Agreement, including the Term and termination rights provided for in the Agreement, and therefore SP agrees that it will cooperate in good faith to accomplish the objectives of the Benchmark procedure for the benefit of SR.

VI. Benchmark Metrics

At their highest level of classification, the original contract services to be provided by SP ("in-scope" services) are Category A Services.

Prior to the commencement of all benchmarking studies, SR and SP will agree on the specific services or sub-services (metrics) to be included within the scope of the study. Also, SP will be apprised of the metrics sufficiently in advance of the benchmarking study to establish administrative processes to capture the necessary metric data. The exact metrics to be included in the benchmark study will be contingent upon: (1) the detail in which the benchmark company maintains cost and pricing data within its database; and, (2) SP's ability to capture pricing information at the desired level of detail.

The following table is shown solely as an example of the types of metrics that may be included in the benchmarking study:

Contract "In-Scope" Services	Possible Benchmark Service / Sub-Service
Applications Development / Maintenance	Cost per supported function point Cost per hour per competent FTE
Helpdesk or Call Center	Cost per contact Cost per call
Telecommunications	Cost per minute for Voice Cost for data network Network cost per node or device
Desktop Management	Cost per seat (hardware, standard software) Cost per seat (maintenance and support)
Distributed Computing Services and Web Hosting Services	Cost per Server Unix Operation & Maintenance Cost per server NT Operation & Maintenance Cost per AS400 system operations and maintenance Cost per kGEMS
Mainframe Computing Services and Storage Services	Cost per MIP Cost per DASD meg.

VII. Peer comparison and benchmark performance requirements

The SP must perform to a level as depicted in the outcome of the benchmark. The level is a price point better than (select one): (1) peer average, (2) upper 25th percentile of the peer group, (3) upper (xx) percentile of the database, or (4) database average.

VIII. Definitions:

See Appendix J.

ED-05-PO-0908

Appendix I: Incumbent's Transition Out Plan

Goals

The primary goal of the transition plan is to ensure minimal impact to the Office of the Chief Information Officer (OCIO) and ED at the expiration of the incumbent's task order.

Key Roles and Responsibilities for the Transition

This section identifies the key roles and responsibilities of the Transition Team.

Exhibit 1: Key Transition Leadership Roles

ED Transition Manager	Incumbent Project Manager	Incoming Contractor Project Manager
Robert Leach	Outgoing Project Manager	Incoming Project Manager

The Outgoing Project Manager will serve in this capacity until the completion of the transition. His/Her responsibilities will include:

- Responsible for successful implementation of the Transition Plan
- Assign all necessary staff
- Create and maintains project schedule
- Track and manage all activities of the Transition Plan
- Attend daily and weekly meetings with OCIO to provide status updates
- Oversee training program development and implementation
- Ensure all deliverable dates are meet
- Ensure all deliverables meet quality standards and receive a thorough, quality review
- Ensure adequate communication between Transition Teams
- Ensure all GFE is identified and returned

Training Program

Supporting EDNet, its infrastructure, development, and daily operations is a complex task. Each and every business day, the outgoing Team works with OCIO to carry out hundreds of activities. To ensure continuity the outgoing Team (in conjunction with OCIO) has developed a comprehensive catalogue of SOPs.

Exhibit 2: SOPs and Related Documents

Required SOPs and Related Documents

Required SOPs and Related Documents
Security, Configuration Management, and Disaster Recovery SOPs
EDNet Configuration Management Plan
EDNet Security Plan
EDNet Disaster Recovery Plan
EDNet Contingency Plan
SOP for EDNet Access Control
SOP for EDNet Network- and Host-Based Intrusion Detection Systems
EDNet Information System Security Incident Response Plan
SOP for UNIX-Based Server Management
Technical Review Board Process Guide
Change Control Review Board Process Guide
Security Review Board Process Guide
SOP for the Symantec Enterprise Firewall System
Server Operations SOPs
SOP for Windows-Based Server Management
SOP for EDNet Patch Management
SOP for Event Log Collection and Review
SOP for Remote Access Services
SOP for EDNet Exchange 2000
SOP for Norton AntiVirus Administration
SOP for Compaq Insight Manager
SOP for Altiris on Windows-Based Servers
SOP for HQ Backup System (Backup Exec)
Operations and Maintenance Manual for Server Management Systems
NCC and Telecom SOPs
SOP for Routers and Switches
SOP for Backbone Services
SOP for Unicenter TND on Windows-Based Servers
SOP for CiscoWorks 2000
SOP for Cisco Unity
TATS SOP
SOP for Video Teleconferencing
Inventory Management SOPs
SOP for the EDNet Technical Architecture Database (ETAD) on Windows-Based Server
SOP for EDNet Maintenance Agreements
End User Support SOPs
SOP for Helpdesk
– Ticket Flows
– Communication Plan
– Approval Procedures
– HEAT Procedures
– Installation Procedures
SOP for Regional Operations

The Incumbents shall continue to work with OCIO to continually update these and other SOPs during the transition period. All SOPs are the possession of OCIO and OCIO alone shall provide the incoming contractor copies or access to these documents.

Training Goals

The Incumbents shall provide formal training sessions to the incoming contractor staff. These training sessions will augment the knowledge provided in the SOPs, as follows:

- Provide additional information not found in SOPs on the organization and activities performed by staff in specific functional areas

- Clarify any information contained in the SOPs that new staff might not understand

- Provide training scenarios that mimic real life problems and train new staff on how to respond to real-life situations

Training shall be developed and delivered based on functional area. These include areas such as NCC, Server Operations, Security Operations, Telecommunications, Regional Operations, etc.

Formal Training Schedule
Training shall be scheduled within the 60-day transition period. Formal training classes are listed in the proposed schedule. Each training session is expected to last approximately 2 hours.

Informal Training
The Incumbents shall work with OCIO to allow incoming managers and certain key incoming staff to "shadow" the outgoing staff.

Return of all GFE
The Incumbents shall establish an inventory database of all equipment provided to the incumbents for use on the EDNet Task Order. The inventory shall include the name of the item, the owning office, a tracking number, and a description of where and how the item is being used. GFE on the EDNet Task Order includes the following items:

- Cell phones

- Blackberries

- Laptop computers

- Government badges

- Government deliverables not already sent to OCIO

- Other items as identified and agreed to by the Incumbent and OCIO

Data Center Move
The Incumbents' Transition Manager shall oversee the Data Center move during its transition and will work closely with the OCIO and incoming managers to ensure a proper transition. The Incumbents shall prepare a separate and comprehensive analysis of the current status of this project.

Estimated Timeline for Transition
All training, regularly scheduled meetings, and major deliverables are listed in the timeline, see Exhibit 3. The exact start date of the transition is unknown, therefore the timeline is only approximate; a final time shall be generated with Microsoft Project once an exact start date is known.

Exhibit 3: Estimated Incumbent Transition Out Schedule

Task Name	Duration	Start	Finish
Termination Notification	1 day	9/30/2004 8:00	9/30/2004 17:00
Kick-Off Meeting	1 day	10/1/2004 8:00	10/1/2004 17:00
Designation of Key Staff	1 day	10/1/2004 8:00	10/1/2004 17:00
Delivery of SOP's to OCIO for Delivery to New Contractor	1 day	10/5/2004 8:00	10/5/2004 17:00

ED-05-PO-0908

Delivery of Training Schedule	1 day	10/6/2004 8:00	10/6/2004 17:00
Weekly Meeting	1 day	10/6/2004 8:00	10/6/2004 17:00
- Weekly Meeting 1	1 day	10/6/2004 8:00	10/6/2004 17:00
Training	1 day	10/13/2004 8:00	10/13/2004 17:00
-Program Management Training	1 day	10/15/2004 8:00	10/15/2004 17:00
-Project Management Training	1 day	10/18/2004 8:00	10/18/2004 17:00
-Server Operation Training	3 days	10/20/2004 8:00	10/22/2004 17:00
-Security Operations Training	3 days	10/25/2004 8:00	10/27/2004 17:00
-NCC Operations Training	3 days	10/28/2004 8:00	11/1/2004 17:00
-Telecommunications Operations Training	3 days	10/28/2004 8:00	11/1/2004 17:00
-Helpdesk Training	4 days	11/1/2004 8:00	11/4/2004 17:00
-Deskside Support Training	4 days	11/5/2004 8:00	11/10/2004 17:00
-Engineering and Implementation Training	3 days	11/2/2004 8:00	11/4/2004 17:00
-Regional Operations Training	3 days	11/10/2004 8:00	11/12/2004 17:00
-ELMst Training	3 days	11/10/2004 8:00	11/12/2004 17:00
-Configuration Management Training	2 days	11/8/2004 8:00	11/9/2004 17:00
-Records Management Training	2 days	11/8/2004 8:00	11/9/2004 17:00
-RTSC Training	3 days	11/11/2004 8:00	11/15/2004 17:00
-Informal Training	5 days	11/16/2004 8:00	11/22/2004 17:00
Identification of Draft GFE List for Return	1 day	10/27/2004 8:00	10/27/2004 17:00
-Final GFE List	1 day	11/10/2004 8:00	11/10/2004 17:00
-All GFE Returned	1 day	12/8/2004 8:00	12/8/2004 17:00
Draft SOP Checklist	1 day	11/3/2004 8:00	11/3/2004 17:00
-Revised/Final SOP Checklist	1 day	11/17/2004 8:00	11/17/2004 17:00
Draft Project List	1 day	11/10/2004 8:00	11/10/2004 17:00
-Revised Final Project List	1 day	12/1/2004 8:00	12/1/2004 17:00
Project Meetings	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 1	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 2	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 3	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 4	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 5	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 6	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 7	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 8	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 9	1 day	11/17/2004 8:00	11/17/2004 17:00
- Project Meetings 10	1 day	11/17/2004 8:00	11/17/2004 17:00
Data Center Project Impact Deliverable Draft Due	1 day	11/24/2004 8:00	11/24/2004 17:00
Revised Final Due	1 day	12/8/2004 8:00	12/8/2004 17:00

Appendix J: List of Definitions

25th Percentile - The peer price associated with the best 25th performance percentile of the defined peer group or Database. The quartile as developed by Microsoft Excel percentile function.

AA – see *Auto Attendant*.

Administration – Services provided in the operation and maintenance of server and/or a system. This includes services such as installation of a new or additional hardware, installation and upgrade of software applications and network operating system, and configuration of hardware and software. This also includes account management, backup and restore, performance monitoring and tuning, security monitoring, problem tracking and error detection.

Annual Performance Rating Plan (APRP) – The APRP is the tool that will be used to determine if a contractor will be issued a new term. It is comprised of 100 available points, 50 of which are associated to quantitative SLA measurement, and 50 of which are associated to qualitative manager comments and reviews. A score of at least 85 is required for a contractor to win a new term.

APRP – see *Annual Performance Rating Plan*.

Assistive Technology Device – Any item, piece of equipment, or system, whether acquired commercially, modified, or customized, that is commonly used to increase, maintain, or improve functional capabilities of individuals with disabilities.

Assistive Technology Services – Any service that directly assists an individual with a disability in the selection, acquisition, or use of any Assistive Technology (AT) device.

Auto Attendant (AA) – works with the IP PBX (Cisco CallManager) to receive calls on specific telephone extensions and to allow callers to select appropriate extensions (e.g., answers a call, plays a user-configurable Welcome prompt, plays a Main Menu asking the user to perform actions such as "Press 4 for a directory of extensions").

Benchmarker – the organization that the SP and SR agree to conduct the benchmark.

Benchmark Objective – shall mean when taken in combination, the technology services, service levels and charges shall be within the stated requirements for price performance.

Benchmarking – the objective measurement and comparison process of requestors environment to that of a similar peer group.

Benchmark Notice Date – The date in which the Benchmarker notifies both parties that the benchmark results are available.

Business Hours – workday, see *Workday*, hours for Helpdesk operations are 0700 until 2200 EST and Deskside Support is 0700 until 1900 local time. During the month of September and the first week of October the workweek is extended to include Saturday and Sunday.

C&A – see *Certification & Accreditation*.

Capability Maturity Model (CMM) – see *IT Service Capability Model*.

Capability Maturity Model Integration (CMMI) – see *IT Service Capability Model*.

CCA – see *Clinger-Cohen Act*.

CCRB – see *Configuration Change Review Board*.

CERT – see *Computer Emergency Response Team*.

Certification & Accreditation (C&A) – Is the process, which provides a comprehensive and uniform approach to certify and accredit the ED's General Support Systems (GSSs) and Major Applications (MAs).

Change Management – Change Management is a process that ensures the following:
- Evolution, development, and maintenance of products and services are managed and controlled in accordance with approved policies, standards, and procedures.
- Changes to the production system's infrastructure are applied with proper planning, testing, and notification.
- Negative impacts to the customer and/or the production environment are minimized as a result of changes to the system.

The scope of change management includes any change that affects systems and network infrastructure or the integrity of the customer's data or communications.

Clearinghouse – see *Enterprise Lifecycle Management Support (ELMst) Clearinghouse*.

Clinger-Cohen Act (CCA) – The Clinger-Cohen Act[51] requires Federal agencies to make sound investment decisions before purchasing information technology systems. The Act mandates the establishment of a CIO whose job is critical to ensuring that the mandates of the Act are implemented. The Clinger-Cohen Act (CCA):
- The CCA of 1996 directs OMB and federal agencies to reform the management of IT through: capital planning and investment control; enterprise architecture; IT security; performance and results-based management; IRM workforce management.
- The CCA emphasizes the need for federal agencies to significantly improve how they determine which IT initiatives to undertake and manage those initiatives.
- The CCA, OMB requirements, and GAO guidance specifically prescribe certain aspects of each agency's IT capital planning process.

Close of Business (COB) – Close of business is defined as 9pm EST Monday through Friday, not including Federal Holidays.

CMM – see *IT Service Capability Maturity Model*.

CMMI – see *IT Service Capability Maturity Model*.

COB – see *Close of Business*.

Commercial Off the Shelf Software (COTS) – Product is one that is used "as-is." COTS products are designed to be easily installed and to interoperate with existing system components. Almost all software bought by the average computer user fits into the COTS category: operating systems, office product suites, word processing, and e-mail programs are among the myriad examples. One of the major advantages of COTS software, which is mass-produced, is its relatively low cost.

Computer Emergency Response Team (CERT) – The CERT Coordination Center (CERT / CC) is located at the Software Engineering Institute (SEI), a federally funded research and development center at Carnegie Mellon University in Pittsburgh, Pennsylvania. Following the Internet Worm incident, which brought 10 percent of Internet systems to a halt in November 1988, the Defense Advanced Research Projects Agency (DARPA) charged the SEI with setting up a center to coordinate communication among experts during security emergencies and to help prevent future incidents. Since then, the CERT / CC has

---

[51] Clinger-Cohen Act, Pub. L. No. 104-106, Division E (1996) (codified at 40 U.S.C. Chapter 25).
ED-05-PO-0908

helped to establish other response teams and our incident handling practices have been adopted by more than 80 response teams around the world.

Configuration Change Review Board – Provides technical and management control of all changes that affect the systems, infrastructure, and data and communications integrity of the ED internal network (EDNet) and extranet (connections to other external sites).

ConnectED – Is the Department's enterprise intranet. ConnectED enables business and disseminates information through its infrastructure of hardware, software, personnel and policies. ConnectED serves as the infrastructure and support for several Department-wide applications such as OUS Budget Formulation, the ED Calendar of Events, Ask ED (an online referral tool), and the institution for information on major initiatives such as One-ED, the Department's Strategic Plan and other Management Initiatives and Priorities.

COR – see *Contracting Officer's Representative*.

Contracting Officer's Representative (COR) – An individual designated and authorized in writing by the contracting officer to perform specific technical or administrative functions. If the Contracting Officer designates a contracting officer's representative (COR), the Contractor will receive a copy of the written designation. It will specify the extent of the COR's authority to act on behalf of the contracting officer. The COR is not authorized to make any commitments or changes that will affect price, quality, quantity, delivery, or any other term or condition of the contract.

COTS – see *Commercial Off the Shelf Software*.

CRA – see *Customer Response Applications editor*.

Custom Applications – These applications are software programs and/or systems developed specifically to perform an ED function. These applications are not available as a Commercial-off-the-shelf software product. A software development company, ED contractor, or civil servant may write the software. This software is sometimes known as Government-off-the-shelf (GOTS).

Customer Response Applications (CRA) editor – A visual programming environment where you create telephony and multimedia application scripts (e.g., for Cisco IP Interactive Voice Response (IP IVR) and Cisco IP Integrated Contact Distribution (IP ICD) solutions). You can use the Cisco CRA Editor on any computer that has web access to the CRA server.

Customer Satisfaction – Customer satisfaction is how pleased the customer is with the services provided by the contractor.

Database – The set of valid data points for a given information technology analysis area.

Database Average – This is the arithmetic mean of a defined database

Day – Sunday through Saturday.

Denial of Service – Any action or series of actions that prevent any part of a system from functioning in accordance with its intended purpose. This includes any action that causes unauthorized destruction, modification or delay of service.

Desktop Administration – Services provided in the operation and maintenance of an individual's desktop computer. This includes services such as installation of a new system, hardware upgrades, relocation and removal of hardware, installation and upgrade of software applications and operating system. It also includes configuration of hardware and software, backup and restore, performance monitoring and tuning, problem tracking and error detection, needs assessment, procurement, disposal, and inventory management.

ED-05-PO-0908

Desktop or Desktop Computer – Is a distributed computing resource, either networked or standalone, consisting of a CPU, keyboard, monitor, and a screen manipulation device, such as a mouse. This typically includes PCs, Apple Macintoshes, UNIX-based workstations, and other terminals, but also includes laptops.

Desktop Configuration – The hardware and software characteristics associated with a desktop computer (UNIX, PC, Macintosh, X-Terminal). Hardware characteristics include: CPU, RAM, amount of disk storage, size of monitor, cards installed in the system unit, and devices attached directly to the system unit. Software characteristics include: identification of COTS application software in use on the workstation, operating system, and a description of any commonly distributed custom applications.

Deskside – see *End User Services*.

Disaster Recovery Facility (DRF) – Internal Department of Education assigned name for the EDNet disaster recovery facility in Kennesaw, GA.

Disaster Recovery Plan (DRP) – Plan to resume or recover, specific essential mission critical IT operations and reconstitution at the DRF. The plan describes the technical steps on how the Department's OCIO organization would respond to a loss of pre-defined mission critical IT infrastructure and/or applications. The plan outlines the team of operatives, facilities information including maximum capacities, notification and escalation matrix, activation criteria, critical function recovery plan and resumption of normal operations phases.

Distributed Software – This is software utilized by the end user, either directly or indirectly, to do their work. The software may be resident on the desktop computer, or on a shared device such as an application server. Desktop software is divided into three types: operating system, utilities, and applications. Operating system software includes, but is not limited to, Windows 95, Windows NT, MacOS, and UNIX. Utility programs perform functions such as disk management, file backup / recovery, file compression, memory management, security, and virus protection. Application programs encompass a wide variety of programs required by the end users to perform their work. Examples of programs in this category are word processors, spreadsheets, email, groupware, desktop publishing, programming languages, compilers, data base managers, and engineering tools.

Downtime – The amount of time when an end user's access to EDNet resources and services is impaired. Downtime for each incident shall be the period between the time of impairment and the time that the system is returned to fully operational status.

DRF – see *Disaster Recovery Facility*.

DRP – see *Disaster Recovery Plan*.

EA – see *Enterprise Architecture*.

ED.gov – The Department's main web server (www.ed.gov), machines supporting the main web service (e.g. server boxes, load balancers), and various applications and services hosted on www.ed.gov and related machines (e.g. site search, database applications, web content management, etc.). The system does not include the National Center for Education Statistics (nces.ed.gov) and most of the Office of Federal Student Aid sites that are related but separate ED entities.

ELMst – see *Enterprise Lifecycle Management Clearinghouse*.

EDNet – The ED's IT Service Delivery Infrastructure. It includes, but is not limited to the following services: LAN, MAN, and WAN services provided in support of custom applications and systems, office automation software, interoffice messaging, Internet connectivity and presence, intranet, anti-virus products, remote access, mobile computing, file storage, and network printing, faxing, and copying. For

ED-05-PO-0908

the purposes of this contract EDNet includes, but is not limited to: network devises, wires and cables, servers, desktops, mobile handheld and laptop computing devises, printers, copiers, and peripherals. Certain custom applications are also part of EDNet.

Encryption – The process of scrambling data in a highly controlled manner. After encryption, the data is unreadable. Before a recipient can read encrypted data, it must be decrypted or unscrambled. Encrypted data is sometimes referred to as cipher text; unencrypted data is sometimes referred to as plain text.

End User Services – Encompasses services provided to the customer at deskside. This included but is not limited to hardware and software support. Customers have been categorized into importance based upon criticality and software configuration; see Section III Scope of Work, Category A, Table 2 of the Performance Work Statement.

Enterprise Architecture (EA) – A blueprint of how to utilize IT investment to support business processes and mission. EA specifies how computer hardware, software, systems, and networks provide information and data across the enterprise. The EA defines reusable services and components across the enterprise and promotes standardization of business process, data, and systems.

Enterprise Lifecycle Management Support (ELMst) Clearinghouse – The Clearing House (CH), managed by the Enterprise Lifecycle Management Support Team (ELMst), was developed to assist Department of Education (the Department or ED) Principal Office (PO) Asset Managers (AMs) with the proper procedures for removing equipment no longer in use by employees within their respective POs. The CH provides service for surplus equipment, the Headquarters (HQ) excess equipment program (PCs R Us), and the donation and disposal of information technology (IT) equipment.

FAR – see *Federal Acquisition Regulations*.

FedCIRC – see *Federal Computer Incident Response Center*.

Federal Acquisition Regulations (FAR) – The FAR was established to codify uniform policies for acquisition of supplies and services by executive agencies. It is issued and maintained jointly, pursuant to the Office of Federal Procurement Policy (OFPP) Reauthorization Act, under the statutory authorities granted to the Secretary of Defense, Administrator of General Services and the Administrator, National Aeronautics and Space Administration. Statutory authorities to issue and revise the FAR have been delegated to the Procurement Executives in DOD, GSA and NASA.

Federal Computer Incident Response Center (FedCIRC) – The Federal Computer Incident Response Center (FedCIRC) is the federal civilian agencies' trusted focal point for computer security incident reporting, prevention, and response. FedCIRC is part of the National Cyber Security Division (NCSD), a division of the Information Analysis and Infrastructure Protection (IAIP) Directorate in the Department of Homeland Security.

Federal Information Security Management Act Of 2002 (FISMA) – The purpose of the FISMA Act is to:
    (1) Provide a comprehensive framework for ensuring the effectiveness of information security controls over information resources that support Federal operations and assets;
    (2) Recognize the highly networked nature of the current Federal computing environment and provide effective government wide management and oversight of the related information security risks, including coordination of information security efforts throughout the civilian, national security, and law enforcement communities;
    (3) Provide for development and maintenance of minimum controls required to protect Federal information and information systems;
    (4) Provide a mechanism for improved oversight of Federal agency information security programs;
    (5) Acknowledge that commercially developed information security products offer advanced, dynamic, robust, and effective information security solutions, reflecting market solutions for the

protection of critical information infrastructures important to the national defense and economic security of the nation that are designed, built, and operated by the private sector; and

(6) Recognize that the selection of specific technical hardware and software information security solutions shall be left to individual agencies from among commercially developed products.

FISMA – see *Federal Information Security Management Act Of 2002.*

FTE – see *Full Time Equivalent.*

FTS – see *GSA Federal Technology Services.*

Full Time Equivalent (FTE) – Equal to one work-year for a given job, 1,776 hours. Used to standardize the amount of work expected to be accomplished by the given job and to control for work that is regularly done part-time or with overtime.

General Support System – The terms "general support system" and "major application" were used in OMB Bulletins Nos. 88-16 and 90-08. A general support system is "an interconnected set of information resources under the same direct management control which shares common functionality." Such a system can be, for example, a local area network (LAN) including smart terminals that supports a branch office, an agency-wide backbone, a communications network, a departmental data processing center including its operating system and utilities, a tactical radio network, or a shared information processing service organization. Normally, the purpose of a general support system is to provide processing or communications support.

GPRA – see *Government Performance Results Act of 1993.*

Groupware – COTS software that allows individuals to work in cooperation and collaboration for a common goal. Examples of groupware are electronic forms software, collaborative tools, and meeting facilitation tools such as GroupSystems. This does not include software products considered part of the basic office automation suite.

GSA Federal Technology Services (FTS) – An ED contract vehicle used to acquire, purchase and bill for telecommunications resources, including, but not limited to: dedicated circuits; switched voice services (local and long distance); toll-free numbers; cell phones; pagers; and calling cards. GSA FTS is undergoing a transition from FTS2001 to FTS Networx.

Government Performance Results Act of 1993 (GPRA) – In 1993, Congress enacted GPRA to establish a means for strategic planning and performance measurement for government agencies to ensure program efficiency. In order to carry out that function, GPRA requires each government agency to submit an annual performance plan and outcome report based on its strategic plan that monitors and evaluates program performance.

Helpdesk – These services provide centralized information and support management service to handle a company's internal queries and operational problems about IT-related processes, policies, systems and usage. Services include hardware and software support, logging of problems, dispatch of service technicians or parts, training coordination, and other IT-related issues.

- *Tier 0* – Typically associated with "self help" through the use of Web Portal, Frequently Asked Questions (FAQs), User Guides, peer support, common databases, etc.
- *Tier 1* – First level support calls, faxes, e-mails, etc. sent to the "Helpdesk". Information service generalists and "power users" handle these calls at the Helpdesk. Calls typically involve basic "how to" questions, password resets, etc. Tier 1 support can use remote control software to troubleshoot problem calls.
- *Tier 2* – Second level support calls that are passed from the Helpdesk to specialized support teams that are typically more technically oriented personnel. These are usually technicians, engineers and deskside support personnel performing "break / fix", installs, moves / adds / changes, and complex "how to" calls.

ED-05-PO-0908

- *Tier 3* – Third level support calls that are passed from Tier 2 support to internal experts or original equipment manufacturers (OEMs) that are responsible through service agreements for fixing known errors or deficiencies with the hardware, software or configurations of infrastructure products.

Holiday – ED observes the following Holidays: New Years Day, Martin Luther King Jr's Birthday, Presidents Day, Memorial Day, Independence Day, Labor Day, Columbus Day, Veterans Day Thanksgiving Day, Christmas

ICD – see *Integrated Call Distribution*.

IDS – see *Intrusion Detection System*.

Integrated Call Distribution (ICD) – An IP-based automatic call distribution (ACD) system developed by Cisco Systems, Inc. IP ICD queues and distributes incoming calls destined for groups of Cisco CallManager users. You can integrate IP ICD with IP IVR to gather caller data and classify incoming calls.

Integrated Services Digital Network (ISDN) – A high-speed switched digital telephone network. The regular phone network is analog. ED employs ISDN (along with analog and IP-based services) to support voice, video and data communications.

Intrusion Detection System (IDS) – A security application, which electronically detects inappropriate, incorrect, or anomalous activity on a network. EDNet employs both host (which operate on a localized host to detect malicious activity) and network based. EDNet network-based ID system monitors the traffic on its network segment as a data source to capture all network traffic that crosses its network segment. All output is centralized utilizing Net Forensics Security Information Management Console and is manually monitored for suspicious behavior. Any event deemed an incident drives the IRP (incident response plan) upon invocation. The IRP is handled by the OCIO's Information Assurance organization with assistance of the security services team.

IMAC – see *Installs, Moves, Adds, and Changes*.

INET – Internet, see *ED.gov*, and Intranet, see *ConnectED*.

Information Technology Division (ITD) – The division charged with IT operations and execution.

Information Technology Service Delivery Infrastructure – See definition for EDNet.

Installs, Moves, Adds, and Changes (IMAC) – The de-installation, move, and re-installation of system hardware. This also includes installation of system software and hardware.

Interactive Voice Response (IVR) – For more details, see Customer Response Applications (CRA) Editors and discussion of Cisco IP Interactive Voice Response (IP IVR) solution.

Internet Tools – Commercial-off-the-shelf software products that allow an individual to perform functions on the Internet, such as web browsing, file transfer, web server, and telnet.

Interoperability – The concept of having free and open methods to share data and IT services among different products and systems.

Investment Review Board (IRB) – Establishes an Investment Review Board within the Department of Education. The IRB is a forum for deliberation and decisions about Department information system and information resource investments needed to achieve the Department's mission and business requirements.

The Board is a forum for deliberation and decisions about Department information system and information resource investments needed to achieve the Department's mission and business requirements. The Board shall work with other Department officials to ensure that the Department:

    (a) Maximizes the value, and assesses and manages the risk and costs, of significant information system investments;

    (b) Integrates information system investment decisions with the Department's mission, strategic plan, and budget;

    (c) Focuses on the entire life cycle of its information system investments, including design, selection, implementation, management, evaluation, modification, and termination of programs, projects, and systems;

    (d) Makes information resource investment decisions based on its business needs and processes; and

    (e) Emphasizes performance and results in information resource investments.

IP PBX – see *IP-based Private Branch Exchange.*

IP-based Private Branch Exchange (IP PBX) – An IP-based Private Branch Exchange (IP PBX) developed by Cisco Systems, Inc., called Cisco CallManager. Cisco CallManager is the software-based call-processing component of the Cisco IP telephony solution, part of Cisco AVVID (Architecture for Voice, Video and Integrated Data). The software extends enterprise telephony features and functions to packet telephony network devices such as IP phones, media processing devices, voice-over-IP (VoIP) gateways, and multimedia applications. Cisco CallManager is installed on the Cisco Media Convergence Server (MCS). Cisco CallManager works with ED deployed IP-based solutions such as AutoAttendant, CRA Editor, IP ICD, and IP ICD.

IRB – see *Investment Review Board.*

ISDN – see *Integrated Services Digital Network.*

ITD – see *Information Technology Division.*

IT Service Capability Maturing Model Integration (CMMI) – A capability maturity model that specifies different maturity levels based on key processes for organizations that provide IT services. See http://www.itservicecmm.org.

IVR – see *Interactive Voice Response.*

LAN – see *Local Area Network.*

Local Area Network (LAN) – A group of computers and associated devices that share a common communications line or wireless link and typically share the resources of a single processor or server within a small geographic area (for example, within an office building).

Local Time – Local time is defined to include the applicable time zones for all of ED's headquarter and regional office locations.

Log Auditing – Log auditing is used to record data on who, what, when, where, and why an event occurred for a particular device or application to ensure expected or normal operations. Daily reviews of data collections are mandated to greatly increase the Department's ability to detect suspicious behavior and intrusion attempts and to determine whether or not such attempts succeeded. This is in part accomplished by the tracking of users, use of resources, and processes and ability to provide detailed logging reports of this activity. This entails daily reviews of website access logs, proxy servers and router logs among the data sources.

MAN – see *Metropolitan Area Network.*

Measurement Criteria – the unit of measurement that defines the pricing requirements of the benchmark results. (Price per MIP)

Memoranda of Understanding (MOU) – A written and signed agreement between two or more principal offices that creates in each office a duty to perform or not perform a service or action. The agreement provides standards of performance for each principal office's duties.

Messaging Services – A common set of systems, including e-mail, calendaring, web access, anti-virus, anti-Spam, blackberry, PDAs and storage systems, used to exchange information and data throughout the enterprise. Messaging is considered a critical tool for all of ED's employees. Current technologies in use include Exchange 2000, Exchange Central, Symantec Mail Security for Exchange and Norton Anti-Virus Corporate Edition.

Metropolitan Area Network (MAN) – Metropolitan Area Network; a geographically limited network, in ED's case, this refers to the Department's Washington, DC network.

MOU – see *Memoranda of Understanding*.

National Center for Education Statistics (NCES) – NCES is the primary federal entity for collecting and analyzing data that are related to education in the United States and other nations.

National Institute of Standard and Technology (NIST) – A non-regulatory federal agency within the US Commerce Department's Technology administration, with a mission to develop and promote measurement, standards and technology to enhance productivity, facilitate trade and improve the quality of life.

National Security and Emergency Preparedness (NS / EP) – A series of telecommunications programs and services used to maintain a state of readiness or respond to and manage any event or crisis (local, national, or international) that causes or could cause injury or harm to the population, damage to or loss of property, or degrades or threatens the NS / EP posture of the United States.

NCES – see *National Center for Education Statistics*.

Network Services – The ability to operate and maintain the connectivity of the WAN, MAN and LAN networks to support enhanced voice, video and data communications services and solutions. Additionally, network services supports other non-IT, non-connected aspects of telecommunications resources, equipment and services such as cell phones, calling cards, pagers and voicemail applications.

NIST – see *National Institute of Standards and Technology*.

NS / EP – see *National Security and Emergency Preparedness*.

Office Automation Software - Software that is used across ED that automates office functions. This includes, but is not limited to, word processing, spreadsheet, presentation graphics, and electronic mail.

Office of Management and Budget (OMB) – OMB's predominant mission is to assist the President in overseeing the preparation of the federal budget and to supervise its administration in Executive Branch agencies. In helping to formulate the President's spending plans, OMB evaluates the effectiveness of agency programs, policies, and procedures, assesses competing funding demands among agencies, and sets funding priorities. OMB ensures that agency reports, rules, testimony, and proposed legislation are consistent with the President's Budget and with Administration policies.

OMB – see *Office of Management and Budget*.

PC R Us Program – ED Program that reuses surplus IT equipment that meets EDNet's minimum technical specifications.

ED-05-PO-0908

PDP – see *Product Development Process.*

PEB – see *Performance Evaluation Board.*

Peer Average - The peer group average is the arithmetic mean of the peer group.

Peer Group – The data points that are matched to the defined benchmarked environment.

Peer Group Average – This is the arithmetic mean of the peer group

Performance Evaluation Board (PEB) –The PEB shall evaluate the Contractor's performance under this contract and develop a numerical rating for that performance. That rating shall be taken into account as part of ED's decision to award additional performance periods. The COR shall be the evaluation coordinator and submit observation reports and other performance data to the PEB.

Performance Work Statement (PWS) – A statement of the technical, functional and performance characteristics of the work to be performed, identifies essential functions to be performed, determines performance factors, including the location of the work, the units of work, the quantity of work units, and the quality and timeliness of the work units.

Peripherals –Devices available to the end user through a direct connection or a local area network. This includes printers, scanners, plotters, modems, CD-ROMs, etc. This also includes devices attached to individual desktops, including but not limited to printers, scanners, plotters, modems, external hard disks, etc.

PMI – see *Project Management Institute.*

POs – see *Principal Offices.*

Project Management Institute (PMI) – Established in 1969 and headquartered outside Philadelphia, Pennsylvania USA, the Project Management Institute (PMI) is the world's leading not-for-profit project management professional association, with over 100,000 members worldwide. Currently, PMI supports over 100,000 members in 125 countries worldwide. PMI members are individuals practicing and studying project management in many different industry areas, including aerospace, automotive, business management, construction, engineering, financial services, information technology, pharmaceuticals and telecommunications.

Over time, PMI has become, and continues to be, the leading professional association in project management. Members and project management stakeholders can take advantage of the extensive products and services offered through PMI. These products and services are described below and are explained in detail throughout the PMI Web site.

Principal Offices (POs) – Used to refer to any one of the principal operating components of the Department, such as the Office of Vocational and Adult Education (OVAE) or the Office of Postsecondary Education (OPE).

Product Development Process (PDP) – is a stage gate approach based upon Dr. Robert G. Cooper's Stage – Gate® methodology (http://www.stage-gate.com/research.html). The process is used to validate technology products throughout their development process; ensuring proper business discipline is applied to technology projects.

Production Servers Services – All services required to operate and maintain production servers, virtual servers, specialized appliances (such as Firewall, Google, Firepass, BigIP, etc), backup systems, storage systems, and Operating System (OS) Operations and Maintenance (O&M), to include all tasks required to

maintain such services and OS O&M, such as server / OS building, retirement, OS upgrades, security patching, integration testing, backups, and any other services required to maintain services.

Service is divided into four tiers:

- *Mission Critical Production Infrastructure* servers requiring priority one restoration in the event of an outage or disaster;
- *Mission Critical Production Application* servers requiring priority two restoration in the event of an outage or disaster;
- *Mission Supportive Production Servers* requiring priority three restoration in the event of an outage or disaster; and
- *Production Servers* requiring no Disaster Recovery (DR). Restoration times for specific systems in the event of an outage or recovery are documented in the individual system Disaster Recovery Plans (DRPs) and Standard Operating Procedures (SOPs).

Project Manager – personnel experienced in managing projects of similar size and scope. All Project Managers must by Project Management Institute (PMI) or equivalently certified.

PWS – see *Performance Work Statement*.

QA – see *Quality Assurance*.

QASP – see *Quality Assurance Surveillance Plan*.

QoS – see *Quality of Service*.

Quality Assurance (QA) – The independent review and testing processes by which products are tested for meeting specified requirements.
Product Testing

- Implement enterprise wide testing program (policy / procedures) for applications and/or systems (hardware / software) that require access on EDNet
- Coordinate and lead a matrix managed team compromised of Engineering, Configuration Management, Operations, Telecommunications and Customers
- Manage and develop test plans
- Examine work products to verify compliance with established plans, standards, procedures
- Customer of the test lab
    o Schedule time
    o Request special requirements
- Conduct system testing to ensure requirements are met and system performs in accordance with specifications
    o NOTE: Acceptance is performed by the customer
- Capture data for analysis

Process Validation

- Audits and Assessments
    o SDLC Processes being followed
    o SOP's being followed
    o Testing processes being followed
- Process Improvement Recommendations
- Corrective Actions – prevent recurrence of previously encountered defects and problems
- Preventive Actions – prevent the occurrence of defects and problems that have not yet been encountered

Improvement Analysis

- Data collection and analysis of service metrics
    o SLAs

ED-05-PO-0908

- o Testing results
- o Trend Analysis
- Develop recommendations for long-term improvements
  - o Preventative, corrective or enhancement

Quality Assurance Surveillance Plan (QASP) – An organized written document used for quality assurance surveillance. The document contains specific methods to perform surveillance of the service provider.

Quality of Service (QoS) – The different service classes required to support hardware and customers (end users).

QoS Class	User Requirements
Criticality 4	Mission Critical Infrastructure Server or Network Device
Criticality 3	Mission Critical Server, Network Device or Customer
Criticality 2	Mission Supportive Server, Network Device or Customer
Criticality 1	General Server, Network Device or Customer

Root Cause – The cause that, if corrected, would prevent recurrence of this and similar occurrences. The root cause does not apply to this occurrence only, but has generic implications to a broad group of possible occurrences, and it is the most fundamental aspect of the cause that can logically be identified and corrected. There may be a series of causes that can be identified, one leading to another. This series should be pursued until the fundamental, correctable cause has been identified.

For example, in the case of a leak, the root cause could be management not ensuring that maintenance is effectively managed and controlled. This cause could have led to the use of improper seal material or missed preventive maintenance on a component, which ultimately led to the leak. In the case of a system misalignment, the root cause could be a problem in the training program, leading to a situation in which operators are not fully familiar with control room procedures and are willing to accept excessive distractions.

Root Cause Analysis – Analysis of the Root Cause (See *Root Cause*) of a problem.

Remote Access – Logging into an ED computer system through a network or modem to execute a command or manipulate data on that system.

SDLC – see *Software Development Lifecycle*.

Security Services – Security operations is an essential part of OCIO's operations organization. This organization is responsible for safeguarding and ensuring that users of EDNet operate in a safe computing environment. This includes responsibility for defining security and risk mitigation based on predefined policies within the system and reducing reliance on human interaction. This team is made up of subject matter experts who continually examine and implement ways to protect the Department against intruders and other electronic dangers. Services formed by this team include, regularly scheduled vulnerability scans and monitor intrusion detection systems for security events, identify and rated viruses daily and take appropriate action based on category, and ensured that server and desktop signature files are maintained and up to date, identify, rate and respond to vendor patch alerts, respond to forensic imaging request from Department authorities and be integral part of the Security Review Board which discusses EDNet wide security issues. Included areas of responsibilities include server hardening, configuration of controls, monitoring of controls, response of events and secure coding policies.

Also works in cooperation with the OCIO's Information Assurance organization for incident reporting to management and federal authorities and is responsible for security representation in engineering and operations lead meetings, technical review board, change control review board and any applicable EDNet government management led meetings where this representation is needed. Supports all certification and accreditation efforts as well as OIG, GAO and third party risk assessment security audits annually.

ED-05-PO-0908

Server Operations (SO) – Responsible for managing the server and application infrastructure that are located at the DRF and responsible for implementing all production change requests that affects the systems supported at the DRF. Included in this tasking are backup, recovery and vaulting capabilities for critical systems. Server Operations is also responsible for specialized recovery efforts in support of special messaging restores in response to legal investigations. In addition, the full server compliment of service are provided for all DRF systems, including file system maintenance on all platforms, managing file permissions upon request, Windows 2000 Active Directory Services, WINS services, DHCP Services, Web Server Infrastructure, Database Servers, Application Servers and File & Print Servers. All production support of the Sun Solaris environment is also provided by this organization.

A portion of the server operations organization is a database administration team. This team provides database admin and general administrative support on SQL server, Oracle, Hummingbird, Project server and Lotus Notes applications throughout the Department. This includes monitoring of ORACLE databases, monitoring of SQL databases, ensure all scheduled jobs have completed successfully, remaining current with available security patches and correcting vulnerabilities, interfacing with other Server Operation teams to optimize their application databases, and provide support to helpdesk technicians on custom application errors. Customized support for clients are provided by the same database administration team in the form of hoc support to customers on specialize applications, including programming and limited time database admin support per request.

Service Level Agreements (SLAs) – An agreement that sets the expectations between the service provider and the customer and describes the products or services to be delivered, the single point of contact for end-user problems and metrics by which the effectiveness of the process is monitored and approved.

Service Tower - information technology service areas that are present in the contract and subject to a benchmark. They typically consist of the following; data center mainframe and server environments, distributed desktop computing, helpdesk and call center, telecommunication voice and date, applications, web hosting and data storage.

Single Point of Contact (SPOC) – The first point of contact for all technical and end-user support issues, including Tier 0, Tier 1 and Tier 2 support levels. Tier 0 is self-help. Tier 1 is the first point of contact. Tier 2 help desk analysts have more in-depth technical knowledge or specialized expertise.

SLAs – see *Service Level Agreements.*

Smartnet – Encompasses all Cisco equipment used by ED and maintained by ITD's Networking Services.

SME – see *Subject Matter Expert.*

Software Development Lifecycle (SDLC) – Systems Development Lifecycle (SDLC) refers to coordination of activities associated with implementing automated systems that use information technology), from conception through disposal. Baseline analysis primarily involves capture of the activities and decision points (e.g., IT Business Case) that impact the SDLC process. This shall also include the development of an SDLC policy for ED that integrates with existing decision points and tangential activities and/or redefine or create new decision points and activities in order to create an easily performed, repeatable process that can be used throughout the Department.

SO – see *Server Operations.*

SOW – see *Statement of Work.*

SPOC – see *Single Point of contact.*

ED-05-PO-0908

Statement of Work (SOW) – The statement of work includes an objectives section allowing the customer to emphasize the desired end state or performance metric to be achieved. It also mandates the assessment of past performance, technical approach and cost for each task order. The customer determines the relative importance of each criterion.

Stage-Gate® Methodology – This methodology was developed by Dr. Robert G. Cooper, http://www.stage-gate.com/research.html. The Stage-Gate® process is an operational roadmap for driving new product projects from idea to launch – a blueprint for managing the new product process – improving effectiveness and efficiency.

Subject Matter Expert (SME) – An individual who exhibits the highest level of expertise in performing a specialized job, task or skill within the organization.

TATS – see *Telecommunications Automated Tracking System*.

Technical Review Board (TRB) – Governs the technical aspects of new systems development that might affect the performance of the many client and enterprise systems, infrastructure, data, and general integrity of the ED network (EDNet). Dovetails into the Department's overarching System Development Life Cycle (SDLC) governance and Investment Review Board (IRB) process, four specific technical reviews are needed on each system development project. The TRB is the review authority tasked to perform these and each review has a different focus, in the following sequence: Planning, Requirements, Design, and Implementation TRBs.

Telecommunications Automated Tracking System (TATS) – A customized government-off-the-shelf (GOTS) software application and associated database that maintains an accurate inventory and billing of telecommunications resources, such as equipment, facilities and services including but not limited to: telephone / fax lines, circuits, wireless devices, cell phones, pagers, toll-free numbers, and calling cards. The TATS application allows authorized users to request, approve, submit vendor orders, receipt and inventory, and reconcile billing. TATS also offers robust reporting tools.

Tier 1, 2, and 3 – Each of the tiers refer to a classification of software to be supported by the service provider. A complete description of each tiers' software is included in Appendix C.

TOC – see *Total Cost of Ownership*.

Total Cost of Ownership (TCO) – A comprehensive assessment of information technology (IT) or other costs across enterprise boundaries over time. For IT, TCO includes hardware and software acquisition, management and support, communications, end-user expenses and the opportunity cost of downtime, training and other productivity losses.

TRB – see *Technical Review Board*.

Technical Review Board (TRB) – The TRB governs the technical aspects of new systems development that might affect the performance of the many client and enterprise systems, infrastructure, data, and general integrity of the ED network (EDNet).

Uptime – The amount of time when an end user's access to EDNet resources and services is unimpaired and fully operational.

VOD – see *Video on Demand*.

Video on Demand (VOD) – The ability to offer and manager the use of a standards-based solution to re-broadcast video messages based on the user's schedule across the ED intranet.

Vulnerability Scanning – This activity is performed by the security services / operations organization. The goal is to help ensure a security-rich environment for OCIO by utilizing multiple security scanners to

analyze Web servers and applications from a low-level, solitary hacker perspective and identify possible security holes. This identifies potential security problems by proactively testing the Department's Internet-connected Web servers by openly searching for weaknesses in the same way that a hacker would to eliminate the Department's data from being compromised.

WAN – see *Wide Area Network.*

War Dialing – The use of a special dialer application, connected to a modem so a computer can dial a list of numbers in an attempt to determine what numbers are connected to a modem. A modem connected to a computer that is also connected to the EDNet network could result in unauthorized entry to EDNet shall it be compromised. This practice identifies the phone lines within the Department that have are at this risk and once identified, steps are taken to determine security risk presented and reported to OCIO management for appropriate action.

Wide Area Network (WAN) – A communications network that connects computing devices over geographically dispersed locations. While a local-area network (LAN) typically services a single building or location, a WAN covers a much larger area, such as a city, state or country. WANs can use either phone lines or dedicated communication lines.

Workday – The Department of Education's ITD business unit runs on a twenty-four (24) hour seven (7) days a week 365 days a year basis for server, security and network support, otherwise ITD follows the Federal Government's workweek (M-F) including Federal holidays.

AMENDMENT OF SOLICITATION. MODIFICATION OF CONTRACT

		1. Contract ID Code	Page	of Pages
			1	3

2. Amendment/Modification No.	3. Effective Date	4. Requisition/Purchase Req. No.		5. Project No. (if applicable)
01	May 20, 2005			

6. Issued By	Code CPOA	7. Administered By (If other than Item 6)	Code
Contracts & Acquisitions Mgt., Group A U.S. Dept. of Education 550 12th Street, SW, 7th Floor Washington, DC 20202-4210 Victor Cairo 202-245-6199		SEE BLOCK 6	

8. Name and Address of Contractor (No., Street, County, and Zip Code)		(X)	9A. Amendment of Solicitation No.
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DRIVE LANHAM MD 207062295	Vendor ID: 00001238 DUNS: 883778896 CAGE: 1SXC4		
			9B. Date (See Item 11)
			10A. Modification of Contract/Order No.
		X	ED-05-PO-0908
			10B. Date (See Item 13)
			Apr 26, 2005

Code		Facility Code	

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers [ ] is extended [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDG-MENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. Accounting and Appropriation Data (if required)
See Schedule $ US   0.00

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(x)	A. This change order is issued pursuant to: (Specify authority) The changes set forth in item 14 are made in the Contract Order No. in item 10A.
X	B. The above numbered Contract/Order is modified to reflect the administrative changes (such as changes in paying office, appropriation date, etc.) Set fourth item 14, pursuant to the authority of FAR 43.103 (b)
	C. This supplemental agreement is entered into pursuant to authority of:
	D. Other (Specify type of modification and authority)

E. IMPORTANT: Contractor [X] is not, [ ] is required to sign this document and return _____ copies to the issuing office.

14. Description of Amendment/Modification (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification is to change the designated Contracting Officer's Representative.

See page three for modification text

Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. Name and Title of Signer (Type or Print)		16A. Name and title of Contracting Officer (Type or Print)	
		James Hairfield Contracting Officer James.Hairfield@ED.GOV	(202) 245-6219
15B. Contractor/Offeror	15C. Date Signed	16B. United States of America	16C. Date Signed
(Signature of person authorized to sign)		(Signature of Contracting Officer)	4/1/15

NSN 7540-01-152-8070	30-105	STANDARD FORM 30 (REV. 10-83)
PREVIOUS EDITIONS UNUSABLE		Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE

Item No.	Supplies/Services	Quantity	Unit		Price	Amount

Reference clause G.1 ED 306-5 Contracting Officer's Representative.

Delete paragraph C in its entirety and substitute with the following:

Valerie Fowler
U.S. Department of Education
550 12th Street, SW
10053
Washington, DC 20202
Telephone number (202) 245-6464

All other terms and condition remain the same by reason of this modification.

AMENDMENT OF SOLICIT NO MODIFICATION OF CONTRACT

	Contract ID Code	Page 1	of Pages 3

2. Amendment/Modification No. 0002	3. Effective Date Aug 1, 2005	4. Requisition/Purchase Req. No.	5. Project No. (if applicable)

6. Issued By Code CPOA	7. Administered By (If other than Item 6) Code
Contracts & Acquisitions Mgt., Group A U.S. Dept. of Education 550 12th Street, SW, 7th Floor Washington, DC 20202-4210 Victor Cairo 202-245-6199	SEE BLOCK 6

8. Name and Address of Contractor (No., Street, County, and Zip Code)	(X)	9A. Amendment of Solicitation No.
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DRIVE LANHAM MD 207062295 Vendor ID: 00001238 DUNS: 883778896 CAGE: 1SXC4		9B. Date (See Item 11)
		10A. Modification of Contract/Order No. ED-05-PO-0908
	X	10B. Date (See Item 13) Apr 26, 2005

Code	Facility Code

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDG-MENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. Accounting and Appropriation Data (if required)
See Schedule $ US   148,765.89

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(x)	A. This change order is issued pursuant to: (Specify authority) The changes set forth in item 14 are made in the Contract Order No. in item 10A.
	B. The above numbered Contract/Order is modified to reflect the administrative changes (such as changes in paying office, appropriation date, etc.) Set fourth item 14, pursuant to the authority of FAR 43.103 (b)
X	C. This supplemental agreement is entered into pursuant to authority of: 52.243-1 Changes - Firm Fixed Price
	D. Other (Specify type of modification and authority)
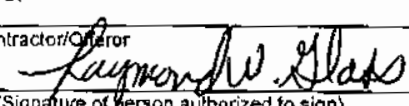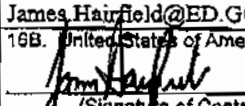
E. IMPORTANT: Contractor ☐ is not, ☒ is required to sign this document and return 1 copies to the issuing office.

14. Description of Amendment/Modification (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification is to append Category A services to add the Education Performance Appraisal System (EDPAS) and SES Performance Appraisal System (SESPAS) Performance Work Statement.

See page three for modification text

Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. Name and Title of Signer (Type or Print) RAYMOND W. GLASS SR. CONTRACTS ADMINISTRATOR	16A. Name and title of Contracting Officer (Type or Print) James Hairfield (202) 245-6219 Contracting Officer James.Hairfield@ED.GOV
15B. Contractor/Offeror (Signature of person authorized to sign)	15C. Date Signed 8/4/05	16B. United States of America (Signature of Contracting Officer)	16C. Date Signed AUG 10 2005

SN 7540-01-152-8070	30-105	STANDARD FORM 30 (REV. 10-83)
PREVIOUS EDITIONS UNUSABLE		Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE

Item No.	Supplies/Services	Quantity	Unit	Unit Price	Amount
0011	Category A (EDPAS/SESPAS)	1	SE	148,765.89	148,765.89
	Accounting and Appropriation Data: 0800A2005.A.2005.EMH00000.500.2572A.000.00 0.0000.000000 US$ 148,765.89 BOC: 2572A PR #: EDOOOM-05-000142				

This modification is issued in accordance with the terms and conditions of ED-05-PO-0908.

The purpose of this modification is to append Category A services to add the EDPAS sow.

1. Delete B.1 ED 301-17 Provision For Pricing and Payment in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category C labor is $1,669,407.50. The ceiling for Category C hours is 26,133. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,221,969.27. The Contractor shall take appropriate steps to ensure that the ceiling price stated is not exceeded. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiated and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

2. Attachment I Performance Work Statement; Category A is appended to include the attached EDPAS SOW.

3. Attachment II - Cost Proposal Work Sheet - Category A is appended as follows:

Category A	Number	Rate Yr 1	Rate Yr 2	Rate Yr 3	Rate Yr 4	Rate Yr 5
EDPAS/SESPAS	1	$148,765.89	$169,591.30	$178,070.86	$186,974.40	$196,323.12

Category A	Number	Rate Yr 6	Rate Yr 7	Rate Yr 8	Rate Yr 9	Rate Yr 10
EDPAS/SESPAS	1	$206,139.28	$216,446.24	$227,268.56	$238,631.98	$250,563.58

Category A	Monthly Yr 1	Monthly Yr 2	Monthly Yr 3	Monthly Yr 4	Monthly Yr 5
EDPAS/SESPAS	$13,524.17	$14,132.61	$14,839.24	$15,581.20	$16,360.26

Category A	Monthly Yr 6	Monthly Yr 7	Monthly Yr 8	Monthly Yr 9	Monthly Yr 10
EDPAS/SESPAS	$17,178.27	$18,037.19	$18,939.05	$19,886.00	$20,880.30

This modification constitutes final equitable adjustment for all changes contained herein.

The base period value of Category A services is increased from $10,012,419.98 by $148,765.89 to $10,161,185.87

4. List of Attachments

   1. EDPAS/SESPAS Performance Work Statement

PERFORMANCE WORK STATEMENT
ED PERFORMANCE APPRAISAL SYSTEM (EDPAS) AND SES PERFORMANCE APPRAISAL SYSTEM (SESPAS)

I.   INTRODUCTION AND BACKGROUND

The Department of Education (ED) has established, implemented, and is currently operating a five tier performance appraisal system known as the Education Performance Appraisal System (EDPAS). A new five level Senior Executive Service Performance Appraisal System (SESPAS) has been approved. Right Management Consultants supplies the IC2000 software that supports the automation of the EDPAS system. The SESPAS software must be developed/modified to support the process of the SES Performance Plan development and the actual rating of record automated calculation.

II.   PURPOSE

The purpose of this solicitation is to provide the Group/System Administrator and Help Desk operations support of the EDPAS/SESPAS and to assist in other EDPAS/SESPAS efforts on a daily and continuous basis. The primary objectives are:

1. <u>Maintenance Support</u>: Provide maintenance and technical support for the IC2000 software.
2. <u>Operational Support</u>: Provide systems administration and information technology support for the operations of ED's automated performance appraisal systems.
3. <u>Help Desk</u>: Provide help desk support to all users.
4. <u>Functionality Support</u>: Ensure trouble-free operation of the EDPAS/SESPAS application on the EDNET, the Education Department's local area network.
5. <u>Software Support</u>: Provide liaison responsibilities between ED and Right Management Consultant to ensure the EDPAS/SESPAS system is fully operational and trouble free.

This solicitation is to be awarded under Category A of the EDNet Support Services contract. The base period of performance shall be from August 1, 2005 through June 30, 2006 with nine option years of performance. The period of performance shall mirror the EDNet Support Services contract.

III.   DEFINITIONS AND ACRONYMS

ED -- The Department of Education

EDNET – The Department of Education's local area network.

EDPAS (Education Performance Appraisal System) – ED's performance appraisal program which provides for the establishment of standards and critical elements; communication of elements and standards to employees; evaluation of employees' performance; and appropriate use of appraisal information in making personnel decisions.

FPPS – Federal Personnel Payroll System

EDPAS/SESPAS Help Desk – An entity that provides assistance to employees who are using the automated EDPAS/SESPAS. Such assistance is provided by telephone, email, or on-site visits.

Intelligent Consensus (IC2000) -- The software that is used to enter performance standards, collect the employee performance feedback from supervisors and calculate the overall rating. It is available to users from application servers located at several ED Headquarters' buildings and each of the ten regional offices. The database server is located at ED Headquarters'. IC2000 is implemented as a client-server application on the EDNET. The current version is a web-based version. IC2000 is a product of Right Management Consultants, Inc., of Tempe, Arizona. (www.right.com)

Peak Periods – Defined as April 1 through June 30.

ROMS – Rating Official Maintenance System

SESPAS- Senior Executive Service Performance Appraisal System, ED's performance appraisal system for members of the Senior Executive Service. This provides for the establishment of standards and critical elements; communication of elements and standards to employees; evaluation of employee's performance; and appropriate use of appraisal information in making personnel decisions.

Valid Complaints – Complaints that are justifiable from an ED standpoint; i.e. those that indicate non-compliance with Help Desk requirements.

IV. SCOPE OF WORK

The contractor is required to provide the services described in Section IX (Activities) of this performance work statement. The contractor shall be responsible for performing all the tasks described. The work involves four principal areas: project management, system/group administration, reports, and Help Desk service.

The work shall be performed on normal government workdays. The contractor shall make EDPAS available to ED users 7 days a week, 24 hours a day, except as relieved from doing so by the Contracting Officer's Representative (COR). EDPAS/SESPAS Help Desk staff shall be available to ED customers from 8:30 AM to 5:00 PM Eastern Standard/Daylight Time Monday through Friday each federal work day except as relieved from doing so by the COR or by circumstances such as a government-wide shutdown that curtail a normal federal work day, including federal holidays.

The contractor may provide help desk support through the 1-800 EDNet Helpdesk number with an option for users to reach the EDPAS Help Desk staff during hours of operations.

V. GOVERNMENT-FURNISHED FACILITIES AND EQUIPMENT

The Government shall provide adequate office space, equipment, supplies and materials necessary to accomplish the work under this contract.

VI. CONTRACTOR-FURNISHED FACILITIES AND EQUIPMENT

The contractor is not required to provide facilities or equipment.

VII. CONTRACTOR PERSONNEL

The contractor shall provide staff qualified to perform the work described in this performance work statement. Past contractor performance indicated that during peak periods, as described above, additional staff is required. Contractor personnel responsible for answering the telephone and interacting with ED staff must be able to clearly speak and easily understand English.

The contractor shall provide a project manager for administration and technical supervision of contractor employees. The project manager shall be the contractor's primary representative for the EDPAS/SESPAS effort. The project manager shall have the technical experience and be knowledgeable in all facets of the work required in this performance work statement.

The contractor shall provide a staff with knowledge and/or expertise in the following areas:

1. Knowledge of the basic capabilities of the IC2000 application. Contractor staff must be able to compare the basic capabilities of the system to what ED users have at their desktops and provide support and advice that enables ED customers to execute the EDPAS/SESPAS application.
2. Excellent public relations skills in dealing courteously and effectively with customers.
3. General knowledge of ORACLE
4. General knowledge of SQL Server databases.
5. Basic understanding of EDNet.

6. Basic knowledge of performance management policies and regulation for Federal Agencies.

VIII.   MINIMUM STANDARDS OF PERFORMANCE

The Contractor shall meet the Service Level Agreements as described under the Helpdesk Call Answer and Priority 3 Customer Support in the EDNet Support Services Contract during non-peak period. Non-peak period is defined as July 1 through March 31.

1. SPECIFIC REQUIREMENTS

The Contractor shall provide a plan describing actions, and procedures to ensure (1) a smooth transition from contract award to full operational status, and (2) a smooth transition from current contract performance to performance by a different contractor. Phase-Out plans shall include provisions for completion of appropriate Contractor responsibilities should there be a contract termination proceeding.

IX.   ACTIVITIES / SPECIFIC REQUIREMENTS

To achieve the purpose of this contract, the contractor shall be responsible for, but not limited to, performing the following activities:

PERFORMANCE MATRIX

Task 1: Project Management and Technical Oversight
The contractor shall apply widely-accepted "best practices" of project management and technical oversight to all work conducted under this contract to monitor and control project progress, cost, and resources in relation to planned schedule, milestones, and deliverables.

Required Service	Task	Standard	Acceptable Quality Level	Method of Surveillance
Accurate, timely, and interactive reporting of project status allows ED to make timely and informed decisions about EDPAS/SESPAS.	1.1. Kick-off Meeting The Contractor shall hold an initial kick-off meeting with the appropriate ED and contractor personnel. At this meeting, ED personnel will provide the contractor staff with any additional information and documentation relevant to successful completion of this task; review the task to resolve any questions, clarification and assumptions, including any proposed changes to the requirements.	Conduct kick-off meeting within seven workdays after contract award.	No deviation without advance COR/PM approval.	COR/PM inspection of deliverable.
	1.2. Project Plan: Develop and deliver a Project Plan that includes staff resources, time requirements, schedule of events based on a timeline prepared by the Project Manager (PM), and documentation of any requirements changes reported in the kick-off meeting.	Deliver the draft Project Plan for PM approval within five workdays of the kick-off meeting. Project Plan should include each of the major tasks and subtasks identified in the work statement, beginning and end dates, and milestones. Upon receipt of PM comments, revise and re-submit the final Project Plan within five workdays.	No deviation without advance COR/PM approval.	COR/PM inspection of deliverable.

4

	1.3. Conduct Project Status Meetings. The contractor shall meet with the COR/PM and other ED staff as appropriate, as determined by the PM, to discuss project status/progress and open action items.	Meet on a schedule determined by the COR/PM.
		• Provide accurate, current, complete data in advance of the meeting, to include:
		   o Financial data
		   o Action items
		   o Current project status (descriptions and schedules)
		• Address inquiries and concerns of ED staff at meetings
		• Provide to the COR/PM a copy of meeting minutes. Minutes are to be provided no later than three workdays after each meeting, and are to be written in clear, understandable, error-free grammar. Format of the minutes is to be as specified by the COR/PM.
			No deviation without COR/PM approval.	COR/PM review and approval.

	1.4. Prepare Monthly Status Report	Monthly Status Report is to be received by the COR/PM no later than the fifth workday of the month.	No deviation without COR/PM approval.	COR/PM review and approval.

Task 2: System/Group Administrator Functions

The system/group administrator duties are different at different periods in the performance rating cycle. The contractor shall be responsible for, but not limited to, performing the following duties:

Responsive and efficient system administration support enables the Government to operate EDPAS/SESPAS with minimum disruption to ED customers and maximum customer satisfaction.	2.1. Perform "Beginning of Rating Period" functions. 2.1.1. Enter ED's performance plan criteria into IC for required surveys. 2.1.2. Track the progress of, and prepare appropriate follow-	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.

	Performance Standard	Acceptable Quality Level (AQL)	Method of Surveillance
up notices.			
2.1.3. Other EDPAS/SESPAS duties, functions and tasks as assigned.			
2.2. Perform "Prior to Midpoint Rating Period" functions.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
2.2.1. Resolve rating official/employee relationships. This shall be a continuous maintenance function, due to reorganizations, reassignments, etc.			
2.2.2. Other EDPAS/SESPAS duties, functions and tasks as assigned.			
2.3. Perform "During Midpoint Rating Period" functions.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
2.3.1 Track progress of, and prepare appropriate follow-up notices for the evaluation timeframe.			
2.3.2 Enter employees into the appropriate survey, using data from the Federal Personnel Payroll System (FPPS).			
2.3.3. As necessary, manually make changes to rating officials and standards.			

2.3.4. Other EDPAS/SESPAS duties, functions and tasks as assigned.			
2.5. Perform "Prior to End of Year Rating Period" functions. 2.6. Initiate notices by email or other means to all rating officials.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
2.5. Perform "End of Year Rating Period" Functions. 2.5.1. Prepare a notice by email or other means to all ED supervisors to complete their evaluations and ratings. 2.5.2 Track progress of, and prepare appropriate follow-up notices. 2.5.3. As necessary, manually enter evaluations for employees. 2.5.4. Create reports in an ED-specified format for individuals who are visually impaired. Send reports to an ED specialist to prepare in Braille for those individuals who are blind. 2.5.5. Reestablish ED's performance plan criteria in IC for next rating cycle.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.

	2.5.6. Other EDPAS/SESPAS duties, functions and tasks as assigned.			

Task 3: EDPAS/SESPAS Reports

There are general, user-generated, administrative, and ad-hoc reporting requirements. The contractor shall be responsible for, but not limited to, producing the following reports:

Reports are timely, thorough, useful, and accurate.	3.1. The contractor shall produce the following reports as required by the COR/PM: • AD HOC Reports. • Evaluations Not Completed, by Principal Organization and Employee.	The following reports are due within one workday of request: • AD HOC Reports. • Evaluations Not Completed, by Principal Organization and Employee. • Aggregate Reports, ED and/or organization-wide. Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	3.2. The contractor shall conduct analyses and prepare ad hoc reports as required.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.

Task 4: EDPAS/SESPAS Help Desk

The contractor shall provide assistance to employees using IC by telephone, email, and on-site visits. The requirements are to:

The contractor shall maintain an EDPAS/SESPAS Help Desk that provides expert assistance to ED customers.	4.1. Maintain coverage of the EDPAS Help Desk telephones from 8:30 a.m. to 5:00 p.m. (Eastern Standard/Daylight Time) each federal workday with continuous coverage by one operator (during "peak" periods, additional operators may be needed.)	Except during peak periods (as defined in Section III Definitions and Acronyms), no more than 12 valid complaints may be received about the telephone availability of Help Desk personnel during the performance of the task order.	Except during peak periods, no more than 12 valid complaints may be received during each period of performance (base year or option year) about the telephone availability of Help	COR/PM review and approval.

		Desk personnel during peak period.	COR/PM review and approval.
4.2. Answer telephone, voice mail, email and in-person requests from IC users. Types of assistance to be provided include, but are not limited to, changing passwords.	The contractor shall retrieve voice mail messages throughout the day, at least four times a day, and respond within one workday. Contractor shall retrieve email messages throughout the day, at least four times a day, and respond within one workday of receipt. Contractor shall log all calls/requests into an automated database of calls received and types of problems encountered daily. The ED PM shall have access to the database. During peak periods (as defined in Section III Definitions and Acronyms) the database shall be updated within three workdays. Contractor shall complete requests from IC users within one workday of receipt. During peak periods, IC user requests shall be completed within three workdays.	Voice mail and email messages must be responded to within one workday during peak period.	

Task 5: Technical Support

The contractor shall provide technical support services for the IC2000 software and for maintaining the EDPAS/SESPAS application on the EDNET.

Technical support provides expert assistance in maintaining the EDPAS/SESPAS application.	5.1. Provide technical assistance in resolving operating problems.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	5.2. Assist in installing IC maintenance releases.	Performance conforms to requirements specified by the	No deviation without COR/PM	COR/PM review and approval.

9

		Performance Standards	Acceptable Quality Level	Method of Surveillance
		COR/PM, 95 percent of the time.	approval.	
	5.3. Resolve problems associated with EDPAS/SESPAS application and its interaction with the ED network, with Oracle and SQL Server, and the IC software.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
Task 6: Other Assigned Tasks				
I. The contractor completes other assigned tasks that add value to the functioning of the EDPAS/SESPAS.	6.1. Contractor shall forward script files to the ED Oracle database administrator at times during the rating period designated by the ED PM. Designated times typically surround peak periods.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	6.2. As requested, the Contractor shall provide software demonstrations, training, and respond to questions related to IC.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	6.3. As time permits assists ED staff in other facets of the EDPAS/SESPAS program, such as updating EDPAS/SESPAS instructional materials.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	6.4 As requested, the Contractor shall provide AD HOC reports to ED staff.	Reports are due within one workday of request.	No deviation without COR/PM approval.	COR/PM review and approval.

10

			Supporting Period

Service Level Agreement: (During non-peak period)

- Operational Support of EDPAS/SESPAS – Telephone Availability of Help Desk Personnel:
  The SLA's of this area shall mirror the Helpdesk Call Answer SLA's.

- Operational Support of EDPAS/SESPAS – Voice Mail and Email Messages Responded to and Resolved Within one Workday:
  The SLA's of this area shall mirror the Priority 3 Customer Support SLA's.

11

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. Contract ID Code	Page	of Pages
		1	4

2. Amendment/Modification No.	3. Effective Date	4. Requisition/Purchase Req. No.	5. Project No. (if applicable)
000003	Aug 25, 2005		

6. Issued By	Code CPOA	7. Administered By (If other than Item 6)	Code
Contracts & Acquisitions Mgt., Group A U.S. Dept. of Education 550 12th Street, SW, 7th Floor Washington, DC 20202-4210 Victor Cairo 202-245-6199		SEE BLOCK 6	

8. Name and Address of Contractor (No., Street, County, and Zip Code)		(X)	9A. Amendment of Solicitation No.
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DRIVE LANHAM MD 207062295	Vendor ID: 00001238 DUNS: 883778896 CAGE: 1SXC4		
			9B. Date (See Item 11)
		X	10A. Modification of Contract/Order No. ED-05-PO-0908
			10B. Date (See Item 13) Apr 26, 2005

Code		Facility Code	

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers ☐ is extended ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. Accounting and Appropriation Data (if required)
See Schedule $ US   2,788,884.00

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(x)	
	A. This change order is issued pursuant to: (Specify authority) The changes set forth in item 14 are made in the Contract Order No. in item 10A.
	B. The above numbered Contract/Order is modified to reflect the administrative changes (such as changes in paying office, appropriation date, etc.) Set fourth item 14, pursuant to the authority of FAR 43.103 (b)
	C. This supplemental agreement is entered into pursuant to authority of:
X	D. Other (Specify type of modification and authority) B.3 301-21 Amount Contract Increase/Decrease

E. IMPORTANT: Contractor ☒ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. Description of Amendment/Modification (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification is to provide additional funds for Category C.

See page four for modification text

Except as provided herein. all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. Name and Title of Signer (Type or Print)		16A. Name and title of Contracting Officer (Type or Print)	
		James Hairfield Contracting Officer James.Hairfield@ED.GOV	(202) 245-6219
15B. Contractor/Offeror	15C. Date Signed	16B. United States of America	16C. Date Signed
(Signature of person authorized to sign)		(Signature of Contracting Officer)	AUG 2 9 2005

NSN 7540-01-152-8070   30-105   STANDARD FORM 30 (REV. 10-83)
PREVIOUS EDITIONS UNUSABLE   Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE

Item No.	Supplies/Services	Quantity	Unit	Unit Price	Amount
0012	Category C (OCIO)	1	SE	61,659.00	61,659.00
	Accounting and Appropriation Data: 0800A2005.A.2005.EIE00000.701.2572A.A17.000 .0000.000000 US$ 61,659.00 BOC: 2572A PR #: EDOCIO-05-000334				
0013	Category C (SAA)	1	SE	1,067,353.00	1,067,353.00
	Accounting and Appropriation Data: 0202A2005.A.2005.EIE00000.725.2572A.000.000. 0000.000000 US$ 1,067,353.00 BOC: 2572A PR #: EDOCIO-05-000334				
0014	Category C (OCR)	1	SE	805,988.00	805,988.00
	Accounting and Appropriation Data: 0700A2005.A.2005.EIE00000.711.2572A.000.000. 0000.000000 US$ 805,988.00 BOC: 2572A PR #: EDOCIO-05-000334				
0015	Category C (OIG)	1	SE	314,840.00	314,840.00
	Accounting and Appropriation Data: 1400A2005.A.2005.EIE00000.744.2572A.000.000. 0000.000000 US$ 314,840.00 BOC: 2572A PR #: EDOCIO-05-000334				
0016	Category C (NIFL)	1	SE	25,100.00	25,100.00
	Accounting and Appropriation Data: 0400M2004.B.2005.EIE00000.766.2572A.000.257 .0000.000000 US$ 25,100.00 BOC: 2572A PR #: EDOCIO-05-000334				
0017	Category C (NAGB)	1	SE	13,944.00	13,944.00
	Accounting and Appropriation Data: 1100A2005.B.2005.EIE00000.768.2572A.000.902. 0000.000000 US$ 13,944.00 BOC: 2572A PR #: EDOCIO-05-000334				
0018	Other Direct Cost	1	SE	500,000.00	500,000.00
	Accounting and Appropriation Data: 0202A2005.A.2005.EIE00000.725.2572A.000.000. 0000.000000				

Item No.	Supplies/Services		Quantity	Unit	Un ce	Amount
	BOC: 2572A PR #: MOD&&&05083877					
	BOC: 2572A PR #: MOD&&&05083877					

This modification is issued in accordance with the terms and conditions of ED-05-PO-0908.

The purpose of this modification is to provide funding to Category C services.

1. Delete B.1 ED 301-17 Provision For Pricing and Payment in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category B is $30,033.76. The not-to-exceed amount for Category C labor is $3,958,291.50. The ceiling for Category C hours is 48,908. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amount set forth above. The Contract is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

The base period value of Category C services including ODCs is increased from $2,891,376.77 by $2,788,884.00 to $5,680,260.77.

The total base period value of this contract is increased from $13,082,596.40 by $2,788,884.00 to $15,871,480.40.

AMENDMENT OF SOLICITATION OF CONTRACT

mdment/Modification No.	3. Effective Date	4. Requisition/Purchase Req	5. Project No. (if applicable)
M00 004	Sep 30, 2005		

sued By	Code CPOA	7. Administered By (If other than Item 6)	Code
ntracts & Acquisitions Mgt., Group A .S. Dept. of Education 50 12th Street, SW, 7th Floor Washington, DC 20202-4210 Victor Cairo 202-245-6199		SEE BLOCK 6	

8. Name and Address of Contractor (No., Street, County, and Zip Code)	(X)	9A. Amendment of Solicitation No.
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DRIVE LANHAM MD 207062295 Vendor ID: 00001238 DUNS: 883778896 CAGE: 1SXC4		9B. Date (See Item 1)
	X	10A. Modification of Contract/Order No. ED-05-PO-0908
		10B. Date (See Item 13) Apr 26, 2005

Code	Facility Code

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers [ ] is extended [ ] is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGE MENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. Accounting and Appropriation Data (if required)
See Schedule $ US   8,152,400.00

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(x) A. This change order is issued pursuant to: (Specify authority) The changes set forth in item 14 are made in the Contract Order No. in item 10A.

[ ] B. The above numbered Contract/Order is modified to reflect the administrative changes (such as changes in paying office, appropriation data, etc.)
Set fourth item 14, pursuant to the authority of FAR 43.103 (b)

[ ] C. This supplemental agreement is entered into pursuant to authority of:

X   D. Other (Specify type of modification and authority)
B.3 301-21 Contract Amount Increase/Decrease

E. IMPORTANT: Contractor [X] is not, [ ] is required to sign this document and return _____ copies to the issuing office.

. Description of Amendment/Modification (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

he purpose of this modification is to provide additional funds for Category C.

e page four for modification text

Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. Name and Title of Signer (Type or Print)		16A. Name and title of Contracting Officer (Type or Print)
		James Hairfield (202) 245-6219 Contracting Officer James.Hairfield@ED.GOV

3. Contractor/Offeror	15C. Date Signed	16B. United States of America	16C. Date Signed
(Signature of person authorized to sign)		(Signature of Contracting Officer)	SEP 30 2005

540-01-152-8070
US EDITIONS UNUSABLE

30-105

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

		Quantity	Unit	Price	Amount
	SCHEDULE				
		1	SE	1,528,000.00	1,528,000.00
0027	Category C (SAA)	1	SE	803,000.00	803,000.00
	Accounting and Appropriation Data: 0202A2005.A.2005.EIE00000.725.2572A.000.000. 0000.000000 US$ 803,000.00 BOC: 2572A PR #: EDOCIO-05-000469				
0028	Category C (OCR)	1	SE	4,665,000.00	4,665,000.00
	Accounting and Appropriation Data: 0700A2005.A.2005.EIE00000.711.2572A.000.000. 0000.000000 US$ 4,665,000.00 BOC: 2572A PR #: EDOCIO-05-000469				
0029	Category C (OIG)	1	SE	1,070,500.00	1,070,500.00
	Accounting and Appropriation Data: 1400A2005.A.2005.EIE00000.744.2572A.000.000. 0000.000000 US$ 1,070,500.00 BOC: 2572A PR #: EDOCIO-05-000469				
0030	Category C (NIFL)	1	SE	29,500.00	29,500.00
	Accounting and Appropriation Data: 0400M2004.B.2005.EIE00000.766.2572A.000.257 .0000.000000 US$ 29,500.00 BOC: 2572A PR #: EDOCIO-05-000469				
0031	Category C (NAGB)	1	SE	39,600.00	39,600.00
	Accounting and Appropriation Data: 1100A2005.B.2005.EIE00000.768.2572A.000.902. 0000.000000 US$ 39,600.00 BOC: 2572A PR #: EDOCIO-05-000469				
0032	Category C (CHAFL)	1	SE	15,300.00	15,300.00
	Accounting and Appropriation Data: 0241A2005.A.2005.EIE00000.776.2572A.000.000. 0000.000000 US$ 15,300.00				

SCHEDULE

Item No.	Supplies/Services	Quantity	Unit	Unit Price	Amount
	BOC: 2572A PR #: EDOCIO-05-000469				
0033	Category C (NBES)	1	SE	1,500.00	1,500.00
	Accounting and Appropriation Data: 1100M2005.B.2005.EIE00000.759.2572A.000.305 .0000.000000 US$ 1,500.00 BOC: 2572A PR #: EDOCIO-05-000469				

This modification is issued in accordance with the terms and conditions of ED-05-PO-0908.

The purpose of this modification is to provide funding to Category C services.

1. Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category B is $1,259,841.23. The not-to-exceed amount for Category C labor is $12,110,691.50. The ceiling for Category C hours is 141,264. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amount set forth above. The Contract is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

The base period value of Category C services including ODCs is increased from $5,680,260.77 by $8,152,400.00 to $13,832,660.77.

The total base period value of this contract is increased from $17,113,009.96 by $8,152,400.00 to $25,265,409.96.

~~MEN~~ ... ~~ATION~~/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE		PAGE OF PAGES
			1　　5

3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (if applicable)
JUL 03, 2006	EDOCIO-06-000231	

	CODE	CPOA	7. ADMINISTERED BY (if other than Item 6)	CODE	
...ons Mgt., Group A			See Block 6		
...ion, 550 12th Street, SW, 7th Floor					
...202-4210					
... 202-245-6199					

... ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(X)	9A. AMENDMENT OF SOLICITATION NO.
...MPUTER SCIENCES CORPORATION　　DUNS: 883778696			
...0 HUBBLE DR　　　　　　　　　　　Cage Code: 1SXC4			9B. DATED (SEE ITEM 11)
...ANHAM SEABROOK MD 207066229			
			10A. MODIFICATION OF CONTRACT/ORDER NO.
		x	GS35F4381G/ED-05-PO-0908
Ms. Maryke Guild (301) 794-2108			
			10B. DATED (SEE ITEM 13)
CODE　00001238　　　FACILITY CODE			APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)
See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) 52.243-1 CHANGES FIXED PRICE

E. IMPORTANT: Contractor [ ] is not, [x] is required to sign this document and return ___1___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

1. This modification will be executed in accordance with the terms and conditions of contract number ED-05-PO-0908.

2. The purpose of this modification is five-fold: 1) to change the contract to reflect phase I of Category C Services to Category A Services migration; 2) to update the Earned Value Management System clause; 3) to remove budgetary support requirements from the contract; 4) to provide additional Category A funding for the base period of the contract and 5) incorporate AIX Servers and Windows 2003 Servers into Category A.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)
RAYMOND W. GLASS SR. CONTRACTS ADMINISTRATOR	James Hairfield, Contracting Officer (202) 245-6219
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
Raymond W. Glass (Signature of person authorized to sign)	7/13/06	*signature* (Signature of Contracting Officer)	7/14/06

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
0049	Category A Production Servers	1.00	SE	799,743.84	799,743.84
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0050	Category A End User Support	1.00	SE	197,863.05	197,863.05
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0051	Category A Phase I Migration	1.00	SE	201,831.56	201,831.56
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0052	Category C Services	1.00	SE	67,736.20	67,736.20
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				

A.   Changes to clause B.1, ED 301-17 are as follows:

Category A is increased by $1,603,101.57 as a result of an increase in server quantities, reconciliation of end user quantities and the phase I migration of services from Category C to A.

Category B remains unchanged

Category C is reduced by $605,494.68 due to the phase I migration and then increased by $201,831.56 as part of that amount is being funded through line 0051 of this modification and line 0052 is an increases of $67,736.20 resulting in a net reduction to Category C of $335,926.92.

Category C ODCs remain unchanged

Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is increased from $10,161,185.87 by $1,603,101.57 to $11,764,287.44. The not-to-exceed amount for Category B is $1,554,828.20. The not-to-exceed amount for Category C labor is reduced from $12,110,691.50 by $335,926.92 to $11,774,764.58. The ceiling for Category C hours is reduced from 141,264 by 12,361 to 128,903. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

B. ·   H.17 delete in its entirety and replace with the following
334-3 Earned Value Management System (October 2005) (Applies only to development projects):

(a) In the performance of this contract the Contractor shall use an earned value management system (EVMS) to manage the contract that at the time of contract award has been recognized by the cognizant Administrative Contracting Officer (ACO) or a Federal department or agency as compliant with the guidelines in ANSI/EIA Standard–

748 (current version at time of award) and the Contractor will submit reports in accordance with the requirements of this contract.

(b) If, at the time of award, the Contractor's EVMS has not been recognized by the cognizant ACO or a Federal department or agency as complying with EVMS guidelines (or the Contractor does not have an existing cost/schedule control system that is compliant with the guidelines in ANSI/EIA Standard–748 (current version at time of award)), the Contractor shall apply the system to the contract and shall be prepared to demonstrate to the ACO that the EVMS complies with the EVMS guidelines referenced in paragraph (a) of this clause.

(c) Agencies may conduct Integrated Baseline Reviews (IBR). If a pre-award IBR has not been conducted, such a review shall be scheduled as early as practicable after contract award, but not later than 180 days after award. The Contracting Officer may also require an IBR at (1) exercise of significant options or (2) incorporation of major modifications. Such reviews will normally be scheduled before award of the contract action.

(d) Unless a waiver is granted by the ACO or Federal department or agency, Contractor proposed EVMS changes require approval of the ACO or Federal department or agency, prior to implementation. The ACO or Federal department or agency, shall advise the Contractor of the acceptability of such changes within 30 calendar days after receipt of the notice of proposed changes from the Contractor. If the advance approval requirements are waived by the ACO or Federal department or agency, the Contractor shall disclose EVMS changes to the ACO or Federal department or agency at least 14 calendar days prior to the effective date of implementation.

(e) The Contractor agrees to provide access to all pertinent records and data requested by the Contracting Officer or a duly authorized representative. Access is to permit Government surveillance to ensure that the EVMS conforms, and continues to conform, with the performance criteria referenced in paragraph (a) of this clause.

(f) The Contractor shall require the subcontractors specified below to comply with the requirements of this clause: [Accelerated Solutions Inc.]

c. Section J List of Attachments:

Contract Attachment 1 - Performance Work Statement (PWS) delete and replace with attachment 1 of this modification. This version deletes Budgetary Support Requirements from Category C services and also reflects Phase I of the Category C to A migration for the functions of network and telecomm operations, program overhead, and IT distribution and imaging center with assistive technology.

Contract Attachment 1, Appendix F Detailed Work Descriptions of the Performance Work Statement delete and replace with Attachment 2 to this modification. The revised version accounts for the changes to the PWS mentioned in the previous paragraph.

Contract Attachment 2 - Pricing Schedule append with the following:

Attachment 3 of this modification Pricing Schedule- Phase I Migration Cost Worksheet

Category C to Category A Migration:

Effective April 1, 2006 Network and Telecom Operations, Program Overhead and IT Distribution and Imaging Center (ITDIC) combined with Assistive Technology as part of phase I were migrated from Category C to Category A services. The firm fixed price of phase I of the migration of services from Category C to Category A services is $605,494.68 for the base period. The option period prices are detailed on the attachment.

Contract Attachment 2 - Pricing Schedule is appended with attachment 4 to this modification Pricing Schedule- AIX Server/Windows 2003 Server Cost Worksheet

AIX Server and Windows 2003 Servers
Effective July 1, 2005 the Department placed three (3) Windows 2003 Servers into production.
Effective May 1, 2006 the Department placed eleven (11) AIX Servers into production.
Effective June 1, 2006 the number of AIX servers is increased from eleven (11) to eighteen (18) servers.

D 8. Modification List of Attachments:

    1. Revised Performance Work Statement
    2. Revised Appendix F: Detailed Work Description
    3. Phase I Migration Cost Worksheet
    4. Windows 2003/AIX Servers Cost Worksheet

In consideration of the modification(s) agreed to herein as complete equitable adjustments for the Contractor's "proposal(s) for adjustment," the Contractor hereby releases the Government from any and all liability under this contract for further equitable adjustments attributable for such facts or circumstances giving rise to the "proposal(s) for adjustment."

ATTACHMENT 1 – PERFORMANCE WORK STATEMENT

I. Introduction

This task order shall acquire IT support services needed to meet ED's needs and to migrate to an IT Service Capability Maturity Model Integration (CMMI) Level 3 service environment. The services and solutions provided by the contractor to support EDNet shall meet the objectives of the OCIO in a cost-effective manner. Currently, ED has six areas of IT services:

- Production Server
- Messaging
- End User
- Networking
- Security
- Assistive Technology

The contractor shall provide Category A work (Firm Fixed Price per Unit Services) at a minimum of CMMI Level 3 on day one of the contract improving to CMMI Level 4 within five (5) years. All work shall be governed by improving service levels, described in Section IV of the Performance Work Statement (PWS), Performance Standards and Acceptable Quality Levels. All personnel shall conform to ED security policy, including training and paperwork requirements.

Principle Objectives
ED's Office of the Chief Information Officer (OCIO) Information Technology Division (ITD) has three objectives:

- To **immediately improve all services** that ITD provides to its customer base, as measured by meeting Service Level Agreements (SLAs) and ongoing independent third party Customer Satisfaction surveys.
- To **immediately lower the cost and demonstrate better service** through the adoption of CMMI Level 3 processes and competence.
- To **continuously lower costs and improve customer satisfaction** going forward for all ITD provided services.

A. Category A (Firm Fixed Price per Unit Services)
The contractor shall provide firm fixed price managed services billed on a per unit basis at a minimum of CMMI Level 3 on day one progressing to Level 4 within three to five (3-5) years. The contractor is responsible for all processes used in the completion of this work and shall have the capacity to handle multiple critical operational issues at one time.

- Maintain the **production servers**.
- Provide **messaging services** including but not limited to E-mail and Blackberry (or equivalent).
- Support **end users** and their hardware and software, including assistive technology (deskside) and IT Image and Distribution Center – ITIDC (Warehouse/Clearinghouse) services.
- Perform **management services**.
- Maintain **networking services**.

B. Category B (Fixed Price / Time and Materials Project Services)
The contractor shall provide resources, including but not limited to Subject Matter Expert (SME) and Business Executive Expertise, on a fixed price and/or time and materials basis to support any

IT projects; all projects shall follow ITD's CMMI Level 3 Product Development Process (PDP). Category B Support shall be acquired in accordance with the task order / work order procedures outlined in Section C – SUPPLIES OR SERVICES AND PRICES / COSTS of the RFQ. The Contractor shall use an Earned Value Management System and process for Category B (time and materials project-based) work in accordance with OMB, ANSI / EIA-748-A and other applicable regulations throughout the life of the contract. This process shall result in monthly reports by project reflecting expenditures for the Budget Cost of Work Performed, Actual Cost of Work Performed and Actual Cost of Work Scheduled. The Contractor shall provide a plan to implement an Earned Value Management System before award and must implement the system within 90 days after award[1].

ITD is responsible for maintaining the PDP, but the contractor shall provide personnel with demonstrable skills, competence and experience necessary for working within a CMMI Level 3 process environment. This includes providing qualified project managers and business management executives. All Project Managers acquired under this task shall be Project Management Institute (PMI) or equivalently certified and be responsible for managing ITD approved projects. Business management executives shall be responsible for managing *tiger teams*[2], compromised of SMEs and personnel from various technical disciplines, among other things for short to medium duration tasks. Category B shall be the preferred method for ED to acquire SMEs; therefore it is important that the service provider demonstrates its depth and breadth in technical expertise in areas governed by this contract (e.g., Customer Service, IT Infrastructure, Enterprise Architecture, Email Architecture, etc.).

C. Category C (Sustaining Time and Materials Support)
The contractor shall provide qualified labor on a time and materials basis for continuous staffing of services whose processes will be managed by ED for the following:

- Perform **management services**.
- Maintain **networking services**.
- Provide **security services**[3].
- Maintain a **roster of security-approved personnel** available to ED on an emergency basis.

Presently, these services are performed within processes that are at either CMMI Level 1 or 2; the contractor shall assist ITD in improving these processes to CMMI Level 3 within three (3) years and CMMI Level 4 within eight (8) years of the start of the contract. The contractor shall support, an Earned Value Management System for all Category C work (time and materials and project based) in accordance with OMB regulations[4]. The contractor shall provide ED with personnel who are capable of, and have had prior experience in working within CMMI Level 3 environments.

Section III, Scope of Work, provides greater detail concerning the products that constitute these three Categories.

Productivity Improvement
Any time a process moves from CMMI Level 3 to CMMI Level 4, ED shall benefit from an increase in the quality of service delivered to its approximately 6,000 internal customers. ED enjoys a high ratio of professional staff to clerical staff. Therefore, as customer service improves,

---

[1] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.
[2] Tiger Teams are cross functional teams performing focused and tightly scoped projects.
[3] Security Services are cross functional in nature and cut across all of the other service areas.
[4] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

as a result of the service provider's process improvements, ED's customer base shall experience a commensurate increase in productivity.

ED also recognizes that a successful service provider shall capture savings through increased internal labor productivity as more of Category A processes are migrated from CMMI Level 3 to CMMI Level 4. ED's share of the benefits shall be reflected in improved quality of service associated with the functions and processes of ED customer (end user) operations.

IT Service Capability Maturity Model Integration Process

In order to achieve ITD's objectives, the contractor shall conform to the following methodologies. First, the concept of IT Service Capability Maturity Model Integration[5] as defined by ED.

Table 1.   CMMI Levels

IT Service Capability Maturity Model Integration Level[6]	Definition
IT Service CMMI Level 0	**Unaware**, no awareness of a need to improve IT service delivery.
IT Service CMMI Level 1	**Initial Phase**, IT service delivery is characterized as ad hoc, and occasionally even chaotic. Few processes are defined, and success depends on individual effort and heroics.
IT Service CMMI Level 2	**Repeatable**. Basic service management processes are established. The necessary discipline is in place to repeat earlier successes on similar services with similar service levels.
IT Service CMMI Level 3	**Defined**. The IT service processes are documented, standardized, and integrated into standard service processes. All services are delivered using approved, tailored versions of the organization's standard service processes.
IT Service CMMI Level 4	**Quantifiable Managed**. Detailed measurements of the IT service delivery process and service quality are collected. Both the service processes and the delivered services are quantitatively understood and controlled.
IT Service CMMI Level 5	**Optimization**. Continuous process improvement is enabled by quantitative feedback from the processes and from piloting innovative ideas and technologies.

Category A support shall be provided at CMMI Level 3 immediately upon contract award and therefore ED expects that this support shall be provided at a lower cost than is currently experienced today. Category B and C's services are expected to be consumed at the same general rate in the first year of the contract and therefore shall be no more expensive than today's costs.

However, as indicated above, the contractor is expected to migrate Category C services (currently CMMI Level 1) to Category A, CMMI Level 3. Accordingly, the contractor shall provide a comprehensive migration plan and (upon ED's approval) execute it.

Product Development Process

ITD shall use the Product Development Process, described below, as its management tool in monitoring product progress at all levels of the CMM.

ITD shall use the Stage-Gate® methodology[7] to manage the Product Development Process. ITD considers all IT services and projects to be products and shall manage them accordingly, fulfilling the role of gatekeeper. "The Stage-Gate® process is an operational roadmap for driving new

---

[5] Based, in part, upon research from http://www.itservicecmm.org.

[6] Ibid.

[7] Developed by Dr. Robert G. Cooper. http://www.stage-gate.com/research.html.

product projects from idea to launch — a blueprint for managing the new product process — improving effectiveness and efficiency.

How It Works

Product development begins with an idea and ends with the successful launch of a new product. The steps between these points can be viewed as a dynamic process. Stage-Gate® divides the process into a series of activities (stages) and decision points (gates).

Stages

Each stage contains a set of defined concurrent activities, incorporating industry best practices. Activities during each stage are executed in parallel to enhance speed to market. This is further enhanced by the use of cross-functional teams all working towards the same goals.

Gates

Gates are the decision points where senior managers decide whether to continue funding a project. The outcome of the decision is to Go, Kill, Hold, or Recycle the project. Gates also act as "quality control" checkpoints, which evaluate among other things:

- Have the deliverables been executed in a quality fashion?
- Is the project attractive from an economic and business standpoint?
- Is the information sufficient to make a decision?
- Is the action plan and request for resources sound?"[8]

II. Description of Current Operations

ITD is responsible for the full life-cycle management of EDNet, the Department's primary IT service delivery infrastructure comprised of network hardware, software and equipment. EDNet is the technical vehicle through which ED employees use many critical information resources and reach out to ED's customers. EDNet provides desktop services including a standard office automation software suite, enterprise-wide e-mail, desktop computers and peripherals. EDNet also houses an intranet (ConnectED), a presence on the Internet (ED.gov), and many custom business applications and information systems. EDNet includes enterprise level backup, recovery, archiving, storage / retrieval systems and security. EDNet is supported on a 7x24x365 basis[9].

The primary data center for EDNet, which houses the majority of EDNet's mission-critical systems, is being relocated in late 2004 from its current location at the Regional Office Building 3 in Washington, DC to a new facility in the Washington, DC metropolitan area in Oxon Hill, Maryland. In addition to the primary data center, EDNet has three secondary data centers in the Washington, DC area, and a disaster recovery and backup center, the Disaster Recovery Facility (DRF), in Kennesaw, Georgia. The primary and backup data centers support multiple ED offices located in Washington, DC and across the country.

As a Federal agency General Support System, EDNet is responsible for following and maintaining a current Disaster Recover Plan (DRP) to reconstitute the IT infrastructure required to

---

[8] http://www.stage-gate.com/research.html.
[9] Applies to server, security and network support.

4

support mission-critical functions during a disaster. The DRF facility has been designed to be a robust, compatible, secure, and scalable warm backup facility to the primary data center. Redundant connections have been provided to most ED locations to ensure maximum network availability. DRF interconnects with the Headquarters and regional facilities to provide connectivity in the event of a significant disruption of service and as a contingency for other services. The infrastructure in the DRF has been sized for expansion to provide warm backup and disaster recovery services to applications sponsored by other ED Principal Offices (POs), and offers additional expandability for future requirements. Such expansion shall be completed and funded incrementally as needed. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time.

EDNet currently includes:

- Program management, engineering, network and server operations, disaster recovery, database administration, messaging, telecommunications, multimedia and video teleconferencing;

- Providing nationwide IT office relocations;

- Providing cabling support;

- Supporting IT refreshes including new IT equipment and asset management;

- Maintaining a surplus IT equipment clearinghouse;

- Assistive technology engineering;

- Providing customer services including project assurance, project management, helpdesk and deskside support for approximately 6,000 users located in over 20 sites across the Nation; and

- Supporting regional operations including regional deskside support, records management, information management and other activities as needed.

EDNet Critical Functions are described in Appendix B.

III. Scope of Work
The contractor shall provide ED with top quality professional IT services to manage, support, and continuously improve EDNet. The detailed description of services for each functional area are included within this (Section III Scope of Work) and Appendix F – Detailed Work Descriptions. The contractor shall provide support services, and comply with ED's enterprise architecture, for, but are not limited to, the following:

All Categories

- Support shall be provided on a 24x7x365 basis[10];

- The Contractor shall provide weekly status briefings to senior management;

- ED's Investment Review Board (IRB), Technical Review Board (TRB) and Configuration Change Review Board (CCRB) processes (e.g., equipment entering the EDNet environment, etc.);

Category A

---

[10] This does not include helpdesk support. Helpdesk support is provided each workday, see Workday Appendix J, hours for Helpdesk operations are 0700 until 2200 EST and Deskside Support is 0700 until 1900 local time. *During the month of September and the first week of October the workweek is extended to include Saturday and Sunday.*

- User account management and administration including: user space allocations; changing customer's e-mail account's user name; creation and maintenance of e-mail distribution lists, moving files and account information within ED; changing account privileges; adding and deleting accounts; maintaining print queues; coordinate the transfer of account information anytime a customer's move (physical or organizational) would require information to be transferred to a different ED system;

- Data center operations including: server room management, surveillance of systems operations, backups and file restores, and management of: servers, server farms, load balancers, gateways, and firewalls;

- Assistive technology deskside support;

- Desktop image development and testing;

- Software version maintenance;

- EDNet customer services, Helpdesk support, including enterprise-wide systems including office automation software suite (e.g., word processing, spreadsheet, database, presentation / graphics, etc.), e-mail, Internet / intranet systems, video conferencing, Cisco AVVID infrastructure (to include IP Telephony, Broadcast Video over IP and associated AVVID applications) and hardware, to approximately 6,000 users;

- National and Regional operations deskside support, including Desktops, peripherals, appliances, and devices, such as PC's, laptops, palmtops and other personal digital assistants, printers, scanners, and PC peripherals;

- Small nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs); and

- IT refresh support, including new IT equipment, asset management database administration.

- Program management to include, measurements, staffing, analysis, tracking, reporting, and administrative support;

- Network operations and management support of ED personnel and equipment including converged communications, and networking including internetworking services, telecommunication services, multimedia / Video teleconferencing services, and wire and cable management (installation and maintenance);

- IT Image and Distribution Center - ITIDC (Warehouse/Clearinghouse) support, including IT equipment (hardware and software) surplus, disposal and redistribution.

Category B

- Systems engineering services;

- Introduction of radically new technology (e.g., switching desktop from windows based technology to a different technology);

- Application packaging, testing and delivery; and

- Large nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs).

Category C

- Product assurance;

- Program management to include overall management, measurements, dashboard development and maintenance, staffing, planning, accounting, tracking, reporting, and administrative support;

- Security support, including vulnerability management, malicious and mobile code identification, containment and eradication, penetration testing and log auditing;
- Network operations and management support of ED personnel and equipment including server operations (including NCES), INET (internet and intranet) operations, custom applications, change management / certification & accreditation, and security operations;
- Assistive Technology engineering (testing, compliance, etc.);

The contractor shall provide support as the IT service delivery infrastructure changes in scope and complexity, as determined by ED. ED reserves the right to include additional work deemed as within the general scope of this contract. The contractor understands that the volume of work could decrease or increase at any point during the life of the EDNet Management Contract. For example, the number of ED offices or locations could change at any time.

The contractor shall be required to support ED's customer accounts by managing Windows, Macintosh, Unix or other technology as covered by the then current ED Product Support Plan. The contractor shall provide timely, courteous and competent responses to its customers' requests.

The contractor shall provide support in the form of, but not limited to, answering questions concerning problem resolution for ED's standard COTS and some specialized applications for its customers. The contractor shall coordinate the transfer of information from Tier 0 / 1 to Tier 2 and Tier 3 services[11], some of which shall be provided by the contractor, ED, various third party vendors and Original Equipment Manufactures (OEMs).

The contractor shall provide subject matter expertise as a resource to be consumed by ITD's Product Development Process or continuing IT operations. This service can take the form of, but is not limited to, providing short term or continuous support for defined projects, such as performing a cost benefits analysis, architectural review, implementation planning QA, feasibility study, and application programming. Additionally, the contractor shall coordinate with and transfer to, any knowledge developed or required to the appropriate ED employees. The contractor shall perform project and time management, while meeting predefined objectives.

Finally, the contractor shall provide a set of processes and practices that bring server, messaging and user services immediately upon award of task to CMMI Level 3. The contractor shall actively migrate additional technical operational products through the Capability Maturity Model, using _Kaizen_[12], lean manufacturing[13] principles, and/or Six Sigma[14]. Supporting ED's management requires the ability, on the part of the contractor, to perform excellent, consistent and timely work, and to support executive level decisions through presentations to ED's management. The

---

[11] Tier 0 / 1 – self-help and basic helpdesk services, Tier 2 advanced helpdesk services and Tier 3 SME and OEM helpdesk services.

[12] _Kaizen_ is a process improvement methodology that considers human resources as the most important company asset, believes that processes must evolve by gradual improvement rather than radical changes, and believes that improvement must be based on statistical/quantitative evaluation of process performance.

[13] Lean methods create a continual improvement-based, waste elimination culture that involves workers at all levels of the organization and is based upon three objectives 1) Reduce production resource requirements, 2) Increase manufacturing velocity and flexibility, and 3) Improve quality and eliminate defects.

[14] Six Sigma is a rigorous and disciplined methodology that uses data and statistical analysis to measure and improve a company's operational performance by identifying and eliminating "defects" in manufacturing and service-related processes. Commonly defined as 3.4 defects per million opportunities, Six Sigma can be defined and understood at three distinct levels: metric, methodology and philosophy.

contractor shall include root cause costs as a part of doing business to be borne by the contractor and shall work with ED to define processes and report formats in order to define the events that drive this requirement.

ED recognizes that the migration to Managed Services is a mature business practice used by many organizations to ensure responsive and competitive operations. The contractor shall work with ED to implement an IT infrastructure that is consistent with industry best practices and the contractor shall provide a comprehensive, best value solution. The contractor shall provide support services for, but not limited to, the following of EDNet include Category A (FFP per Unit Services), Category B (FFP / T&M Project Services) and Category C (Sustaining T&M Support):

Transition In Plan

The Service Provider shall provide a comprehensive Transition In Plan that shall be used for the first two (2) month's at ED and will integrate with the incumbent's Transition Out Plan. This Transition In Plan should complement the incumbent's Transition Out Plan and include, at a minimum:

- Identification of Risks and Risk Mitigation
- Level of Effort
- Schedule (including milestones)
- Resource Allotments
- Dependencies
- Costs

Appendix I contains the elements the contractor can expect from the Transition Out Plan.

Transition Out

Sixty (60) days prior to the expiration or termination of the contract, the contractor shall provide a Transition Out Plan. The offeror shall present a detailed plan for any Transition Out tasks, regardless of precipitating reasons. The Transition Out Plan shall be constructed so as to require no more than 60 days from termination notification to phase-out completion. The plan shall include procedures to minimizing impact on contract performance. Transition Out Plans shall include provisions for completion of all contractor responsibilities.

The Offeror's Transition Out Plan shall:

- Present procedures for retaining the required staffing level including key personnel necessary to provide complete contractual support through the expiration of the contract.
- Include a work breakdown structure and cost estimate.
- Include a training plan and schedule for each activity covered by the contract.
- Describe in detail how responsibility and accountability will be relinquished for all government-furnished equipment.

The offeror shall coordinate its activities with other contractors to effect smooth and orderly transitions at the beginning and the end of contract periods. The offeror shall remove all contractor-owned equipment, tools, parts and belongings from the Government-furnished spaces by midnight of the last day of the contract.

Enterprise Email / Messaging Architecture

The Service Provider shall provide a stable enterprise email system capable of supporting ED's user communities. The architecture shall accommodate system availability and reliability as describe the Service Level Agreements in Section IV.

An annual Email Architectural Fee shall be charged to ED. This annual fee is to cover the development and upkeep of ED's email architecture. The architecture shall accommodate a

6,500 customer email base with the following identified needs, it is understood that ED's needs will continue to evolve over time and this list shall be understood to be a starting point, not an exhaustive list:

- 24x7 Uptime within SLA limits (see Section IV of the PWS)
- Appropriate Redundancy to maintain SLAs
- Disaster Recovery Planning to meet SLA
- Backup and Restore Capabilities on a mailbox, post office, server and system level
- Email Message Disk Space Management
- Email Message Archiving that meets Federal Regulations
- SPAM filtering
- Remote Connectivity from PCs and the Web
- Wireless Email Access
- Access through handheld devices, such as but not limited to, PDAs and Blackberry devices
- Integration with VoIP voicemail messaging
- Strategy for incorporating Instant Messaging
- Virus Scanning capabilities for incoming, outgoing and internal messaging
- Secure Messaging (Encryption) for both internal and external messages

The Service Provider shall provide an architecture that shall place stability of operations above other considerations. The existing email system is described under Category A of the PWS.

Expected Investment in Tools

The Service Provider shall provide a description of which tools shall be introduced, how the tools shall be introduced, and how those tools shall improve customer satisfaction and/or ED's productivity. The Service Provider shall make an investment in these tools, and if the Service Provider chooses, a line item charge may be included in the cost proposal. This line item may include any additional yearly maintenance charges. It is understood that ED will own intellectual property to all data, the software and the licensing of these tools[15]. These tools include:

(1) Management Information Dashboard.
- Offeror shall provide a tool that provides a daily snapshot of how ED and the offeror are delivering IT operations, historical information, trend analysis and correlation, summary of challenges, and recommendations as needed, in a format that is viewable by all stakeholders (e.g., web site, reports, etc.).

(2) Performance Monitoring Tools
- Performance monitoring tools shall be used to measure IT infrastructure performance, IT infrastructure uptime, and keep track of security metrics. Service provider shall list what tools shall be used to manage performance.

(3) Project Management Tools
- Project management tools are required to provide, among other things, budget variance reports (project over-run and under-run metrics), resource usage, task usage, milestone reports, and comply with OMB and other regulatory earned value requirements[16]. Service provider shall list what tools shall be used to manage projects.

---

[15] ED will own all licenses and tools that are listed as a line item in the Cost Proposal worksheet, but not tools provided by the offeror at no charge to ED. At ED's option "free" software and licenses may be purchased from the offeror at GSA or better rates. **All data is the intellectual property of ED.**

[16] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

(4) Communication Tools
- Contractor shall provide, at their expense, appropriate use of communication tools for their staff that will interface with ED's current communication environment. This is inclusive of, but not limited to:
  a. Cellular Phone Hardware and service
  b. Blackberry Hardware
  c. Personal computers required for remote support

Major IT Issue Handling

A major issue is defined as any IT event that affects more than 50 employees (e.g., email outage, virus attack, VoIP outage, security event, etc.). All major events shall follow the escalation procedure, root cause analysis and customer communication procedure described below.

Escalation Procedure

The Service Provider shall follow an escalation procedure when responding to major issue(s). The service provider's escalation procedure shall conform to or exceed the following guidelines:

- Notify the appropriate ITD Manager or designee within fifteen (15) minutes of becoming aware of any major IT issues. Notification shall occur via voice communication. If the ITD Manager or his/her designee is unavailable the service provider shall immediately notify the Directory of IT or his/her designee.

Customer Communication

The Service Provider shall provide communications directly to the affected customer (end-user) base once OCIO management has been informed for all major IT issues. Communications shall take the form of informational web updates via ConnectED, voice mail and/or email, as appropriate. All communications regarding IT issues shall be approved by a Service Provider manager and ED prior to release and shall include at a minimum an explanation of the problem and anticipated resolution time.

Root Cause Analysis

The Service Provider shall perform root cause analyses for all major issues. Once root cause has been determined an alternative analysis shall be performed, followed by a plan for remedy, which shall be presented for OCIO executive review and decision. Remedies shall be tracked and an update shall be provided to OCIO executive management providing expected results measured against actual results. For Category A work, the cost of this process shall be borne by the service provider.

Category A (Firm Fixed Price per Unit Services)

The Contractor shall:

Provide Program Management

Provide backoffice support for Program Management function performed under Category C. Services to be performed under Category A include gathering of metrics data, staffing/administrative support, analysis and report/communication preparation.

Support the production servers environment

Provide Hardware and Software support for the **server infrastructure** on ED's behalf, managing delivery, configuration, installation, and systems administration in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- Server and Software Installation / Refresh Process
- Ongoing Server and Software Maintenance Process
- Server and Software Install, Moves, Adds and Changes (IMACs)

- Server and Software Disposal and License Recovery
- Data protection, backup, and recovery in accordance with SLAs
- See Table 6 for additional detail

Systems include approximately 520 servers (including the disaster recovery facility), 32 administration accounts, including 6 Domain Controllers and 6 Exchange Administration accounts, approximately 400 applications and approximately 16+ TB of disk storage. See Table 2 for geographic locations and a complete inventory and description of technology to be supported

Maintain production servers

The contractor shall perform server support operations, which include server, data center, server image management, helpdesk call center support, network systems monitoring, Tier 2 support including remote management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images for Windows and Unix systems[17].
- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.
- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

Hardware and Software Equipment Inventory / Service Criticality

The following table depicts the current equipment inventories of servers[18], see Table 2, grouped by equipment type and criticality of service. Each table is arranged with Type of equipment on the "Y-Axis" and Criticality[19] on the "X-Axis". Within each block the location and number of equipment is displayed.

Table 2. Server Inventory*

Criticality / Equipment Type	(1) Standard Server O&M (No DR Required)	(2) Mission Supportive Systems (Second Wave DR)	(3) Mission Critical Systems (DR Required)	(4) Critical Infrastructure / Service (DR Required)	Totals
	60	136	50	108	
	9	26	4	8	
	0	6	26	15	
	0	2	0	1	
	1	0	0	2	
	0	0	1	8	

---

[17] As this contract has a potential ten-year life span, it is expected that the Product Development Process has the potential to introduce new operating platforms and systems.

[18] As of June 2004.

[19] Criticality is defined as Level 1 -- No Disaster Recovery (DR) Required, Level 2 – Second Wave DR, Level 3 – DR Required, and Level 4 – DR Required.

	0	0	0	11	
	0	3	0	31	

*Note that the numbers of servers / equipment change frequently.

Maintain messaging services including E-mail and Blackberry

Provide a process for managing all **messaging services** in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- E-mail, blackberry (or equivalent), PDAs, and storage services

- Remote and Mobile customer support

- Data protection and recovery in accordance with SLAs

- Exchange Central administration and maintenance for approximately 50 users

The Messaging System includes approximately 6,000 accounts and mailboxes utilizing approximately 500 GB of data (95 percent of accounts are size restricted to 100 MB) and approximately 500 Blackberries[20].

Provide Messaging Services including E-mail and Blackberry

The contractor shall perform messaging services operations, which include messaging monitoring, Spam filtering, anti-virus scanning and blocking of the messaging systems, disaster recovery of the messaging system, messaging systems management, helpdesk call center support, Tier 2 support including remote management of customer e-mail accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Include Tier 0 / 1, helpdesk support, simple network systems monitoring, Tier 2 support including remote access, management for some COTS applications (anti-virus), account administration and operate and maintain the interface with other Tier 2 and Tier 3 support organizations, for all supported messaging systems (Blackberry, Microsoft Exchange or equivalent).

- Maintain ED's messaging system, including their Blackberry (or equivalent) solution.

- Continually integrate industry best practices for messaging tools and technologies that enhance the productivity of the customer, thereby driving down messaging support costs for ED.

- Provide enhanced technologies that identify and eliminate potential causes of problems and speed resolution times, thus improving ED employees' productivity.

Messaging Account Inventory[21]

Complete inventory grouped by service type is provided in Table 3.

---

[20] As Blackberry usage is expected to grow, this number may not be accurate at the start of the new contract.
[21] As of June 2004.

Table 3.   Messaging

Type of Service	Number of Users
	6,000
	500
	50

The contractor's solution shall, at a minimum, provide the features shown in Table 4.

Table 4.   Features

Features
An **integrated account management** solution.
Maintenance and day-to-day **operations of ED's messaging systems.** Ensuring systems performance, reliability and accessibility.
Anti-virus and Spam solution compatible with ED's messaging environment.
Remote connectivity through AS 5300, Virtual Private Networks (VPN), Outlook Web Agent (OWA), and Firepass.
Ability to **restore a single customer's mailbox.**
Appropriate **disaster recovery** planning and execution.
Ownership of problems from identification to solution / resolution.
Seamless **problem distribution** and **problem resolution** management support.

Maintain Customers (End Users) and their Equipment

Provide Hardware and Software support for the **end user infrastructure** on ED's behalf, managing delivery, configuration, installation, and accounts in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- PC and Software Installation / Refresh Process
- Ongoing PC and Software Maintenance Process
- PC, software, and cabling Install, Moves, Adds and Changes (IMACs)
- PC and Software Disposal and License Recovery
- Data protection and recovery in accordance with SLAs
- Remote and Mobile customer support, including approximately 800 cell phones and 500 PDAs
- Peripherals management, including printers and print queues
- Asset Management
- Assistive Technology Deskside Support
- See Table 6 for further detail

PC systems including approximately 5,500 PCs, 2,000 laptops, and less than 75 Macintosh PCs, laptops or other devices. Accounts include approximately 6,000 Active Directory, Macintosh and Unix accounts utilizing approximately 4 TB of data storage. See Table 5 for user priority, 90 percent of all customers (end users) are located in the Washington DC area. Hardware

descriptions of typical PCs are located in Appendix B and software descriptions are located in Appendix C.

Support Customers (End Users) and their Hardware and Software
The contractor shall perform customer (end user) support operations, which include deskside equipment and peripherals (including printers and assistive technology), deskside image management, helpdesk call center support, Tier 2 support including remote desktop management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images, including but not limited to, Windows and Macintosh systems.

- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

Information Technology Imaging and Distribution Center (ITIDC): Enterprise Lifecycle Management Support (ELMst)

Provide Enterprise Lifecycle Management Support (ELMst) services for The Department of Education EDNet contract.

The ITIDC support shall develop plans, directives, polices and procedures to facilitate the Department's surplus IT equipment for disposal or redeployment of IT equipment meeting the minimum EDNet specifications.

The contractor shall provide program and project management, administrative support, and documentation development in support of business processes that represent a systematic approach to effectively manage the disposal and redeployment of IT equipment meeting the minimum EDNet specifications for the Department of Education'. The contractor shall also provide services to support vendor management, shipping and receiving of all IT equipment, and workflow management for the ITIDC services.

Performance Requirements Summary:
The Contractor shall:

- Operate and manage a central processing and secure storage facility surplus IT equipment.

- Be held accountable for all IT assets and participate in the annual physical inventory and reconciliation process.

- Provide regional surplus inventory management following the department guidelines for surplus / disposal of IT assets.

- Coordinate DOA replacements for the first 30-days of receipt.

- Evaluate IT Equipment (desktops, laptops, monitors, and printers for redeployment within the EDNet environment..

- Install and test the EDNet standard configuration for all desktops, laptops and printers within the EDNet environment.

- Coordinate all workflow activities for the ITIDC.

- Provide Shipping and Receiving support for all IT equipment in the EDNet environment.

Hardware and Software Equipment Inventory / Service Priority
The following table depicts the equipment inventories of customers (end users), see Table 5, grouped by software tier type and priority of service. Each table is arranged with Tier of software on the "Y-Axis" and Priority[22] on the "X-Axis". Within each block the location and number of equipment is displayed. Software tiers are detailed in Appendix C. The typical computer system that shall be supported by the contractor is also detailed in Appendix C.

Table 5. End-User Equipment Inventory[23]

END USER SUPPORT	Priority 3 (Standard Service)	Priority 2 (30 Minute response, warm hand offs for escalation)	Priority 1 (Immediate deskside dispatch)	TOTAL[24]
	4,781	198	26	
	589	0	0	
	294	0	0	

*See Appendix C

Since many of the customer (end user) solutions rely upon the production server environment the features from both have been combined into a single table to avoid arbitrary distinctions. The contractor's solution shall, at a minimum, provide the features shown in Table 6 for both the server and end user environments.

---

[22] Priority is defined as Level 3 – Standard Service, Level 2 – 30 minute response and warm handoff for escalation, and Level 1 – Immediate deskside dispatch.
[23] The tier distribution has been estimated from ED inventory data.
[24] ED understands the distribution of employee volume across tiers 1-3 does not match typical industry norms and will work with the service provider to achieve an industry normal distribution between tiers 1-3.

Table 6.   Server and End User Features

Features
Automated Asset Management – Electronically supported life cycle driven asset management process. Automated asset management consists of electronically supported procurement, automated inventory, and centralized data repository that are available to financial, administrative, technical planners, system administrators, and the helpdesk. Managed data within the asset management system consists of contract terms (maintenance contracts), hardware inventory, software inventory, accounting, maintenance records, change history, support history, and other technical and financial information.   At a minimum, Electronic tools are integrated; so that all input is shared and never repeated between tools and constituencies can view the data in a consistent and up-to-date database or databases. The objective is to optimize assets to lower costs with a proactive lifecycle approach that views IT assets as a portfolio. Vendor may be requested to use Government-furnished property. Vendor shall provide information portability between government- and vendor-furnished property.   *All intellectual property resides with the Government.*
Automated Software Distribution – the ability to install software on a client device without having to physically visit each device. Techniques involve either push, the more advanced method where the server drives the upgrade, or pull, where the customer drives the upgrade by running an installation script from a centralized server.
Virus Detect and Repair – software system that actively monitors and detects virus intrusions, alerts system operators and users to such events, and provides automated eradication and damage repair to the extent possible. The software shall protect both clients and server systems. Automatic updates of the virus detection and repair capability must be available and maintained. The software system shall be fully integrated with processes and policies that provide manual intervention when needed, support for remote / mobile users, and include policies for file / disk sharing and downloads.
Systems Management – automated event management system that proactively and reactively notifies system operators of failures, capacity issues, traffic issues, virus attacks and other transient events. The tools allow monitoring of system status, performance indicators, thresholds, notification of users, and dispatch of trouble tickets.   Systems Management provides optimal system performance, quicker resolution of problems, and minimizes failures.   Automated solutions are used in support of distributed computing operations processes and policies for performance and failure detection and correction, as well as optimization.
Server Based Client Image Control – the ability for a desktop administrator to create a client specific configuration of applications, settings, and privileges on a server. These can then be automatically downloaded to a specific address or set of addresses on the network; therefore, configuring the clients initially, and ultimately standardizing the maintenance of configurations. A client agent is used to synchronize the server and client images for change management.
Scalable Architecture – technology infrastructures that can logically and physically increase in performance and capacity with continuity to meet reasonable growth and change over time. A scalable architecture contains a strategic migration plan for continuous growth and progress.
Fault Tolerance – systems recognize component failures and provide automatic and seamless switching to redundant components, eliminating downtime.
Automated Backup and Restore – provides for backup of the data stored on network servers, as well as desktop and mobile clients. Automated backup and restore does not necessarily provide state management, but enables files to be backed up on a regular basis (without user intervention) and to be stored off-site. If a disaster or loss of files shall occur, the data is available on a backup medium and can be fully restored. Protection shall be the ability of the entire file

system to be restored to a new machine, in the event that the failure required hardware replacement.
Automated Helpdesk Problem Management and Resolution – allows calls to the helpdesk to be ticketed, escalated, dispatched, and closed. Systems include call management, problem management, and resolution supported by a knowledge database. The knowledge database provides a record of all problems and documentation on typical issues and utilized resolutions. At a minimum, an integrated system of tools is in place. Call tracking, escalation and resolution systems are integrated with voice response, e-mail, phone, remote control, asset data and user profiling repositories. Proactive problem elimination is the goal, however reactive problem resolution is the norm. Service levels have been escalated and metrics have been automated into regular management reports. Customer satisfaction is the objective.
Enterprise Policy Management – managed technical environment in which a network or desktop administrator can control, with rules-based logic, which applications, settings, network resources, databases, and other IT assets a user can use. This environment is defined by user ID and is not necessarily machine specific. It is typically implemented by user profiles maintained at the server and synchronized with the client device that a user is logged onto. Enterprise policy management precludes the user from making changes to the system, such as introducing unauthorized software or changing settings that may cause conflict with other system resources. As well, a managed environment controls the ease of use of the desktop, providing a common set of applications and access for groups of users or individuals. In this manner, the user is presented only with the tools they have been trained on and need for the job, and assures that changes are managed.
Change Management – the procedure, policies, and tools established to monitor client computers and other network assets to assure that unauthorized changes are not being implemented. It also affirms that a database of changes is available so that changes can be easily recognized during troubleshooting activities. At a minimum, procedures are supplemented with technology and process controls that automate and enforce the change management procedures.
Data Security Management – the logical protection of organizational data from corruption, theft, or compromise. Data security management involves user identification and authorization, proper controls on downloading and uploading files and data, firewalls, and other technology barriers to prevent unauthorized access, theft, and corruption.
Service Level Tracking and Management – service levels are tracked and managed. The metrics contained in Section IV, Performance Standards and Acceptable Quality Levels, are specific, measurable and meaningful.
Ownership of problems from identification to solution / resolution.
Seamless problem distribution and **problem resolution** management support.

Maintain Helpdesk Support for all Category A products

Provide a **single point of contact** (SPOC) to act as the primary interface to the thousands of customers that use various enterprise applications (e.g., E-mail), desktop and server hardware, Commercial off the Shelf Software (COTS) as well as custom developed applications, including but not limited to:

- First level problem and user request support including effective troubleshooting and resolution for those problems and requests that can be resolved remotely.

- Effective troubleshooting, triage, assignment and dispatch for those problems and requests that require second or third level support including support delivered at the customer's location.

The contractor shall provide all server, end user and messaging support including helpdesk operations subject to specific expectation level process maturity, SLAs and continuous improvement going forward. ED's helpdesk receives, on average, 6,700 calls per month.

Helpdesk Support
The contractor's server, end user and messaging operations, shall include Tier 0 / 1 helpdesk support, simple network systems monitoring, Tier 2 support including remote desktop management for defined number COTS applications and operation and maintenance of the interface with other Tier 2 and Tier 3 support organizations, for all supported hardware and software. The contractor shall:

- Maintain a SPOC for all systems for customers to obtain resolution of all IT problems and/or technical issues including Tier 0 / 1, 2 and 3 helpdesk service.

- Continually integrate industry best practices for helpdesk tools and technologies that enhance the productivity of the helpdesk agents, thereby driving down helpdesk support costs for ED.

- Provide enhanced technologies that speed resolution times or proactively eliminate end-user problems, thus improving ED employee's productivity.

Helpdesk User Priorities
Below are the definitions of the different Helpdesk user categories and priorities:
- **Priority 1 Customers (Users)** – Senior executive for the Department of Education (Secretary of Education and direct reports)

- **Priority 2 Customers (Users)** – Direct reports to Secretary's direct reports

- **Priority 3 Customers (Users)** – Remainder of the Department of Education users

Helpdesk Call Volumes
Complete history of call volumes for EDNet's Helpdesk from June 2002 until January 2004, see Table 7.

Table 7.   Monthly Helpdesk Call Volumes

Month Year	January	February	March	April	May	June	July	August	September	October	November	December	Totals
2002	-	-	-	-	-	6,724	7,318	8,643	8,175	6,205	6,800	4,942	
2003	6,353	5,415	7,697	7,366	6,687	6,789	7,102	8,178	7,527	7,794	5,867	5,490	
2004	4,879												

The contractor's solution shall, at a minimum, provide the features shown in the Table 8.

Table 8.   Features

Features
A **single point of contact** for problem and service requests.
Ownership of problems from identification to solution / resolution.
Seamless **call distribution** and **call management** support.

Network Services: Converged Communications and Networking

Network Services

18

The Network Services Group supervises, monitors, and maintains the U.S. Department of Education Service Delivery Infrastructure Network (EDNet) to deliver a full range of voice, video, and data communications solutions and services, including Smartnet. The Network Control Center (NCC) is the focal point for network troubleshooting; firewall, router, switch and network device management; IP telephony and unified messaging; performance monitoring; and coordination with affiliated networks. NCC technicians perform Helpdesk (Tier 2 and 3) customer service and provide access control and information security support services.

- **Provide Network Monitoring Services** through the continuous monitoring of network availability and services. The Contractor shall provide network-monitoring services to include, but not limited to, responding to and remedying network alerts, monitoring network traffic, publishing usage reports, coordinating circuit outages and installations, etc.

- **Provide Network Configuration Management Services** by maintaining the identification, documentation, and reports for network elements and appliances, including their versions, constituent components and relationships for EDNet network hardware, network management software and associated documentation. The Contractor shall provide network configuration management services to include, but not limited to, maintaining IP schema database, maintaining router access control listing (ACL), etc.

- **Provide IP Telephony Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the IP telephony system, IP-based Private Branch Exchange (IP PBX) hardware equipment, software applications and services, including features, such as advanced call routing, voice mail, contact centers, etc., that can be utilized. The Contractor shall deploy and maintain the call routing and dial plans for Cisco IP phone solutions that utilize advanced call routing, voice mail, contact centers, etc. The Contractor shall seek to leverage audio and video conferencing solutions that help the agency increase productivity and business communications by employing the latest advances in computer networking and multimedia. The Contractor shall deploy IP phone solutions are standards-based, including protocols such as H.323, MGCP, and employ the appropriate bandwidth and traffic shaping through Quality of Service (QoS) to provide high-quality voice transmission. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Integrated Call Distribution Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the Cisco Integrated Call Distribution (ICD) system hardware, software applications and services, including features, such as the customer response applications (CRA) editor, Interactive Voice Response (IVR), Auto Attendant (AA), historical reporting and recording session services. The Contractor shall develop and maintain ICD scripts based on individual customer requirements that offer increased productivity and customer service. The Contractor shall create and maintain VoiceXML applications that leverage speech recognition technology to support end-user requirements. The Contractor shall be equipped to handle standard and advanced troubleshooting tasks. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Unified Messaging Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the Cisco Unity unified messaging system hardware, software applications and services, including integration with Microsoft Exchange. The Contractor

shall develop and maintain user profiles and access control for phone and web-based applications such as Unity ActiveAssistant. The Contractor shall provide Tier 1 (customer service), including answering frequently asked questions, training end-users, Helpdesk and other network services group personnel on the capabilities and functionality of the system. The Contractor shall develop and maintain user profiles based on individual customer requirements that offer increased productivity and customer service. The Contractor shall be equipped to handle standard and advanced troubleshooting tasks. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

Telecommunications Services

- Provides ordering services and centrally manages the acquisition of telecommunications resources, including equipment, facilities and services to ensure that these resources are acquired in a manner that is most effective for the government.

- Coordinates agency use and support of national security and emergency preparedness (NS / EP) telephone networks and services.

- Provides Helpdesk (Tier 2 and 3) customer service support.

- Coordinates contracts and maintenance level agreements with the GSA Federal Technology Services (FTS) Division and the telecommunications service providers.

- Provide Analog / ISDN Voicemail Services by maintaining reliable and secure voicemail platforms for headquarters and regional office locations. The Contractor shall provide voicemail administration services to include, but not limited to, maintaining access control, responding to and remedying system alerts, monitoring system traffic and load, publishing usage reports, coordinating voicemail outages and installations, performing user problem troubleshooting, etc.

Multimedia Services Group

The Multimedia Services Group operates and maintains the Department's audio-visual equipment, most notably the 57 custom room and Video Teleconferencing Center (VTC) systems throughout headquarters and regional offices. Additionally, remotely manages the regional VTC facilities to include security, orientation, and provide Helpdesk (Tier 1, 2 and 3) customer service support and reservations for VTC resources. Maintains the accountability of multimedia resources, including ad-hoc voice mail delivery system for the Office of the Secretary, implementation of IP / TV for the enterprise, ISDN circuit-switched network for VTC. Designs, installs, maintains audio-visual and VTC equipment and services. Support for audio-visual production and equipment for the EDNet network and other non-EDNet systems, including the Secretary's conference room and auditorium facilities. Performs standard and advanced troubleshooting and calibration. Develops closed captioning for video communications in compliance with Section 508 Accessibility standards. Supports the cable television and satellite television services and head-end equipment.

- **Provide Audio-Visual Support Services** by providing services, including but not limited to: video production services and audio visual support for the agency, handle audiovisual and communication equipment repairs for educational activities and special events located throughout agency buildings in greater Washington, DC area. The Contractor shall provide support services to assist in the design, installation, testing, operations and maintenance of agency audio-

visual equipment and facilities as needed. The Contractor shall perform video production and editing, including open and closed-captioning, of content used for such services as online learning, training films, and executive-level broadcast messages. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Video Teleconferencing (VTC) Services** by providing design, installation, testing, operations and maintain a full range of video teleconferencing products and services that increase business communications and reduce unnecessary travel costs as needed. The Contractor shall maintain and optimize the current architecture to support video teleconferencing and recommend new and alternate solutions that maximizes the benefits of converged video, data and audio conferencing for users. The Contractor shall provide primary customer support (i.e., Helpdesk) services to handle requests and schedule the bridging of multipoint VTC sessions across the enterprise and outside the enterprise to "off-net" VTC endpoints. The Contractor shall provide standard and advanced troubleshooting of VTC equipment and serve as a liaison with product vendors, such as Polycom. The Contractor shall provide services to schedule and install desktop video conferencing systems with the end-users across multiple Washington, DC area locations and coordinate the deployment of these services remotely with technicians to regional office locations. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- Provide Cable Television (CATV) Services by providing design, installation, testing, operation and maintain equipment, facilities and services that support cable television (CATV) and IP-based television (IP / TV) services (or video telephony) to multiple locations throughout the Washington, DC area and regional office locations as needed. The Contractor shall provide standard and advanced troubleshooting of Cisco video broadcast over IP (IP / TV) equipment, maintain archived content on servers, and develop and maintain the ability to provide video on demand (VOD) services. The Contractor shall develop associated standard operating procedures to support the proper operation, maintenance and security of the system(s).

Category B (Fixed Price / Time and Materials Project Services)
Maintain **availability of subject matter experts (SMEs)** as needed number of defined projects per year. The contractor shall:

- Be responsible for maintaining two personnel rosters. The first comprised of qualified Business Executives and the second comprised of Qualified Personnel[25] that may or may not be working on the contract that ED can pull from in the case of a critical operational issue.

  o Business Executives may be called to lead tiger teams[26], compromised of personnel from various technical disciplines, among other things for short to medium duration tasks.

  o Personnel may be called to support: customer service improvement events, virus attack, system-wide problem resolution, serious email issues, market analysis, security, wireless solutions, computer forensics, load testing, data

---

[25] Qualified Personnel shall have security paper work and training completed before being added to the roster.

[26] Tiger Teams are cross-functional teams performing focused and tightly scoped projects.

     center expertise including: infrastructure, moves, cabling, HVAC, electrical / UPS, equipment, maintaining a technology roadmap, training, etc.

    o Both rosters shall be composed of personnel who have successfully completed ED's security requirements, including ED's security training and security paperwork.

    o It is expected that operational personnel shall be available within twenty-four (24) hours and Subject Matter Experts (SME) shall be available within two (2) weeks upon a request for assistance from ED.

- Use an Earned Value Management System that complies with OMB and any other relevant regulatory requirements to provide earned value information to ED for use in its reporting requirements.

- Provide resources for approximately 36,000 hours per year who are to be used at ED's discretion in executing ITD's Product Development Process outlined in Section I, Introduction.

Most projects shall occur within the Washington DC area, See Appendix A for a detailed list of Washington DC area locations. Some example projects include major moves (100 regional staff from one building to another), or an enterprise software upgrade from one version to the latest version (i.e., Exchange 2000 to Exchange 2003). Category B will be the preferred method for ED to acquire SME during the lifetime of this contract.

The contractor shall provide SMEs in a variety of technical fields, including, but not limited to, project management, business management, technical architecture (i.e., network, web, database, application development, etc.), security architecture, product experts, programmers conversant in the most current computer languages, network engineering, etc. The contractor shall assign resources to work within ED's Product Development Process and provide personnel with demonstratable skills, competence and experience necessary for a CMMI Level 3 process environment. The contractor shall at a minimum:

- Provide capable personnel who are able to perform the work as determined by projects' needs

- Maintain personnel with minimal turnover, defined as less than twenty (20) percent turnover during the lifetime of any specific Category B project

- Fill all vacancies within ten (10) business days

- Invoice on a per project basis

- Provide a yearly audit of all Project activity

- Comply with OMB and other regulatory earned value requirements[27]

- Meet the acceptable quality levels for relevant Category B service, see Section IV Performance Standards and Acceptable Quality Levels

The contractor's solution shall, at a minimum, provide the features shown in Table 9.

---

[27] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

Table 9.   Features

Features
An **integrated project management** solution.
Provision of SME and/or Business Executives appropriate for each project.
Ownership of problems from identification to solution / resolution.
Management of projects to scope, schedule and budget.

Category B Support Areas

Projects, which includes Project Management of tasks as assigned and provision of SMEs, shall be provided on a managed project basis. The contractor shall:

- Provide cost estimates and proposals on a project-by-project basis prior to project commencement.

- Manage projects using an OMB compliant earned value management system[28].

- Continually integrate industry best practices for project management tools and technologies that enhance the productivity of the customer, thereby driving down project oversight support costs for ED.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee's productivity.

- See detailed descriptions of tasks in Appendix F.

Provision of SMEs, the contractor shall provide:

- Business Management – Executive roster of qualified staff to lead tiger teams[29], compromised of SMEs and personnel from various technical, program and budget disciplines, among other things for short to medium duration tasks.

- Information Management – Expertise to supplement ED's Information Assurance program using state of the art processes, policies and equipment.

- Enterprise Strategy – Expertise to supplement IT Strategy initiatives, including IT Investment Management (ITIM), Enterprise Architecture (EA), business case development, OMB300 submission, portfolio management, records management, IT market analysis, etc.

- SMEs in a variety of technical, administrative and program fields.

Category C (Sustaining Time and Materials Support)

Demonstrate **availability of qualified personnel** for continuous staffing of IT processes managed by ED. The contractor shall:

- Manage projects using an OMB compliant earned value management system[30].

- Provide qualified staffing not to exceed 160,000 hours per year (expected to steadily decrease for the term of the contract as worked is moved under Category A).

---

[28] Ibid.

[29] Tiger Teams are cross-functional teams performing focused and tightly scoped projects.

[30] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

See Appendix A for geographic locations of ED offices, most continuous support staff shall be located in the Washington DC area.

The contractor shall provide Qualified Personnel who shall meet the continuous day to day demands of the ITD Implementation / Transition Plan and ongoing daily operations. Tasks described here are outside of the scope of tasks described in Categories A and B. All intellectual property developed while meeting Category C objectives shall be the sole property of the Government. The contractor shall, at a minimum:

- Provide capable personnel who are able to cover the work schedule as determined by ED
- Maintain personnel with minimal turnover, defined as less than ten (10) percent attrition per year
- Fill all vacancies within ten (10) business days
- Track attendance and hours in accordance with Government regulations at the project level
- Invoice on a monthly basis at the project level
- Provide a yearly audit of all time and material activity at the project level
- Furnish level of effort estimates for any new task items at the project level
- Provide any required earned value detail to ED for its reporting requirements at the project level
- Meet the acceptable quality levels for relevant Category C service, see Section IV Performance Standards and Acceptable Quality Levels

The contractor's solution for all Category C services shall provide, at a minimum, the features contained in Table 10. Features.

Table 10. Features

Features
Provision of qualified personnel appropriate for each task.
Ownership of problems from identification to solution / resolution.
Management of tasks to scope, schedule and budget.

Category C Support Areas
Program Management, which includes overall management, measurements, dashboard development and maintenance, staffing, planning, tracking, reporting, and administrative support. The contractor shall:

- Provide articulate and highly trained personnel trained in standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The expected level of effort / Full Time Equivalents (FTEs) to meet these tasks are: 5 to 7 per year after the Phase I C to A migration.

Ongoing Project Management, which includes Scheduling, Administrative Support, and Other Tasks as assigned are expected to provide continuous project management support for the Project Management Office. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / Full Time Equivalents (FTEs) to meet these tasks are: 2 to 4 per year.

Server Operations, which include Project Management of tasks, INET, Change Management, Data Base Administration, Security Operations, Custom Application Support, Other Tasks as assigned, and are expected to provide Disaster Recovery support on a continuous basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 29 to 31 per year.

NCES Support, which includes support of NCES' server operations components by providing technical expertise in the Microsoft Windows, Linux, and F5 BigIP infrastructure. This expertise shall be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills. The contractor shall:

- Provide database maintenance.
- Provide Server and Microsoft IIS support.
- Provide ad hoc custom application support.
- Support the Department's mission critical Security Operations.
- Provide Web development and programming support.
- Provide design for new systems, applications, and databases as required.
- Act as point of contact for other developers working with NCES.

The initial expected level of effort / FTEs to meet these tasks are: 2 to 4 per year.

Product Assurance, which include Project Management of tasks, Independent Review and Testing, Improvement Analysis and other tasks as assigned are expected to be provided on a continuous support basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- Detailed descriptions of tasks are provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 2 to 4 per year.

Converged Communications and Networking, which includes Project Management of tasks, Network Services, Telecom, Video Teleconferencing (VTC), Multimedia, other tasks as assigned, and are expected to provide networking, telecom, and multimedia video teleconferencing operations on a continuous support basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.
- See detailed descriptions of tasks provided in Appendix F.

The expected level of effort / FTEs to meet these tasks are: 6 to 8 per year after the Phase I C to A migration.

Engineering and Lab Support Operations, which include Assistive Technology Engineering (testing, compliance, etc.), Technical Writing, Enterprise Architecture, Technical Review Administration and Project Management of tasks as assigned and is expected to provide lab support operations on a continuous basis. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.

- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 8 to 10 per year.

CMMI Process

All successful solutions shall describe in detail how they shall move the Department closer to its goal of process maturity and improved customer service by providing:

- Proven industry standard processes, enabling ED to reach a minimum of CMMI Level 3 on day one of the contract in server, desktop and messaging services support.

- An outline of a continuous process to migrate Category C — CMMI Level 1 products to CMMI Level 2 within a year, from CMMI Level 2 to Category A — CMMI Level 3 within three (3) years, and move Category A — CMMI Level 3 products to CMMI Level 4 within three to five (3-5) years.

IV. Performance Standards and Acceptable Quality Levels
Below are listed the Performance Standards and Acceptable Quality levels for the Department of Education EDNet Support Services.

Disincentives for Not Meeting Performance Standards

Each performance period ED and the service provider shall select some specific SLAs that shall be scored, and shall be a factor in issuing a new term[31].

Management Information Dashboard

The first step in running an agency on sound business principles is correctly and consistently collecting the necessary metrics. By automating this process through the use of a management information dashboard, ED managers can make the most efficient and effective use of their resources. Information rolls up to the CIO / senior management who view all active projects and initiatives and drill down to details about specific initiatives and assets.

The SLAs listed in this section shall be measured and rolled up to this management information dashboard to provide management with the necessary metrics to run operations. The dashboard, as well as the SLAs, shall be adjusted over time as processes continue to improve.

Sample metrics to be gathered are listed below. Service provider shall provide additional metrics (with rationale), as needed:
- Total operating costs, fixed and variable, shall enable managers to gain a quick understanding of the overall health of the organization for funding needs.

- A total count of personnel provides an understanding of the staff needed to support the mission.

---

[31] As discussed in Section H.14 Award Term Provisions, SLAs that are missed shall deduct some predefined number of points from 50 (the starting score).

- EDNet is critical to providing customers (whether internal or external) with timely information, so reporting on network utilization, outages, etc will provide a quick status check of the network.

- Customer satisfaction is a crucial component of an organization's ability to ensure that it is delivering value to its end users.

Benchmark

ED has the option to execute the benchmarking clause as outlined in Appendix H of the PWS, to determine that the fees, service and service levels contained within this contract are among the industry's competitive rates and service levels for such services.

General Service Levels

General SLAs apply equally to all categories of work undertaken by the service provider, with the most important being Customer Satisfaction followed by Security and Asset Management. As these areas often overlap between service categories, they have been highlighted to indicate their importance.

Customer Satisfaction

Customer satisfaction shall be measured in three ways. First "touch" surveys shall be used on every helpdesk call that generates a trouble ticket. Second a monthly managers survey shall be performed where the service provider and ED can discuss any perceived problems with the level and quality of service being provided. Finally, an independent third party customer satisfaction survey shall be performed semi-annually for the first two (2) years of the contract, assuming all surveys return positive results the frequency shall be moved to annually for the remainder of the contract.

Customer Satisfaction (Touch Survey)

Service Name: Customer Satisfaction (Touch Survey)
Service Description: Measures performance of service provided to customer (end-user). Used to identify customer's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve customer / management satisfaction and service performance.
Performance Standard: 100% of customers receive surveys.
Responsibilities: Measure Customer Satisfaction on a daily basis by sending "touch" surveys to all customers that have logged a trouble ticket (requested service). Service Provider shall be responsible for creating the survey questions, with ED approval. The questions shall be a limited number of Yes / No questions. For example: (1) Are you satisfied with the explanation of your problem? Y/N (2) Are you satisfied with the service? Y/N (3) Are you satisfied with the result? Y/N
Assumptions: Survey shall be completed via direct voice contact or via e-mail. Customers shall take part on a volunteer basis.
Frequency: Measure Daily and Report Monthly
Measurement Period: 24 hours a day 365 days a year.
How Measured: The following formula is valid for the daily reporting periods. Number of customers who received surveys / total number of helpdesk calls = "% Service Level Attained"
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Customer Satisfaction (Touch Survey) Deliverables: Monthly report. Reports shall provide a monthly roll-up of any daily reports into a plain-English format, highlighting all failures and trends. The statistics shall be tracked so that percentage totals can be compared month to month. For example: January Q1 75% Yes, 25% No, Q2 ... February Q1 85% Yes, 15% No, Q2 ...
Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Customer Satisfaction (Manager Survey)

Service Name: Customer Satisfaction (Manager Survey)
Service Description: Measures performance of service provided to ED based upon management's perception. Used to identify management's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve management satisfaction and service performance. All ITD managers are responsible for filling out the Customer Satisfaction Manager Surveys.
Performance Standard: 100% of the IT managers receive surveys. General upward trend shall be observed over the measurement periods.
Responsibilities: Measure Manager Satisfaction on a monthly basis by sending a short web based survey to all managers.
Assumptions: Survey shall be completed via web survey form. Managers shall take part on a volunteer basis, and a **non-response constitutes a very satisfied response.**
Frequency: Measure Weekly and Report Monthly
Measurement Period: 12 months a year.
How Measured: The following formula is valid for the monthly reporting periods. Number of responses with a very satisfied or satisfied rating / total number of surveys= "% Service Level Attained"
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Customer Satisfaction (Manager Survey) Deliverables: Monthly report. Reports shall provide a monthly roll-up into a plain-English format, highlighting any failures, problems and trends. The report shall also list possible remedies for any problems identified.
Disincentive: Five (5) points - However, for scoring purposes, this survey shall not be considered an SLA. It shall be considered to be part of the 2nd set of 50 points in the Annual Performance Review Plan, which is based on qualitative feedback from managers.
Notes: Results shall be posted on private (intranet) manager accessed ED web site for management review and comment.

Customer Satisfaction (Independent Survey)

Service Name: Customer Satisfaction (Independent Survey)
Service Description: Measures performance of service provided to customer (end-user). Used to identify customer's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve customer / management satisfaction and service performance.

Performance Standard: 100% customer satisfaction, to be determined by the following:
 	
(1) Baseline customer satisfaction survey, to be performed by independent third party during base year one (1) of the contract, is determined.
 	
(2) Customer dissatisfaction (defined as scores below 4, on a 5 point scale with 5 being high) is reduced by 10% per measurement period until 0% is reached (100% customer satisfaction when measuring 4 or 5)
 	
    - Penalties will be assessed using sliding scale 1
 	
(3) Once 100% customer satisfaction has been achieved (100% 4 or 5 ratings), a baseline will be established based upon measurement of rating 5 only
 	
(4) Customer dissatisfaction (defined as scores below 5, on a 5 point scale with 5 being high) is reduced by 5% per measurement period until 0% is reached (100% customer satisfaction when measuring 5)
 	
    - Penalties will be assessed using sliding scale 2

(NOTE: Customer Satisfaction process shall not start until one (1) year after contract initiation)

Responsibilities: Measure Customer Satisfaction by contracting an independent third party to develop and administer the surveys to all customers that receive ITD services.

Assumptions: Survey shall be completed via a web interface. Customers shall take part on a volunteer basis. Survey shall be developed by an independent third party with input from both the Service Provider and ED.

Frequency: Measure and Report Semi-Annually, switching to Annually after the first two (2) years successful performance of the contract.

Measurement Period: Semi-annually, switching to Annually after the first two (2) years successful performance of the contract. When the customer satisfaction survey moves from a semi-annual frequency to an annual frequency the most recent survey scored will be used for the measurement period in question.
For example:
During Option Year 1, two customer satisfaction surveys shall be performed, resulting in a score for each measurement period.   During Award Year 3, a single customer satisfaction survey shall be performed, that score will be used for the measurement period in which it was performed and the following measurement period (Award Year Measurement Period 1 and Award Year Measurement Period 2).

How Measured: Formula is determined by an independent third party, but shall be statistically significant and all data shall be validated and normalized.

Sources: Independent third party maintained tool that provides documentation capabilities to meet the reporting requirements.

Customer Satisfaction (Independent Survey) Deliverables: Semi-Annual / Annual report. Reports shall provide a roll-up of all monthly reports into a plain-English format, highlighting any problems and trends, and comparing ED against industry averages. This information shall be presented to both the Service Provider and ED in a presentation format and include any recommendations for improvement.

Disincentive: 20 points -- However, for scoring purposes, this survey shall not be considered an SLA. It shall be considered to be part of the 2nd set of 50 points in the Annual Performance Review Plan, which is based on qualitative feedback from managers.

Penalties for Customer Satisfaction shall be applied using sliding scale 1 (satisfaction defined as 4 or 5) and than scale 2 (satisfaction defined as 5).

1) **Scale 1** -- Customer Dissatisfaction is defined as anything below a 4 on a 5 point scale

Customer Dissatisfaction Decrease	Points
10% or greater	20 points
09% or greater	18 points
08% or greater	16 points
07% or greater	14 points
06% or greater	12 points
05% or greater	10 points
04% or greater	08 points
03% or less	0 points

For example:
The contract begins with an initial satisfaction (a 4 or 5) rating of 40 percent, leaving 60 percent of customers dissatisfied (less than 4 or 5). The service provider is responsible for decrease the percentage of dissatisfied customers by 6 percent (10 percent of 60 percent). After a measurement period, the service provider reduces dissatisfaction by 7 percent. Using scale 1, the service provider can determine that all 20 potential points are accrued. If the service provider only reduced dissatisfaction by 4.8 percent, an 8 percent decrease, only 16 points would be accrued.

2) **Scale 2** – Customer Dissatisfaction is defined as anything below a 5 on a 5 point scale

Customer Dissatisfaction Decrease	Points
5% or greater	20 points
4% or greater	18 points
3% or greater	16 points
2% or greater	14 points
1% or greater	12 points
0% or less	0 points

For example:
The contract has progressed to a satisfaction (5) rating of 40 percent, leaving 60 percent of customers dissatisfied (less than 5). The service provider is responsible for decrease the percentage of dissatisfied customers by 3 percent (5 percent of 60 percent). After a measurement period, the service provider reduces dissatisfaction by 7 percent. Using scale 2, the service provider can determine that all 20 potential points are accrued. If the service provider only reduced dissatisfaction by 2.5 percent, a 1.5 percent decrease, only 14 points would be accrued.

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

This survey will not be conducted by the Service Provider or ED.

Security
Security consists of five SLAs that are intended to keep the ED synchronized with all ED and Federal Government security mandates and alerts, and provide appropriate notification in the event of a security event.

Notification of Security Event

Service Name: Acceptable time to notify ED of a Security Event	
Service Description: Measure performance of the service provider to inform ED of any Security events within fifteen (15) minutes of their occurrence. The Service Provider and ED shall determine the appropriate list of personnel to be notified, based upon severity and criticality of the event. A Security Event is defined as any IT event that affects more than 50 employees resulting from a malicious attack (e.g., spoof attack, virus attack, SPAM, Intrusion, unauthorized access to financial or HR material, etc.).	
Performance Standard: 100% notification within fifteen (15) minutes of event's discovery. Updates every hour until events are resolved, or as noted by ED security point-of-contact.	
Responsibilities: The service provider shall follow the chain of command for reporting according to ED's guidelines.	
Assumptions: Notification shall occur after a security event is discovered.	
Frequency: Measure Daily and Report Monthly.	
Measurement Period: 24 hours a day 365 days a year.	
How Measured: Number of Security Events reported within fifteen (15) minutes / total number of Security Events = "% Service Level Attained".	
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.	
Notification of Security Event Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.	
Disincentive: None	
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.	

CERT / FedCIRC Alerts

Service Name: Acceptable Time to Respond to CERT / FedCIRC Alert.
Service Description: Measures performance of the service provider to respond to CERT / FedCIRC Alerts.

Performance Standard: 100% response to alert (within CERT / FedCIRC alert task specifications), and creation of impact on EDNet within four (4) hours of release.
Responsibilities: Service Provider shall respond to CERT / FedCIRC alerts, including the initiation of the testing process and notification of the appropriate ED personnel. Generate after action report ten (10) days after each event, or as stated by ED.
Assumptions: The service provider shall be responsible for gathering CERT / FedCIRC alerts.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of CERT-FedCIRC alerts responded to with within CERT-FedCIRC alert task specifications and creation of impact on EDNet within 4 hours of release / total number of CERT-FedCIRC alerts = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
CERT / FedCIRC Alerts Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

CERT / FedCIRC Tasks

Service Name: Acceptable Time to Complete CERT / FedCIRC Tasks.
Service Description: Measures performance of the service provider to respond to CERT / FedCIRC Tasks.
Performance Standard: 100% creation with 24 hours of a suggested action plan to re-mediate. 100% plan execution within seven (7) days of creation.
Responsibilities: Service Provider shall complete CERT / FedCIRC alert tasks within the specified timeframes of the alerts. Generate after action report ten (10) days after each event, or as stated by ED.
Assumptions: CERT / FedCIRC alerts have been tested against ED's configurations. No changes shall be made until all the proper testing is completed.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of CERT-FedCIRC tasks action plans created within 24 hours and completed within seven (7) days / total number of CERT-FedCIRC tasks = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
CERT Tasks Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Anti-Virus Update (Software Version)

Service Name: Acceptable Time from Anti-Virus Update Release to Full Distribution
Service Description: Measures performance of the service provider to update ED's infrastructure with the latest tested anti-virus updates.
Performance Standard: 48 hours after government CCRB approval. No production version is to be more than one (1) version behind from current vendor release at any time.
Responsibilities: Service Provider shall complete the anti-virus update for ED's entire infrastructure at least 48 hours from government CCRDB approval, and ensure that the production version of the anti-virus software is current by at least one (1) version.
Assumptions: Updates have been tested against ED's configurations. No changes shall be made until all the proper testing is completed.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.

How Measured: Number of Updates completed within specifications and number of cases where virus version is out of date / total number of Updates = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Update Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Virus File Release (Signature Files)

Service Name: Acceptable Time to Release Virus definitions Update
Service Description: Measures number of virus definitions that are not updated.
Performance Standard: 100% within 24 hours of virus update release to both client and servers that are connected to the network.
Responsibilities: Update Virus Release Files as designated by ED and ensure software is working properly by completing any manufacturer and/or ED designated tests.
Assumptions: Service Provider is responsible for retrieving updates from ant-virus software provider.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Releases completed within specifications / total number of Releases = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Release Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Virus Penetrations of Network

Service Name: Number of virus penetrations to the network that cause a network outage.
Service Description: Measures number of virus penetrations to the network that cause a network outage.
Performance Standard: Zero (0) downtime due to virus of worm (email borne or otherwise) infiltration on EDNet.
Responsibilities: Prevent virus penetration to ED network.
Assumptions: The latest version of anti-virus software signature files (virus definitions) must include the virus / worm impacting EDNet (the virus / worm must be detectable by latest commercial signature files).   If the virus / worm is contained in a new virus signature file that has been released, but not updated as per the 24 hour **Virus File Release (Signature Files)** SLA, no points shall be deducted.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Network downtime associated with virus penetrations within specifications
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Release Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Issue Escalation Management

Emergency Management involves the timeliness of an emergency response and following the appropriate escalation procedure outlined in Section III Scope of Work of the PWS.

Issue Escalation Management

Service Name: Acceptable Time to Communicate a Major Emergency Event
Service Description: Measures time the service provider takes to respond to a major emergency event (to IT Management and employees). A major issue (emergency event) is defined as any IT event that affects more than 50 employees (e.g., email outage, virus attack, VoIP outage, etc.).
Performance Standard: ITD Manager or designee is notified within fifteen (15) minutes of becoming aware of any major IT issues 100% of the time. Communication to customers to be determined based on response from Director of IT or designee.
Responsibilities: Service Provider shall provide notification to Director or IT when a major emergency event occurs, and will provide communication to the Department based on the direction received from IT Management. Notification to the Director must occur via voice communication. If the Director of Information Technology or designee is unavailable the service provider is to notify the Chief Information Office or designee.
Assumptions: The service provider shall be responsible for gathering the major emergency event status.
Frequency: Measure Monthly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of major emergency events communicated to Director of IT within 15 minutes / total number of major emergency events = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Emergency Management Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Asset Management

Asset Management is intended to provide ED with a complete an accurate count of its IT inventory, warranties and to be used in its IT refresh cycle.

Asset Management Accuracy

Service Name: Asset Management – Hardware and/or Software Inventory Accuracy
Service Description: Ensure that asset information is timely and accurate so that ED may better leverage its capabilities with regards to purchasing, service contracts and refresh of technology. This applies to assets owned by ED and managed by service provider. This activity includes the tracking, reporting, and disposal, as required, of resources and general-purpose computer assets, vendor coordination and administering licenses for System Software and maintenance agreements of the assets.
Performance Standard: 95% accuracy of asset management system.
Responsibilities: Keep asset management system accurate and up to date.
Assumptions: The service provider is responsible for maintaining the asset management system.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Assets Accurately Inventoried / total number of Assets Inventoried = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Asset Management Accuracy Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Category A Service Levels

Category A work is all firm fixed price with the service provider in control of the people, process and technology, as such these SLAs are meant to ensure that ED receives the desired level of service from this relationship.

Production Services

The following five SLAs are to provide ED with a robust production server infrastructure. The server infrastructure includes both Messaging and Web Services servers.

Server Availability - Criticality 1

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 1 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction. *Note:* includes all Criticality 1 production servers within EDNet.
Performance Standard: 99.6% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. The service provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 1 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.6%). Example: Server X (a single Criticality 1 server) was down for 45 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance. Daily Availability = ((24 Hours * 7 Days) - 1 Hour - 45 minutes) / ((24 Hours * 7 Days) – 1 Hour) = 99.55% uptime for Server X, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None Note: This disincentive is based on downtime per Criticality 1 server - i.e. server downtime shall not be averaged across all servers.
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server Availability - Criticality 2

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 2 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction. *Note:* includes all Criticality 2 production servers within EDNet.

Performance Standard: 99.6% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 2 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attained", and compare against Performance Standard (99.6%). Example: Server X (a single Criticality 2 server) was down for 45 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance. Daily Availability = (24 Hours - 1 Hour - 45 minutes) / (24 Hours – 1 Hour) = 99.55% uptime for Server X, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low Note: This disincentive is based on downtime per Criticality 2 server - i.e. server downtime shall not be averaged across all servers.
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server Availability - Criticality 3

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 3 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction. *Note:* includes all Criticality 3 production servers within EDNet.
Performance Standard: 99.9% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 3 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attained", and compare against Performance Standard (99.9%). Example: Server X (a single of Criticality 3) was down for 30 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance. Daily Availability = (24 Hours - 1 Hour - 30 minutes) / (24 Hours – 1 Hour) = 99.7% uptime for Server X, thus the SLA is missed for this particular server.

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium Note: This disincentive is based on downtime per Criticality 3 server - i.e. server downtime shall not be averaged across all servers.
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server Availability - Criticality 4

Service Name: Production Server Availability
Service Description: At a "server" level, measures Criticality 4 server availability with a desired result of driving service provider towards minimal to no downtime and thereby improving end-user productivity and customer satisfaction. *Note:* includes all Criticality 4 production servers within EDNet.
Performance Standard: 99.9% Availability.
Responsibilities: Service Provider - Maintain all servers in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to server systems.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours per day seven days a week.
How Measured: Measure each Criticality 4 server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.9%). Example: Server X (a single Criticality 4 server) was down for 30 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance. Daily Availability = (24 Hours - 1 Hour - 30 minutes) / (24 Hours – 1 Hour) = 99.7%, uptime for Server X, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Server Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High Note: This disincentive is based on downtime per Criticality 4 server - i.e. server downtime shall not be averaged across all servers.
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Messaging Availability

Service Name: Messaging Server Availability
Service Description: The percent of time that the messaging / exchange server is available for normal business operations. Includes Microsoft Exchange and Blackberry (or equivalent).
Performance Standard: 99.9% Availability
Responsibilities: Maintain Messaging Server in good operating condition so standard / normal ED activities can take place within defined time frames.

Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Time frame excludes standard scheduled down time for required maintenance.
Frequency: Measure and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Measure each server, (total hours available during measurement period not including scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.9%).   Example Messaging Server was down for 30 minutes during the measurement period, assuming 1 hour scheduled down time for required maintenance.   Daily Availability = (24 Hours - 1 Hour - 30 minutes) / (24 Hours – 1 Hour) = 99.7%, uptime for the Messaging Server, thus the SLA is missed for this particular server.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Messaging Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High.   In addition, if a mail server is down more than four (4) hours that impacts over 5% of the total Department's customers, 50% of the annual Email Architecture Fee shall be refunded **PER INSTANCE**[32].
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Server System Restoration (Non-Disaster Recovery)

Service Name: System Restoration in Non-Disaster Recovery Situations.
Service Description: Complete process of restoring systems when notified by ED end user or become aware of failure through self-analysis or helpdesk. Includes NT and UNIX servers, and the restoration of production data.
Performance Standard: Criticality 1 Server Restore - System, including application, restoration completed within twelve (12) hours from time of notification by ED (Helpdesk), 100% of the time.   Criticality 2 Server Restore - System, including application, restoration completed within eight (8) hours from time of notification by ED (Helpdesk), 100% of the time.   Criticality 3 and 4 Server Restore - System, including application, restoration completed within four (4) hours from time of notification by ED (Helpdesk), 100% of the time.
Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide service provider easy access to required areas to perform file restorations.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Systems Restored within SLA timeframe / Total Number of System Restores = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
System Restoration (Non-Disaster Recovery) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

---

[32] See Attachment II Cost Proposal worksheet.

Disincentive:
Criticality 1 Server restore - None
Criticality 2 Server restore - Low
Criticality 3 Server restore - Medium
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Disaster Recovery

Service Name: ED Authorized Disaster Recovery
Service Description: Complete process of implementing the DRP when notified by the appropriate ED management or become aware of failure through self-analysis or helpdesk. Includes NT and UNIX servers, and the restoration of production data.
Performance Standard: 12 hours until completion from time of notification by ED, 100% of the time.
Responsibilities: Maintain DRF as per ED requirements and be available to perform testing and validation of DRP. ED to provide service provider easy access to required areas to perform DRP.
Assumptions: ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to DRF.
Frequency: Measure Monthly and Report Quarterly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Disaster Recovery Events within SLA timeframe / Total Number of Disaster Recovery Events = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Disaster Recovery Deliverables: Quarterly report. Reports shall provide a roll-up of all monthly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Timeliness of Backups

Service Name: Timeliness of Backups.
Service Description: Percentage of time that the backups are performed on time.   *Note:* The backups must be free from errors and omissions.
Performance Standard: 100% of backups are performed when scheduled.
Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide Service Provider easy access to required areas that allow for completion of duties. ED will provide to the service provider the backup schedule[33].
Assumptions: That incremental backup are completed nightly, full backups monthly and a copy of the tapes is rotated off-site monthly. This represents ED's minimum acceptable backup schedule, backups are kept in accordance with ED's archival policy.
Frequency: Measure Monthly and Report Quarterly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Times Backups were performed before the Deadline / Total Number of Backups Performed = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Timeliness of Backups Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

---

[33] See Roles and Responsibilities in Appendix G.

Disincentive: Low
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

End User Support

The End User Support SLAs are broad in scope requiring that all background systems needed in order to provide customer service are also in proper order and functioning. It is possible that End User Support SLAs could be triggered because of a network or server mishap; in such cases the End User Support SLAs in addition to the other SLAs (i.e., Production Server, Network, etc.) could come into effect. *The service provider is responsible for all SLAs triggered by an event.*

Installation

Service Name: Installation.
Service Description: Acceptable time required to install a new desktop system upon appropriate request from ED. Note: Normally more than fifteen (15) installations at once are considered a project and are based on agreed timeframe.
Performance Standard: One (1) business day from time system scheduled for installation, 100% of the time.
Responsibilities: Install and test system, and remove shipping cartons to ED designated area.
Assumptions: ED shall provide access to facilities as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to facilities.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Installation completed <= SLA business day / Total Number of Installs within Measurement Period = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Installation Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Any transaction that includes more than fifteen (15) units shall be considered a "project" and shall be completed as a separate function with separate pricing and service level commitment.

Moves, Adds or Changes (MACs)

Service Name: Moves, Adds or Changes (MACs).
Service Description: Acceptable time required to move, add or change software or hardware a desktop system upon appropriate request from ED. *Note:* Normally a group of more than fifteen (15) MACs at once is considered project and is based on an agreed upon timeframe.
Performance Standard: One (1) business days, 90% of the time, from time of notification by ED for standard and non-standard product(s), for less than 15 employees, and not to exceed Three (3) business days.
Responsibilities: De-install system, Move system, reinstall or Add / Change appropriate hardware or software to ED designated destination and validate that system is able to "communicate" with the network.
Assumptions: ED shall provide access to facilities as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to facilities.
Frequency: Measure and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: MACs completed <= One (1) of SLA business day / Total Number of MACs within reporting period = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping"

for each activity within a process including up-time and downtime data.

Moves, Adds or Changes (MACs) Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.

Disincentive: Medium

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Any transaction that includes more than fifteen (15) units shall be considered a "project" and shall be completed as a separate function with separate pricing and service level commitment.

Establish Individual User Accounts (including E-mail)

Service Name: Establish Individual User Accounts (including E-mail).

Service Description: Acceptable time for creation of access authorizations and codes for ED or service provider that as representatives of the ED or service provider for user access to systems.

Performance Standard: Four (4) business hours until completion from time of notification by ED, 100% of the time (assuming not more than 20 accounts per day)

Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.

Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.

Frequency: Measure Weekly and Report Monthly.

Measurement Period: 24 hours a day 365 days a year.

How Measured: IDs created within SLA timeframe / Total Number of IDs created = "Service Level Attained".

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Establish Individual User Accounts (including E-mail) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Systems requiring accounts include: Network, Email and Remote Access (Citrix) accounts.

EDNet Password Reset

Service Name: EDNet Password Reset.

Service Description: Reset end user EDNet password, authorizations based on end user request.

Performance Standard: Fifteen (15) minutes 95% of the time, 100% password resets within two (2) business hours.

Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.

Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.

Frequency: Measure Weekly and Report Monthly.

Measurement Period: 24 hours a day 365 days a year.

How Measured: Number of EDNet Password Resets within SLA timeframe / Total Number of Password Resets = "Service Level Attained".

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Password Reset Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

File Restoration (Non-Disaster Recovery)

Service Name: File Restoration (Non-Disaster Recovery).

Service Description: Begin process of restoring files when notified by ED end user or become aware of failure through self-analysis or contact center.

Performance Standard: Eight (8) hours from the time the tape arrives, 90% of the time (assuming normal ED tape retention policy and volume of file being restored allows an 8 hours restore), not to exceed seventy two (72) hours.

Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide service provider easy access to required areas that allow for appropriate data back-up capabilities.

Assumptions: Upon arrival of tapes, files shall be restored within the eight (8) hour window.

Frequency: Measure Weekly and Report Monthly.

Measurement Period: 24 hours a day 365 days a year.

How Measured: Number of Files Restored within SLA timeframe / Total Number of Files Restored = "Service Level Attained".

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

File Restoration (Non-Disaster Recovery) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Disable User Accounts (Including E-mail)

Service Name: Disable User Accounts (Including E-mail).

Service Description: Acceptable time for deletion of access authorizations and codes for ED or service provider.

Performance Standard: One (1) business hour, from time of notification by ED, 100% of the time.

Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.

Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.

Frequency: Measure Weekly and Report Monthly.

Measurement Period: 24 hours a day 365 days a year.

How Measured: IDs Deleted within SLA timeframe / Total Number of IDs Deleted = "Service Level Attained".

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Disable User Accounts (Including E-mail) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Helpdesk

The Helpdesk SLAs are intended to provide a minimum standard of service expected by ED. All of the following SLAs deal with the customer's experience while using ITD's services, and as such are of great importance to ED.

Priority 1 Customer Support

Service Name: Priority 1 Customer Support

Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 1 Customers.
Performance Standard: First contact within fifteen (15) minutes, and two (2) hours until resolution, 99% of the time, 100% within eight (8) hours. *Note:* Any resolution time requirements less than four (4) business hours shall require "HOT" spares.
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.
Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Weekly and Report Monthly
Measurement Period: Business hours.
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained". *Note:* This includes notification, escalation and restoration of service.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Priority 1 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Priority 1 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.

Priority 2 Customer Support

Service Name: Priority 2 Customer Support
Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 2 Customers
Performance Standard: First contact within thirty (30) minutes, and four (4) hours until resolution, 95% of the time, 100% resolution within twelve (12) hrs. *Note:* Any resolution time requirements less than four (4) business hours shall require "HOT" spares.
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.
Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Business hours.
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained". *Note:* This includes notification, escalation and restoration of service.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Priority 2 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Priority 2 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.

Priority 3 Customer Support

Service Name: Priority 3 Customer Support
Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 3 Customers
Performance Standard: First contact within one (1) business hour, and twelve (12) business hours until resolution, 90% of the time, 100% within 24 hours.
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.
Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Business hours.
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained".   *Note:* This includes notification, escalation and restoration of service.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Priority 3 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.   Priority 3 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.

Helpdesk Call Answer

Service Name: Helpdesk Call Answer.
Service Description: Answer time is the number of seconds it takes any representative of ED to connect with service provider's contact center representative.
Performance Standard: 90% of calls shall be answered < 30 seconds by live person that is front-end directed by ACD.
Responsibilities: Answer all calls with a live person during the service activity definition timeframe while providing ACD front-end director activity.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Calls Answered in < 30 seconds / Total Calls = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Helpdesk Call Answer Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.   Service Provider shall provide a telephone number staffed by technical professionals during required time frames. ED calls designated toll free number and has all required data, including "entitlement data" ready for call activity.

Call Abandonment Rate

Service Name: Call Abandonment Rate.

Service Description: The call abandonment rate is the proportion of calls that come into the service provider's Helpdesk, which either hang up or are disconnected before the service provider's agent answers the phone.

Note: There is a "wrong immediate hang up" exclusion so they will not be included in this metric.

Performance Standard: <3% of calls abandoned, after initial fifteen (15) seconds of hold time.

Responsibilities: Recording and managing calls that are abandoned to less than prescribed service level.

Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting.

Frequency: Measure Daily and Report Monthly.

Measurement Period: Business hours.

How Measured: Number of Abandoned Calls (calls that have entered the queue and "hang up") / Total Calls = "Service Level Attained".

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Call Abandonment Rate Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: None

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Service Provider provided ACD system has capability of tracking and reporting all abandoned calls.

First Call Resolution

Service Name: First Call Resolution.

Service Description: The desired percentage of total contacts planned for resolution at this level. First contact completion applies when the first person the customer reaches either answer the question, resolve the problem, or dispatch service when appropriate. Warm transfers and callbacks shall be considered second or greater contact.

Performance Standard: 40% for the first two months with 5% monthly increases until first call resolution rate equals 70%. Once 70%, a 1% monthly increase shall be observed until the first call resolution rate equals 85%, 95% of the time.

Responsibilities: Provide required assistance (non-technical and technical) to satisfy ED end-user needs on the initial call to the helpdesk.

Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting.

Technical dispatch counts as first call resolution and is subject to response times as follows:
Priority 1, fifteen (15) min.; closure two (2) hrs. 99%, 100% resolution eight (8) hrs.
Priority 2, thirty (30) min.; closure four (4) hrs. 95%, 100% resolution twelve (12) hrs.
Priority 3, two (2) hrs.; closure twelve (12) hrs. 90%, 100% resolution twenty-four (24) hrs.

Frequency: Measure Daily and Report Monthly.

Measurement Period: Business hours.

How Measured: Number of calls resolved on the first call / total calls = "Service Level Attained"

Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

First Call Resolution Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: High

Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Service Provider provided system has capability to track and report out of compliance activities.

Follow-On Calls due to Problem Repeated after Initial Fix Failed

Service Name: Follow-On Calls due to Problem Repeated after Initial Fix Failed.
Service Description: This is a measure of quality. It tracks repeat calls, or the number of calls initiated by an end user to correct the same problem that had been closed as resolved.
Performance Standard: 10% for the first two months with a 1% reduction per month until 5% is achieved, 99% of the time.
Responsibilities: Provide required assistance (non-technical and technical) to satisfy ED end-user needs on follow-on calls to the helpdesk.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Repeat Calls / Total Calls = "Service Level Attained".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Follow-On Calls due to Problem Repeated after Initial Fix Failed Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Service provider provided system has capability to track and report out compliance activities.

Call Center Availability

Service Name: Call Center Availability.
Service Description: The percent of time that the Call Center environment is available for normal business operations. *Note:* This includes IVR.
Performance Standard: 99.9% Availability.
Responsibilities: Maintain Call Center environment in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to the call center environment as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to the call center environment.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Total Available Hours / by Total Hours in measurement period = "Service Level Attainted".
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Call Center Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. SLA is defined as the availability of the call center environment (telephone / PBX, voice mail, ACD, IVR, etc.) to the customer.

Network

The following four SLAs govern the operations of the network infrastructure (i.e., LAN, MAN, LAN, VoIP, etc.) at ED and as such are a critical component of the overall service provided to ED's customers.

Move, Add, Change or Delete Telecom – 1 to 25 Software

Service Name: Move, Add, Change or Delete Telecom (IP and non-IP Telephony) – 1 to 25 Software.
Service Description: Average time to complete a move, add, change or delete for network system that only requires a change that can be completed by software.
Performance Standard: One (1) business day, 100% of the time.
Responsibilities: Service Provider - Maintain all telecomm equipment in good operating condition so standard / normal ED activities can take place within defined time frames. Meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Deskside Support business hours (business days).
How Measured: Average of the time taken to perform function for each request. Each request is the time from request approval to completion of the request. Example (time for a +b + c / 3 = average time to complete). This can be subject to availability service levels or a maximum number of requests as well.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Move, Add, Change or Delete Telecom – 1 to 25 Software Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Over 25 Software MACs shall be completed on an agreed-upon timeframe.

Move, Add, Change or Delete Telecom – 1 to 25 Hardware & Wire

Service Name: Move, Add, Change or Delete Telecom – 1 to 25 Hardware & Wire.
Service Description: Average time to complete a move, add, change or delete for network system that only requires a change that can be completed by hardware / wire.
Performance Standard: Five (5) business days, 100% of the time.
Responsibilities: Service Provider –shall maintain all telecomm equipment in good operating condition so standard / normal ED activities can take place within defined time frames. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Deskside Support business hours.
How Measured: Average of the time taken to perform function for each request. Each request is the time from request approval to completion of the request. Example (time for a +b + c / 3 = average time to complete) This can be subject to availability service levels or a maximum number of requests as well.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.

Move, Add, Change or Delete Telecom – 1 to 25 Hardware & Wire Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. Over 25 Hardware & Wire MACs shall be completed on an agreed-upon timeframe.

Network Availability

Service Name: Network Availability.
Service Description: The percent of time that the network, including LAN, WAN, Internet, Intranet and VoIP, is available for normal business operations. Includes voice and data as well as the equipment infrastructure.
Performance Standard: 99.9% Availability.
Responsibilities: Maintain network in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems. Availability excludes maintenance windows.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours per day 365 days per year.
How Measured: Measure network availability, (total hours available during measurement period excluding scheduled down time) / (by total hours in measurement period – scheduled down time) = "service level attainted", and compare against Performance Standard (99.9%). Example Network was down for 15 minutes during the measurement period. "Daily Availability" = (22.75 Hours) / (24 Hours – 1 Hour) = 98.91%.
Sources: Web enabled tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Network Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. SLA is defined as the availability of the network to the customer.

Response Time – Network

Service Name: Response Time – Network.
Service Description: Time required for a packet to go between an end user demarcation point and the host site front-end processor or similar device.
Performance Standard: 0.5 second.
Responsibilities: Maintain network in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours per day 365 days per year.
How Measured: Time required for a packet to go between an end user demarcation point and the host site front end processing or similar device.
Sources: Web enabled tool supplied by service provider that shall use a tool or agent to measure the time increment.
Response Time – Network Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.

Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Category B Service Levels

Category B work are fixed duration projects with a clear beginning and end. Each project shall be bid in a firm fixed price / time and materials manner by the service provider, after which SLAs shall be used to ensure that budget, schedule and quality are maintained.

Project Management

The Project Management SLAs are intended to insure that all work in this category is performed in a professional, timely and consistent manner. All three SLAs are concerned with the quality and variance to budget and schedule of the work provided.

Variance to Budget (Time and Materials task orders only)

Service Name: Variance to Budget (if applicable)
Service Description: Total cost to complete program requirements shall come in at the budgeted cost.
Performance Standard: Total shall be at or below budget for projects, 95% of the time. No more than 10% above budge.
Responsibilities: Maintain project plan in good operating condition so proposed activities can take place within defined budgets.
Assumptions: The service provider shall meet all project management requirements detailed in Appendix F.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total Budget for the program – Actual Cost of the program / Total Budget for the program.   Note: This would need to take into consideration change requests required by ED.
Sources: Baseline Project Plan.
Variance to Budget Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Variance to Schedule

Service Name: Variance to Schedule.
Service Description: Completed program requirements shall be delivered at scheduled time.
Performance Standard: Total shall be on or ahead of Schedule for projects, 95% of the time.
Responsibilities: Maintain project plan in good operating condition so proposed activities can take place within defined schedules.
Assumptions: The service provider shall meet all project management requirements detailed in Appendix F.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total Schedule Time for the program – Actual Time of the program / Total Scheduled Time for the program.   Note: This would need to take into consideration change requests required by ED.
Sources: Baseline Project Plan.
Variance to Schedule Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Deliverable Quality

Service Name: Deliverable Quality.
Service Description: Deliverable Quality is composed of two parts, Reports and Deliverables. This measure is utilized by ITD to measure, at a business function level, the ability of the service provider to perform required services, while achieving the desired result of driving service provider behavior towards a reduction of performance errors.
Performance Standard: 100% of deliverables shall meet the performance standards identified in the task order, or the work shall be redone.
Responsibilities: Provide deliverable to ED that meet the expectations of quality.
Assumptions: The service provider has clearly understood ED's requirements and has solicited feedback when required. Ed shall provide consistent instructions to the service provider.
Frequency: Measure Monthly and Report Quarterly.
Measurement Period: Project initiation until project completion.
How Measured: Number of Deliverables Completed in accordance with performance standards / Total Number of Deliverables = "Service Level Attained".
Sources: Baseline Project Plan.
Deliverable Quality Deliverables: Quarterly report. Reports shall provide a roll-up of all monthly reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Category C Service Levels

Category C work is Time and Material operations. The service provider is expected to supply qualified personnel who shall implement ED's processes and achieve the service levels encapsulated within each SLA below.

Quality Assurance Process

The Quality Assurance SLAs are intended to provide insight into how the Quality Assurance Process works and to provide enough detail for other business units within ED to successful schedule quality assurance's participation in projects, etc. Therefore the SLAs described below are heavily customer focused and are explicit rather than implicit SLAs captured under the Production Server and End User Support SLAs.

Variance to Schedule (Quality Assurance)

Service Name: Variance to Schedule (Quality Assurance).
Service Description: Products shall complete the Quality Assurance process within the scheduled timeframe.
Performance Standard: The Quality Assurance process shall be completed within 1 business day for Minor Testing Request (i.e., configuration changes) and ten (10) business days for Integration Testing (i.e., updates and upgrades) of submission 95% of the time.   *Note:* Major system changes (i.e., new applications, etc.) would be scheduled on a case-by-case basis.
Responsibilities: Maintain Quality Assurance process in good operating condition so standard / normal Quality Assurance activities can take place within defined time frames.
Assumptions: The service provider shall meet all project management requirements as detailed in Appendix F.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total scheduled time for the program – Actual time of the program / Total Scheduled Time for the program.   *Note:* This would need to take into consideration change requests and out of scope elements required by the ED.
Sources: Baseline Project Plan.

Variance to Schedule (Quality Assurance) Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Custom Report Creation
The Custom Report Creation SLAs are intended to provide assurances of quality for reports (ex. Reports in Fox Pro, etc.) created for business units.

Mean Time to Repair – Applications

Service Name: Mean Time to Repair – Applications.
Service Description: Time to Restore Functionality of Application.
Performance Standard: six (6) hours, 95.5% of the time, 100% repair within one (1) business day.
Responsibilities: Resolve problem and have "broken application" up and running within designated timeframe.
Assumptions: ED shall provide access to applications as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Problems Resolved <= SLA hours / Total Number of Problems = "Service Level Attained". *Note:* This includes notification, escalation and restoration of service.
Sources: Service Provider maintained web enabled tool that provides documentation capabilities to meet the reporting requirements.
Mean Time to Repair – Applications Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Availability – Custom Reports

Service Name: Availability – Custom Reports.
Service Description: The percent of time that the application is available for normal business operations.
Performance Standard: 99.5% Availability.
Responsibilities: Maintain application in good operating condition so standard / normal ED activities can take place within defined time frames.
Assumptions: ED shall provide access to applications as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Project initiation until project completion.
How Measured: Total Available Hours / by Total Hours in measurement period = "Service Level Attained". Example 24 Hours * 30 Days (average days in a month) = "Monthly Available" to define if "Service Level Attained".
Sources: Service Provider maintained web enabled tool that provides documentation capabilities to meet the reporting requirements.
Availability – Custom Reports Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: None
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment. SLA is defined as the availability of the Custom Report to the customer.

Attachment III

	Monthly Yr 1	Total Yr 1	Monthly Yr 2	Total Yr 2	Monthly Yr 3	Total Yr 3	Monthly Yr 4	Total Yr 4
Network Telecom Ops	$ 141,386.71	$ 424,160.13	$ 135,078.69	$ 1,620,944.28	$ 135,078.69	$ 1,620,944.28	$ 135,078.69	$ 1,620,944.28
Program Overhead	$ 30,485.87	$ 91,457.61	$ 29,125.73	$ 349,508.76	$ 29,125.73	$ 349,508.76	$ 29,125.73	$ 349,508.76
IT Dist. Imaging Center	$ 29,958.98	$ 89,876.94	$ 28,622.35	$ 343,468.20	$ 28,622.35	$ 343,468.20	$ 28,622.35	$ 343,468.20
Total	$ 201,831.56	$ 605,494.68	$ 192,826.77	$ 2,313,921.24	$ 192,826.77	$ 2,313,921.24	$ 192,826.77	$ 2,313,921.24

	Monthly Yr 5	Total Yr 5	Monthly Yr 6	Total Yr 6	Monthly Yr 7	Total Yr 7	Monthly Yr 8	Total Yr 8
Network Telecom Ops	$ 135,078.69	$ 1,620,944.28	$ 135,078.69	$ 1,620,944.28	$ 135,078.69	$ 1,620,944.28	$ 135,078.69	$ 1,620,944.28
Program Overhead	$ 29,125.73	$ 349,508.76	$ 29,125.73	$ 349,508.76	$ 29,125.73	$ 349,508.76	$ 29,125.73	$ 349,508.76
IT Dist. Imaging Center	$ 28,622.35	$ 343,468.20	$ 28,622.35	$ 343,468.20	$ 28,622.35	$ 343,468.20	$ 28,622.35	$ 343,468.20
Total	$ 192,826.77	$ 2,313,921.24	$ 192,826.77	$ 2,313,921.24	$ 192,826.77	$ 2,313,921.24	$ 192,826.77	$ 2,313,921.24

	Monthly Yr 9	Total Yr 9	Monthly Yr 10	Total Yr 10
Network Telecom Ops	$ 135,078.69	$ 1,620,944.28	$ 135,078.69	$ 1,620,944.28
Program Overhead	$ 29,125.73	$ 349,508.76	$ 29,125.73	$ 349,508.76
IT Dist. Imaging Center	$ 28,622.35	$ 343,468.20	$ 28,622.35	$ 343,468.20
Total	$ 192,826.77	$ 2,313,921.24	$ 192,826.77	$ 2,313,921.24

ED-05-PO-0908, Modification 0005, Attachment IV

	Unit Y 1		Unit Y 2		Unit Y 3		Unit Y 4		Unit Y 5	
	No.	Unit	No.	Unit	No.	Unit	No.	Unit	No.	Unit
Windows 2003	3	$ 455.56	3	$ 423.87	3	$ 332.30	3	$ 277.43	3	$ 249.03
AIX	18	$ 1,684.19	18	$ 1,632.34	18	$ 1,546.83	18	$ 1,509.68	18	$ 1,479.44

	Unit Y 6		Unit Y 7		Unit Y 8		Unit Y 9		Unit Y 10	
	No.	Unit	No.	Unit	No.	Unit	No.	Unit	No.	Unit
Windows 2003	3	$ 235.17	3	$ 222.78	3	$ 211.98	3	$ 201.78	3	$ 190.02
AIX	18	$ 1,408.48	18	$ 1,386.75	18	$ 1,369.53	18	$ 1,355.79	18	$ 1,351.08

Appendix F: Detailed Work Descriptions

Category B Tasks

Projects

Task Area Provides Project services for ITD.

Desired Outcome: To provide quality IT projects for the Department of Education organizations by providing effective, best practice project management support for the successful implementation of projects, products, services and features on to EDNet and in compliance with ED's Enterprise Architecture. The primary goal is to provide base-level improvement in project completion against schedule and budget estimates, while delivering the expected functionality with world-class quality.

Description of Services: Provide PMI or equivalently certified[1] experienced project managers and subject matter experts (SME) who follow and implement "best practice" project management methodologies, along with the various security and configuration controls of EDNet, help to insure that applications, systems and emerging technologies meet certification and accreditation standards of, but not limited to the U.S. Office of Management & Budget (OMB 130), National Institutes of Standards and Technologies (NIST), Clinger-Cohen Act, FISMA, GPRA, FAR, and Privacy Act, for an as needed number of ITD defined projects per year. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time. Resources required shall be used at ED's discretion in executing ITD's Product Development Process outlined in Section I, Introduction. Most projects shall occur within the Washington DC area, See Appendix A for a detailed list of Washington DC area locations.

The contractor shall provide SMEs in a variety of technical and business fields, including, but not limited to, technical architecture (e.g., network, web, database, application development, etc.), product experts, programmers conversant in the most current computer languages, network engineering, IT investment management, business case development, portfolio management, technology market analysis, OMB 300 development, etc. The contractor shall assign resources to work within ED's Product Development Process and provide personnel with demonstratable skills, competence and experience necessary for a CMMI Level 3 process environment.

The contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services; assisting in the analysis and selection of vendor-provided products and services. The contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the ITD mission. The contractor shall assist FTE management in the proper budgeting and financial management of ITD programs and projects; assist in the development of bills and materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a project so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) demonstrate conformance with both departmental and federal standards for the management planning, tracking and controlling of projects and tasks.

---

[1] Equivalently Certified is defined by OMB as "Experienced managing projects of similar size and scope, within ten (10) percent of baseline cost, schedule and performance goals, as the project to which currently assigned OR a government project management certification or a commercial certification such as the Project management Institute (PMI), AND dedicated to the project or program on a full-time basis."

The contractor shall provide an integrated project solution, provision SMEs appropriate for each project, take ownership of problems from identification to solution / resolution, and manage all projects to scope, schedule and budget.

Some example projects include major moves (100 regional staff from one building to another), or an enterprise software upgrade from one version to the latest version (i.e., Exchange 2000 to Exchange 2003).

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires approximately 36,000 hours per year[2].

Performance Requirements Summary:

Project Management

- Manage projects to ensure they are within scope, budget and on schedule.
- Manage projects using OMB's earned value discipline[3].
- Provide master scheduling capabilities to rollup projects for a resource allocation and alerts.
- Provide SMEs as appropriate throughout the life of the project.
- Provide risk / issue / action item tracking and management.

---

[2]Subject to change.
[3] See OMB, ANSI/EIA-748-A, Planning, Budgeting, Acquisition and Management of Capital Assets.

Management Services: Program Management

Task Area Provides overall Program Management services for ITD.

Desired Outcome: To ensure that all work performed is successful in achieving the task's purpose, goals and objectives; on schedule, within budget, thoroughly documented, and in accordance with performance specifications, requirements and standards; coordinated with other tasks; integrated with other tasks performed under this contract; integrated with efforts outside of this contract but related to ED's IT service delivery infrastructure; and consistent with ED's strategic goals, objectives and mission.

If a team of contractors is awarded this contract, the team-lead contractor shall be responsible for ensuring that successful program management is achieved for this contract. Therefore, the team-lead contractor shall be ultimately responsible for ensuring that the purpose, goals, objectives, requirements and service standards of the task are achieved. The contractor shall receive the Contracting Officer's approval prior to subcontracting or "teaming" any portion of the contract to another contractor.

Description of Services: Provide qualified and experienced staff who follow, implement and support "best practice" program management methodologies. Program management includes overall management, measurements, dashboard development and maintenance, staffing, planning, tracking, and reporting for the entire EDNet contract. This office shall interact with focal points across service areas.

The Contractor shall provide internal communications planning services, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the mission. The Contractor shall assist FTE management in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a program so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) or Product Development Process (PDP) demonstrate conformance with all relevant departmental and federal standards for the management planning, tracking and controlling of programs and tasks.

The contractor shall provide a draft Program Management project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance. The plan will address all elements contained in the QASP for EDNet management, and shall include:

- A single Program Manager (PM) to manage the entire task effort
- Project managers across each service area who shall work with the PM to provide management and direction in accordance with ED guidance for services provided under all three categories of work
- PM and Project Manager roles and responsibilities
- Transition Management including Contract Phase-In and Phase-Out Plans
- Staffing management to include security processing
- Quality control
- Performance management and surveillance including SLA metrics, reporting, development of management dashboard, ongoing quality process, and content measure evaluation
- Financial management, Total Cost of Ownership, qualitative benefits, reporting and price performance support
- Cost benefit analysis support
- Customer satisfaction surveys
- Information Technology Investment Management support

- Planning support
- Administrative support for procurement, staffing and other business related functions.
- Document management and maintenance (standards, policies, procedures, and operations guides) support
- Risk management
- Logistics support
- Meeting support
- Program documentation support
- Reports, oral presentations and other deliverables

Estimated Workload: This work currently requires between 5 to 7 FTEs per year. Note that some of these services will be performed under Category A as a result of the Phase I C to A migration. See Category A Performance Work Statement.

Performance Requirements Summary:

Program Management:

The contractor shall:

- Provide overall contract, program management, staffing support, planning support, quality control support, performance surveillance support, analysis support, performance monitoring and metrics, reporting, administrative support, logistics support, meeting support, standards development and support, documentation, reports and other deliverables.

- Manage projects using OMB's earned value discipline[4].

- Provide ongoing support for overall contract management and reporting.

---

[4] Ibid.

Management Services: Ongoing Project Management

Task Area Provides ongoing Project Management support services for ITD.

Desired Outcome: To provide quality ongoing IT project management support for the Department of Education organizations by providing effective, best practice project management support for the successful implementation of products, services and features on to EDNet. The primary goal is to provide base-level support in project completion against schedule and budget estimates, while delivering the expected functionality with world-class quality.

Description of Services: Provide qualified and experienced project management support personnel and PMI or equivalently certified[5] project managers, as needed, who follow and implement "best practice" project management methodologies, along with the various security and configuration controls of EDNet, help to insure that applications, systems and emerging technologies meet certification and accreditation standards of, but not limited to the U.S. Office of Management & Budget (OMB 130), National Institutes of Standards and Technologies (NIST), Clinger-Cohen Act, FISMA, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the ITD mission. The Contractor shall assist FTE management in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a project so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) demonstrate conformance with both departmental and federal standards for the management planning, tracking and controlling of projects and tasks.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 2 to 4 FTEs per year.

Performance Requirements Summary:

Project Management

- Support the management of projects to ensure they are within scope, budget and on schedule.
- Provide master scheduling services for all projects, allowing for the rollup of projects for a resource allocation and alerts.
- Manage projects using OMB's earned value discipline[6].
- Provide ongoing support for risk / issue / action project tracking and management.

---

[5] Equivalently Certified is defined by OMB as "Experienced managing projects of similar size and scope, within ten (10) percent of baseline cost, schedule and performance goals, as the project to which currently assigned OR a government project management certification or a commercial certification such as the Project management Institute (PMI), AND dedicated to the project or program on a full-time basis."
[6] See OMB OMB, ANSI/EIA-748-A, Planning, Budgeting, Acquisition and Management of Capital Assets.

Management Services: Product Assurance

Task Area Provide Product Assurance services for ITD.

Desired Outcome: To provide product assurance functions to ensure that projects are managed within scope, budget and schedule. Level of quality and customer satisfaction is commensurate with the constraints of budget and schedule

Description of Services: To provide independent review and testing of work products, provide process audits to ensure processes and procedures are being followed and providing recommendations with the audit results. Perform data collection and analysis of that data to provide information on performance measurements and metrics and provide recommendations for improvements. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services and assist in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the Product Assurance mission. Assist in performing and analyzing process audits, creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 2 to 4 FTEs per year.

Performance Requirements Summary:

Independent Review & Testing

- Exam work products to verify compliance with established plans, standards and procedures
- Conduct system testing to ensure requirements are met and system performs in accordance with specifications
- Process Validation
- Systems Development Life Cycle (SDLC), Standard Operating Procedures (SOPs), testing processes being followed
- Audits & Assessment

Improvement Analysis

- Data collection and analysis of service metrics
- Recommendations for long term improvements

Network Services: Server Operations

Task Area: Develops Plans and Programs for the Operation, Maintenance, and Enhancement of Server operations, intranet and extranet administration.

Desired Outcome: The Server Operations (SO) division shall develop plans, directives, policies and procedures in support of the efficient use and management of server operations, Database Administration, Customer Applications, Security, Change Management and Disaster Recovery resources, including a full range of server, network and messaging recovery services, facilities, and equipment for any part of Server Operations not captured within the firm fixed price portion of the contract.

Description of Services: The Contractor shall provide business process and analysis, project management, financial management and administration support, and policy and planning services in support of management and use of SO resources. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business case, business requirements, technical reports, and white papers in support of the SO mission. The contractor shall assist in analyzing customer satisfaction surveys, and create and publish online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires 32 to 34 FTEs a year[7].

Performance Requirements Summary:

Server Operations

- **Provide database administration and general administrative support** on SQL server, Oracle, Hummingbird, Project server and Lotus Notes applications throughout the Department. This includes Monitoring of ORACLE databases, Monitoring of SQL Databases, Insure all scheduled jobs have completed successfully, Stay current with available Security Patches and fixing vulnerabilities, Work with other Server operation teams to optimize their application databases. Provide support to helpdesk technicians on Custom Application Errors.

- **Provide ad hoc custom application support** to customers on specialize applications, including programming and limited time database admin support per request. Also assist and familiarize ED developers with standards and best practices in the Department.

- **Support the Department's mission critical Security Operations** component by providing technical expertise in the use of intrusion detection & prevention systems (e.g. Entercept and CISCO IDS) integrated with Net Forensics Security Information Management Console to monitor firewall activities, router ACL violations, enterprise

---

[7] Includes FTEs associated with National Center for Education Statistics (NCES).

anti-virus alerts and emerging internet threats. Ensure that EDNet continues to operate in a safe computing environment by following published Incident Handling Response Standard Operating Procedures (SOPs). The contractor shall be responsible for vulnerability scanning and associated activities. This expertise is to be utilized in daily operations support of the local facility, production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulations drills.

- Provide support for the evolution, development, and maintenance of **Intrusion Detection Surveillance (IDS) products and services**. The Contractor shall have responsibility that the IDS systems are managed and controlled in accordance with approved policies, standards and procedures. The Contractor shall ensure that changes to the production system's infrastructure are applied with proper planning, testing and notification and that negative impacts to the customer or the production environment are minimized as a result of changes to the system.

Disaster Recovery

- **Network** – The Contractor shall support the Department's mission critical networking component by providing technical expertise in the Cisco, Cisco VoIP, Cisco ACS, Cisco PIX, Cisco VPN, Symantec SEF, Microsoft DNS services, Solaris DJBDNS, MRTG, CA Unicenter and Windows 2000 infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore connectivity during disaster recovery efforts and simulation drills.

- **Servers** – The Contractor shall support the Department's mission critical server operations component by providing technical expertise in the Microsoft Windows and Sun Solaris infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

Change Management

- **Provide continuous support of systems operation** to including development and maintenance of all Standard Operating Procedures (SOPs) in support of the EDNet system, development and maintenance of all Memorandums of Understanding (MOUs) between the EDNet owners and Principal Office systems housed on the network, maintain expert knowledge of the Federal Information Security Management Act (FISMA) and all applicable security regulations to include ED security training, NIST guidance and OMB A-130, maintain and complete the annual NIST self-evaluation, serve as the EDNet librarian of all SOPs for all teams that support EDNet, ensure that SOPs, plans, and related documentation are in compliance with FISMA, and monitor all EDNet teams for such compliance.

- **Provide Configuration Management Plan support**, by being responsible for change management to include running the Change Control Review Board, the CCRB tracking system, attending all Technical Review Boards (TRBs) and Security Review Board (SRB) meetings to ensure proper integration of all of the review boards as well as ensuring continued compliance with FISMA requirements, and specifically Certification & Accreditation compliance. The CM team shall also be responsible for administering and record keeping of all Technical Review Boards to include ensuring compliance with the TRB process, and shall assist EDNet staff and Program Office Coordinators in aligning with those processes.

- **Maintenance of the system's baseline configuration** capture and documentation, provide analysis and consultation ensuring the configuration compliance against the baseline continues to be maintained, and performing

Configuration Identification, Configuration Change Control, Configuration Status Accounting, and CM Audits.

- **Provide and maintain Change Control, Documentation and NIST / FISMA / C&A Compliance.**

National Center for Educational Statistics (NCES) Support

The Offeror shall support NCES' mission critical server operations components by providing technical expertise in the Microsoft Windows, Linux, and F5 BigIP infrastructure. This expertise shall be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

- **Provide database maintenance and administration** of Microsoft SQL system including monitoring and maintenance of SQL Databases that are used with the NCES Web Site. Insure all scheduled jobs have completed successfully. Maintain SQL backups. Stay current with available Security Patches and vulnerability patching.

- **Provide Server and Microsoft IIS support**, including monitoring and maintenance of IIS servers that compose the NCES Web Site. Insure all scheduled jobs have completed successfully, stay current with available Security Patches and fixing vulnerabilities. Configure and maintain NCES' Compaq Storage Area Network (SAN). Configure and maintain F5 BigIP load balancers and Linux IDS server. Configure and maintain NCES' backup system. Administer various other applications such as WebTrends, Verity UltraSeek, IPCheck, SNORT, Microsoft Site Server, Microsoft SQL 2000, ESRI GIS Mapping System, and other systems as needed.

- **Provide ad hoc custom application support** to outside developers on specialized applications, including programming and limited time database admin support per request. Also assist and familiarize developers with ED and NCES' standards and best practices.

- **Support the Department's mission critical Security Operations.** Work with other Server Operations Teams to insure that all systems are in compliance with ED standards (e.g., up to date on security patches, run periodic scans to determine if any vulnerabilities exist, etc.).

- **Provide Web development and programming support**, including new applications as well as maintaining legacy applications using VBScript, JavaScript, HTML, ASP, and Style Sheets. Provide video editing as well as web based video presentation. Develop multimedia applications using Macromedia Flash. Design web graphics using Adobe Photoshop and Illustrator. Create animations using Cinema 4D. Provide support for the NCES Graphing tool.

- **Provide design for new systems, applications, and databases** as required.

- **Act as point of contact for other developers working with NCES.**

Network Services: Converged Communications and Networking

Task Area: Develops Plans and Programs for the Operation, Maintenance, and Enhancement of Converged Communications and Networking.

Desired Outcome: The Converged Communications and Networking (CCN) division shall develop plans, directives, policies and procedures in support of the efficient use and management of network, telecommunications, and multimedia resources, including a full range of voice, video and data services, facilities, and equipment, including Smartnet equipment.

Description of Services: The Contractor shall provide business process and analysis, project management, financial management, administration support, and policy and planning services in support of management and use of telecommunications resources, to include, but not limited to a full range of voice, video and data communications. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services; assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the CCN mission. Assist in developing and analyzing customer satisfaction surveys, and creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires 6 to 8 FTEs a year. Note that some of these services will be performed under Category A as a result of the Phase I C to A migration. See Category A Performance Work Statement.

Performance Requirements Summary:
OCIO Converged Communications and Networking provides operations, maintenance and customer support services to ED employees and staff throughout headquarters and regional office locations.

Telecommunications Services

- The Telecommunications Services Group:
    - Maintains accurate billing and accountability of telecommunications resources, including circuit-switched and dedicated data circuits, local and long distance services, voicemail platforms, audio and data conferencing solutions, calling card, pagers, cell phones and wireless handhelds. Designs, installs, maintains and repairs telecommunications equipment and services or coordinates these services.
    - Compiles statistics and prepares necessary system reports and forms. Maintains system administration of the Telecommunications Automated Tracking System (TATS), which is used to request, approve, order receive and issue telecom resources and serves as a robust reporting tool.

- Provides Helpdesk (Tier 2 and 3) customer service support.

- **Provide Telecommunications Processing Services** by responding quickly and accurately to requests for telecommunications services submitted from each Principal Office. The Contractor shall provide order processing services to include, but not limited to, reviewing requests submitted by authorized Principal Office personnel for telephone / fax services, voicemail services, wireless services, etc.

- **Provide Telecommunications Billing and Inventory Services** by maintaining an accurate inventory and billing records for all telecommunications resources (i.e., equipment, facilities and services). The Contractor shall provide inventory management and billing services to include, but not limited to, maintaining an accurate and complete record of all telecommunications assets billed to the agency; reconcile billing statements from vendor-supplied documentation and electronic files, monitoring system traffic, etc.

- **Provide Telecommunications Programming and Database Management Services** by maintaining assist FTE telecom staff with the identify, planning, testing, executing, controlling and closing of the functionality and enhancements to the agency's Telecommunications Automated Tracking System (TATS) application. The Contractor shall provide support services to include, but not limited to, maintaining integrity of the TATS program application layer and database layer; develop business requirements and associated documentation to support the development of enhancements to system functionality; develop test plans and associated test scripts; etc.

- **Provide GSA FTS Contract Transition Services** by developing and execute a project plan to ensure a smooth transition from the GSA FTS2001 contract vehicle to the GSA FTS Networx contract vehicle. The Contractor shall assist FTE telecom staff in developing a transition plan to ensure the smooth and orderly transition from the General Services Administration (GSA) Federal Telecommunications System (FTS) 2001 contract vehicle to the FTS Networx contract vehicle in support of a full range of voice, video and data communications services.

Network Services: Engineering

Task Area Provide Engineering services for ITD.

Desired Outcome: Provide ongoing Engineering support including writing, enterprise architecture and technical reviews.

Description of Services: The Engineering division shall develop and maintain plans, directives, policies and procedures in support of the efficient use and management of enterprise network research, development and engineering. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, and assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the Engineering mission. Assist in developing and analyzing customer satisfaction surveys, and creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The Contractor shall provide resources to occasionally perform rapid application development[8] and development of prototypes using the SDLC process.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 8 to 10 FTEs a year.

Performance Requirements Summary:

- Technical Writing
- Development Lab Technician
- Development Lab Manager
- Technical Enterprise Architect
- Technical Review Administration
- Assistive Technology Engineering (testing, compliance, etc.)

---

[8] The Rapid Application Development (RAD) methodology was developed in response to the need for quickly delivering systems. An application development approach includes small teams (generally 2 – 6 developers) using joint application development (JAD) and iterative-prototyping techniques to construct interactive systems of low to medium complexity within short time frames (generally 60 to 120 days).

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE		PAGE OF PAGES	
				1	18

2. AMENDMENT/MODIFICATION NO. 0006	3. EFFECTIVE DATE JUL 01, 2006	4. REQUISITION/PURCHASE REQ. NO. EDOCIO-06-000234		5. PROJECT NO. (If applicable)	

6. ISSUED BY CODE CPOA	7. ADMINISTERED BY (If other than Item 6) CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Victor Cairo VXC 202-245-6199	See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR LANHAM SEABROOK MD 207066229 Cage Code: 1SXC4		
		9B. DATED (SEE ITEM 11)
	x	10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
Ms. Marvke Guild (301) 794-2108		
		10B. DATED (SEE ITEM 13)
CODE 00001238 FACILITY CODE		APR 26. 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)
See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) 52.217-9

E. IMPORTANT: Contractor [ ] is not, [x] is required to sign this document and return ___1___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

1. This modification will be executed in accordance with the terms and conditions of contract ED-05-PO-0908

2. The purpose of this modification is five-fold: 1) to exercise the first option period; 2) to update the contract to reflect phase II of Category C Services to Category A Services migration; 3) to update the key personnel designation clause; 4) to change the contract specialist and 5) to incorporate the new Service Level Agreements.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) RAYMOND W. GLASS SR. CONTRACTS ADMINISTRATOR	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219	
15B. CONTRACTOR/OFFEROR *Raymond W. Glass* (Signature of person authorized to sign)	15C. DATE SIGNED 7/24/06	16B. UNITED STATES OF AMERICA *John Xau* (Signature of Contracting Officer)	16C. DATE SIGNED 7/24/06

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

ITEM NO	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
0053	Category A Services	1.00	SE	7,038,245.39	7,038,245.39
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0054	ODCs Option Year I	1.00	SE	1,056,774.75	1,056,774.75
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0055	Category C Services	1.00	SE	1,000,000.00	1,000,000.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0056	Category A Services	1.00	SE	536,000.00	536,000.00
	Accounting and Appropriation Data: 1400A2006.A.2006.EIE00000.744.2572A.000.000.0000.000000				
0057	Category A Services	1.00	SE	2,000,000.00	2,000,000.00
	Accounting and Appropriation Data: 0700A2006.A.2006.EIE00000.711.2572A.000.000.0000.000000				
0058	Category A Services	1.00	SE	75,273.00	75,273.00
	Accounting and Appropriation Data: 0400M2005.B.2006.EIE00000.766.2572A.000.257.0000.000000				
0059	Category A Services	1.00	SE	27,969.00	27,969.00
	Accounting and Appropriation Data: 1100A2006.B.2006.EIE00000.768.2572A.000.902.0000.000000				
0060	Category A Services	1.00	SE	1,350,938.00	1,350,938.00
	Accounting and Appropriation Data: 0202A2006.A.2006.EIE00000.725.2572A.000.000.0000.000000				
0061	Category A Services	1.00	SE	4,491,136.00	4,491,136.00
	Accounting and Appropriation Data: 0243X2006.A.2006.EIE00000.751.2572A.000.000.0000.000000				
0062	Category A Services	1.00	SE	2,000.00	2,000.00
	Accounting and Appropriation Data: 1901A2006.A.2006.EIE00000.792.2572A.000.000.0000.000000				
0063	Category A Services	1.00	SE	1,555.00	1,555.00
	Accounting and Appropriation Data: 0241A2006.A.2006.EIE00000.776.2572A.000.000.0000.000000				
0064	Category A Services (EDPAS)	1.00	SE	169,591.30	169,591.30

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT
	Accounting and Appropriation Data: 0800A2006.A.2006.EMH00000.777.2572A.000.000.0000.000000				
0065	Category C Services	1.00	SE	43,225.25	43,225.25
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0066	Category C (NCES)	1.00	SE	130,186.00	130,186.00
	Accounting and Appropriation Data: 1100A2006.B.2006.ERN00000.R50.2521A.417.830.0000.000000				
0067	Category C (NCES)	1.00	SE	738,000.00	738,000.00
	Accounting and Appropriation Data: 1100A2006.B.2006.ERN00000.R50.2521A.A06.830.0000.000000				
0068	Category C (NCES)	1.00	SE	200,000.00	200,000.00
	Accounting and Appropriation Data: 1100M2006.B.2006.ER000000.RT5.2521A.000.305.0000.000000				
0069	Category C (NCES)	1.00	SE	125,000.00	125,000.00
	Accounting and Appropriation Data: 1100M2006.B.2006.ER000000.RMB.2521A.000.324.0000.000000				

1. Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is increased from $11,764,287.44 by $15,692,707.69 to $27,456,995.13. The not-to-exceed amount for Category B is $1,554,828.20. The not-to-exceed amount for Category C labor is increased from $11,774,764.58 by $2,236,411.25 to $14,011,175.83. The ceiling for Category C hours is increased from 128,903 by 25,677 to 154,580. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is increased from $1,721,969.27 by $1,056,774.75 to $2,778,744.02. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

2. Delete D.1, ED 301-1, SHIPMENT AND MARKING (March 1986) in its entirety and replace with the following:

A. The contract number shall be placed on or adjacent to all exterior mailing or shipping labels of deliverables items called for by the contract.

B. Ship deliverable items to:
U.S. Department of Education
550 12th Street, SW
7163
Washington DC 20202

C. Mark deliverables for:
Eugene Hopkins

3. Delete F.1 DELIVERIES OR PERFORMANCE in its entirety and replace with the following:

The period of performance shall be from May 1, 2005 to June 30, 2007, inclusive of all specified deliveries and/or task work.

4. Delete H.2, ED 307-21, KEY PERSONNEL DESIGNATION (3/85) in its entirety and replace with the following:

In accordance with the clause entitled "Key Personnel", the following key personnel are considered to be essential to the work being performed:

David Hegland, Program Manager
Gordon Babcock, Chief Technology Architect and Category B Service Project Manager
Jerry Ryznar, Deputy Program Manager for Operations
Marie Lavallee, Program Management Office (PMO) Manager
George Altiery, Service Delivery Manager
TBD, Process Improvement Manager

5. Delete H.3 INVOICING in its entirety and replace with the following:

The contractor shall submit the original and one (1) copy of invoices to the address below:

U.S. Department of Education
Contracts and Acquisitions Management
550 12 Street, SW
Room 7163
Washington DC 20202-4210
ATTN: Eugene Hopkins

The final invoice for this contract shall be clearly marked "FINAL INVOICE" and shall be submitted within three (3) months of contract expiration.

6. Delete H.5 SECURITY CLEARANCE AND USER ID REQUESTS in its entirety.

7. Delete H.7 ED 307-13 DEPARTMENT SECURITY REQUIREMENTS (3/05) in its entirety and replace with the following:

307-13 DEPARTMENT SECURITY REQUIREMENTS (JUNE 2006)

The Contractor and its subcontractors shall comply with Department Security policy requirements as set forth in:

    A. The Statement of Work of this contract;
    B. The Privacy Act of 1974 (P.L. 93-579, U.S.C. 552a);
    C. The U. S. Department of Education Handbook for Information
       Assurance Security Policy, OCIO-01 (March 2006); and
    D. The U.S. Department of Education Departmental Directive OM:5-101,
       "Contractor Employee Personnel Security Screenings."

The Contractor may request copies of the above referenced documents by contacting the Contract Specialist via phone at 202-245-6224 or via e-mail at Eugene.Hopkins@ed.gov.

Contractor employee positions required under this contract and their designated risk levels:

    High Risk (HR): All positions are considered High Risk.
    Moderate Risk (MR):
    Low Risk (LR):

All contractor employees must undergo personnel security screening if they will be employed for thirty (30) days or more, in accordance with Departmental Directive OM:5-101, "Contractor Employee Personnel
Screenings." The type of screening and the timing of the screening will depend upon the nature of the contractor position, the type of data to be accessed, and the type of information technology (IT) system access required. Personnel security screenings will be commensurate with the risk and magnitude of harm the individual could cause.

The contractor shall:
 - Ensure that all non-U.S. citizen contractor employees are lawful permanent residents of the United States or have appropriate work authorization documents as required by the Department of Homeland
    Security, Bureau of Immigration and Appeals, to work in the United States.
 - Ensure that no employees are assigned to High Risk designated positions prior to a completed preliminary screening.
 - Submit all required personnel security forms to the Contracting Officer's Representative (COR) within 24 hours of an assignment to a Department contract and ensure that the forms are complete.
 - Ensure that no contractor employee is placed in a higher risk position than that for which he or she was previously approved, without the approval of the Contracting Officer or his or her representative, the Department Personnel Security Officer, and the Computer Security Officer.
 - Ensure that all contractor employees occupying High Risk designated positions submit forms for reinvestigation every five (5) years for the duration of the contract or if there is a break in service to a
    Department contract of 365 days or more.
 - Report to the COR all instances of individuals seeking to obtain unauthorized access to any departmental IT system, or sensitive but unclassified and/or Privacy Act protected information.
 - Report to the COR any information that raises an issue as to whether a contractor employee's eligibility for continued employment or access to Department IT systems, or sensitive but unclassified and/or Privacy Act protected information, promotes the efficiency of the service or violates the public trust.
 - Withdraw from consideration under the contract any employee receiving an unfavorable adjudication determination.
 - Officially notify each contractor employee if he or she will no longer work on a Department contract.
 - Abide by the requirements in Departmental Directive OM:5-101, "Contractor Employee Personnel Screenings."

Further information including definitions of terms used in this clause and list of required investigative forms for each risk designation are contained in Departmental Directive OM:5-101, "Contractor Employee Personnel Screenings."

Failure to comply with the contractor personnel security requirements may result in a termination of the contract for default.

8. Delete H.8 ED 307-15 WITHHOLDING OF CONTRACT PAYMENT -SECURITY (04/05) delete in its entirety and replace with the following:

ED 307-15 WITHHOLDING OF CONTRACT PAYMENT - SECURITY JUNE 2006

Notwithstanding any other payment provisions of this contract, failure of the contractor to submit required forms, responses or reports when due; failure to perform or deliver required work, supplies, or services; or, failure to meet any of the requirements of the contract, to include all requirements as specified in Clause 307-13 Department Security Requirements, will result in the withholding of payments under this contract in such amounts as the contracting officer deems appropriate, unless the failure arises out of causes beyond the control, and without the fault of negligence, of the contractor, as defined by the clause entitled "Excusable Delays or Default", as applicable. The Government shall promptly notify the contractor of its intention to withhold payment of any invoice or voucher submitted. Payment will be withheld until the failure is cured, a new delivery schedule is agreed upon, or payment is made as part of a termination settlement.

9. Effective July 1, 2006 Delete H.14 AWARD TERM PROVISIONS and replace with the following clause: Additionally, Section 7 of CSC's technical proposal, Service Level Plan, no longer applies.

> This is a performance-based contract that directly links the contractor's performance in achieving SLAs, performance standards and acceptable quality levels with the opportunity to obtain additional performance periods (award terms).

> The performance evaluation process shall operate as follows:
> - o An award term determination is comprised of two (2) successive six (6) month evaluations that are averaged to obtain an annual score.
> - o For the award term decisions beginning at the conclusion of option period one, the contractor must receive a rating of "Superior" to earn additional award term periods.
> - o The Performance Evaluation Board (PEB) may elect to recommend an additional award term for performance less than Superior provided that the performance during the current evaluation period is Satisfactory AND cumulative ratings to date (including the current evaluation period) would result in an average rating of Superior.
> - o No official award term determination shall be made during the contract's base period. The contractor's performance during the period shall be evaluated and the results furnished to the contractor.
> - o No official SLA disincentive determinations shall be made during the contract's base period. The contractor's performance during the period shall be evaluated and the results furnished to the contractor.
> - o Failure to earn an award term at the end of any performance evaluation period eliminates eligibility for award of future award terms.
> - o Although the ability to be awarded additional performance periods ends at the conclusion of Award Term 5, the contractor's performance shall continue to be evaluated and rated. Those results shall be documented in past performance reports and considered by ED in future procurement decisions.
> - o Award of all Option Periods and Award Terms is subject to the availability of sufficient funds.

> The award team period summary is as follows:

Contract Period	Evaluation Period	Superior Performance During the Evaluation Period Results in Award of the Following Additional Performance Period
Transition Period	May 1, 2005 - June 30, 2005	Not applicable
Base Period	July 1, 2005 - June 30, 2006	Not applicable (dry run evaluation)
Option Period One	July 1, 2006 - June 30, 2007	July 1, 2008- June 30, 2009
Option Period Two	July 1, 2007 - June 30, 2008	July 1, 2009 - June 30, 2010
Award Term 1	July 1, 2008 - June 30, 2009	July 1, 2010 - June 30, 2011
Award Term 2	July 1, 2009 - June 30, 2010	July 1, 2011 - June 30, 2012
Award Term 3	July 1, 2010 - June 30, 2011	July 1, 2012 - June 30, 2013
Award Term 4	July 1, 2011 - June 30, 2012	July 1, 2013 - June 30, 2014
Award Term 5	July 1, 2012 - June 30, 2013	July 1, 2014 - June 30, 2015
Award Term 6	July 1, 2013 - June 30, 2014	None
Award Term 7	July 1, 2014 - June 30, 2015	None

1. Performance Evaluation Board:

   ED shall create a Performance Evaluation Board (PEB) comprised of selected managers and the COR. The PEB shall evaluate the Contractor's performance under this contract and develop a numerical rating for that performance. That rating shall be taken into account as part of ED's decision to award additional performance periods. The COR shall be the evaluation coordinator and submit observation reports and other performance data to the PEB.

2. Performance Evaluation Process:

   The contractor shall provide a performance evaluation report reflecting progress on all SLAs currently in effect. The performance evaluation process shall contain the following steps:

   a. Performance shall be rated at six (6) month intervals throughout the life of the contract.

   b. The annual rating for each evaluation period shall be comprised of an average of the two six (6) month ratings.

   c. An annual performance-rating plan shall be sent to the contractor thirty (30) days in advance of the beginning of the next annual performance period. The contractor may submit comments concerning the plan within fifteen (15) days of its receipt. If ED chooses to revise the plan on the basis of the contractor's comments, revisions shall be sent to the contractor in advance of the performance period.

   d. At the conclusion of the six (6) month rating period, COR shall collect performance evaluation results from appropriate ED staff and submit the necessary information to the PEB for final rating. The PEB shall also

consider the contractor's self-assessment of performance against the rating plan, provided it is received by COR by the 15th of the month following completion of the rating period.

e. The PEB shall complete each six (6) month rating process no later than one (1) month after the rating period ends and submit the rating to the Chief Information Officer (CIO) or designee for review and approval.

f. Upon completion of the second six (6) month rating period, the CIO or designee shall review and approve the average ratings that shall determine award term eligibility.

g. If the CIO or designee-approved rating is high enough to rate an award term, the documentation shall be forwarded to the Contracting Officer who shall execute an appropriate modification to the contract. In all other cases, the CO shall submit the rating results to the contractor.

For example, each contract performance year consists of two (2) six (6) month performance periods in which SLA data is collected and reported to PEB. The PEB collects data from key customers, customers (end users) and IT management, as discussed in Section H.14 Award Term Provisions, point 4 The Annual Performance Rating Plan (AARP), subsection c (the following section). This score is added to the SLA score and a total computed. Each six (6) month total from both of the years performance periods are average to arrive at a yearly score which is applied to the Overall Ratings Table (see Section H.14 Award Term Provisions, point 4 The Annual Performance Rating Plan (AARP), subsection d).

Rating Category	Measurement Period 1	Measurement Period 2	Average
SLAs	45 of 50	47 of 50	46 of 50
Small Business Goals	5 of 5	5 of 5	5 of 5
Exceeded Small Business Goals	0 of 2	2 of 2	1 of 2
Major Continuous Improvement Projects	8 of 8	6 of 8	7 of 8
Customer Satisfaction (Manager Survey)	5 of 5	4 of 5	4.5 of 5
Customer Satisfaction (Independent Survey)[1]	20 of 20	15 of 20	17.5 of 20
OCIO Senior Management	8 of 10	9 of 10	8.5 of 10
Total	91 of 100	88 of 100	89.5 of 100

3. The Annual Performance Rating Plan (APRP):
   The APRP may be adjusted from year to year to emphasize / de-emphasize various components of contractor performance. However, each plan shall meet the following conditions:

---

[1] If the Independent Customer Satisfaction Survey occurs annually, the score from the first measurement period shall be used in the second measurement period. For example if 20 points were scored in the first measurement period, the same score of 20 points shall be used in the second measurement period.

a. The APRP shall provide for assigning a maximum total of one hundred (100) points for the contractor's performance during the six (6) month evaluation period.

b. Fifty (50) of the one hundred (100) points shall measure the contractor's performance in meeting selected objective SLAs from Section IV, Performance Standards and Acceptable Quality Levels, of the PWS:

- This APRP section shall detail **the points to be deducted (disincentives)** from the overall fifty (50) points for each failure to meet the designated acceptable quality levels or subcontracting goals. Item 4. below, Period and Monthly SLA Calculations contains the methodology for deducting points.

c. The remaining fifty (50) points shall be scored by the PEB based upon input from key customers, end users and IT management. This portion of the APRP will:
- Identify the rating categories, their components, and the points assigned to each category.

- Initial rating categories include (but are not limited to the following:

  I. Small business goals contained in the contractor's approved subcontracting plan – Total Seven (7) Points (Reporting Requirements must be met without fail for the service provider to be eligible to earn these points.)
     - Met goals five (5) points
     - Exceeded goals two (2) points

  II. Major Continuous Improvement Projects – Total Eight (8) Points
     - Active participation with verifiable productivity improvements of ED employees five (5) points
     - Refinement of SLAs from measurement period to measurement period, three (3) points

  III. Customer Satisfaction – Total Twenty-five (25) Points
     - Touch Survey zero (0) points
     - Managers' Survey five (5) points
       The managers survey measures performance of the service provided to ED based upon management's satisfaction. The results are used to identify and resolve any issues and problems. Such resolutions should improve management satisfaction. An independent third party on a monthly basis will conduct the survey. The total managers survey score for the measurement period shall be averaged over six (6) months.
     - Independent Customer Satisfaction Survey twenty (20) points

If no Customer Satisfaction Survey occurs during the measurement period (e.g., annual frequency), the most recent, Customer Satisfaction Survey will be reused for that measurement period.

Points shall be awarded on a sliding scale as indicated below:

The customer satisfaction survey will be conducted by an independent third party and measure the performance of service provided to the end user community. The results shall be used to identify any issues and problems and the resulting actions shall improve customer service satisfaction.

100% customer satisfaction, to be determined by the following:

1. Baseline customer satisfaction survey, to be performed by independent third party during base year one (1) of the contract, is determined.

    (1) Customer dissatisfaction (defined as scores below 4, on a 5 point scale with 5 being high) is reduced by 10% per measurement period until 0% is reached (100% customer satisfaction when measuring 4 or 5)

    - Penalties will be assessed using sliding scale 1

    (2) Once 100% customer satisfaction has been achieved (100% 4 or 5 ratings), a baseline will be established based upon measurement of rating 5 only

Customer dissatisfaction (defined as scores below 5, on a 5 point scale with 5 being high) is reduced by 5% per measurement period until 0% is reached (100% customer satisfaction when measuring 5)

Frequency: Measure and Report Semi-Annually, switching to Annually after the first two (2) years successful performance

Measurement Period: Semi-annually, switching to Annually after the first two (2) years of successful performance of the contract. When the customer satisfaction survey moves from a semi-annual frequency to an annual frequency the most recent survey scored will be used for the measurement period in question.
For example:
During Option Year 1, two customer satisfaction surveys shall be performed, resulting in a score for each measurement period. During Award Year 3, a single customer satisfaction survey shall be performed, that score will be used for the measurement period in which it was performed and the following measurement period (Award Year Measurement Period 1 and Award Year Measurement Period 2).

20 points –Penalties for Customer Satisfaction shall be applied using sliding scale 1 (satisfaction defined as 4 or 5) and than scale 2 (satisfaction defined as 5).

Customer Dissatisfaction Decrease	Points
10% or greater	20 points
09% or greater	18 points
08% or greater	16 points
07% or greater	14 points
06% or greater	12 points
05% or greater	10 points
04% or greater	08 points
03% or less	0 points

For example:
The contract begins with an initial satisfaction (a 4 or 5) rating of 40 percent, leaving 60 percent of customers dissatisfied (less than 4 or 5). The service provider is responsible for decrease the percentage of dissatisfied customers by 6 percent (10 percent of 60 percent). After a measurement period, the service provider

reduces dissatisfaction by 7 percent. Using scale 1, the service provider can determine that all 20 potential points are accrued. If the service provider only reduced dissatisfaction by 4.8 percent, an 8 percent decrease, only 16 points would be accrued.

2) **Scale 2** – Customer Dissatisfaction is defined as anything below a 5 on a 5 point scale

Customer Dissatisfaction Decrease	Points
5% or greater	20 points
4% or greater	18 points
3% or greater	16 points
2% or greater	14 points
1% or greater	12 points
0% or less	0 points

For example:
The contract has progressed to a satisfaction (5) rating of 40 percent, leaving 60 percent of customers dissatisfied (less than 5). The service provider is responsible for decrease the percentage of dissatisfied customers by 3 percent (5 percent of 60 percent). After a measurement period, the service provider reduces dissatisfaction by 7 percent. Using scale 2, the service provider can determine that all 20 potential points are accrued. If the service provider only reduced dissatisfaction by 2.5 percent, a 1.5 percent decrease, only 14 points would be accrued.

IV. OCIO Senior Management - Total Ten (10) Points
   • Management Discretion ten (10) points[2]
V.   Merit Points- Total five (5) Points
   • The PEB may award up to 5 (five) additional points based on meritorious acts performed by the service provider. Any such acts would not be covered or measured under the SLAs or the points associated with the non-SLA areas, i.e. small business goals, major continuous improvement projects, customer satisfaction, OCIO senior management. The service provider must initiate the awarding of merit points

---

[2] OCIO Senior Management point assignment shall take into consideration CMMI level improvements.

through communication that provides evidence of the
act(s) and the benefits realized by the Department.

d. Point scores from both areas shall be combined and an overall rating
developed as follows:

Overall Rating Table

Rating	Point Range	Description
Unacceptable	0-49	Performance of 49 and below is indicative of serious mismanagement, negligence and/or incompetence. Continued performance at this level will require Education to consider terminating the order for default. **2. Not eligible for award**
Substandard	50-69	Performance between 50 and 69 requires the Contractor to establish a deficiency correction plan and schedule to take the necessary corrective actions. Implementation of the plan and schedule will be tracked by the COR and Contracting Officer. **3. Not eligible for award**
Satisfactory	70-84	Performance between 70 and 84 is satisfactory with 84points being the expressed level of satisfactory performance that can be expected from a good Contractor. **4. Not eligible for award**
Superior	85-93	Performance is significantly above satisfactory in all service areas. **5. THIS IS THE MINIMUM TARGET LEVEL FOR CONTRACTOR PERFORMANCE (Eligible for Award Term One through Award Term Five)**
Outstanding	94-100	All areas of performance are superior and there are significant indications of creativity, ingenuity, initiative and/or excellent performance under adverse conditions. **6. Eligible for award for Award Term One through Award Term Five**

e. Review Process:
   The contractor may request an internal review of an unfavorable award
   term determination. The request shall be submitted in writing to the
   Contracting Officer within fifteen (15) days of notification of the award
   term decision. Contractor disagreements with the subjective ratings
   assigned by the PEB are not subject to review. The Contracting Officer
   shall conduct a review and issue a final decision concerning the matter.

4. Period and Monthly SLA Calculations

   The following factors are defined for each SLA:
   - Disincentive Level – the level of disincentive applied to the SLA
   - Period Frequency – the period in which the SLA is calculated and
     Disincentive Value Demerits are applied.

- Disincentive Value – The number of Disincentive Value Demerits applied if the SLA is missed within the Period Frequency.
- Max Value – The total maximum number of points that can be deducted for missing this SLA during the semi-annual rating period

The Disincentive Level defines the Disincentive Value for each Period Frequency according to the following convention:

Disincentive Level	Period Frequency		
	Daily	Weekly	Monthly
High	3	6	9
Medium	2	3	6
Low	1	2	3

The following table lists the Disincentive Level, Period Frequency, Disincentive Value and Max Value for each SLA.

SLA Reference	SLA Name (from QASP)	ED Alignment	Disincentive Level	Period Frequency	Disincentive Value	Maximum Deducted Award Points
SLA-01	Server Availability	OPS	High	Weekly	6	5
SLA-02	Network Availability	NET	High	Weekly	6	5
SLA-03	Outlook Availability	OPS	Medium	Weekly	3	3
SLA-04	Blackberry Availability	OPS	Medium	Weekly	3	3
SLA-05	Unity Availability	OPS	Medium	Weekly	3	2
SLA-06	Qualified & Timely Staffing of Personnel	MGT	Medium	Daily	3	5
					Sub Total	23
SLA-07	Anti-Virus Update (Software Version)	OPS	High	Weekly	6	2
SLA-08	Virus File Release (Signature Files)	OPS	Low	Weekly	2	3
SLA-09	Timeliness of Backups	OPS	Low	Weekly	2	1
					Sub Total	6

SLA-10	Notification of Issue & Security Events	SEC	High	Daily	3	3
SLA-11	CERT / FedCIRC Alerts & Tasks	SEC	High	Weekly	6	1
SLA-12	Virus Penetrations of Network	SEC	High	Weekly	6	1
SLA-13	Service Restoration (Non-DR)	MGT	Medium	Daily	2	1
					Sub Total	**6**
SLA-14	Installation	OPS	Medium	Weekly	3	1
SLA-15	Moves, Adds or Changes (MACs)	OPS	Low	Weekly	2	1
SLA-16	Maintain User Accounts - Email - Password Resets - Disable User Accts - File Restorations	OPS	Low	Weekly	2	1
SLA-17	Priority 1 Customer Support	OPS	High	Weekly	6	1
SLA-18	Priority 2 Customer Support	OPS	Low	Weekly	2	1
SLA-19	Priority 3 Customer Support	OPS	Low	Weekly	2	1
SLA-20	Helpdesk Call Answer	OPS	Low	Daily	1	1
SLA-21	Call Abandonment Rate	OPS	Low	Daily	1	1
SLA-22	Initial Problem Resolution	OPS	Medium	Daily	3	1
SLA-23	Call Backs on Same Problem	OPS	High	Daily	3	3
SLA-24	Move, Add, Change or Delete Telecom – 1 to 15 Software	NET	Low	Weekly	2	1
					Sub Total	**13**

SLA-25	Timely Production of Required Reports	MGT	Medium	Weekly	3	1
SLA-26	Complete & Accurate Process Documentatio n	MGT	Low	Daily	1	1
					Sub Total	2
					Report Total	50

For each SLA, calculations occur every period and every month.

Example Period Calculation using SLA-01:

Period	Number of times SLA missed within the period (Availability per server = 99.6%)	Total Disincentive Value Demerits Applied (6 applied per missed SLA)
Month X Week 1	0	0
Month X Week 2	4	24
Month X Week 3	2	12
Month X Week 4	0	0

Example Monthly Calculation using SLA-01
At the end of the month, the Total Disincentive Value Demerits Applied during all periods in the month are reported for this SLA.-

-
At the end of the semiannual Measurement period, the total number of Disincentive Value Demerits accumulated are totaled and then converted to points for each SLA in a ratio of 50 Disincentive Value Demerits = 1 Point. The maximum number of points that can be subtracted from the initial 50 SLA points per SLA is determined by the Maximum Deducted Value Points for each SLA. For example, in the case of SLA-01 the maximum penalty is 5 points regardless of the number of Disincentive Value Demerits accumulated for that SLA within the Measurement period.

10. Section J List of Attachments:

Contract Attachment 1 - Performance Work Statement (PWS) delete and replace with attachment 1 of this modification. This version reflects Phase II of the Category C to Category A migration for the functions of Program Overhead, Disaster Recovery Facility (DRF), Telecom Billing and Desktop/Server Engineering. Additionally, the contract SLAs are deleted and replaced with the revised SLAs. Also in accordance with provision H.15 "Service Level Agreement Modification Process" three new SLAs (SLA-

06, SLA-25 and SLA-26) are undergoing the 2 quarter testing period required prior to being included in the Award Points Allocation process.

Contract Attachment 1, Appendix F Detailed Work Description of the Performance Work Statement delete and replace with Attachment 2 of this modification. The revised version accounts for the change to the PWS mentioned in the previous paragraph.

Contract Attachment 2 - Pricing Schedule append with the following:

Attachment 3 of this modification Pricing Schedule - Phase II Migration Cost Worksheet.

Category C to Category A Migration:

Effective July 1, 2006 Program Overhead, Disaster Recovery Facility (DRF), Telecom Billing and Desktop/Server Engineering as part of phase II were migrated from Category C to Category A services. The firm fixed price of phase II of the migration from Category C to Category A services during option period I is $2,442,521.76.

11. Modification List of Attachments:

   1. Revised Performance Work Statement
   2. Revised Appendix F: Detailed Work Description
   3. Phase II Migration Cost Worksheet

In consideration of the modification(s) agreed to herein as complete equitable adjustments for the Contractor's "proposal(s) for adjustments," the Contractor hereby releases the Government from any and all liability under this contract for further equitable adjustments attributable for such facts or circumstances giving rise to the "proposal(s) for adjustment."

ATTACHMENT 1 – PERFORMANCE WORK STATEMENT

I. Introduction

This task order shall acquire IT support services needed to meet ED's needs and to migrate to an IT Service Capability Maturity Model Integration (CMMI) Level 3 service environment. The services and solutions provided by the contractor to support EDNet shall meet the objectives of the OCIO in a cost-effective manner. Currently, ED has six areas of IT services:

- Production Server
- Messaging
- End User
- Networking
- Security
- Assistive Technology

The contractor shall provide Category A work (Firm Fixed Price per Unit Services) at a minimum of CMMI Level 3 on day one of the contract improving to CMMI Level 4 within five (5) years. All work shall be governed by improving service levels, described in Section IV of the Performance Work Statement (PWS), Performance Standards and Acceptable Quality Levels. All personnel shall conform to ED security policy, including training and paperwork requirements.

Principle Objectives

ED's Office of the Chief Information Officer (OCIO) Information Technology Division (ITD) has three objectives:

- To **immediately improve all services** that ITD provides to its customer base, as measured by meeting Service Level Agreements (SLAs) and ongoing independent third party Customer Satisfaction surveys.

- To **immediately lower the cost and demonstrate better service** through the adoption of CMMI Level 3 processes and competence.

- To **continuously lower costs and improve customer satisfaction** going forward for all ITD provided services.

A. Category A (Firm Fixed Price per Unit Services)

The contractor shall provide firm fixed price managed services billed on a per unit basis at a minimum of CMMI Level 3 on day one progressing to Level 4 within three to five (3-5) years. The contractor is responsible for all processes used in the completion of this work and shall have the capacity to handle multiple critical operational issues at one time.

- Maintain the **production servers**.

- Provide **messaging services** including but not limited to E-mail and Blackberry (or equivalent).

- Support **end users** and their hardware and software, including assistive technology (deskside)and IT Image and Distribution Center – ITIDC (Warehouse/Clearinghouse) services.

- Maintain a **roster of security-approved personnel** available to ED on an emergency basis.
- Perform management services.
- Maintain **networking services**.

B. Category B (Fixed Price / Time and Materials Project Services)

The contractor shall provide resources, including but not limited to Subject Matter Expert (SME) and Business Executive Expertise, on a fixed price and/or time and materials basis to support any IT projects; all projects shall follow ITD's CMMI Level 3 Product Development Process (PDP). Category B Support shall be acquired in accordance with the task order / work order procedures outlined in Section C – SUPPLIES OR SERVICES AND PRICES / COSTS of the RFQ. The Contractor shall use an Earned Value Management System and process for Category B (time and materials project-based) work in accordance with OMB, ANSI / EIA-748-A and other applicable regulations throughout the life of the contract. This process shall result in monthly reports by project reflecting expenditures for the Budget Cost of Work Performed, Actual Cost of Work Performed and Actual Cost of Work Scheduled. The Contractor shall provide a plan to implement an Earned Value Management System before award and must implement the system within 90 days after award[1].

ITD is responsible for maintaining the PDP, but the contractor shall provide personnel with demonstrable skills, competence and experience necessary for working within a CMMI Level 3 process environment. This includes providing qualified project managers and business management executives. All Project Managers acquired under this task shall be Project Management Institute (PMI) or equivalently certified and be responsible for managing ITD approved projects. Business management executives shall be responsible for managing *tiger teams*[2], compromised of SMEs and personnel from various technical disciplines, among other things for short to medium duration tasks. Category B shall be the preferred method for ED to acquire SMEs; therefore it is important that the service provider demonstrates its depth and breadth in technical expertise in areas governed by this contract (e.g., Customer Service, IT Infrastructure, Enterprise Architecture, Email Architecture, etc.).

C. Category C (Sustaining Time and Materials Support)

The contractor shall provide qualified labor on a time and materials basis for continuous staffing of services whose processes will be managed by ED for the following:

- Perform project **management services**.
- Provide network services
- Provide **security services**[3].

Presently, these services are performed within processes that are at either CMMI Level 1 or 2; the contractor shall assist ITD in improving these processes to CMMI Level 3 within three (3) years and CMMI Level 4 within eight (8) years of the start of the

---

[1] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.
[2] Tiger Teams are cross functional teams performing focused and tightly scoped projects.
[3] Security Services are cross functional in nature and cut across all of the other service areas.

contract. The contractor shall support, an Earned Value Management System for all Category C work (time and materials and project based) in accordance with OMB regulations[4]. The contractor shall provide ED with personnel who are capable of, and have had prior experience in working within CMMI Level 3 environments.

Section III, Scope of Work, provides greater detail concerning the products that constitute these three Categories.

Productivity Improvement

Any time a process moves from CMMI Level 3 to CMMI Level 4, ED shall benefit from an increase in the quality of service delivered to its approximately 6,000 internal customers. ED enjoys a high ratio of professional staff to clerical staff. Therefore, as customer service improves, as a result of the service provider's process improvements, ED's customer base shall experience a commensurate increase in productivity.

ED also recognizes that a successful service provider shall capture savings through increased internal labor productivity as more of Category A processes are migrated from CMMI Level 3 to CMMI Level 4. ED's share of the benefits shall be reflected in improved quality of service associated with the functions and processes of ED customer (end user) operations.

IT Service Capability Maturity Model Integration Process

In order to achieve ITD's objectives, the contractor shall conform to the following methodologies. First, the concept of IT Service Capability Maturity Model Integration[5] as defined by ED.

Table 1. CMMI Levels

IT Service Capability Maturity Model Integration Level[6]	Definition
IT Service CMMI Level 0	**Unaware**, no awareness of a need to improve IT service delivery.
IT Service CMMI Level 1	**Initial Phase**, IT service delivery is characterized as ad hoc, and occasionally even chaotic. Few processes are defined, and success depends on individual effort and heroics.
IT Service CMMI Level 2	**Repeatable**. Basic service management processes are established. The necessary discipline is in place to repeat earlier successes on similar services with similar service levels.
IT Service CMMI Level 3	**Defined**. The IT service processes are documented, standardized, and integrated into standard service processes. All services are delivered using approved, tailored versions of the organization's standard service processes.
IT Service CMMI Level 4	**Quantifiable Managed**. Detailed measurements of the IT

---

[4] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.
[5] Based, in part, upon research from http://www.itservicecmm.org.
[6] Ibid.

IT Service Capability Maturity Model Integration Level[6]	Definition
	service delivery process and service quality are collected. Both the service processes and the delivered services are quantitatively understood and controlled.
IT Service CMMI Level 5	**Optimization.** Continuous process improvement is enabled by quantitative feedback from the processes and from piloting innovative ideas and technologies.

Category A support shall be provided at CMMI Level 3 immediately upon contract award and therefore ED expects that this support shall be provided at a lower cost than is currently experienced today. Category B and C's services are expected to be consumed at the same general rate in the first year of the contract and therefore shall be no more expensive than today's costs.

However, as indicated above, the contractor is expected to migrate Category C services (currently CMMI Level 1) to Category A, CMMI Level 3. Accordingly, the contractor shall provide a comprehensive migration plan and (upon ED's approval) execute it.

Product Development Process
ITD shall use the Product Development Process, described below, as its management tool in monitoring product progress at all levels of the CMM.

ITD shall use the Stage-Gate® methodology[7] to manage the Product Development Process. ITD considers all IT services and projects to be products and shall manage them accordingly, fulfilling the role of gatekeeper. "The Stage-Gate® process is an operational roadmap for driving new product projects from idea to launch — a blueprint for managing the new product process — improving effectiveness and efficiency.

How It Works
Product development begins with an idea and ends with the successful launch of a new product. The steps between these points can be viewed as a dynamic process. Stage-Gate® divides the process into a series of activities (stages) and decision points (gates).

Stages
Each stage contains a set of defined concurrent activities, incorporating industry best practices. Activities during each stage are executed in parallel to enhance speed to market. This is further enhanced by the use of cross-functional teams all working towards the same goals.

---

[7] Developed by Dr. Robert G. Cooper. http://www.stage-gate.com/research.html.

Gates

Gates are the decision points where senior managers decide whether to continue funding a project. The outcome of the decision is to Go, Kill, Hold, or Recycle the project. Gates also act as "quality control" checkpoints, which evaluate among other things:

- Have the deliverables been executed in a quality fashion?
- Is the project attractive from an economic and business standpoint?
- Is the information sufficient to make a decision?
- Is the action plan and request for resources sound?"[8]

II. Description of Current Operations

ITD is responsible for the full life-cycle management of EDNet, the Department's primary IT service delivery infrastructure comprised of network hardware, software and equipment. EDNet is the technical vehicle through which ED employees use many critical information resources and reach out to ED's customers. EDNet provides desktop services including a standard office automation software suite, enterprise-wide e-mail, desktop computers and peripherals. EDNet also houses an intranet (ConnectED), a presence on the Internet (ED.gov), and many custom business applications and information systems. EDNet includes enterprise level backup, recovery, archiving, storage / retrieval systems and security. EDNet is supported on a 7x24x365 basis[9].

The primary data center for EDNet, which houses the majority of EDNet's mission-critical systems, is being relocated in late 2004 from its current location at the Regional Office Building 3 in Washington, DC to a new facility in the Washington, DC metropolitan area in Oxon Hill, Maryland. In addition to the primary data center, EDNet has three secondary data centers in the Washington, DC area, and a disaster recovery and backup center, the Disaster Recovery Facility (DRF), in Kennesaw, Georgia. The primary and backup data centers support multiple ED offices located in Washington, DC and across the country.

As a Federal agency General Support System, EDNet is responsible for following and maintaining a current Disaster Recover Plan (DRP) to reconstitute the IT infrastructure required to support mission-critical functions during a disaster. The DRF facility has been designed to be a robust, compatible, secure, and scalable warm backup facility to the primary data center. Redundant connections have been provided to most ED locations to ensure maximum network availability. DRF interconnects with the Headquarters and regional facilities to provide connectivity in the event of a significant disruption of service and as a contingency for other services. The infrastructure in the DRF has been sized for expansion to provide warm backup and disaster recovery services to applications sponsored by other ED Principal Offices (POs), and offers additional expandability for future requirements. Such expansion shall be completed and funded incrementally as needed. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many

---

[8] http://www.stage-gate.com/research.html.
[9] Applies to server, security and network support.

as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time.

EDNet currently includes:

- Program management, engineering, network and server operations, disaster recovery, database administration, messaging, telecommunications, multimedia and video teleconferencing;

- Providing nationwide IT office relocations;

- Providing cabling support;

- Supporting IT refreshes including new IT equipment and asset management;

- Maintaining a surplus IT equipment clearinghouse;

- Assistive technology engineering;

- Providing customer services including project assurance, project management, helpdesk and deskside support for approximately 6,000 users located in over 20 sites across the Nation; and

- Supporting regional operations including regional deskside support, records management, information management and other activities as needed.

EDNet Critical Functions are described in Appendix B.

III. Scope of Work

The contractor shall provide ED with top quality professional IT services to manage, support, and continuously improve EDNet. The detailed description of services for each functional area are included within this (Section III Scope of Work) and Appendix F – Detailed Work Descriptions. The contractor shall provide support services, and comply with ED's enterprise architecture, for, but are not limited to, the following:

All Categories

- Support shall be provided on a 24x7x365 basis[10];

- The Contractor shall provide weekly status briefings to senior management;

- ED's Investment Review Board (IRB), Technical Review Board (TRB) and Configuration Change Review Board (CCRB) processes (e.g., equipment entering the EDNet environment, etc.);

Category A

- User account management and administration including: user space allocations; changing customer's e-mail account's user name; creation and maintenance of e-mail distribution lists, moving files and account information within ED; changing account privileges; adding and deleting accounts; maintaining print queues; coordinate the transfer of account information anytime a customer's move

---

[10] This does not include helpdesk support. Helpdesk support is provided each workday, see Workday Appendix J, hours for Helpdesk operations are 0700 until 2200 EST and Deskside Support is 0700 until 1900 local time. *During the month of September and the first week of October the workweek is extended to include Saturday and Sunday.*

(physical or organizational) would require information to be transferred to a different ED system;

- Data center operations including: server room management at the Education Data Center (EDC), surveillance of systems operations, backups and file restores, and management of: servers, server farms, load balancers, gateways, and firewalls;

- Disaster Recovery Facility (DRF): reference the responsibilities and resources required for processing cutover between failed EDNet production operations to their backup processing capability at the DRF. Include all equipment , processes and people required to handle the cutover. Ensure that the escalation process is well understood and that the correct management teams are on board with all emergency procedures to be prepared for a cutover.

- Assistive technology deskside support;

- Desktop image development and testing;

- Software version maintenance;

- EDNet customer services, Helpdesk support, including enterprise-wide systems including office automation software suite (e.g., word processing, spreadsheet, database, presentation / graphics, etc.), e-mail, Internet / intranet systems, video conferencing, Cisco AVVID infrastructure (to include IP Telephony, Broadcast Video over IP and associated AVVID applications) and hardware, to approximately 6,000 users;

- National and Regional operations deskside support, including Desktops, peripherals, appliances, and devices, such as PC's, laptops, palmtops and other personal digital assistants, printers, scanners, and PC peripherals;

- Small nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs); and

- IT refresh support, including new IT equipment, asset management database administration.

- Program management to include overall management, measurements, dashboard development and maintenance, staffing, planning, accounting, budgeting, tracking, reporting, administrative support; and Product assurance;

- Network operations and management support of converged communications, and networking including internetworking services, telecommunication services, multimedia / Video teleconferencing services, and wire and cable management (installation and maintenance);

- IT Image and Distribution Center - ITIDC (Warehouse/Clearinghouse) support, including IT equipment (hardware and software) surplus, disposal and redistribution.

Category B

- Systems engineering services;

- Introduction of radically new technology (e.g., switching desktop from windows based technology to a different technology);
- Application packaging, testing and delivery; and
- Large nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs).

Category C

- Project Management Support
- Security support, including vulnerability management, malicious and mobile code identification, containment and eradication, penetration testing and log auditing and security operations;
- Configuration Management
- Custom Application Support
- Network operations and management support of NCES
- Assistive Technology engineering (testing, compliance, etc.); and

The contractor shall provide support as the IT service delivery infrastructure changes in scope and complexity, as determined by ED. ED reserves the right to include additional work deemed as within the general scope of this contract. The contractor understands that the volume of work could decrease or increase at any point during the life of the EDNet Management Contract. For example, the number of ED offices or locations could change at any time.

The contractor shall be required to support ED's customer accounts by managing Windows, Macintosh, Unix or other technology as covered by the then current ED Product Support Plan. The contractor shall provide timely, courteous and competent responses to its customers' requests.

The contractor shall provide support in the form of, but not limited to, answering questions concerning problem resolution for ED's standard COTS and some specialized applications for its customers. The contractor shall coordinate the transfer of information from Tier 0 / 1 to Tier 2 and Tier 3 services[11], some of which shall be provided by the contractor, ED, various third party vendors and Original Equipment Manufactures (OEMs).

The contractor shall provide subject matter expertise as a resource to be consumed by ITD's Product Development Process or continuing IT operations. This service can take the form of, but is not limited to, providing short term or continuous support for defined projects, such as performing a cost benefits analysis, architectural review, implementation planning QA, feasibility study, and application programming. Additionally, the contractor shall coordinate with and transfer to, any knowledge developed or required to the appropriate ED employees. The contractor shall perform project and time management, while meeting predefined objectives.

---

[11] Tier 0 / 1 – self-help and basic helpdesk services, Tier 2 advanced helpdesk services and Tier 3 SME and OEM helpdesk services.

Finally, the contractor shall provide a set of processes and practices that bring server, messaging and user services immediately upon award of task to CMMI Level 3. The contractor shall actively migrate additional technical operational products through the Capability Maturity Model, using *Kaizen*[12], lean manufacturing[13] principles, and/or Six Sigma[14]. Supporting ED's management requires the ability, on the part of the contractor, to perform excellent, consistent and timely work, and to support executive level decisions through presentations to ED's management. The contractor shall include root cause costs as a part of doing business to be borne by the contractor and shall work with ED to define processes and report formats in order to define the events that drive this requirement.

ED recognizes that the migration to Managed Services is a mature business practice used by many organizations to ensure responsive and competitive operations. The contractor shall work with ED to implement an IT infrastructure that is consistent with industry best practices and the contractor shall provide a comprehensive, best value solution. The contractor shall provide support services for, but not limited to, the following of EDNet include Category A (FFP per Unit Services), Category B (FFP / T&M Project Services) and Category C (Sustaining T&M Support):

Transition In Plan

The Service Provider shall provide a comprehensive Transition In Plan that shall be used for the first two (2) month's at ED and will integrate with the incumbent's Transition Out Plan. This Transition In Plan should complement the incumbent's Transition Out Plan and include, at a minimum:

- Identification of Risks and Risk Mitigation
- Level of Effort
- Schedule (including milestones)
- Resource Allotments
- Dependencies
- Costs

Appendix I contains the elements the contractor can expect from the Transition Out Plan.

Transition Out

---

[12]*Kaizen* is a process improvement methodology that considers human resources as the most important company asset, believes that processes must evolve by gradual improvement rather than radical changes, and believes that improvement must be based on statistical/quantitative evaluation of process performance.

[13] Lean methods create a continual improvement-based, waste elimination culture that involves workers at all levels of the organization and is based upon three objectives 1) Reduce production resource requirements, 2) Increase manufacturing velocity and flexibility, and 3) Improve quality and eliminate defects.

[14] Six Sigma is a rigorous and disciplined methodology that uses data and statistical analysis to measure and improve a company's operational performance by identifying and eliminating "defects" in manufacturing and service-related processes. Commonly defined as 3.4 defects per million opportunities, Six Sigma can be defined and understood at three distinct levels: metric, methodology and philosophy.

Sixty (60) days prior to the expiration or termination of the contract, the contractor shall provide a Transition Out Plan. The offeror shall present a detailed plan for any Transition Out tasks, regardless of precipitating reasons. The Transition Out Plan shall be constructed so as to require no more than 60 days from termination notification to phase-out completion. The plan shall include procedures to minimizing impact on contract performance. Transition Out Plans shall include provisions for completion of all contractor responsibilities.

The Offeror's Transition Out Plan shall:
- Present procedures for retaining the required staffing level including key personnel necessary to provide complete contractual support through the expiration of the contract.
- Include a work breakdown structure and cost estimate.
- Include a training plan and schedule for each activity covered by the contract.
- Describe in detail how responsibility and accountability will be relinquished for all government-furnished equipment.

The offeror shall coordinate its activities with other contractors to effect smooth and orderly transitions at the beginning and the end of contract periods. The offeror shall remove all contractor-owned equipment, tools, parts and belongings from the Government-furnished spaces by midnight of the last day of the contract.

Enterprise Email / Messaging Architecture / Disaster Recovery
The Service Provider shall provide a stable enterprise email system capable of supporting ED's user communities. The architecture shall accommodate system availability and reliability as describe the Service Level Agreements in Section IV.

An annual Email Architectural Fee shall be charged to ED. This annual fee is to cover the development and upkeep of ED's email architecture. The architecture shall accommodate a 6,500 customer email base with the following identified needs, it is understood that ED's needs will continue to evolve over time and this list shall be understood to be a starting point, not an exhaustive list:
- 24x7 Uptime within SLA limits (see Section IV of the PWS)
- Appropriate Redundancy to maintain SLAs
- Disaster Recovery Planning to meet SLA
- Backup and Restore Capabilities on a mailbox, post office, server and system level
- Email Message Disk Space Management
- Email Message Archiving that meets Federal Regulations
- SPAM filtering
- Remote Connectivity from PCs and the Web
- Wireless Email Access
- Access through handheld devices, such as but not limited to, PDAs and Blackberry devices
- Integration with VoIP voicemail messaging
- Strategy for incorporating Instant Messaging
- Virus Scanning capabilities for incoming, outgoing and internal messaging
- Secure Messaging (Encryption) for both internal and external messages

The Service Provider shall provide an architecture that shall place stability of operations above other considerations. The existing email system is described under Category A of the PWS.

Expected Investment in Tools
The Service Provider shall provide a description of which tools shall be introduced, how the tools shall be introduced, and how those tools shall improve customer satisfaction and/or ED's productivity. The Service Provider shall make an investment in these tools, and if the Service Provider chooses, a line item charge may be included in the cost proposal. This line item may include any additional yearly maintenance charges. It is understood that ED will own intellectual property to all data, the software and the licensing of these tools[15]. These tools include:

(1) Management Information Dashboard.
- Offeror shall provide a tool that provides a daily snapshot of how ED and the offeror are delivering IT operations, historical information, trend analysis and correlation, summary of challenges, and recommendations as needed, in a format that is viewable by all stakeholders (e.g., web site, reports, etc.).

(2) Performance Monitoring Tools
- Performance monitoring tools shall be used to measure IT infrastructure performance, IT infrastructure uptime, and keep track of security metrics. Service provider shall list what tools shall be used to manage performance.

(3) Project Management Tools
- Project management tools are required to provide, among other things, budget variance reports (project over-run and under-run metrics), resource usage, task usage, milestone reports, and comply with OMB and other regulatory earned value requirements[16]. Service provider shall list what tools shall be used to manage projects.

(4) Communication Tools
- Contractor shall provide, at their expense, appropriate use of communication tools for their staff that will interface with ED's current communication environment. This is inclusive of, but not limited to:
  a. Cellular Phone Hardware and service
  b. Blackberry Hardware
  c. Personal computers required for remote support

Major IT Issue Handling
A major issue is defined as any IT event that affects more than 50 employees (e.g., email outage, virus attack, VoIP outage, security event, etc.). All major events shall

---

[15] ED will own all licenses and tools that are listed as a line item in the Cost Proposal worksheet, but not tools provided by the offeror at no charge to ED. At ED's option "free" software and licenses may be purchased from the offeror at GSA or better rates. **All data is the intellectual property of ED.**
[16] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

follow the escalation procedure, root cause analysis and customer communication procedure described below.

Escalation Procedure

The Service Provider shall follow an escalation procedure when responding to major issue(s). The service provider's escalation procedure shall conform to or exceed the following guidelines:

- Notify the appropriate ITD Manager or designee within fifteen (15) minutes of becoming aware of any major IT issues. Notification shall occur via voice communication. If the ITD Manager or his/her designee is unavailable the service provider shall immediately notify the Directory of IT or his/her designee.

Customer Communication

The Service Provider shall provide communications directly to the affected customer (end-user) base once OCIO management has been informed for all major IT issues. Communications shall take the form of informational web updates via ConnectED, voice mail and/or email, as appropriate. All communications regarding IT issues shall be approved by a Service Provider manager and ED prior to release and shall include at a minimum an explanation of the problem and anticipated resolution time.

Root Cause Analysis

The Service Provider shall perform root cause analyses for all major issues with preliminary being available within 1 business day and final within five business days. Once root cause has been determined an alternative analysis shall be performed, followed by a plan for remedy, which shall be presented for OCIO executive review and decision. Remedies shall be tracked and an update shall be provided to OCIO executive management providing expected results measured against actual results. For Category A work, the cost of this process shall be borne by the service provider.

Category A (Firm Fixed Price per Unit Services)

The Contractor shall:

Provide Program Management Services

Provide overall management, measurements, dashboard maintenance, staffing, planning, accounting, budgeting, tracking, reporting, administrative support, product assurance and improvement analysis.

Task Area Provides overall Program Management services.

Desired Outcome: To ensure that all work performed is successful in achieving the task's purpose, goals and objectives; on schedule, within budget, thoroughly documented, and in accordance with performance specifications, requirements and standards; coordinated with other tasks; integrated with other tasks performed under this contract; integrated with efforts outside of this contract but related to ED's IT service delivery infrastructure; and consistent with ED's strategic goals, objectives and mission.

If a team of contractors is awarded this contract, the team-lead contractor shall be responsible for ensuring that successful program management is achieved for this

contract. Therefore, the team-lead contractor shall be ultimately responsible for ensuring that the purpose, goals, objectives, requirements and service standards of the task are achieved. The contractor shall receive the Contracting Officer's approval prior to subcontracting or "teaming" any portion of the contract to another contractor.

Description of Services: Provide qualified and experienced staff who follow, implement and support "best practice" program management methodologies. Program management includes overall management, measurements, dashboard maintenance, staffing, planning, accounting, budgeting, tracking, and reporting for the entire EDNet contract. This office shall interact with focal points across service areas.

The Contractor shall provide internal communications planning services, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the mission. The Contractor shall assist FTE management in the proper budgeting and financial management of projects and programs; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a program so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) or Product Development Process (PDP) demonstrate conformance with all relevant departmental and federal standards for the management planning, tracking and controlling of programs and tasks.

The contractor shall provide a draft Program Management project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance. The plan will address all elements contained in the QASP for EDNet management, and shall include:

- A single Program Manager (PM) to manage the entire task effort
- Project managers across each service area who shall work with the PM to provide management and direction in accordance with ED guidance for services provided under all three categories of work
- PM and Project Manager roles and responsibilities
- Transition Management including Contract Phase-In and Phase-Out Plans
- Staffing management to include security processing
- Quality control
- Performance management and surveillance including SLA metrics, reporting, maintenance of management dashboard, ongoing quality process, and content measure evaluation
- Financial management, Total Cost of Ownership, qualitative benefits, reporting and price performance support
- Budgeting support to include budget formulation, funding requirements and projections, monitoring, reporting and tracking expenditures
- Cost benefit analysis support
- Customer satisfaction surveys
- Information Technology Investment Management support
- Planning support
- Administrative support for procurement, staffing and other business related functions.

- Document management and maintenance (standards, policies, procedures, and operations guides) support
- Risk management
- Logistics support
- Meeting support
- Program documentation support
- Reports, oral presentations and other deliverables

Performance Requirements Summary:

Program Management:

The contractor shall:

- Provide overall contract, program management, staffing support, planning support, quality control support, performance surveillance support, budgeting support, analysis support, performance monitoring and metrics, reporting, administrative support, logistics support, meeting support, standards development and support, documentation, reports and other deliverables and Product Assurance.

- Manage projects using OMB's earned value discipline[17].

- Provide ongoing support for overall contract management and reporting.

Server and End-user Engineering

- Technical Writing

- Development Lab Technician

- Development Lab Manager

- Technical Review Administration

Support the production servers environment

Provide Hardware and Software support for the **server infrastructure** on ED's behalf, managing delivery, configuration, installation, and systems administration in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- Server and Software Installation / Refresh Process

- Ongoing Server and Software Maintenance Process

- Server and Software Install, Moves, Adds and Changes (IMACs)

- Server and Software Disposal and License Recovery

- Data protection, backup, and recovery in accordance with SLAs

- Support Disaster Recovery Facility Environment per Disaster Recovery Plan

- Engineering

---

[17] Ibid.

- See Table 6 for additional detail

Systems include approximately 520 servers (including the disaster recovery facility), 32 administration accounts, including 6 Domain Controllers and 6 Exchange Administration accounts, approximately 400 applications and approximately 16+ TB of disk storage. See Table 2 for geographic locations and a complete inventory and description of technology to be supported

Maintain production servers

The contractor shall perform server support operations, which include server, data center, server image management, helpdesk call center support, network systems monitoring, Tier 2 support including remote management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images for Windows and Unix systems[18].

- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

- Support the Disaster Recovery environment at warm start state of readiness prepared for cutover when necessary with in performance parameters.

Hardware and Software Equipment Inventory / Service Criticality

The following table depicts the current equipment inventories of servers[19], see Table 2, grouped by equipment type and criticality of service. Each table is arranged with Type of equipment on the "Y-Axis" and Criticality[20] on the "X-Axis". Within each block the location and number of equipment is displayed.

Table 2. Server Inventory*

Criticality / Equipment Type	(1) Standard Server O&M (No DR Required)	(2) Mission Supportive Systems (Second Wave DR)	(3) Mission Critical Systems (DR Required)	(4) Critical Infrastructure / Service (DR Required)	Totals
	60	136	50	108	
	9	26	4	8	

---

[18] As this contract has a potential ten-year life span, it is expected that the Product Development Process has the potential to introduce new operating platforms and systems.
[19] As of June 2004.
[20] Criticality is defined as Level 1 – No Disaster Recovery (DR) Required, Level 2 – Second Wave DR, Level 3 – DR Required, and Level 4 – DR Required.

0	6	26	15
0	2	0	1
1	0	0	2
0	0	1	8
0	0	0	11
0	3	0	31

*Note that the numbers of servers / equipment change frequently.

Maintain messaging services including E-mail and Blackberry

Provide a process for managing all **messaging services** in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- E-mail, blackberry (or equivalent), PDAs, and storage services
- Remote and Mobile customer support
- Data protection and recovery in accordance with SLAs
- Exchange Central administration and maintenance for approximately 50 users

The Messaging System includes approximately 6,000 accounts and mailboxes utilizing approximately 500 GB of data (95 percent of accounts are size restricted to 100 MB) and approximately 500 Blackberries[21].

Provide Messaging Services including E-mail and Blackberry

The contractor shall perform messaging services operations, which include messaging monitoring, Spam filtering, anti-virus scanning and blocking of the messaging systems, disaster recovery of the messaging system, messaging systems management, helpdesk call center support, Tier 2 support including remote management of customer e-mail accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Include Tier 0 / 1, helpdesk support, simple network systems monitoring, Tier 2 support including remote access, management for some COTS applications (anti-virus), account administration and operate and maintain the interface with

---

[21] As Blackberry usage is expected to grow, this number may not be accurate at the start of the new contract.

> other Tier 2 and Tier 3 support organizations, for all supported messaging systems (Blackberry, Microsoft Exchange or equivalent).

- Maintain ED's messaging system, including their Blackberry (or equivalent) solution.

- Continually integrate industry best practices for messaging tools and technologies that enhance the productivity of the customer, thereby driving down messaging support costs for ED.

- Provide enhanced technologies that identify and eliminate potential causes of problems and speed resolution times, thus improving ED employees' productivity.

Messaging Account Inventory[22]

Complete inventory grouped by service type is provided in Table 3.

Table 3. Messaging

Type of Service	Number of Users
	6,000
	500
	50

The contractor's solution shall, at a minimum, provide the features shown in Table 4.

Table 4. Features

Features
An **integrated account management** solution.
Maintenance and day-to-day **operations of ED's messaging systems**. Ensuring systems performance, reliability and accessibility.
Anti-virus and Spam solution compatible with ED's messaging environment.
Remote connectivity through AS 5300, Virtual Private Networks (VPN), Outlook Web Agent (OWA), and Firepass.
Ability to **restore a single customer's mailbox**.
Appropriate **disaster recovery** planning and execution.
Ownership of problems from identification to solution / resolution.
Seamless **problem distribution** and **problem resolution** management support.

Support Disaster Recovery

- **Network** – The Contractor shall support the Department's mission critical networking component by providing technical expertise in the Cisco, Cisco VoIP, Cisco ACS, Cisco PIX, Cisco VPN, Symantec SEF, Microsoft DNS

---

[22] As of June 2004.

services, Solaris DJBDNS, MRTG, CA Unicenter and Windows 2000 infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore connectivity during disaster recovery efforts and simulation drills.

- **Servers** – The Contractor shall support the Department's mission critical server operations component by providing technical expertise in the Microsoft Windows and Sun Solaris infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

Maintain Customers (End Users) and their Equipment

Provide Hardware and Software support for the **end user infrastructure** on ED's behalf, managing delivery, configuration, installation, and accounts in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- PC and Software Installation / Refresh Process
- Ongoing PC and Software Maintenance Process
- PC, software, and cabling Install, Moves, Adds and Changes (IMACs)
- PC and Software Disposal and License Recovery
- Data protection and recovery in accordance with SLAs
- Remote and Mobile customer support, including approximately 800 cell phones and 500 PDAs
- Peripherals management, including printers and print queues
- Asset Management
- Assistive Technology Deskside Support
- See Table 6 for further detail

PC systems including approximately 5,500 PCs, 2,000 laptops, and less than 75 Macintosh PCs, laptops or other devices. Accounts include approximately 6,000 Active Directory, Macintosh and Unix accounts utilizing approximately 4 TB of data storage. See Table 5 for user priority, 90 percent of all customers (end users) are located in the Washington DC area. Hardware descriptions of typical PCs are located in Appendix B and software descriptions are located in Appendix C.

Support Customers (End Users) and their Hardware and Software

The contractor shall perform customer (end user) support operations, which include deskside equipment and peripherals (including printers and assistive technology), deskside image management, helpdesk call center support, Tier 2 support including remote desktop management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

ATTACHMENT 1 – PERFORMANCE WORK STATEMENT

I. Introduction

This task order shall acquire IT support services needed to meet ED's needs and to migrate to an IT Service Capability Maturity Model Integration (CMMI) Level 3 service environment. The services and solutions provided by the contractor to support EDNet shall meet the objectives of the OCIO in a cost-effective manner. Currently, ED has six areas of IT services:

- Production Server
- Messaging
- End User
- Networking
- Security
- Assistive Technology

The contractor shall provide Category A work (Firm Fixed Price per Unit Services) at a minimum of CMMI Level 3 on day one of the contract improving to CMMI Level 4 within five (5) years. All work shall be governed by improving service levels, described in Section IV of the Performance Work Statement (PWS), Performance Standards and Acceptable Quality Levels. All personnel shall conform to ED security policy, including training and paperwork requirements.

Principle Objectives

ED's Office of the Chief Information Officer (OCIO) Information Technology Division (ITD) has three objectives:

- To **immediately improve all services** that ITD provides to its customer base, as measured by meeting Service Level Agreements (SLAs) and ongoing independent third party Customer Satisfaction surveys.

- To **immediately lower the cost and demonstrate better service** through the adoption of CMMI Level 3 processes and competence.

- To **continuously lower costs and improve customer satisfaction** going forward for all ITD provided services.

A. Category A (Firm Fixed Price per Unit Services)

The contractor shall provide firm fixed price managed services billed on a per unit basis at a minimum of CMMI Level 3 on day one progressing to Level 4 within three to five (3-5) years. The contractor is responsible for all processes used in the completion of this work and shall have the capacity to handle multiple critical operational issues at one time.

- Maintain the **production servers**.

- Provide **messaging services** including but not limited to E-mail and Blackberry (or equivalent).

- Support **end users** and their hardware and software, including assistive technology (deskside)and IT Image and Distribution Center – ITIDC (Warehouse/Clearinghouse) services.

- Maintain a **roster of security-approved personnel** available to ED on an emergency basis.
- Perform management services.
- Maintain **networking services**.

B. Category B (Fixed Price / Time and Materials Project Services)

The contractor shall provide resources, including but not limited to Subject Matter Expert (SME) and Business Executive Expertise, on a fixed price and/or time and materials basis to support any IT projects; all projects shall follow ITD's CMMI Level 3 Product Development Process (PDP). Category B Support shall be acquired in accordance with the task order / work order procedures outlined in Section C – SUPPLIES OR SERVICES AND PRICES / COSTS of the RFQ. The Contractor shall use an Earned Value Management System and process for Category B (time and materials project-based) work in accordance with OMB, ANSI / EIA-748-A and other applicable regulations throughout the life of the contract. This process shall result in monthly reports by project reflecting expenditures for the Budget Cost of Work Performed, Actual Cost of Work Performed and Actual Cost of Work Scheduled. The Contractor shall provide a plan to implement an Earned Value Management System before award and must implement the system within 90 days after award[1].

ITD is responsible for maintaining the PDP, but the contractor shall provide personnel with demonstrable skills, competence and experience necessary for working within a CMMI Level 3 process environment. This includes providing qualified project managers and business management executives. All Project Managers acquired under this task shall be Project Management Institute (PMI) or equivalently certified and be responsible for managing ITD approved projects. Business management executives shall be responsible for managing *tiger teams*[2], compromised of SMEs and personnel from various technical disciplines, among other things for short to medium duration tasks. Category B shall be the preferred method for ED to acquire SMEs; therefore it is important that the service provider demonstrates its depth and breadth in technical expertise in areas governed by this contract (e.g., Customer Service, IT Infrastructure, Enterprise Architecture, Email Architecture, etc.).

C. Category C (Sustaining Time and Materials Support)

The contractor shall provide qualified labor on a time and materials basis for continuous staffing of services whose processes will be managed by ED for the following:

- Perform project **management services**.
- Provide network services
- Provide **security services**[3].

Presently, these services are performed within processes that are at either CMMI Level 1 or 2; the contractor shall assist ITD in improving these processes to CMMI Level 3 within three (3) years and CMMI Level 4 within eight (8) years of the start of the

---

[1] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.
[2] Tiger Teams are cross functional teams performing focused and tightly scoped projects.
[3] Security Services are cross functional in nature and cut across all of the other service areas.

contract. The contractor shall support, an Earned Value Management System for all Category C work (time and materials and project based) in accordance with OMB regulations[4]. The contractor shall provide ED with personnel who are capable of, and have had prior experience in working within CMMI Level 3 environments.

Section III, Scope of Work, provides greater detail concerning the products that constitute these three Categories.

Productivity Improvement

Any time a process moves from CMMI Level 3 to CMMI Level 4, ED shall benefit from an increase in the quality of service delivered to its approximately 6,000 internal customers. ED enjoys a high ratio of professional staff to clerical staff. Therefore, as customer service improves, as a result of the service provider's process improvements, ED's customer base shall experience a commensurate increase in productivity.

ED also recognizes that a successful service provider shall capture savings through increased internal labor productivity as more of Category A processes are migrated from CMMI Level 3 to CMMI Level 4. ED's share of the benefits shall be reflected in improved quality of service associated with the functions and processes of ED customer (end user) operations.

IT Service Capability Maturity Model Integration Process

In order to achieve ITD's objectives, the contractor shall conform to the following methodologies. First, the concept of IT Service Capability Maturity Model Integration[5] as defined by ED.

Table 1. CMMI Levels

IT Service Capability Maturity Model Integration Level[6]	Definition
IT Service CMMI Level 0	**Unaware**, no awareness of a need to improve IT service delivery.
IT Service CMMI Level 1	**Initial Phase**, IT service delivery is characterized as ad hoc, and occasionally even chaotic. Few processes are defined, and success depends on individual effort and heroics.
IT Service CMMI Level 2	**Repeatable**. Basic service management processes are established. The necessary discipline is in place to repeat earlier successes on similar services with similar service levels.
IT Service CMMI Level 3	**Defined**. The IT service processes are documented, standardized, and integrated into standard service processes. All services are delivered using approved, tailored versions of the organization's standard service processes.
IT Service CMMI Level 4	**Quantifiable Managed**. Detailed measurements of the IT

---

[4] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.
[5] Based, in part, upon research from http://www.itservicecmm.org.
[6] Ibid.

IT Service Capability Maturity Model Integration Level[6]	Definition
	service delivery process and service quality are collected. Both the service processes and the delivered services are quantitatively understood and controlled.
IT Service CMMI Level 5	**Optimization.** Continuous process improvement is enabled by quantitative feedback from the processes and from piloting innovative ideas and technologies.

Category A support shall be provided at CMMI Level 3 immediately upon contract award and therefore ED expects that this support shall be provided at a lower cost than is currently experienced today. Category B and C's services are expected to be consumed at the same general rate in the first year of the contract and therefore shall be no more expensive than today's costs.

However, as indicated above, the contractor is expected to migrate Category C services (currently CMMI Level 1) to Category A, CMMI Level 3. Accordingly, the contractor shall provide a comprehensive migration plan and (upon ED's approval) execute it.

Product Development Process

ITD shall use the Product Development Process, described below, as its management tool in monitoring product progress at all levels of the CMM.

ITD shall use the Stage-Gate® methodology[7] to manage the Product Development Process. ITD considers all IT services and projects to be products and shall manage them accordingly, fulfilling the role of gatekeeper. "The Stage-Gate® process is an operational roadmap for driving new product projects from idea to launch — a blueprint for managing the new product process — improving effectiveness and efficiency.

How It Works

Product development begins with an idea and ends with the successful launch of a new product. The steps between these points can be viewed as a dynamic process. Stage-Gate® divides the process into a series of activities (stages) and decision points (gates).

Stages

Each stage contains a set of defined concurrent activities, incorporating industry best practices. Activities during each stage are executed in parallel to enhance speed to market. This is further enhanced by the use of cross-functional teams all working towards the same goals.

---

[7] Developed by Dr. Robert G. Cooper. http://www.stage-gate.com/research.html.

Gates

Gates are the decision points where senior managers decide whether to continue funding a project. The outcome of the decision is to Go, Kill, Hold, or Recycle the project. Gates also act as "quality control" checkpoints, which evaluate among other things:

- Have the deliverables been executed in a quality fashion?

- Is the project attractive from an economic and business standpoint?

- Is the information sufficient to make a decision?

- Is the action plan and request for resources sound?"[8]

II. Description of Current Operations

ITD is responsible for the full life-cycle management of EDNet, the Department's primary IT service delivery infrastructure comprised of network hardware, software and equipment. EDNet is the technical vehicle through which ED employees use many critical information resources and reach out to ED's customers. EDNet provides desktop services including a standard office automation software suite, enterprise-wide e-mail, desktop computers and peripherals. EDNet also houses an intranet (ConnectED), a presence on the Internet (ED.gov), and many custom business applications and information systems. EDNet includes enterprise level backup, recovery, archiving, storage / retrieval systems and security. EDNet is supported on a 7x24x365 basis[9].

The primary data center for EDNet, which houses the majority of EDNet's mission-critical systems, is being relocated in late 2004 from its current location at the Regional Office Building 3 in Washington, DC to a new facility in the Washington, DC metropolitan area in Oxon Hill, Maryland. In addition to the primary data center, EDNet has three secondary data centers in the Washington, DC area, and a disaster recovery and backup center, the Disaster Recovery Facility (DRF), in Kennesaw, Georgia. The primary and backup data centers support multiple ED offices located in Washington, DC and across the country.

As a Federal agency General Support System, EDNet is responsible for following and maintaining a current Disaster Recover Plan (DRP) to reconstitute the IT infrastructure required to support mission-critical functions during a disaster. The DRF facility has been designed to be a robust, compatible, secure, and scalable warm backup facility to the primary data center. Redundant connections have been provided to most ED locations to ensure maximum network availability. DRF interconnects with the Headquarters and regional facilities to provide connectivity in the event of a significant disruption of service and as a contingency for other services. The infrastructure in the DRF has been sized for expansion to provide warm backup and disaster recovery services to applications sponsored by other ED Principal Offices (POs), and offers additional expandability for future requirements. Such expansion shall be completed and funded incrementally as needed. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many

---

[8] http://www.stage-gate.com/research.html.
[9] Applies to server, security and network support.

as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time.

EDNet currently includes:

- Program management, engineering, network and server operations, disaster recovery, database administration, messaging, telecommunications, multimedia and video teleconferencing;

- Providing nationwide IT office relocations;

- Providing cabling support;

- Supporting IT refreshes including new IT equipment and asset management;

- Maintaining a surplus IT equipment clearinghouse;

- Assistive technology engineering;

- Providing customer services including project assurance, project management, helpdesk and deskside support for approximately 6,000 users located in over 20 sites across the Nation; and

- Supporting regional operations including regional deskside support, records management, information management and other activities as needed.

EDNet Critical Functions are described in Appendix B.

III. Scope of Work
The contractor shall provide ED with top quality professional IT services to manage, support, and continuously improve EDNet. The detailed description of services for each functional area are included within this (Section III Scope of Work) and Appendix F – Detailed Work Descriptions. The contractor shall provide support services, and comply with ED's enterprise architecture, for, but are not limited to, the following:

All Categories

- Support shall be provided on a 24x7x365 basis[10];

- The Contractor shall provide weekly status briefings to senior management;

- ED's Investment Review Board (IRB), Technical Review Board (TRB) and Configuration Change Review Board (CCRB) processes (e.g., equipment entering the EDNet environment, etc.);

Category A

- User account management and administration including: user space allocations; changing customer's e-mail account's user name; creation and maintenance of e-mail distribution lists, moving files and account information within ED; changing account privileges; adding and deleting accounts; maintaining print queues; coordinate the transfer of account information anytime a customer's move

---

[10] This does not include helpdesk support. Helpdesk support is provided each workday, see Workday Appendix J, hours for Helpdesk operations are 0700 until 2200 EST and Deskside Support is 0700 until 1900 local time. *During the month of September and the first week of October the workweek is extended to include Saturday and Sunday.*

(physical or organizational) would require information to be transferred to a different ED system;

- Data center operations including: server room management at the Education Data Center (EDC), surveillance of systems operations, backups and file restores, and management of: servers, server farms, load balancers, gateways, and firewalls;

- Disaster Recovery Facility (DRF): reference the responsibilities and resources required for processing cutover between failed EDNet production operations to their backup processing capability at the DRF. Include all equipment , processes and people required to handle the cutover. Ensure that the escalation process is well understood and that the correct management teams are on board with all emergency procedures to be prepared for a cutover.

- Assistive technology deskside support;

- Desktop image development and testing;

- Software version maintenance;

- EDNet customer services, Helpdesk support, including enterprise-wide systems including office automation software suite (e.g., word processing, spreadsheet, database, presentation / graphics, etc.), e-mail, Internet / intranet systems, video conferencing, Cisco AVVID infrastructure (to include IP Telephony, Broadcast Video over IP and associated AVVID applications) and hardware, to approximately 6,000 users;

- National and Regional operations deskside support, including Desktops, peripherals, appliances, and devices, such as PC's, laptops, palmtops and other personal digital assistants, printers, scanners, and PC peripherals;

- Small nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs); and

- IT refresh support, including new IT equipment, asset management database administration.

- Program management to include overall management, measurements, dashboard development and maintenance, staffing, planning, accounting, budgeting, tracking, reporting, administrative support; and Product assurance;

- Network operations and management support of converged communications, and networking including Internetworking services, telecommunication services, multimedia / Video teleconferencing services, and wire and cable management (installation and maintenance);

- IT Image and Distribution Center - ITIDC (Warehouse/Clearinghouse) support, including IT equipment (hardware and software) surplus, disposal and redistribution.

Category B
- Systems engineering services;

- Introduction of radically new technology (e.g., switching desktop from windows based technology to a different technology);

- Application packaging, testing and delivery; and

- Large nationwide IT office relocations including Installations, Moves, Additions and Changes (IMACs).

Category C

- Project Management Support

- Security support, including vulnerability management, malicious and mobile code identification, containment and eradication, penetration testing and log auditing and security operations;

- Configuration Management

- Custom Application Support

- Network operations and management support of NCES

- Assistive Technology engineering (testing, compliance, etc.); and

The contractor shall provide support as the IT service delivery infrastructure changes in scope and complexity, as determined by ED. ED reserves the right to include additional work deemed as within the general scope of this contract. The contractor understands that the volume of work could decrease or increase at any point during the life of the EDNet Management Contract. For example, the number of ED offices or locations could change at any time.

The contractor shall be required to support ED's customer accounts by managing Windows, Macintosh, Unix or other technology as covered by the then current ED Product Support Plan. The contractor shall provide timely, courteous and competent responses to its customers' requests.

The contractor shall provide support in the form of, but not limited to, answering questions concerning problem resolution for ED's standard COTS and some specialized applications for its customers. The contractor shall coordinate the transfer of information from Tier 0 / 1 to Tier 2 and Tier 3 services[11], some of which shall be provided by the contractor, ED, various third party vendors and Original Equipment Manufactures (OEMs).

The contractor shall provide subject matter expertise as a resource to be consumed by ITD's Product Development Process or continuing IT operations. This service can take the form of, but is not limited to, providing short term or continuous support for defined projects, such as performing a cost benefits analysis, architectural review, implementation planning QA, feasibility study, and application programming. Additionally, the contractor shall coordinate with and transfer to, any knowledge developed or required to the appropriate ED employees. The contractor shall perform project and time management, while meeting predefined objectives.

---

[11] Tier 0 / 1 – self-help and basic helpdesk services, Tier 2 advanced helpdesk services and Tier 3 SME and OEM helpdesk services.

Finally, the contractor shall provide a set of processes and practices that bring server, messaging and user services immediately upon award of task to CMMI Level 3. The contractor shall actively migrate additional technical operational products through the Capability Maturity Model, using *Kaizen*[12], lean manufacturing[13] principles, and/or Six Sigma[14]. Supporting ED's management requires the ability, on the part of the contractor, to perform excellent, consistent and timely work, and to support executive level decisions through presentations to ED's management. The contractor shall include root cause costs as a part of doing business to be borne by the contractor and shall work with ED to define processes and report formats in order to define the events that drive this requirement.

ED recognizes that the migration to Managed Services is a mature business practice used by many organizations to ensure responsive and competitive operations. The contractor shall work with ED to implement an IT infrastructure that is consistent with industry best practices and the contractor shall provide a comprehensive, best value solution. The contractor shall provide support services for, but not limited to, the following of EDNet include Category A (FFP per Unit Services), Category B (FFP / T&M Project Services) and Category C (Sustaining T&M Support):

Transition In Plan
The Service Provider shall provide a comprehensive Transition In Plan that shall be used for the first two (2) month's at ED and will integrate with the incumbent's Transition Out Plan. This Transition In Plan should complement the incumbent's Transition Out Plan and include, at a minimum:

- Identification of Risks and Risk Mitigation
- Level of Effort
- Schedule (including milestones)
- Resource Allotments
- Dependencies
- Costs

Appendix I contains the elements the contractor can expect from the Transition Out Plan.

Transition Out

---

[12]*Kaizen* is a process improvement methodology that considers human resources as the most important company asset, believes that processes must evolve by gradual improvement rather than radical changes, and believes that improvement must be based on statistical/quantitative evaluation of process performance.

[13] Lean methods create a continual improvement-based, waste elimination culture that involves workers at all levels of the organization and is based upon three objectives 1) Reduce production resource requirements, 2) Increase manufacturing velocity and flexibility, and 3) Improve quality and eliminate defects.

[14] Six Sigma is a rigorous and disciplined methodology that uses data and statistical analysis to measure and improve a company's operational performance by identifying and eliminating "defects" in manufacturing and service-related processes. Commonly defined as 3.4 defects per million opportunities, Six Sigma can be defined and understood at three distinct levels: metric, methodology and philosophy.

Sixty (60) days prior to the expiration or termination of the contract, the contractor shall provide a Transition Out Plan. The offeror shall present a detailed plan for any Transition Out tasks, regardless of precipitating reasons. The Transition Out Plan shall be constructed so as to require no more than 60 days from termination notification to phase-out completion. The plan shall include procedures to minimizing impact on contract performance. Transition Out Plans shall include provisions for completion of all contractor responsibilities.

The Offeror's Transition Out Plan shall:
- Present procedures for retaining the required staffing level including key personnel necessary to provide complete contractual support through the expiration of the contract.
- Include a work breakdown structure and cost estimate.
- Include a training plan and schedule for each activity covered by the contract.
- Describe in detail how responsibility and accountability will be relinquished for all government-furnished equipment.

The offeror shall coordinate its activities with other contractors to effect smooth and orderly transitions at the beginning and the end of contract periods. The offeror shall remove all contractor-owned equipment, tools, parts and belongings from the Government-furnished spaces by midnight of the last day of the contract.

Enterprise Email / Messaging Architecture / Disaster Recovery
The Service Provider shall provide a stable enterprise email system capable of supporting ED's user communities. The architecture shall accommodate system availability and reliability as describe the Service Level Agreements in Section IV.

An annual Email Architectural Fee shall be charged to ED. This annual fee is to cover the development and upkeep of ED's email architecture. The architecture shall accommodate a 6,500 customer email base with the following identified needs, it is understood that ED's needs will continue to evolve over time and this list shall be understood to be a starting point, not an exhaustive list:
- 24x7 Uptime within SLA limits (see Section IV of the PWS)
- Appropriate Redundancy to maintain SLAs
- Disaster Recovery Planning to meet SLA
- Backup and Restore Capabilities on a mailbox, post office, server and system level
- Email Message Disk Space Management
- Email Message Archiving that meets Federal Regulations
- SPAM filtering
- Remote Connectivity from PCs and the Web
- Wireless Email Access
- Access through handheld devices, such as but not limited to, PDAs and Blackberry devices
- Integration with VoIP voicemail messaging
- Strategy for incorporating Instant Messaging
- Virus Scanning capabilities for incoming, outgoing and internal messaging
- Secure Messaging (Encryption) for both internal and external messages

The Service Provider shall provide an architecture that shall place stability of operations above other considerations. The existing email system is described under Category A of the PWS.

Expected Investment in Tools
The Service Provider shall provide a description of which tools shall be introduced, how the tools shall be introduced, and how those tools shall improve customer satisfaction and/or ED's productivity. The Service Provider shall make an investment in these tools, and if the Service Provider chooses, a line item charge may be included in the cost proposal. This line item may include any additional yearly maintenance charges. It is understood that ED will own intellectual property to all data, the software and the licensing of these tools[15]. These tools include:

(1) Management Information Dashboard.
- Offeror shall provide a tool that provides a daily snapshot of how ED and the offeror are delivering IT operations, historical information, trend analysis and correlation, summary of challenges, and recommendations as needed, in a format that is viewable by all stakeholders (e.g., web site, reports, etc.).

(2) Performance Monitoring Tools
- Performance monitoring tools shall be used to measure IT infrastructure performance, IT infrastructure uptime, and keep track of security metrics. Service provider shall list what tools shall be used to manage performance.

(3) Project Management Tools
- Project management tools are required to provide, among other things, budget variance reports (project over-run and under-run metrics), resource usage, task usage, milestone reports, and comply with OMB and other regulatory earned value requirements[16]. Service provider shall list what tools shall be used to manage projects.

(4) Communication Tools
- Contractor shall provide, at their expense, appropriate use of communication tools for their staff that will interface with ED's current communication environment. This is inclusive of, but not limited to:
  a. Cellular Phone Hardware and service
  b. Blackberry Hardware
  c. Personal computers required for remote support

Major IT Issue Handling
A major issue is defined as any IT event that affects more than 50 employees (e.g., email outage, virus attack, VoIP outage, security event, etc.). All major events shall

---

[15] ED will own all licenses and tools that are listed as a line item in the Cost Proposal worksheet, but not tools provided by the offeror at no charge to ED. At ED's option "free" software and licenses may be purchased from the offeror at GSA or better rates. **All data is the intellectual property of ED.**
[16] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

follow the escalation procedure, root cause analysis and customer communication procedure described below.

Escalation Procedure

The Service Provider shall follow an escalation procedure when responding to major issue(s). The service provider's escalation procedure shall conform to or exceed the following guidelines:

- Notify the appropriate ITD Manager or designee within fifteen (15) minutes of becoming aware of any major IT issues. Notification shall occur via voice communication. If the ITD Manager or his/her designee is unavailable the service provider shall immediately notify the Directory of IT or his/her designee.

Customer Communication

The Service Provider shall provide communications directly to the affected customer (end-user) base once OCIO management has been informed for all major IT issues. Communications shall take the form of informational web updates via ConnectED, voice mail and/or email, as appropriate. All communications regarding IT issues shall be approved by a Service Provider manager and ED prior to release and shall include at a minimum an explanation of the problem and anticipated resolution time.

Root Cause Analysis

The Service Provider shall perform root cause analyses for all major issues with preliminary being available within 1 business day and final within five business days. Once root cause has been determined an alternative analysis shall be performed, followed by a plan for remedy, which shall be presented for OCIO executive review and decision. Remedies shall be tracked and an update shall be provided to OCIO executive management providing expected results measured against actual results. For Category A work, the cost of this process shall be borne by the service provider.

Category A (Firm Fixed Price per Unit Services)

The Contractor shall:

Provide Program Management Services

Provide overall management, measurements, dashboard maintenance, staffing, planning, accounting, budgeting, tracking, reporting, administrative support, product assurance and improvement analysis.

Task Area Provides overall Program Management services.

Desired Outcome: To ensure that all work performed is successful in achieving the task's purpose, goals and objectives; on schedule, within budget, thoroughly documented, and in accordance with performance specifications, requirements and standards; coordinated with other tasks; integrated with other tasks performed under this contract; integrated with efforts outside of this contract but related to ED's IT service delivery infrastructure; and consistent with ED's strategic goals, objectives and mission.

If a team of contractors is awarded this contract, the team-lead contractor shall be responsible for ensuring that successful program management is achieved for this

contract. Therefore, the team-lead contractor shall be ultimately responsible for ensuring that the purpose, goals, objectives, requirements and service standards of the task are achieved. The contractor shall receive the Contracting Officer's approval prior to subcontracting or "teaming" any portion of the contract to another contractor.

Description of Services: Provide qualified and experienced staff who follow, implement and support "best practice" program management methodologies. Program management includes overall management, measurements, dashboard maintenance, staffing, planning, accounting, budgeting, tracking, and reporting for the entire EDNet contract. This office shall interact with focal points across service areas.

The Contractor shall provide internal communications planning services, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the mission. The Contractor shall assist FTE management in the proper budgeting and financial management of projects and programs; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a program so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) or Product Development Process (PDP) demonstrate conformance with all relevant departmental and federal standards for the management planning, tracking and controlling of programs and tasks.

The contractor shall provide a draft Program Management project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance. The plan will address all elements contained in the QASP for EDNet management, and shall include:

- A single Program Manager (PM) to manage the entire task effort
- Project managers across each service area who shall work with the PM to provide management and direction in accordance with ED guidance for services provided under all three categories of work
- PM and Project Manager roles and responsibilities
- Transition Management including Contract Phase-In and Phase-Out Plans
- Staffing management to include security processing
- Quality control
- Performance management and surveillance including SLA metrics, reporting, maintenance of management dashboard, ongoing quality process, and content measure evaluation
- Financial management, Total Cost of Ownership, qualitative benefits, reporting and price performance support
- Budgeting support to include budget formulation, funding requirements and projections, monitoring, reporting and tracking expenditures
- Cost benefit analysis support
- Customer satisfaction surveys
- Information Technology Investment Management support
- Planning support
- Administrative support for procurement, staffing and other business related functions.

- Document management and maintenance (standards, policies, procedures, and operations guides) support
- Risk management
- Logistics support
- Meeting support
- Program documentation support
- Reports, oral presentations and other deliverables

Performance Requirements Summary:

Program Management:

The contractor shall:

- Provide overall contract, program management, staffing support, planning support, quality control support, performance surveillance support, budgeting support, analysis support, performance monitoring and metrics, reporting, administrative support, logistics support, meeting support, standards development and support, documentation, reports and other deliverables and Product Assurance.
- Manage projects using OMB's earned value discipline[17].
- Provide ongoing support for overall contract management and reporting.

Server and End-user Engineering

- Technical Writing
- Development Lab Technician
- Development Lab Manager
- Technical Review Administration

Support the production servers environment

Provide Hardware and Software support for the **server infrastructure** on ED's behalf, managing delivery, configuration, installation, and systems administration in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- Server and Software Installation / Refresh Process
- Ongoing Server and Software Maintenance Process
- Server and Software Install, Moves, Adds and Changes (IMACs)
- Server and Software Disposal and License Recovery
- Data protection, backup, and recovery in accordance with SLAs
- Support Disaster Recovery Facility Environment per Disaster Recovery Plan
- Engineering

---

[17] Ibid.

- See Table 6 for additional detail

Systems include approximately 520 servers (including the disaster recovery facility), 32 administration accounts, including 6 Domain Controllers and 6 Exchange Administration accounts, approximately 400 applications and approximately 16+ TB of disk storage. See Table 2 for geographic locations and a complete inventory and description of technology to be supported

Maintain production servers
The contractor shall perform server support operations, which include server, data center, server image management, helpdesk call center support, network systems monitoring, Tier 2 support including remote management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images for Windows and Unix systems[18].

- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

- Support the Disaster Recovery environment at warm start state of readiness prepared for cutover when necessary with in performance parameters.

Hardware and Software Equipment Inventory / Service Criticality
The following table depicts the current equipment inventories of servers[19], see Table 2, grouped by equipment type and criticality of service. Each table is arranged with Type of equipment on the "Y-Axis" and Criticality[20] on the "X-Axis". Within each block the location and number of equipment is displayed.

Table 2.   Server Inventory*

Criticality / Equipment Type	(1) Standard Server O&M (No DR Required)	(2) Mission Supportive Systems (Second Wave DR)	(3) Mission Critical Systems (DR Required)	(4) Critical Infrastructure / Service (DR Required)	Totals
	60	136	50	108	
	9	26	4	8	

---

[18] As this contract has a potential ten-year life span, it is expected that the Product Development Process has the potential to introduce new operating platforms and systems.
[19] As of June 2004.
[20] Criticality is defined as Level 1 – No Disaster Recovery (DR) Required, Level 2 – Second Wave DR, Level 3 – DR Required, and Level 4 – DR Required.

0	6	26	15
0	2	0	1
1	0	0	2
0	0	1	8
0	0	0	11
0	3	0	31

*Note that the numbers of servers / equipment change frequently.

Maintain messaging services including E-mail and Blackberry

Provide a process for managing all **messaging services** in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- E-mail, blackberry (or equivalent), PDAs, and storage services
- Remote and Mobile customer support
- Data protection and recovery in accordance with SLAs
- Exchange Central administration and maintenance for approximately 50 users

The Messaging System includes approximately 6,000 accounts and mailboxes utilizing approximately 500 GB of data (95 percent of accounts are size restricted to 100 MB) and approximately 500 Blackberries[21].

Provide Messaging Services including E-mail and Blackberry

The contractor shall perform messaging services operations, which include messaging monitoring, Spam filtering, anti-virus scanning and blocking of the messaging systems, disaster recovery of the messaging system, messaging systems management, helpdesk call center support, Tier 2 support including remote management of customer e-mail accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Include Tier 0 / 1, helpdesk support, simple network systems monitoring, Tier 2 support including remote access, management for some COTS applications (anti-virus), account administration and operate and maintain the interface with

---

[21] As Blackberry usage is expected to grow, this number may not be accurate at the start of the new contract.

other Tier 2 and Tier 3 support organizations, for all supported messaging systems (Blackberry, Microsoft Exchange or equivalent).

- Maintain ED's messaging system, including their Blackberry (or equivalent) solution.

- Continually integrate industry best practices for messaging tools and technologies that enhance the productivity of the customer, thereby driving down messaging support costs for ED.

- Provide enhanced technologies that identify and eliminate potential causes of problems and speed resolution times, thus improving ED employees' productivity.

Messaging Account Inventory[22]

Complete inventory grouped by service type is provided in Table 3.

Table 3.   Messaging

Type of Service	Number of Users
	6,000
	500
	50

The contractor's solution shall, at a minimum, provide the features shown in Table 4.

Table 4.   Features

Features
An **integrated account management** solution.
Maintenance and day-to-day operations of **ED's messaging systems**. Ensuring systems performance, reliability and accessibility.
Anti-virus and Spam solution compatible with ED's messaging environment.
Remote connectivity through AS 5300, Virtual Private Networks (VPN), Outlook Web Agent (OWA), and Firepass.
Ability to **restore a single customer's mailbox**.
Appropriate **disaster recovery** planning and execution.
Ownership of problems from identification to solution / resolution.
Seamless **problem distribution** and **problem resolution** management support.

<u>Support Disaster Recovery</u>

- **Network** -- The Contractor shall support the Department's mission critical networking component by providing technical expertise in the Cisco, Cisco VoIP, Cisco ACS, Cisco PIX, Cisco VPN, Symantec SEF, Microsoft DNS

---

[22] As of June 2004.

services, Solaris DJBDNS, MRTG, CA Unicenter and Windows 2000 infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore connectivity during disaster recovery efforts and simulation drills.

- **Servers** – The Contractor shall support the Department's mission critical server operations component by providing technical expertise in the Microsoft Windows and Sun Solaris infrastructure. This expertise is to be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

Maintain Customers (End Users) and their Equipment

Provide Hardware and Software support for the **end user infrastructure** on ED's behalf, managing delivery, configuration, installation, and accounts in accordance with the approved ED Product Support Plan as it evolves during the lifetime of the contract, including but not limited to:

- PC and Software Installation / Refresh Process
- Ongoing PC and Software Maintenance Process
- PC, software, and cabling Install, Moves, Adds and Changes (IMACs)
- PC and Software Disposal and License Recovery
- Data protection and recovery in accordance with SLAs
- Remote and Mobile customer support, including approximately 800 cell phones and 500 PDAs
- Peripherals management, including printers and print queues
- Asset Management
- Assistive Technology Deskside Support
- See Table 6 for further detail

PC systems including approximately 5,500 PCs, 2,000 laptops, and less than 75 Macintosh PCs, laptops or other devices. Accounts include approximately 6,000 Active Directory, Macintosh and Unix accounts utilizing approximately 4 TB of data storage. See Table 5 for user priority, 90 percent of all customers (end users) are located in the Washington DC area. Hardware descriptions of typical PCs are located in Appendix B and software descriptions are located in Appendix C.

Support Customers (End Users) and their Hardware and Software

The contractor shall perform customer (end user) support operations, which include deskside equipment and peripherals (including printers and assistive technology), deskside image management, helpdesk call center support, Tier 2 support including remote desktop management of customer accounts and the operations and maintenance of the interface with other Tier 2 and Tier 3 support organizations. The contractor shall:

- Maintain ED software images, including but not limited to, Windows and Macintosh systems.

- Continually integrate industry best practices for hardware and software tools and technologies that enhance the productivity of technicians, thereby driving down the Total Cost of Ownership (TCO) for ED and increasing the quality of service provided to ED's customers.

- Provide enhanced technologies that speed resolution times or proactively eliminate customer problems, thus improving ED employee and customer productivity.

Information Technology Imaging and Distribution Center (ITIDC): Enterprise Lifecycle Management Support (ELMst)

Provide Enterprise Lifecycle Management Support (ELMst) services for The Department of Education EDNet contract.

The ITIDC support shall develop plans, directives, polices and procedures to facilitate the Department's surplus IT equipment for disposal or redeployment of IT equipment meeting the minimum EDNet specifications.

The contractor shall provide program and project management, administrative support, and documentation development in support of business processes that represent a systematic approach to effectively manage the disposal and redeployment of IT equipment meeting the minimum EDNet specifications for the Department of Education'. The contractor shall also provide services to support vendor management, shipping and receiving of all IT equipment, and workflow management for the ITIDC services.

Performance Requirements Summary:
The Contractor shall:

- Operate and manage a central processing and secure storage facility surplus IT equipment.

- Be accountable for IT assets and participate in the annual physical inventory and reconciliation process.

- Provide regional surplus inventory management following the department guidelines for surplus / disposal of IT assets.

- Coordinate DOA replacements for the first 30-days of receipt.

- Evaluate IT Equipment (desktops, laptops, monitors, and printers for redeployment within the EDNet environment..

- Install and test the EDNet standard configuration for all desktops, laptops and printers within the EDNet environment.

- Coordinate all workflow activities for the ITIDC.

- Provide Shipping and Receiving support for all IT equipment in the EDNet environment.

Hardware and Software Equipment Inventory / Service Priority

The following table depicts the equipment inventories of customers (end users), see Table 5, grouped by software tier type and priority of service. Each table is arranged with Tier of software on the "Y-Axis" and Priority[23] on the "X-Axis". Within each block the location and number of equipment is displayed. Software tiers are detailed in Appendix C. The typical computer system that shall be supported by the contractor is also detailed in Appendix C.

End-User Equipment Inventory[24]

END USER SUPPORT	Priority 3 (Standard Service)	Priority 2 (30 Minute response, warm hand offs for escalation)	Priority 1 (Immediate deskside dispatch)	TOTAL[25]
	4,781	198	26	
	589	0	0	
	294	0	0	

*See Appendix C

Since many of the customer (end user) solutions rely upon the production server environment the features from both have been combined into a single table to avoid arbitrary distinctions. The contractor's solution shall, at a minimum, provide the features shown in Table 6 for both the server and end user environments.

---

[23] Priority is defined as Level 3 – Standard Service, Level 2 – 30 minute response and warm handoff for escalation, and Level 1 – Immediate deskside dispatch.

[24] The tier distribution has been estimated from ED inventory data.

[25] ED understands the distribution of employee volume across tiers 1-3 does not match typical industry norms and will work with the service provider to achieve an industry normal distribution between tiers 1-3.

Table 6.   **Server and End User Features**

Features
Automated Asset Management -- Electronically supported life cycle driven asset management process. Automated asset management consists of electronically supported procurement, automated inventory, and centralized data repository that are available to financial, administrative, technical planners, system administrators, and the helpdesk. Managed data within the asset management system consists of contract terms (maintenance contracts), hardware inventory, software inventory, accounting, maintenance records, change history, support history, and other technical and financial information. At a minimum, Electronic tools are integrated; so that all input is shared and never repeated between tools and constituencies can view the data in a consistent and up-to-date database or databases. The objective is to optimize assets to lower costs with a proactive lifecycle approach that views IT assets as a portfolio. Vendor may be requested to use Government-furnished property. Vendor shall provide information portability between government- and vendor-furnished property. *All intellectual property resides with the Government.*
Automated Software Distribution -- the ability to install software on a client device without having to physically visit each device. Techniques involve either push, the more advanced method where the server drives the upgrade, or pull, where the customer drives the upgrade by running an installation script from a centralized server.
Virus Detect and Repair – software system that actively monitors and detects virus intrusions, alerts system operators and users to such events, and provides automated eradication and damage repair to the extent possible. The software shall protect both clients and server systems. Automatic updates of the virus detection and repair capability must be available and maintained. The software system shall be fully integrated with processes and policies that provide manual intervention when needed, support for remote / mobile users, and include policies for file / disk sharing and downloads.
Systems Management – automated event management system that proactively and reactively notifies system operators of failures, capacity issues, traffic issues, virus attacks and other transient events. The tools allow monitoring of system status, performance indicators, thresholds, notification of users, and dispatch of trouble tickets. Systems Management provides optimal system performance, quicker resolution of problems, and minimizes failures. Automated solutions are used in support of distributed computing operations processes and policies for performance and failure detection and correction, as well as optimization.
Server Based Client Image Control – the ability for a desktop administrator to create a client specific configuration of applications, settings, and privileges on a server. These can then be automatically downloaded to a specific address or set of addresses on the network; therefore, configuring the clients initially, and ultimately standardizing the maintenance of configurations. A client agent is used to synchronize the server and client images for change management.
Scalable Architecture – technology infrastructures that can logically and physically increase in performance and capacity with continuity to meet reasonable growth and change over time. A scalable architecture contains a strategic migration plan for continuous growth and progress.
Fault Tolerance – systems recognize component failures and provide automatic and seamless switching to redundant components, eliminating downtime.
Automated Backup and Restore – provides for backup of the data stored on network servers, as well as desktop and mobile clients. Automated backup and restore does not necessarily provide state management, but enables files to be backed up on a regular basis (without user intervention) and to be stored off-site. If a disaster or loss of files shall occur, the data is available on a backup medium and can be fully restored. Protection shall be the ability of the entire file system to be restored to a new machine, in the event that the failure required hardware replacement.
Automated Helpdesk Problem Management and Resolution – allows calls to the helpdesk to be ticketed, escalated, dispatched, and closed. Systems include call management, problem management, and resolution supported by a knowledge database. The knowledge database provides a record of all problems and documentation on typical issues and utilized resolutions.

At a minimum, an integrated system of tools is in place. Call tracking, escalation and resolution systems are integrated with voice response, e-mail, phone, remote control, asset data and user profiling repositories. Proactive problem elimination is the goal, however reactive problem resolution is the norm. Service levels have been escalated and metrics have been automated into regular management reports. Customer satisfaction is the objective.

Enterprise Policy Management – managed technical environment in which a network or desktop administrator can control, with rules-based logic, which applications, settings, network resources, databases, and other IT assets a user can use. This environment is defined by user ID and is not necessarily machine specific. It is typically implemented by user profiles maintained at the server and synchronized with the client device that a user is logged onto.

Enterprise policy management precludes the user from making changes to the system, such as introducing unauthorized software or changing settings that may cause conflict with other system resources. As well, a managed environment controls the ease of use of the desktop, providing a common set of applications and access for groups of users or individuals. In this manner, the user is presented only with the tools they have been trained on and need for the job, and assures that changes are managed.

Change Management – the procedure, policies, and tools established to monitor client computers and other network assets to assure that unauthorized changes are not being implemented. It also affirms that a database of changes is available so that changes can be easily recognized during troubleshooting activities.

At a minimum, procedures are supplemented with technology and process controls that automate and enforce the change management procedures.

Data Security Management – the logical protection of organizational data from corruption, theft, or compromise. Data security management involves user identification and authorization, proper controls on downloading and uploading files and data, firewalls, and other technology barriers to prevent unauthorized access, theft, and corruption.

Service Level Tracking and Management – service levels are tracked and managed. The metrics contained in Section IV, Performance Standards and Acceptable Quality Levels, are specific, measurable and meaningful.

Ownership of problems from identification to solution / resolution.

Seamless problem distribution and **problem resolution** management support.

Maintain Helpdesk Support for all Category A products

Provide a **single point of contact** (SPOC) to act as the primary interface to the thousands of customers that use various enterprise applications (e.g., E-mail), desktop and server hardware, Commercial off the Shelf Software (COTS) as well as custom developed applications, including but not limited to:

- First level problem and user request support including effective troubleshooting and resolution for those problems and requests that can be resolved remotely.

- Effective troubleshooting, triage, assignment and dispatch for those problems and requests that require second or third level support including support delivered at the customer's location.

The contractor shall provide all server, end user and messaging support including helpdesk operations subject to specific expectation level process maturity, SLAs and continuous improvement going forward. ED's helpdesk receives, on average, 6,700 calls per month.

Helpdesk Support

The contractor's server, end user and messaging operations, shall include Tier 0 / 1 helpdesk support, simple network systems monitoring, Tier 2 support including remote

desktop management for defined number COTS applications and operation and maintenance of the interface with other Tier 2 and Tier 3 support organizations, for all supported hardware and software. The contractor shall:

- Maintain a SPOC for all systems for customers to obtain resolution of all IT problems and/or technical issues including Tier 0 / 1, 2 and 3 helpdesk service.

- Continually integrate industry best practices for helpdesk tools and technologies that enhance the productivity of the helpdesk agents, thereby driving down helpdesk support costs for ED.

- Provide enhanced technologies that speed resolution times or proactively eliminate end-user problems, thus improving ED employee's productivity.

Helpdesk User Priorities

Below are the definitions of the different Helpdesk user categories and priorities:

- **Priority 1 Customers (Users)** – Senior executive for the Department of Education (Secretary of Education and direct reports)

- **Priority 2 Customers (Users)** – Direct reports to Secretary's direct reports

- **Priority 3 Customers (Users)** – Remainder of the Department of Education users

Helpdesk Call Volumes

Complete history of call volumes for EDNet's Helpdesk from June 2002 until January 2004, see Table 7.

Table 7.   Monthly Helpdesk Call Volumes

Month Year	January	February	March	April	May	June	July	August	September	October	November	December	Totals
2002	-	-	-	-	-	6,724	7,318	8,643	6,175	6,205	6,800	4,942	
2003	6,353	5,415	7,697	7,366	6,687	6,789	7,102	8,178	7,527	7,794	5,867	5,490	
2004	4,879												

The contractor's solution shall, at a minimum, provide the features shown in the Table 8.

Table 8.   Features

Features
A **single point of contact** for problem and service requests.
Ownership of problems from identification to solution / resolution.
Seamless **call distribution** and **call management** support.

Customer Satisfaction

Customer satisfaction shall be measured by touch surveys. Touch surveys shall be used on every helpdesk call that generate trouble tickets.

Customer Satisfaction (Touch Survey)

Service Name: Customer Satisfaction (Touch Survey)
Service Description: Measures performance of service provided to customer (end-user). Used to identify customer's opinion of service performance. The results are used to identify and resolve any issues and problems. Resulting actions shall improve customer / management satisfaction and service performance.
Performance Standard: 100% of customers receive surveys.
Responsibilities: Measure Customer Satisfaction on a daily basis by sending "touch" surveys to all customers that have logged a trouble ticket (requested service). Service Provider shall be responsible for creating the survey questions, with ED approval. The questions shall be a limited number of Yes / No questions. For example: (1) Are you satisfied with the explanation of your problem? Y/N (2) Are you satisfied with the service? Y/N (3) Are you satisfied with the result? Y/N
Assumptions: Survey shall be completed via direct voice contact or via e-mail. Customers shall take part on a volunteer basis.
Frequency: Measure Daily and Report Monthly
Measurement Period: 24 hours a day 365 days a year.
How Measured: The following formula is valid for the daily reporting periods. Number of customers who received surveys / total number of helpdesk calls = "% Service Level Attained"
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Customer Satisfaction (Touch Survey) Deliverables: Monthly report. Reports shall provide a monthly roll-up of any daily reports into a plain-English format, highlighting all failures and trends. The statistics shall be tracked so that percentage totals can be compared month to month. For example: January Q1 75% Yes, 25% No, Q2 ... February Q1 85% Yes, 15% No, Q2 ...
Notes: Results shall be posted on public (intranet) ED web site for customer review and management comment.

Network Services: Converged Communications and Networking

Network Services

The Network Services Group supervises, monitors, and maintains the U.S. Department of Education Service Delivery Infrastructure Network (EDNet) to deliver a full range of voice, video, and data communications solutions and services, including Smartnet. The Network Control Center (NCC) is the focal point for network troubleshooting; firewall, router, switch and network device management; IP telephony and unified messaging; performance monitoring; and coordination with affiliated networks. NCC technicians perform Helpdesk (Tier 2 and 3) customer service and provide access control and information security support services.

- **Provide Network Monitoring Services** through the continuous monitoring of network availability and services. The Contractor shall

provide network-monitoring services to include, but not limited to, responding to and remedying network alerts, monitoring network traffic, publishing usage reports, coordinating circuit outages and installations, etc.

- **Provide Network Configuration Management Services** by maintaining the identification, documentation, and reports for network elements and appliances, including their versions, constituent components and relationships for EDNet network hardware, network management software and associated documentation. The Contractor shall provide network configuration management services to include, but not limited to, maintaining IP schema database, maintaining router access control listing (ACL), etc.

- **Provide IP Telephony Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the IP telephony system, IP-based Private Branch Exchange (IP PBX) hardware equipment, software applications and services, including features, such as advanced call routing, voice mail, contact centers, etc., that can be utilized. The Contractor shall deploy and maintain the call routing and dial plans for Cisco IP phone solutions that utilize advanced call routing, voice mail, contact centers, etc. The Contractor shall seek to leverage audio and video conferencing solutions that help the agency increase productivity and business communications by employing the latest advances in computer networking and multimedia. The Contractor shall deploy IP phone solutions are standards-based, including protocols such as H.323, MGCP, and employ the appropriate bandwidth and traffic shaping through Quality of Service (QoS) to provide high-quality voice transmission. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Integrated Call Distribution Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the Cisco Integrated Call Distribution (ICD) system hardware, software applications and services, including features, such as the customer response applications (CRA) editor, Interactive Voice Response (IVR), Auto Attendant (AA), historical reporting and recording session services. The Contractor shall develop and maintain ICD scripts based on individual customer requirements that offer increased productivity and customer service. The Contractor shall create and maintain VoiceXML applications that leverage speech recognition technology to support end-user requirements. The Contractor shall be equipped to handle standard and advanced troubleshooting tasks. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Unified Messaging Services** by providing operations and maintenance services to include, but not limited to, operations and maintenance of the Cisco Unity unified messaging system hardware,

software applications and services, including integration with Microsoft Exchange. The Contractor shall develop and maintain user profiles and access control for phone and web-based applications such as Unity ActiveAssistant. The Contractor shall provide Tier 1 (customer service), including answering frequently asked questions, training end-users, Helpdesk and other network services group personnel on the capabilities and functionality of the system. The Contractor shall develop and maintain user profiles based on individual customer requirements that offer increased productivity and customer service. The Contractor shall be equipped to handle standard and advanced troubleshooting tasks. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

Telecommunications Services

- Provides ordering services and centrally manages the acquisition of telecommunications resources, including equipment, facilities and services to ensure that these resources are acquired in a manner that is most effective for the government.

- Coordinates agency use and support of national security and emergency preparedness (NS / EP) telephone networks and services.

- Provides Helpdesk (Tier 2 and 3) customer service support.

- Coordinates contracts and maintenance level agreements with the GSA Federal Technology Services (FTS) Division and the telecommunications service providers.

- Provide Analog / ISDN Voicemail Services by maintaining reliable and secure voicemail platforms for headquarters and regional office locations. The Contractor shall provide voicemail administration services to include, but not limited to, maintaining access control, responding to and remedying system alerts, monitoring system traffic and load, publishing usage reports, coordinating voicemail outages and installations, performing user problem troubleshooting, etc.

- Maintains accurate billing and accountability of telecommunications resources, including circuit-switched and dedicated data circuits, local and long distance services, voicemail platforms, audio and data conferencing solutions, calling card, pagers, cell phones and wireless handhelds. Designs, installs, maintains and repairs telecommunications equipment and services or coordinates these services.

- Compiles statistics and prepares necessary system reports and forms. Maintains system administration of the Telecommunications Automated Tracking System (TATS), which is used to request, approve, order receive and issue telecom resources and serves as a robust reporting tool.

- Provide Telecommunications Processing Services by responding quickly and accurately to requests for telecommunications services submitted from each Principal Office. The Contractor shall provide order processing services to include, but not limited to, reviewing requests submitted by authorized Principal Office personnel for telephone / fax services, voicemail services, wireless services, etc.

- Provide Telecommunications Billing and Inventory Services by maintaining an accurate inventory and billing records for all telecommunications resources (i.e., equipment, facilities and services). The Contractor shall provide inventory management and billing services to include, but not limited to, maintaining an accurate and complete record of all telecommunications assets billed to the agency; reconcile billing statements from vendor-supplied documentation and electronic files, monitoring system traffic, etc.

- Provide Telecommunications Programming and Database Management Services by maintaining assist FTE telecom staff with the identify, planning, testing, executing, controlling and closing of the functionality and enhancements to the agency's Telecommunications Automated Tracking System (TATS) application. The Contractor shall provide support services to include, but not limited to, maintaining integrity of the TATS program application layer and database layer; develop business requirements and associated documentation to support the development of enhancements to system functionality; develop test plans and associated test scripts; etc.

- Provide GSA FTS Contract Transition Services by developing and executing a project plan to ensure a smooth transition from the GSA FTS2001 contract vehicle to the GSA FTS Networx contract vehicle. The Contractor shall assist FTE telecom staff in developing a transition plan to ensure the smooth and orderly transition from the General Services Administration (GSA) Federal Telecommunications System (FTS) 2001 contract vehicle to the FTS Networx contract vehicle in support of a full range of voice, video and data communications services.

Multimedia Services Group

The Multimedia Services Group operates and maintains the Department's audio-visual equipment, most notably the 57 custom room and Video Teleconferencing Center (VTC) systems throughout headquarters and regional offices. Additionally, remotely manages the regional VTC facilities to include security, orientation, and provide Helpdesk (Tier 1, 2 and 3) customer service support and reservations for VTC resources. Maintains the accountability of multimedia resources, including ad-hoc voice mail delivery system for the Office of the Secretary, implementation of IP / TV for the enterprise, ISDN circuit-switched network for VTC. Designs, installs, maintains audio-visual and VTC equipment and services. Support for audio-visual production and equipment for the EDNet network and other non-EDNet systems, including the Secretary's conference room and auditorium facilities. Performs standard and advanced troubleshooting

and calibration. Develops closed captioning for video communications in compliance with Section 508 Accessibility standards. Supports the cable television and satellite television services and head-end equipment.

- **Provide Audio-Visual Support Services** by providing services, including but not limited to: video production services and audio visual support for the agency, handle audiovisual and communication equipment repairs for educational activities and special events located throughout agency buildings in greater Washington, DC area. The Contractor shall provide support services to assist in the design, installation, testing, operations and maintenance of agency audio-visual equipment and facilities as needed. The Contractor shall perform video production and editing, including open and closed-captioning, of content used for such services as online learning, training films, and executive-level broadcast messages. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- **Provide Video Teleconferencing (VTC) Services** by providing design, installation, testing, operations and maintain a full range of video teleconferencing products and services that increase business communications and reduce unnecessary travel costs as needed. The Contractor shall maintain and optimize the current architecture to support video teleconferencing and recommend new and alternate solutions that maximizes the benefits of converged video, data and audio conferencing for users. The Contractor shall provide primary customer support (i.e., Helpdesk) services to handle requests and schedule the bridging of multipoint VTC sessions across the enterprise and outside the enterprise to "off-net" VTC endpoints. The Contractor shall provide standard and advanced troubleshooting of VTC equipment and serve as a liaison with product vendors, such as Polycom. The Contractor shall provide services to schedule and install desktop video conferencing systems with the end-users across multiple Washington, DC area locations and coordinate the deployment of these services remotely with technicians to regional office locations. The Contractor shall develop processes, plans, and procedures and create associated documentation to support the proper operation, maintenance and security of the system(s).

- Provide Cable Television (CATV) Services by providing design, installation, testing, operation and maintain equipment, facilities and services that support cable television (CATV) and IP-based television (IP / TV) services (or video telephony) to multiple locations throughout the Washington, DC area and regional office locations as needed. The Contractor shall provide standard and advanced troubleshooting of Cisco video broadcast over IP (IP / TV) equipment, maintain archived content on servers, and develop and maintain the ability to provide video on demand (VOD) services. The Contractor shall develop associated standard operating procedures to support the proper operation, maintenance and security of the system(s).

PERFORMANCE WORK STATEMENT
ED PERFORMANCE APPRAISAL SYSTEM (EDPAS) AND SES PERFORMANCE APPRAISAL SYSTEM (SESPAS)

INTRODUCTION AND BACKGROUND

The Department of Education (ED) has established, implemented, and is currently operating a five tier performance appraisal system known as the Education Performance Appraisal System (EDPAS). A new five level Senior Executive Service Performance Appraisal System (SESPAS) has been approved. Right Management Consultants supplies the IC2000 software that supports the automation of the EDPAS system. The SESPAS software must be developed/modified to support the process of the SES Performance Plan development and the actual rating of record automated calculation.

II.   PURPOSE

The purpose of this solicitation is to provide the Group/System Administrator and Help Desk operations support of the EDPAS/SESPAS and to assist in other EDPAS/SESPAS efforts on a daily and continuous basis. The primary objectives are:

1. Maintenance Support: Provide maintenance and technical support for the IC2000 software.
2. Operational Support: Provide systems administration and information technology support for the operations of ED's automated performance appraisal systems.
3. Help Desk: Provide help desk support to all users.
4. Functionality Support: Ensure trouble-free operation of the EDPAS/SESPAS application on the EDNET, the Education Department's local area network.
5. Software Support: Provide liaison responsibilities between ED and Right Management Consultant to ensure the EDPAS/SESPAS system is fully operational and trouble free.

This solicitation is to be awarded under Category A of the EDNet Support Services contract. The base period of performance shall be from August 1, 2005 through June 30, 2006 with nine option years of performance. The period of performance shall mirror the EDNet Support Services contract.

III.   DEFINITIONS AND ACRONYMS

ED – The Department of Education

EDNET – The Department of Education's local area network.

EDPAS (Education Performance Appraisal System) – ED's performance appraisal program which provides for the establishment of standards and critical elements; communication of elements and standards to employees; evaluation of employees'

performance; and appropriate use of appraisal information in making personnel decisions.

FPPS – Federal Personnel Payroll System

EDPAS/SESPAS Help Desk – An entity that provides assistance to employees who are using the automated EDPAS/SESPAS. Such assistance is provided by telephone, email, or on-site visits.

Intelligent Consensus (IC2000) – The software that is used to enter performance standards, collect the employee performance feedback from supervisors and calculate the overall rating. It is available to users from application servers located at several ED Headquarters' buildings and each of the ten regional offices. The database server is located at ED Headquarters'. IC2000 is implemented as a client-server application on the EDNET. The current version is a web-based version. IC2000 is a product of Right Management Consultants, Inc., of Tempe, Arizona. (www.right.com)

Peak Periods – Defined as April 1 through June 30.

ROMS – Rating Official Maintenance System

SESPAS- Senior Executive Service Performance Appraisal System, ED's performance appraisal system for members of the Senior Executive Service. This provides for the establishment of standards and critical elements; communication of elements and standards to employees; evaluation of employee's performance; and appropriate use of appraisal information in making personnel decisions.

Valid Complaints – Complaints that are justifiable from an ED standpoint; i.e. those that indicate non-compliance with Help Desk requirements.

IV.   SCOPE OF WORK

The contractor is required to provide the services described in Section IX (Activities) of this performance work statement. The contractor shall be responsible for performing all the tasks described. The work involves four principal areas: project management, system/group administration, reports, and Help Desk service.

The work shall be performed on normal government workdays. The contractor shall make EDPAS available to ED users 7 days a week, 24 hours a day, except as relieved from doing so by the Contracting Officer's Representative (COR). EDPAS/SESPAS Help Desk staff shall be available to ED customers from 8:30 AM to 5:00 PM Eastern Standard/Daylight Time Monday through Friday each federal work day except as relieved from doing so by the COR or by circumstances such as a government-wide shutdown that curtail a normal federal work day, including federal holidays.

The contractor may provide help desk support through the 1-800 EDNet Helpdesk number with an option for users to reach the EDPAS Help Desk staff during hours of operations.

V.   GOVERNMENT-FURNISHED FACILITIES AND EQUIPMENT

The Government shall provide adequate office space, equipment, supplies and materials necessary to accomplish the work under this contract.

VI.   CONTRACTOR-FURNISHED FACILITIES AND EQUIPMENT

The contractor is not required to provide facilities or equipment.

VII.   CONTRACTOR PERSONNEL

The contractor shall provide staff qualified to perform the work described in this performance work statement. Past contractor performance indicated that during peak periods, as described above, additional staff is required. Contractor personnel responsible for answering the telephone and interacting with ED staff must be able to clearly speak and easily understand English.

The contractor shall provide a project manager for administration and technical supervision of contractor employees. The project manager shall be the contractor's primary representative for the EDPAS/SESPAS effort. The project manager shall have the technical experience and be knowledgeable in all facets of the work required in this performance work statement.

The contractor shall provide a staff with knowledge and/or expertise in the following areas:

1. Knowledge of the basic capabilities of the IC2000 application. Contractor staff must be able to compare the basic capabilities of the system to what ED users have at their desktops and provide support and advice that enables ED customers to execute the EDPAS/SESPAS application.
2. Excellent public relations skills in dealing courteously and effectively with customers.
3. General knowledge of ORACLE
4. General knowledge of SQL Server databases.
5. Basic understanding of EDNet.
6. Basic knowledge of performance management policies and regulation for Federal Agencies.

VIII.   MINIMUM STANDARDS OF PERFORMANCE

The Contractor shall meet the Service Level Agreements as described under the Helpdesk Call Answer and Priority 3 Customer Support in the EDNet Support Services Contract during non-peak period. Non-peak period is defined as July 1 through March 31.

1. SPECIFIC REQUIREMENTS

The Contractor shall provide a plan describing actions, and procedures to ensure (1) a smooth transition from contract award to full operational status, and (2) a smooth transition from current contract performance to performance by a different contractor. Phase-Out plans shall include provisions for completion of appropriate Contractor responsibilities should there be a contract termination proceeding.

IX.   ACTIVITIES / SPECIFIC REQUIREMENTS

To achieve the purpose of this contract, the contractor shall be responsible for, but not limited to, performing the following activities:

PERFORMANCE MATRIX

	Required Service	Performance Standards	Acceptable...	...Key...
Task 1: Project Management and Technical Oversight *The contractor shall apply widely-accepted "best practices" of project management and technical oversight to all work conducted under this contract to monitor and control project progress, cost, and resources in relation to planned schedule, milestones, and deliverables.*				
Accurate, timely, and interactive reporting of project status allows ED to make timely and informed decisions about EDPAS/SESPAS.	1.1. Kick-off Meeting The Contractor shall hold an initial kick-off meeting with the appropriate ED and contractor personnel. At this meeting, ED personnel will provide the contractor staff with any additional information and documentation relevant to successful completion of this task; review the task to resolve any questions, clarification and assumptions, including any proposed changes to the requirements.	Conduct kick-off meeting within seven workdays after contract award.	No deviation without advance COR/PM approval.	COR/PM inspection of deliverable.

	Required Service	Performance Standards	Acceptable QL	
	1.2. Project Plan: Develop and deliver a Project Plan that includes staff resources, time requirements, schedule of events based on a timeline prepared by the Project Manager (PM), and documentation of any requirements changes reported in the kick-off meeting.	Deliver the draft Project Plan for PM approval within five workdays of the kick-off meeting. Project Plan should include each of the major tasks and subtasks identified in the work statement, beginning and end dates, and milestones. Upon receipt of PM comments, revise and re-submit the final Project Plan within five workdays.	No deviation without advance COR/PM approval.	COR/PM inspection of deliverable.

	Required Service	Performance Standards	Acceptable Quality Level	Incentive
	1.3. Conduct Project Status Meetings. The contractor shall meet with the COR/PM and other ED staff as appropriate, as determined by the PM, to discuss project status/progress and open action items.	Meet on a schedule determined by the COR/PM. • Provide accurate, current, complete data in advance of the meeting, to include: 　o Financial data 　o Action items 　o Current project status (descriptions and schedules) • Address inquiries and concerns of ED staff at meetings • Provide to the COR/PM a copy of meeting minutes. Minutes are to be provided no later than three workdays after each meeting, and are to be written in clear, understandable, error-free grammar. Format of the minutes is to be as specified by the COR/PM.	No deviation without COR/PM approval.	COR/PM review and approval.

35

	Required Service	Performance Standards	Acceptable Quality Level	
	1.4. Prepare Monthly Status Report	Monthly Status Report is to be received by the COR/PM no later than the fifth workday of the month.	No deviation without COR/PM approval.	COR/PM review and approval.

Task 2: System/Group Administrator Functions

The system/group administrator duties are different at different periods in the performance rating cycle. The contractor shall be responsible for, but not limited to, performing the following duties:

	Required Service	Performance Standards	Acceptable Quality Level	
Responsive and efficient system administration support enables the Government to operate EDPAS/SESPAS with minimum disruption to ED customers and maximum customer satisfaction.	**2.1. Perform "Beginning of Rating Period" functions.** **2.1.1.** Enter ED's performance plan criteria into IC for required surveys. **2.1.2.** Track the progress of, and prepare appropriate follow-up notices. **2.1.3.** Other EDPAS/SESPAS duties, functions and tasks as assigned.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	2.2. Perform "Prior to Midpoint Rating Period" functions.	Performance conforms to requirements specified by the	No deviation without COR/PM approval.	COR/PM review and approval.

	Required Service	Performance Standards		
	2.2.1. Resolve rating official/employee relationships. This shall be a continuous maintenance function, due to reorganizations, reassignments, etc. 2.2.2. Other EDPAS/SESPAS duties, functions and tasks as assigned.	COR/PM, 95 percent of the time.		
	2.3. Perform "During Midpoint Rating Period" functions. 2.3.1 Track progress of, and prepare appropriate follow-up notices for the evaluation timeframe. 2.3.2 Enter employees into the appropriate survey, using data from the Federal Personnel Payroll System	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.

	Required Services	Performance Standards	Acceptable Quality Level	
	(FPPS). 2.3.3. As necessary, manually make changes to rating officials and standards. 2.3.4. Other EDPAS/SESPAS duties, functions and tasks as assigned.			
	2.5. Perform "Prior to End of Year Rating Period" functions. 2.6. Initiate notices by email or other means to all rating officials.	Performance conforms to requirements specified by the COR/PM, 95 percent the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	2.5. Perform "End of Year Rating Period" Functions. 2.5.1. Prepare a notice by email or other means to all ED supervisors to complete their evaluations and ratings.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.

	Required Service	Performance Standards		
	2.5.2 Track progress of and prepare appropriate follow-up notices.			
	2.5.3. As necessary, manually enter evaluations for employees.			
	2.5.4. Create reports in an ED-specified format for individuals who are visually impaired, and reports to an ED specialist to prepare in braille for those individuals who are blind.			
	2.5.5. Reestablish ED's performance plan criteria in IC for next rating cycle.			
	2.5.6. Other EDPAS/SESPAS duties, functions and tasks as assigned.			

Task 3: EDPAS/SESPAS Reports

There are general, user-generated, administrative, and ad-hoc reporting requirements.

	Required Services	Performance Standards	Acceptable Quality Level	
The contractor shall be responsible for, but not limited to, producing the following reports:				
Reports are timely, thorough, useful, and accurate.	3.1. The contractor shall produce the following reports as required by the COR/PM: • AD HOC Reports. • Evaluations Not Completed, by Principal Organization and Employee.	The following reports are due within one workday of request: • AD HOC Reports. • Evaluations Not Completed, by Principal Organization and Employee. • Aggregate Reports, ED and/or organization-wide Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	3.2. The contractor shall conduct analyses and prepare ad hoc reports as required.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
Task 4: EDPAS/SESPAS Help Desk				
The contractor shall provide assistance to employees using IC by telephone, email, and on-site visits. The requirements are to:				
The contractor shall maintain an EDPAS/SESPAS	4.1. Maintain coverage of the EDPAS Help Desk	Except during peak periods (as defined in Section III Definitions	Except during peak	COR/PM review and

...e	Required Service	Performance Standards	... ...	... ...
Help Desk that provides expert assistance to ED customers.	telephones from 8:30 a.m. to 5:00 p.m. (Eastern Standard/Daylight Time) each federal workday with continuous coverage by one operator (during "peak" periods additional operators may be needed.)	and Acronyms), no more than 12 valid complaints may be received about the telephone availability of Help Desk personnel during the performance of the task order.	periods, no more than 12 valid complaints may be received during each period of performance (base year or option year) about the telephone availability of Help Desk personnel during peak period.	approval.
	4.2. Answer telephone, voice mail, email and in-person requests from IC users. Types of assistance to be provided include, but are not limited to, changing password	**The contractor shall retrieve voice mail messages throughout the day, at least four times a day, and respond within one workday.** **Contractor shall retrieve email messages throughout the day, at least four times a day, and respond within one workday of receipt.** Contractor shall log all	Voice mail and email messages must be responded to within one workday during peak period.	COR/PM review and approval.

	Required Services	Performance Standards	Acceptable Quality Level	
		calls/requests into an automated database of calls received and types of problems encountered daily. The EDNET shall have access to the database during peak periods (as defined in Section III Definitions and Acronyms the database shall be updated within three work days.

Contractor shall complete requests from IC users within one work day of receipt. During peak periods, in user requests will be completed within three workdays | | |

Task 5: Technical Support

The contractor shall provide technical support services for the IC2000 software and for maintaining the EDPAS/SESPAS application on the EDNET.

Technical support provides expert assistance in maintaining the EDPAS/SESPAS application.	5.1. Provide technical assistance in resolving operating problems.	Performance conform to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	5.2. Assist in installing IC maintenance releases.	Performance conform to requirements specified by the COR/PM, 95 percent of the	No deviation without COR/PM approval.	COR/PM review and approval.

Measure	Required Service	Performance Standards	Acceptable Quality Level	Monitoring Method
		time.		
	5.3. Resolve problems associated with EDPAS/SESPAS application and its interaction with the ED network, Oracle and Server, and the IC software.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
Task 6: Other Assigned Tasks				
I. The contractor completes other assigned tasks that add value to the functioning of the EDPAS/SESPAS.	6.1. Contractor shall forward script files to the ED Oracle database administrator at times during the rating period designated by the ED PM. Designated times typically surround periods	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	6.2. As requested, the Contractor shall provide software demonstrations, training, and respond to questions related to IC.	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	6.3. As time permits assists ED staff in other facets of the EDPAS/SESPAS program, such as updating EDPAS/SESPAS instructional materials	Performance conforms to requirements specified by the COR/PM, 95 percent of the time.	No deviation without COR/PM approval.	COR/PM review and approval.
	6.4 As required, the Contractor shall	Reports are due within one workday of	No deviation without	COR/PM review and

	Requested Service	Performance Standards	Acceptable Quality Level	
	provide AD HOC reports to ED staff.	request.	COR/PM approval.	approval.

Service Level Agreement: (During non-peak period)

- Operational Support of EDPAS/SESPAS - Telephone Availability of Help Desk Personnel:
    The SLA's of this area shall mirror the Help Desk Call Answer SLA's.

- Operational Support of EDPAS/SESPAS - Voice Mail and Email Messages Responded to and Resolved Within one Workday:
    The SLA's of this area shall mirror the Priority 3 Customer Support SLA's.

Category B (Fixed Price / Time and Materials - Project Services)
Maintain **availability of subject matter experts** (SMEs) as needed number of defined projects per year. The contractor shall:

- Be responsible for maintaining two personnel rosters. The first comprised of qualified Business Executives and the second comprised of Qualified Personnel[26] that may or may not be working on the contract that ED can pull from in the case of a critical operational issue.

    o Business Executives may be called to lead tiger teams[27], compromised of personnel from various technical disciplines, among other things for short to medium duration tasks.

    o Personnel may be called to support customer service improvement events, virus attacks, system-wide problem resolution, serious email issues, market analysis, security, wireless solutions, computer forensics, load testing, data center expertise including: infrastructure, moves, cabling, HVAC, electrical / UPS, equipment, maintaining a technology roadmap, training, etc.

    o Both rosters shall be composed of personnel who have successfully completed ED's security requirements, including ED's security training and security paperwork.

    o It is expected that operational personnel shall be available within twenty-four (24) hours and Subject Matter Experts (SME) shall be

---

[26] Qualified Personnel shall have security paper work and training completed before being added to the roster.
[27] Tiger Teams are cross-functional teams performing focused and tightly scoped projects.

available wit··· ··· two (2) weeks·upon a request for assistance from ED.

- Use an Earned Val··· Management System that complies with OMB and any other relevant ···ulatory requirements to provide earned value information to ED f··· ··· in its reporting requirements.

- Provide resources ··· ···proximately 36,000 hours per year who are to be used at ED's discre··· ··· in executing ITD's Product Development Process outlined in Section ··· ···troduction.

Most projects shall occur ··· ··· ··· Washington DC area, See Appendix A for a detailed list of Washington ··· ··· area locations. Some example projects include major moves (100 regional ··· ··· from one building to another), or an enterprise software upgrade from one ··· ···sion to the latest version (i.e., Exchange 2000 to Exchange 2003). Categor··· ··· ···ll be the preferred method for ED to acquire SME during the lifetime of ··· ···ontract.

The contractor shall provid··· ··· ···Es in a variety of technical fields, including, but not limited to, project man··· ··· ···nt, business management, technical architecture (i.e., network, web, databa··· ···plication development, etc.), security architecture, product exper··· ···ogrammers conversant in the most current computer languages, netw··· ···gineering, etc. The contractor shall assign resources to work within E··· ···oduct Development Process and provide personnel with demonstra··· ··· ···ills, competence and experience necessary for a CMMI Level 3 process e··· ···ment. The contractor shall at a minimum:

- Provide capable p··· ··· ···l who are able to perform the work as determined by proj··· ··· ···eeds

- Maintain personne··· ··· ···nimal turnover, defined as less than twenty (20) percent turnov··· ···ng the lifetime of any specific Category B project

- Fill all vacancies w··· ··· ···n (10) business days

- Invoice on a per pr··· ··· basis

- Provide a yearly au··· ··· all Project activity

- Comply with OMB ··· ···her regulatory earned value requirements[28]

- Meet the acceptab··· ··· ···ity levels for relevant Category B service, see Section IV Perform··· ··· Standards and Acceptable Quality Levels

The contractor's solution s··· ··· ·t a minimum, provide the features shown in Table 9.

---

[28] OMB Circular A-11, Part 7, P··· ··· ···. Budgeting, Acquisition and Management of Capital Assets.

Table 9.   Feat...

Features		
An Integrated project management soluti...		
Provision of SME and/or Business Exec... ...ppropriate for each project.		
Ownership of problems from identification to ...u.. on / resolution.		
Management of projects to scope, schedul... .....dget.		

Category B Support Areas

Projects, which includes Project Managemen... .. ....; as assigned and provision of SMEs, shall be provided on a man...g...; project basis. The contractor shall:

- Provide cost estimates and proposals on a ...oject-by-project basis prior to project commencement.

- Manage projects using an OMB compliant ...ned value management system[29].

- Continually integrate industry best practices for project management tools and technologies that enhance the proc... . of the customer, thereby driving down project oversight support c...   ED.

- Provide enhanced technologies that sp... ....lution times or proactively eliminate customer problems, thus impr... .   ...D employee's productivity.

- See detailed descriptions of tasks in Ap;...   ...F.

Provision of SMEs, the contractor shall provi...:

- Business Management – Executive roster ....alified staff to lead tiger teams[30], compromised of SMEs and pers... .....; from various technical, program and budget disciplines, among ....things for short to medium duration tasks.

- Information Management – Expertise to ....ment ED's Information Assurance program using state of the a... ;   ...sses, policies and equipment.

- Enterprise Strategy – Expertise to supplen.....; :T Strategy initiatives, including IT Investment Management (ITIM), Enterprise Architecture (EA), business case development, OMB300 submission, portfolio management, records management, IT market analysis, ...

- SMEs in a variety of technical, administrat... and program fields.

---

[29] Ibid.

[30] Tiger Teams are cross-functional teams performing fo..... .. ...d tightly scoped projects.

Category C (Sustaining T... and Materials Support)

Demonstrate **availability** c... ...alified **personnel** for continuous staffing of IT processes managed by ED. T...o contractor shall:

- Manage projects us... ...n OMB compliant earned value management system[31].

See Appendix A for geogra... ...ocations of ED offices, most continuous support staff shall be located in the ...hington DC area.

The contractor shall provid... ...lified Personnel who shall meet the continuous day to day demands of the ...mentation / Transition Plan and ongoing daily operations. Tasks de... ...ed ...re are outside of the scope of tasks described in Categories A ... ...:. All intellectual property developed while meeting Category C object... ...sha I be the sole property of the Government. The contractor shall, at a m... ...um:

- Provide capable pe... ...el ...ho are able to cover the work schedule as determined by ED

- Maintain personnel ... ...ni...mal turnover, defined as less than ten (10) percent attrition per ...

- Fill all vacancies w... ...n (10) business days

- Track attendance a ...ur... in accordance with Government regulations at the project level

- Invoice on a month ...s ... the project level

- Provide a yearly au... ...all time and material activity at the project level

- Furnish level of effo... ...ima...es for any new task items at the project level

- Provide any require... ...med value detail to ED for its reporting requirements at the ...ect level

- Meet the acceptabl... ...ality ...vels for relevant Category C service, see Section IV Perform... ...St...dards and Acceptable Quality Levels

The contractor's solution f... ...Cal ...gory C services shall provide, at a minimum, the features contained in T... ...0. Features.

---

[31] OMB Circular A-11, Part 7, Pl... ...g, Budgeting, Acquisition and Management of Capital **Assets.**

Table 10. Features

Features		
Provision of qualified personnel appropriate to each task.		
Ownership of problems from identification to solution / resolution.		
Management of tasks to scope, schedule and budget.		

Category C Support Areas

Ongoing Project Management, which includes scheduling, Administrative Support, and Other Tasks as assigned are expected to provide continuous project management support for the Project Management Office. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.

- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / Full Time Equivalents (FTEs) to meet these tasks are: 2 to 4 per year.

Server Operations, which include Project Management of tasks, Change Management, Data Base Administration, Security Operations, Custom Application Support and Other Tasks as assigned. The contractor shall:

- Provide articulate personnel trained in the standard ED software, listed in Appendix C, or any other software required to meet the objectives for this task.

- See detailed descriptions of tasks provided in Appendix F.

The initial expected level of effort / FTEs to meet these tasks are: 29 to 31 per year.

NCES Support, which includes support of NCES server operations components by providing technical expertise in the Microsoft Windows, Linux, and F5 BigIP infrastructure. This expertise shall be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills. The contractor shall:

- Provide database maintenance.

- Provide Server and Microsoft IIS support.

- Provide ad hoc custom application support.

- Support the Department's mission critical Security Operations.

- Provide Web develo ent and programming support.
- Provide design for n systems, applications, and databases as required.
- Act as point of conta for other developers working with NCES.

The initial expected level of ort / FTEs to meet these tasks are: 2 to 4 per year.

Converged Communicati and Networking, which includes Project Management of tasks and I work Engineering. The contractor shall:

- Provide articulate pe nnel trained in the standard ED software, listed in Appendix C, or any er software required to meet the objectives for this task.
- See detailed descri ns of tasks provided in Appendix F.

The expected level of effort TEs to meet these tasks are: 1 per year after the C to A migration.

Engineering and Lab Sup t Operations, which include Assistive Technology Engineering (testing, comp ce, etc.), Server Engineering, Enterprise Architecture and Project M gement of tasks as assigned. The contractor shall:

- Provide articulate p nne trained in the standard ED software, listed in Appendix C, or any er s tware required to meet the objectives for this task.
- See detailed descri is of tasks provided in Appendix F.

The expected level of effort TEs to meet these tasks are: 2 per year after the C to A migration.

CMMI Process

All successful solutions sha escribe in detail how they shall move the Department closer to its go f process maturity and improved customer service by providing:

- Proven industry sta d p cesses, enabling ED to reach a minimum of CMMI Level 3 on da ne of the contract in server, desktop and messaging services por.
- An outline of a conti us process to migrate Category C — CMMI Level 1 products to CMMI el 2 within a year, from CMMI Level 2 to Category A — CMMI Level 3 in three (3) years, and move Category A — CMMI Level 3 products to MI Level 4 within three to five (3-5) years.

IV. Performance Standards and ptab e Quality Levels
Below are listed the Perform ce Standards and Acceptable Quality levels for the Department of Educatio DN Support Services.

Disincentives for Not Meeting Performance ~~St   ~~ ds
Each performance period ED and the service provi   shall select some specific
SLAs that shall be scored, and shall be a factor in   ng a new term[32].

Management Information Dashboard
The first step in running an agency on sound busi   principles is correctly and
consistently collecting the necessary metrics. By a   ating this process through
the use of a management information dashboard,   anagers can make the
most efficient and effective use of their resources.   mation rolls up to the CIO
/ senior management who view all active proj.   s   itiatives and drill down to
details about specific initiatives and assets.

The SLAs listed in this section shall be measured a.   olled up to this
management information dashboard to provide m   ment with the necessary
metrics to run operations. The dashboard, as well   e SLAs, shall be adjusted
over time as processes continue to improve.

Sample metrics to be gathered are listed below.   provider shall provide
additional metrics (with rationale), as needed:

- Total operating costs, fixed and variable, s   able managers to gain a
  quick understanding of the overall hea   c   rganization for funding
  needs.

- A total count of personnel provides an   c   ding of the staff needed
  to support the mission.

- EDNet is critical to providing customers (w   internal or external) with
  timely information, so reporting on network   ation, outages, etc will
  provide a quick status check of the networ.

- Customer satisfaction is a crucial compone   an organization's ability to
  ensure that it is delivering value to its end us

Benchmark
ED has the option to execute the benchmarking c   as outlined in Appendix H
of the PWS, to determine that the fees, service and   ice levels contained
within this contract are among the industry's compe   rates and service levels
for such services.

General Service Levels
General SLAs apply equally to all categories of work   dertaken by the service
provider, with the most important being Customer   action followed by

---

[32] As discussed in Section H.14 Award Term Provisions, SLA   are missed shall deduct some
predefined number of points from 50 (the starting score).

Security and Asset Manage nt. As these areas often overlap between service
categories, they have been hlig ted to indicate their importance.

.-01 Server Availability

Service Name: SLA-01 Server Availabili;	
Service Description: At a "server" level, asu s Production Server availability with a desired result of driving service provider towards minimal to no d time nd thereby improving end-user productivity and customer satisfaction.	
Note: A Production Server is any Windov)00 2003 Server, Windows NT Server, Linux Server, Specialized Appliance Devices (Firewall, Google, Fir s, (P, Cisco Security Appliances, etc.) ,Sun Solaris Server , Enterprise Backup System, Linux Server. (se er, F5, and Citrix Server within EDNet that is included on the Category A monthly invoice, excluding O: ok, ckberry and Unity servers.	
Performance Standard: 99.6% Availabi!	
Responsibilities: Service Provider - Ma al roduction Servers in good operating condition so standard/normal ED activities can take pl with defined Timeframes. Meet all ED security requirements and complete all security paperwork for acce se or systems.	
Assumptions: ED shall provide access orve ystems as per Service Provider requirements.	
The service provider shall meet all ED so ty re uirements and complete all security paperwork for access to server systems.	
Timeframe excludes standard schedule(n t for required maintenance.	
Operational Development Servers are c erc roduction servers and are covered in this SLA.	
Timeframe excludes events outside of s e pr der's control.	
ED will provide the service provider with he h dware, software, and maintenance/warranty for the service provider to achieve this SLA.	
ED and the Service Provider will conduc! ont y SLA Review Board to determine, on a case-by-case basis, servers and events that were supporting elo ent activities and should be excluded.	
Allow one bounce per server with prior E pro per week without affecting the SLA. An RCA is to be produced to determine the root cause of sym oms leading up to the request to bounce the server. Subsequent bounces of the same server he s ne week will require prior ED approval and will be referred to the Monthly SLA Review Board for discu n.	
Frequency: Measure Weekly and Repo nth	
Measurement Period: 24 hours per day da per year	
How Measured: Measure each Producti erv (total hours available during measurement period not including scheduled down time and even tsic of service provider's control) / (by total hours in measurement period – scheduled down time and event tsid f service provider's control) = "service level attainted", and compare against Performance Standard 6%)	
Example: A single Production Server wa wn 2 hours during the measurement period, with one hour scheduled downtime.	
"Weekly Availability" = (168 Hours – 2 ho – 1 ur) / (168 Hours – 1 Hour) = 98.8%. The SLA was missed for this server.	
Sources: Tool supplied by service provi hat omatically records via "date and time stamping" for each activity within a process including up-tim d d time data.	
Server Availability Deliverables: Mont po Reports shall provide a roll-up of all weekly reports into a	

plain-English format, highlighting any problems and trends.	
Disincentive: High	
Note: This disincentive is based on downtime per Production Server - server downtime shall not be averaged across all Production Servers.	
Disincentive Value (Demerits): 6	
Maximum Deducted Award Points: 5	
Notes: Results shall be available through the Dashboard.	
Assigned ED Manager: Renaldo Harper	
ED Alignment: OPS	

SL   02   etwork Availability

Service Name: SLA-02 Network Availabili
Service Description: The percent of time   at t   network, including LAN, WAN, Internet, Intranet and VoIP, is available for normal business operations.   clud   voice and data as well as the equipment infrastructure.
Performance Standard: 99.6% Availabilit
Responsibilities: Service Provider - Main   n al   Network Devices in good operating condition so standard/normal ED activities can take pla   wit   defined Timeframes. Meet all ED security requirements and complete all security paperwork for access   se   er systems.
Assumptions: ED shall provide access to   etw   k Devices as per Service Provider requirements.   The service provider shall meet all ED sec   ty r   uirements and complete all security paperwork for access to network systems.   Timeframe excludes standard scheduled d   vn t   e for required maintenance.   Timeframe excludes events outside of ser   e pr   vider's control.   ED will provide the service provider with a   he h   dware, software, and maintenance/warranty for the service provider to achieve this SLA.
Frequency: Measure Weekly and Report   onth
Measurement Period: 24 hours per day 3   da   per year
How Measured: Measure network availab   y, (al hours available during measurement period excluding scheduled down time and events outside c   erv   provider's control) / (by total hours in measurement period – scheduled down time and events outside   erv   provider's control) = "service level attainted", and compare against Performance Standard (99.6%).   The Network Service is down if a Network   rvi   hardware or software component failure disrupts Network Service and that failure impacts over 10%   the   tal Department's Network Service user base.   Example: The Network Service was down   2   rs during the measurement period, with one hour scheduled downtime.
"Weekly Availability" = (168 Hours – 2 hou   – 1   our) / (168 Hours – 1 Hour) = 98.8%. The SLA was missed.
Sources: Tool supplied by service provide   hat   tomatically records via "date and time stamping" for each activity within a process including up-time   d d   ntime data.
Network Availability Deliverables: Montl   rep   t. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any probl   ns a   d trends.
Disincentive: High
Disincentive Value (Demerits): 6
Maximum Deducted Award Points: 5
Notes: Results shall be available through   D   board
Assigned ED Manager: Pete Tseronis
ED Alignment: NCC

SLA-03 Outlook Av. lab.

Service Name: SLA-03 Outlook Service Availability	
Service Description: The percent of time that the Outlook Servi.. is a. lable for normal business operations.	
Performance Standard: 99.0% Availability	
Responsibilities: Maintain Outlook Service in good operating co. ditio: . standard / normal ED activities can take place within defined Timeframes.	
Assumptions: ED shall provide access to server systems as pe: 3erv. Provider requirements.	
Service Provider shall meet all ED security requirements and co:. ete .ecurity paperwork for access to server systems.	
Timeframe excludes standard scheduled down time for required . :inte ce.	
Timeframe excludes events outside of service provider's control	
ED will provide the service provider with all the hardware, softwa: . an. .intenance/warranty for the service provider to achieve this SLA.	
Frequency: Measure Weekly and Report Monthly.	
Measurement Period: 24 hours a day 365 days a year.	
How Measured: Measure the Outlook Service, (total hours avai. .le d .y measurement period not including scheduled down time and events outside of service provider's cc .:rol) . , total hours in measurement period – scheduled down time and events outside of service provider's cc. rol) .ervice level attainted", and compare against Performance Standard (99.0%).	
The Outlook Service is down if an Outlook Service hardware or : :wa. .mponent failure disrupts Outlook Service and that failure impacts over 10% of the total Departme: . Ou . user base.	
Example: The Outlook Service was down for 2 hours during the . .as. ent period, with one hour scheduled downtime.	
"Weekly Availability" = (168 Hours – 2 hours – 1 Hour) / (168 Ho... ; – : ur) = 98.8%. The SLA was missed.	
Sources: Tool supplied by service provider that automatically re.: rds . .date and time stamping" for each activity within a process including up-time and downtime data.	
Messaging Availability Deliverables: Monthly report. Reports :..all p .de a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.	
Disincentive: Medium.	
Disincentive Value (Demerits): 3	
Maximum Deducted Award Points: 3	
Notes: Results shall be available through the Dashboard.	
Assigned ED Manager: Renaldo Harper	
ED Alignment: OPS	

SLA-04 Blackberry Availability

Service Name: SLA-04 Blackberry Service Availability
Service Description: The percent of time that the Blackberry Service is available for normal business operations.
Performance Standard: 99.0% Availability
Responsibilities: Maintain Blackberry Service in good operating condition so standard / normal ED activities can take place within defined Timeframes.
Assumptions: ED shall provide access to server systems as per Service Provider requirements.   Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.   Timeframe excludes standard scheduled down time for required maintenance.   Timeframe excludes events outside of service provider's control.   ED will provide the service provider with all the hardware, software, and maintenance/warranty for the service provider to achieve this SLA.
Frequency: Measure Weekly and Report Monthly
Measurement Period: 24 hours a day 365 days a year.
How Measured: Measure the Blackberry Service (total hours available during measurement period not including scheduled down time and events outside of service provider's control) / (by total hours in measurement period – scheduled down time and events outside of service provider's control) = "service level attainted", and compare against Performance Standard (99.0%).   The Blackberry Service is down if a Blackberry Service hardware or software component failure disrupts Blackberry Service and that failure impacts over 1% of the total Department's Blackberry user base.   Example: The Blackberry Service was down for 2 hours during the measurement period, with one hour scheduled downtime.   "Weekly Availability" = (168 Hours – 2 hours – 1 hour) / (168 Hours – 1 Hour) = 98.8%. The SLA was missed.
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Messaging Availability Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium.
Disincentive Value (Demerits): 3
Maximum Deducted Award Points: 3
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-05 Unity Availability

Service Name: SLA-05 Unity Service Availability		
Service Description: The percent of time that the Unity Service . available for normal business operations.		
Performance Standard: 99.0% Availability		
Responsibilities: Maintain Unity Service in good operating cond... on s standard / normal ED activities can take place within defined Timeframes.		
Assumptions: ED shall provide access to server systems as pe· erv Provider requirements.		
Service Provider shall meet all ED security requirements and cor lete security paperwork for access to server systems.		
Timeframe excludes standard scheduled down time for required ...int nce.		
Timeframe excludes events outside of service provider's control.		
ED will provide the service provider with all the hardware, softwar an aintenance/warranty for the service provider to achieve this SLA.		
Frequency: Measure Weekly and Report Monthly.		
Measurement Period: 24 hours a day 365 days a year.		
How Measured: Measure the Unity Service, (total hours availabl jur measurement period not including scheduled down time and events outside of service provider's co ol) y total hours in measurement period – scheduled down time and events outside of service provider's co ol) ervice level attainted", and compare against Performance Standard (99.0%).		
The Unity Service is down if a Unity Service hardware or softwar om ent failure disrupts Unity Service and that failure impacts over 10% of the total Department's Unity use ns		
Example: The Unity Service was down for 2 hours during the me ure t period, with one hour scheduled downtime.		
"Weekly Availability" = (168 Hours – 2 hours – 1 Hour) / (168 Ho : – ur) = 98.8%. The SLA was missed.		
Sources: Tool supplied by service provider that automatically re ds "date and time stamping" for each activity within a process including up-time and downtime data.		
Messaging Availability Deliverables: Monthly report. Reports all ide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.		
DisIncentive: Medium.		
DisIncentive Value (Demerits): 3		
Maximum Deducted Award Points: 2		
Notes: Results shall be available through the Dashboard.		
Assigned ED Manager: Renaldo Harper		
ED Alignment: OPS		

SLA-06 Qualified Personnel Availability

Service Name: SLA-06 Qualified Personnel Availability
Service Description: Measure the number of RCAs in which human error was found to be the root cause of the outage and the identified person does not meet position requirements, with a desired result of ensuring qualified personnel are assigned to the EDNet contract, such that the service provider can provide high-quality services and thereby improve end-user productivity and customer satisfaction.   Each individual servicing the EDNet contract meet the qualifications required by a GSA Labor Category (T&M Category C and B) or their company's personnel job title or labor category (FFUP Category A and FFP Category B).
Performance Standard: 100% of RCAs to be found without human error
Responsibilities: Service Provider: Ensure personnel meet the qualifications required by their job title or labor category.
Assumptions: The Service Provider shall hire individuals that meet position requirements.   Timeframe excludes events outside of service provider's control.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours per day 365 days per year.
How Measured: For each outage that requires an RCA, the root cause for the outage will be determined to be Technology Failure, Process Failure, or Human Error. If the root cause is determined to be Human Error, the individual's qualifications will be compared against the assigned GSA Labor Category (T&M Category C and B) or the assigned company personnel job title or labor category (FFUP Category A and FFP Category B). If the individual does not meet the requirement as defined in the applicable job title or labor category, the SLA is missed. Measurement shall be determined to be the % of RCAs to be found without human error.   The service provider will not simultaneously incur SLA-06 and SLA-26 Disincentive Value (Demerits) demerits from a single event.
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Disincentive Value (Demerits): 3
Maximum Deducted Award Points: 5
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: ALL
ED Alignment: MGT

SLA-07 Anti-Virus Update (Software Version)

Service Name: SLA-07 Anti-Virus Update (Software Version)
Service Description: Measures performance of the service provider to update ED's infrastructure with the latest tested anti-virus updates.
Performance Standard: 100% of updates will begin within 48 hours after government approval.
Responsibilities: Service Provider shall begin the anti-virus update for ED's entire infrastructure at least 48 hours from attaining government approval.
Assumptions: Updates have been tested against ED's configurations. No changes shall be made until all the proper testing is completed.   Timeframe excludes events outside of service provider's control.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Updates completed within specifications and number of cases where virus version is out of date / total number of Updates = "% Service Level Attained"
Sources: Service Provider maintained tool that provides documatic capabilities to meet the reporting requirements.
Anti-Virus Update Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Disincentive Value (Demerits): 6
Maximum Deducted Award Points: 2
Notes: Results shall be available through the Dashboard
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-08 Virus File Release (Signature Files)

Service Name: SLA-08 Virus File Release (Signature Files)
Service Description: Measures number of virus definitions that are not updated.
Performance Standard: 100% of updates will begin within 24 hours of virus update release to both client and servers that are on the network.
Responsibilities: Update Virus Release Files as designated by ED and ensure software is working properly by completing any manufacturer and/or ED designated tests.
Assumptions: Service Provider is responsible for retrieving updates from ant-virus software provider. Timeframe excludes events outside of service provider's control. ED will provide the service provider with all the hardware, software, and maintenance/warranty for the service provider to achieve this SLA.
Frequency: Measure Weekly and Report Monthly
Measurement Period: 24 hours a day 365 days a year.
How Measured: Number of Releases completed within specifications / total number of Releases = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Anti-Virus Release Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 2
Maximum Deducted Award Points: 3
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-09 Timeliness of Backups

Service Name: SLA-09 Timeliness of Backups.	
Service Description: Percentage of time that the backups are performed on time. *Note:* The backups must be free from errors and omissions.	
Performance Standard: 96% of backups are performed when scheduled.	
Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide Service Provider easy access to required areas that allow for completion of duties. ED will provide to the service provider the back up schedule.	
Assumptions: That incremental backups are completed nightly, full backups monthly and a copy of the tapes is rotated off-site monthly. This represents ED's minimum acceptable backup schedule, backups are kept in accordance with ED's archival policy. Timeframe excludes standard scheduled down time for required maintenance. Timeframe excludes events outside of service provider's control. ED will provide the service provider with all the hardware, software, and maintenance/warranty for the service provider to achieve this SLA.	
Frequency: Measure Weekly and Report Monthly.	
Measurement Period: 24 hours a day 365 days a year.	
How Measured: Number of Times Backups were performed before the Deadline / Total Number of Backups Performed = "Service Level Attained".	
Sources: Tool supplied by service provider that automatically records a "date and time stamping" for each activity within a process including up-time and downtime data.	
Timeliness of Backups Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.	
Disincentive: Low	
Disincentive Value (Demerits): 2	
Maximum Deducted Award Points: 1	
Notes: Results shall be available through the Dashboard.	
Assigned ED Manager: Renaldo Harper	
ED Alignment: OPS	

SLA-10 Notification of Issue & Security Events

Service Name: SLA-10 Notification of Issue & Security Events	
Service Description: Measures performance of the service provider to inform ED of any Security, Severity 1 or Severity 2 service exceptions within fifteen (15) minutes of their occurrence. A Security Event is defined as any IT event that affects more than 50 employees resulting from a malicious attack (e.g., spoof attack, virus attack, SPAM, Intrusion, unauthorized access to financial or HR material, etc.). Severity 1 and Severity 2 service exceptions are defined as any IT event that affects more than 50 employees (e.g., hardware outage, virus attack, VoIP outage, etc.).	
Performance Standard: 100% of the time, the Service Provider executes the approved escalation/notification procedure.	
Responsibilities: The service provider shall follow the chain of command for reporting according to ED's guidelines. Notification to the Government Manager or designee must occur via voice communication. If the Government Manager or designee is unavailable the service provider is to notify the Chief Information Officer or designee.	
Assumptions: Notification shall occur after a Security, Severity 1 or Severity 2 event is discovered. Timeframe excludes events outside of service provider's control. ED will provide the service provider with all the hardware, software, and maintenance/warranty for the service provider to achieve this SLA.	
Frequency: Measure Daily and Report Monthly.	
Measurement Period: 24 hours a day 365 days a year.	
How Measured: Number of Security, Severity 1 or Severity 2 events reported within fifteen (15) minutes / total number of Security Events = "% Service Level Attained".	
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.	
Notification of Security Event Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.	
Disincentive: High	
Disincentive Value (Demerits): 3	
Maximum Deducted Award Points: 3	
Notes: Results shall be available through the Dashboard.	
Assigned ED Manager: Renaldo Harper & Manny Hernandez	
ED Alignment: OPS/SEC	

SLA-11 CERT / FedCIRC Alerts & Tasks

Service Name: SLA-11 CERT / FedCIRC Alerts and Tasks.
Service Description: Measures performance of the service provider to respond to CERT / FedCIRC Alerts and Tasks.

Performance Standard:
    1.   100% response to alert (within CERT / FedCIRC alert task specifications), and
    2.   100% creation of impact on EDNet within four (4) hours of alert release, and
    3.   100% creation of suggested action plan to re-mediate within 24 hours of an alert, and
    4.   100% plan execution within seven (7) days after Government approves the plan.

Responsibilities: Service Provider shall respond to CERT / FedCIRC alerts and tasks, within the specified timeframes of the alerts, including the initiation of the testing process and notification of the appropriate ED personnel. Generate after action report ten (10) days after each event, or as stated by ED.
Assumptions: The service provider shall be responsible for gathering CERT / FedCIRC alerts. CERT / FedCIRC alerts have been tested against ED's configurations. No changes shall be made until all the proper testing is completed. Timeframe excludes events outside of service provider's control.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Normal Sec-Ops Support Hours
How Measured: Number of CERT-FedCIRC alerts responded to with within CERT-FedCIRC alert task specifications and creation of impact on EDNet within 4 hours of alert release and the number of CERT-FedCIRC tasks action plans created within 24 hours and completed within seven (7) days after Government approves the plan/ total number of CERT-FedCIRC alerts = "% Service Level Attained".
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
CERT / FedCIRC Alerts Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Disincentive Value (Demerits): 6
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: Manny Hernandez
ED Alignment: SEC

SLA-12 Virus Penetrations of Network

Service Name: SLA-12 Virus Penetrations of Network.	
Service Description: Measures number of virus penetrations to the network that cause a network outage.	
Performance Standard: Zero (0) downtime due to virus or worm (email borne or otherwise) infiltration on EDNet.	
Responsibilities: Prevent virus penetration to ED network.	
Assumptions: The latest version of anti-virus software signature files (virus definitions) must include the virus/worm impacting EDNet (the virus/worm must be detectable by latest commercial signature files). If the virus/worm is contained in a new virus signature file that has been released, but not updated as per the 24 hour **Virus File Release (Signature Files)** SLA, no points shall be deducted. Timeframe excludes events outside of service provider's control.	
Frequency: Measure Weekly and Report Monthly.	
Measurement Period: 24 hours a day 365 days a year.	
How Measured: Network downtime associated with virus penetrations within specifications	
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.	
Anti-Virus Release Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.	
Disincentive: High	
Disincentive Value (Demerits): 6	
Maximum Deducted Award Points: 1	
Notes: Results shall be available through the Dashboard.	
Assigned ED Manager: Manny Hernandez	
ED Alignment: SEC	

SLA-13 Service Restoration (Non-Disaster Recovery)

Service Name: SLA-13 Service Restoration (Non-Disaster Recovery Situations).
Service Description: Complete a service restoration when notified by ED end user or become aware of failure through self-analysis or helpdesk. Includes Windows and UNIX servers, and the restoration of production data.
Performance Standard: Windows Server Restore - System, including application, restoration completed within eight (8) hours from time Service Provider receives the tapes from offsite storage, 95% of the time. UNIX Server Restore - System, including application, restoration completed within twelve (12) hours from time Service Provider receives the tapes from offsite storage and they have been cataloged, 95% of the time.
Responsibilities: Maintain back-up data as per ED requirements in a facility that is deemed "secure" by industry standards and provides for quick access. ED to provide service provider easy access to required areas to perform file restorations.
Assumptions: ED shall provide access to server systems as per Service Provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems. Timeframe excludes standard scheduled down time for required maintenance. Timeframe excludes events outside of service provider's control.
Frequency: Measure Daily and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Systems Restored within SLA timeframe / Total Number of System Restores = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
System Restoration (Non-Disaster Recovery) Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Disincentive Value (Demerits): 2
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: ALL
ED Alignment: MGT

SLA-14 Installation

Service Name: SLA-14 Installation.
Service Description: Acceptable time required to install a new desktop system upon appropriate request from ED. Note: Normally more than fifteen (15) installations at once are considered a project and are based on agreed timeframe.
Performance Standard: One (1) business day from time system scheduled for installation, 90% of the time, 100% within 3 business days.
Responsibilities: Install and test system, and remove shipping cartons to ED designated area.
Assumptions: ED shall provide access to facilities as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to facilities. Dependent on appropriate available inventory. Timeframe excludes events outside of service provider's control.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: Installation completed <= SLA business day / Total Number of Installs within Measurement Period = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Installation Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium
Disincentive Value (Demerits): 3
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Any transaction that includes more than fifteen (15) units shall be considered a "project" and shall be completed as a separate function with separate pricing and service level commitment.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-15 Moves, Adds or Changes (MACs)

Service Name: SLA-15 Moves, Adds or Changes (MACs).
Service Description: Acceptable time required to move, add or change software or hardware a desktop system upon appropriate request from ED. *Note:* Normally a group of more than fifteen (15) MACs at once is considered project and is based on an agreed upon timeframe.
Performance Standard: One (1) business day (five business days for surplus activity) from time of scheduled MAC activity, 80% of the time, 100% within (3) business days.
Responsibilities: De-install system, Move system, reinstall or Add / Change appropriate hardware or software to ED designated destination and validate that system is able to "communicate" with the network.
Assumptions: ED shall provide access to facilities as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to facilities. Timeframe excludes events outside of service provider's control.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: MACs completed <= One (1) of SLA business day / Total Number of MACs within reporting period = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Moves, Adds or Changes (MACs) Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 2
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Any transaction that includes more than fifteen (15) units shall be considered a "project" and shall be completed as a separate function with separate pricing and service level commitment.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-16 Maintain User Accounts (Email, Password Resets, Disable User Accts, File Restorations)

Service Name: SLA-16 Maintain User Accounts (Email, Password Resets, Disable User Accts, File Restorations)
Service Description: Acceptable time for creation of access authorizations and passcodes for ED or service provider that as representatives of the ED or service provider for user access to systems. Reset end user EDNet password, authorizations based on end user request. Acceptable time for deletion of access authorizations and codes for ED or service provider. Begin process of restoring files when notified by ED end user or become aware of failure through self-analysis or contact center.
Performance Standard: 1. Creation of access authorizations and passcodes within four (4) business hours from time of notification by ED, 100% of the time (assuming not more than 20 accounts per day) 2. Reset end user EDNet password within fifteen (15) minutes 95% of the time, 100% password resets within two (2) business hours. 3. Deletion of access authorizations and passcodes for ED or service provider within one (1) business hour, from time of notification by ED, 100% of the time. 4. Begin file restoration eight (8) hours from the time the tape arrives, 90% of the time (assuming normal ED tape retention policy and volume of file being restored allows an eight (8) hour restore), not to exceed seventy-two (72) hours.
Responsibilities: Maintain technical staff capable of resolving security issues on the helpdesk or Point of Contact (POC) for end-user client personnel within defined timeframes.
Assumptions: Service Provider shall provide Single Point of Contact (SPOC) for all security request calls. ED shall provide access to server systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to server systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: 24 hours a day 365 days a year.
How Measured: All four measures must be attained to meet SLA. 1. IDs created within SLA timeframe / Total Number of IDs created = "Service Level Attained". 2. Number of EDNet Password Resets within SLA timeframe / Total Number of Password Resets = "Service Level Attained". 3. IDs Deleted within SLA timeframe / Total Number of IDs Deleted = "Service Level Attained". 4. Number of Files Restored within SLA timeframe/ Total Number of Files Restored = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Establish Individual User Accounts (including E-mail) Deliverables: Monthly report. Reports shall provide a roll-up of all weekly reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 2
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Systems requiring accounts include: Network, Email and Remote Access (Citrix) accounts.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-17 Priority 1 Customer Support

Service Name: SLA-17 Priority 1 Customer Support
Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 1 Customers.
Performance Standard: First contact within fifteen (15) minutes, 99% of the time; resolution within two (2) hours, 80% of the time; resolution within one business day, 100% of the time. *Note:* Any resolution time requirements less than four (4) business hours shall require "HOT" spares.
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.
Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems. Timeframe excludes events outside of service provider's control. Priority is based on user to which system is assigned.
Frequency: Measure Weekly and Report Monthly
Measurement Period: Business hours.
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained". *Note:* This includes notification, escalation and restoration of service.
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Priority 1 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Disincentive Value (Demerits): 6
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Priority 1 Customers are identified at time of "system sign-up" and are identified in a monthly list provided by OCIO to SP and remain in place on a per month basis. Changes are acceptable at the beginning of each month.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-18 Priority 2 Customer Support

Service Name: SLA-18 Priority 2 Customer Support	
Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 2 Customers	
Performance Standard: First contact within thirty (30) minutes, 95% of the time; resolution within four (4) hours, 80% of the time; resolution within one business day, 90% of the time, and 100% resolution within 3 business days. *Note:* Any resolution time requirements less than four (4) business hours shall require "HOT" spares.	
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.	
Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems. Priority is based on user to which system is assigned. Timeframe excludes events outside of service provider's control.	
Frequency: Measure Weekly and Report Monthly.	
Measurement Period: Business hours.	
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained". *Note:* This includes notification, escalation and restoration of service.	
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.	
Priority 2 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.	
Disincentive: Low	
Disincentive Value (Demerits): 2	
Maximum Deducted Award Points: 1	
Notes: Results shall be available through the Dashboard. Priority 2 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.	
Assigned Manager: Renaldo Harper	
ED Alignment: OPS	

SLA-19 Priority 3 Customer Support

Service Name: SLA-19 Priority 3 Customer Support
Service Description: Acceptable time to resolve problems for hardware, software and system components within the desktop environment that impact Priority 3 Customers
Performance Standard: Resolution within 3 business days, 90% of the time.
Responsibilities: Resolve problem and have "broken system" up and running or loaner provided within designated timeframe.
Assumptions: ED shall provide access to systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to systems. Timeframe excludes events outside of service provider's control. Priority is based on user to which system is assigned.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Business hours.
How Measured: Problems resolved <= SLA hours / Total Number of Problems = "Service Level Attained". *Note:* This includes notification, escalation and restoration of service.
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Priority 3 Customer Support Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 2
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Priority 3 Customers are identified at time of "system sign-up" and remain in place on a per month basis. Changes are acceptable at the beginning of each month.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-20 Helpdesk Call Answer

Service Name: SLA-20 Helpdesk Call Answer
Service Description: Answer time is the number of seconds it takes any representative of ED to connect with service provider's contact center representative.
Performance Standard: 90% of calls shall be answered < 30 seconds by live person that is front-end directed by ACD.
Responsibilities: Service Provider - Answer all calls with a live person during the service activity definition timeframe while providing ACD front-end director activity.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting. Timeframe excludes events outside of service provider's control. Major Incidents that result in an exceptional volume of calls to the helpdesk during a short period of time will be excluded.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Calls Answered in < 30 seconds / Total Calls = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Helpdesk Call Answer Deliverables: Monthly report. Reports shall provide a roll-up of all Daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 1
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Service Provider shall provide a telephone number staffed by technical professionals during required Timeframes. ED calls designated toll free number and has all required data, including "entitlement data" ready for call activity.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-21 Call Abandonment Rate

Service Name: SLA-21 Call Abandonment Rate.
Service Description: The call abandonment rate is the proportion of calls that come into the service provider's Helpdesk, which either hang up or are disconnected before the service provider's agent answers the phone. *Note:* There is a "wrong immediate hang up" exclusion so they will not be included in this metric.
Performance Standard: <3% of calls abandoned, after initial fifteen (15) seconds of hold time.
Responsibilities: Recording and managing calls that are abandoned to less than prescribed service level.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting. Timeframe excludes events outside of service provider's control. Major Incidents that result in an exceptional volume of calls to the helpdesk during a short period of time will be excluded.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Abandoned Calls (calls that have entered the queue and "hang up") / Total Calls = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Call Abandonment Rate Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 1
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Service Provider provided ACD system has capability of tracking and reporting all abandoned calls.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-22 First Call Resolution

Service Name: SLA-22 Initial Problem Resolution.
Service Description: The desired percentage of problems resolved at initial contact with customer. Initial Problem Resolution applies when the first person the customer reaches either answers the question, resolves the problem, warm transfers the customer to a helpdesk staffer that answers the question or resolves the problem, dispatches service when appropriate. Callbacks shall be considered second or greater contact.
Performance Standard: First call resolution rate equals 80%.
Responsibilities: Provide required assistance (non-technical and technical) to satisfy ED end-user needs on the initial call to the helpdesk.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting. Technical dispatch counts as Initial Problem Resolution and is subject to response times as follows: Priority 1: First contact within fifteen (15) minutes, 99% of the time; resolution within two (2) hours, 80% of the time; resolution within one business day, 100% of the time. Priority 2: First contact within thirty (30) minutes, 95% of the time; resolution within four (4) hours, 80% of the time; resolution within one business day, 90% of the time, and 100% resolution within 3 business days. Priority 3: Resolution within 3 business days, 90% of the time. The number of initial problems resolved will be reduced by the number of Call Backs on same problems being reported by a customer within 4 business days. Timeframe excludes events outside of service provider's control.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of calls resolved on the first call / total calls = "Service Level Attained"
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
First Call Resolution Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Medium.
Disincentive Value (Demerits): 3
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard. Service Provider provided system has capability to track and report out of compliance activities.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-23 Follow-On Calls due to Problem Repeated after Initial Fix Failed

Service Name: SLA-23 Call Backs on Same Problem
Service Description: This is a measure of quality. It tracks repeat calls, or the number of calls initiated by an end user to correct the same problem that had been closed as resolved.
Performance Standard: The number of calls initiated by an end user to correct the same problem that had been closed as resolved is less than 5%.
Responsibilities: Provide required assistance (non-technical and technical) to satisfy ED end-user needs on follow-on calls to the helpdesk.
Assumptions: Service Provider to provide telephone lines in adequate quantity to handle call volume, ACD system to record call date, time and duration information, and electronic interface to all systems for monitoring and reporting. Timeframe excludes events outside of service provider's control.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: Number of Repeat Calls / Total Calls = "Service Level Attained".
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Follow-On Calls due to Problem Repeated after Initial Fix Failed Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: High
Disincentive Value (Demerits): 3
Maximum Deducted Award Points: 3
Notes: Results shall be available through the Dashboard. Service provider provided system has capability to track and report out compliance activities.
Assigned ED Manager: Renaldo Harper
ED Alignment: OPS

SLA-24 Move, Add, Change or Delete Telecom – 1 to 15 Software

Service Name: SLA-24 Move, Add, Change or Delete Telecom – 1 to 15 Software.
Service Description: Average time to complete a move, add, change or delete for network system that only requires a change that can be completed by software.
Performance Standard: 95% are completed within one business day from the time scheduled, 100% within two business days.
Responsibilities: Service Provider to maintain all telecomm equipment in good operating condition so standard / normal ED activities can take place within defined Timeframes. Meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Assumptions: ED shall provide access to telecomm systems as per service provider requirements. Service Provider shall meet all ED security requirements and complete all security paperwork for access to telecomm systems.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: Deskside Support business hours (business days).
How Measured: Average of the time taken to perform function for each request. Each request is the time from request approval to completion of the request.   **Example** (time for a +b + c / 3 = average time to complete).   This can be subject to availability service levels or a maximum number of requests as well.
Sources: Tool supplied by service provider that automatically records via "date and time stamping" for each activity within a process including up-time and downtime data.
Move, Add, Change or Delete Telecom – 1 to 15 Software Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 2
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard.   Over 25 Software MACs shall be completed on an agreed-upon timeframe.
Assigned ED Manager: Pete Tseronis
ED Alignment: NET

SLA-25 Timely Production of Required Reports

Service Name: SLA-25 Timely Production Reports
Service Description: Measure the number of reports delivered on-time within a business month as outlined in the Reports Procedure.
Performance Standard: 100% of reports will be delivered on time.
Responsibilities: Service Provider to ensure reports are delivered on time.
Assumptions: ED and Service Provider will develop the Reports Procedure, which will outline the method of maintaining the approved list of reports. The Service Provider will maintain the Reports Procedure. Reports not listed in the approved list of reports are not subject to this SLA. ED and the Service Provider will adhere to the approved process for adding reports to the Reports Procedure. Timeframe excludes events outside of service provider's control.
Frequency: Measure Weekly and Report Monthly.
Measurement Period: One business month.
How Measured: If the service provider fails to deliver one or more scheduled reports, the SLA is missed for that month.
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Deliverables: Monthly report.
Disincentive: Medium
Disincentive Value (Demerits): 3
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: ALL
ED Alignment: MGT

SLA-26 Complete and Accurate Process Documentation

Service Name: SLA-26 Complete and Accurate Process Documentation
Service Description: Measure the number of RCAs in which Process Failure was found to be the root cause of the outage, with a desired result of ensuring process documentation exists such that the service provider can provide high-quality services and thereby improve end-user productivity and customer satisfaction. Process Failure is defined as the approved process was not followed, the process was not properly documented, or the applicable approved documented process was not available to the required staff while executing the service. Includes published, final, approved processes only.
Performance Standard: None of the RCAs shall find process documentation to be the root cause of the outage.
Responsibilities: Service Provider: Ensure process documentation is up to date, available to all personnel and that all personnel are trained to use most recent process documentation.
Assumptions: The Service Provider will maintain process documentation. Timeframe excludes standard scheduled down time for required maintenance. Timeframe excludes events outside of service provider's control. Exceptions will be referred to the Monthly SLA Review Board to include unusual or unanticipated situations that could not have been anticipated when the published, final, approved processes was developed.
Frequency: Measure Daily and Report Monthly.
Measurement Period: Business hours.
How Measured: For each outage that requires an RCA, the root cause for the outage will be determined to be Technology Failure, Process Failure, or Human Error. If the root cause is determined to be Process Failure, the SLA is missed. The service provider will not simultaneously incur SLA-06 and SLA-26 Disincentive Value (Demerits) demerits from a single event.
Sources: Service Provider maintained tool that provides documentation capabilities to meet the reporting requirements.
Deliverables: Monthly report. Reports shall provide a roll-up of all daily reports into a plain-English format, highlighting any problems and trends.
Disincentive: Low
Disincentive Value (Demerits): 1
Maximum Deducted Award Points: 1
Notes: Results shall be available through the Dashboard.
Assigned ED Manager: ALL
ED Alignment: MGT

V. Period of Performance

This contract, issued against the GSA Schedule 70 contract shall have one (1) base period, two (2) option periods, and up to seven (7) award terms (see

Section H.14 Award Term Provision) thereafter. A sixty (60) day transition period from the current task order to this new contract shall occur from the date of award of this contract. Full operation of this contract must begin sixty (60) days following award. Accordingly, the performance periods are as follows:

Begin	End	Period
May 1, 2005	June 30, 2005	Transition Period
July 1, 2005	June 30, 2006	Base Period
July 1, 2006	June 30, 2007	Option Period One
July 1, 2007	June 30, 2008	Option Period Two
July 1, 2008	June 30, 2009	Award Term One
July 1, 2009	June 30, 2010	Award Term Two
July 1, 2010	June 30, 2011	Award Term Three
July 1, 2011	June 30, 2012	Award Term Four
July 1, 2012	June 30, 2013	Award Term Five
July 1, 2013	June 30, 2014	Award Term Six
July 1, 2014	June 30, 2015	Award Term Seven

VI. Site of Performance
The primary location of work shall be in the Headquarters Data Center Facility in the Washington, D.C. metropolitan area in Oxon Hill, MD. However, all services provided under the contract shall be available to all offices in ED headquarters located in Washington, DC, its metropolitan data facility, and all regional and sub-regional offices, as appropriate. The contractor shall provide the same level of service in the regional and sub-regional offices as at the Headquarters locations, unless exempted from doing so by the Contracting Officer's Representative (COR).

The ED enterprise includes, but is not limited to, the following headquarter locations in the Washington, DC area:

- Federal Regional Office Building 6, 400 Maryland Avenue, SW, Washington, DC

- Headquarters Data Center Facility, Oxon Hill, MD

- Union Center Plaza, 830 First Street, NE, Washington, DC

- Capital Place, 555 New Jersey Avenue, NW, Washington, DC

- Mary E. Switzer Building, 330 C Street, SW, Washington, DC

- 1990 K Street, NW, Washington, DC

- L'Enfant Plaza, 2100 Corridor, SW Washington, DC

- 2100 M Street, NW, Washington, DC

- Connecticut Avenue, NW, Washington, DC

- 800 North Capitol Street, NW, Washington, DC

- 1255 22nd Street, NW, Washington, DC
- 400 Virginia Avenue, SW, Washington, DC
- Metro Center, NW, Washington, DC
- 1775 I Street, NW, Washington, DC
- 525 School Street SW, Washington, DC
- 7100 Old Landover Road, Landover, MD
- Potomac Center Plaza South, 550 12th Street, SW, Washington, DC

Plans are being made for consolidating several of the buildings in the Headquarters area, thus reducing the number of buildings in which ED resides and operates. Current estimates for building moves for the Headquarters buildings are as follows:

- Employees in Mary E. Switzer (MES), non-Operations OCIO staff from Regional Office Building (ROB), and CFO employees from ROB shall be moved to Potomac Center Plaza South, 550 12th St. SW, Washington, DC (to be completed by 08/30/04).
- Operations OCIO staff move to new Primary Data Center in Oxon Hill, MD (to be completed late 2004)
- MES shall be remodeled and ED employees from K Street, North Capitol Street, and other outlying buildings are scheduled to be moved into MES permanently, thus consolidating number of ED Headquarter buildings to approximately 5 (FB6, UCP, Potomac Center, MES, and Oxon Hill Data Center) (to be completed 2006-2008)

Regional Office locations across the United States include, but are not limited to:
- Boston, MA
- New York, NY
- Philadelphia, PA
- Atlanta, GA
- Chicago, IL
- Dallas, TX
- Kansas City, MO
- Denver, CO
- San Francisco, CA
- Seattle, WA

The contractor shall be required to support ED's Cleveland, OH sub-regional office, other sub-regional, temporary office sites throughout the United States, and its territories as needed. The services described in this section shall be

performed by the contractor at ED offices where required, as directed by the COR. In addition, ED may have a future need for support in international locations.

EDNet's primary locations are detailed in Appendix A.

VII. Additional Contractor References
Below are the additional contractor references that are located at the end of this PWS:

Location	Title	Purpose
Appendix A	EDNet Primary Locations	Provides the Department of Education's primary business locations.
Appendix B	Current IT Service Delivery Infrastructure (EDNet) Environment	Provides current EDNet environment details.
Appendix C	Software	Provides the desktop software supported and licensed by ED.
Appendix D	Communication	Provides the technical information about EDNet communications.
Appendix E	EDNet Backup Architecture	Provides the EDNet backup architecture.
Appendix F	Detailed Work Descriptions	Provides detailed work descriptions of Category B and C work.
Appendix G	Roles and Responsibilities	Provides roles and responsibilities of the service provider and ED.
Appendix H	Benchmark	Benchmarking clause.
Appendix I	Incumbents' Transition Out Plan	Basic elements of the Incumbents' Transition Out Plan.
Appendix J	List of Definitions	Glossary of definitions used in the RFQ and PWS.

Appendix F: Detailed Work Descriptions

Category B Tasks

Projects

Task Area Provides Project services for ITD.

Desired Outcome: To provide quality IT projects for the Department of Education organizations by providing effective, best practice project management support for the successful implementation of projects, products, services and features on to EDNet and in compliance with ED's Enterprise Architecture. The primary goal is to provide base-level improvement in project completion against schedule and budget estimates, while delivering the expected functionality with world-class quality.

Description of Services: Provide PMI or equivalently certified[1] experienced project managers and subject matter experts (SME) who follow and implement "best practice" project management methodologies, along with the various security and configuration controls of EDNet, help to insure that applications, systems and emerging technologies meet certification and accreditation standards of, but not limited to the U.S. Office of Management & Budget (OMB 130), National Institutes of Standards and Technologies (NIST), Clinger-Cohen Act, FISMA, GPRA, FAR, and Privacy Act, for an as needed number of ITD defined projects per year. EDNet support includes operating all network systems including more than 100 major and nearly 300 standard network applications, integrating new applications as identified by business owners, and integrating as many as approximately 100 new and upgraded applications annually. Steady state for new and upgrade projects is approximately 50 projects at any one given time. Resources required shall be used at ED's discretion in executing ITD's Product Development Process outlined in Section I, Introduction. Most projects shall occur within the Washington DC area, See Appendix A for a detailed list of Washington DC area locations.

The contractor shall provide SMEs in a variety of technical and business fields, including, but not limited to, technical architecture (e.g., network, web, database, application development, etc.), product experts, programmers conversant in the most current computer languages, network engineering, IT investment management, business case development, portfolio management, technology market analysis, OMB 300 development, etc. The contractor shall assign resources to work within ED's Product Development Process and provide personnel with demonstrable skills, competence and experience necessary for a CMMI Level 3 process environment.

---

[1] Equivalently Certified is defined by OMB as "Experienced managing projects of similar size and scope, within ten (10) percent of baseline cost, schedule and performance goals, as the project to which currently assigned OR a government project management certification or a commercial certification such as the Project management Institute (PMI), AND dedicated to the project or program on a full-time basis."

The contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services; assisting in the analysis and selection of vendor-provided products and services. The contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the ITD mission. The contractor shall assist FTE management in the proper budgeting and financial management of ITD programs and projects; assist in the development of bills and materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a project so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) demonstrate conformance with both departmental and federal standards for the management planning, tracking and controlling of projects and tasks.

The contractor shall provide an integrated project solution, provision SMEs appropriate for each project, take ownership of problems from identification to solution / resolution, and manage all projects to scope, schedule and budget.

Some example projects include major moves (100 regional staff from one building to another), or an enterprise software upgrade from one version to the latest version (i.e., Exchange 2000 to Exchange 2003).

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires approximately 36,000 hours per year[2].

Performance Requirements Summary:

Project Management

- Manage projects to ensure they are within scope, budget and on schedule.
- Manage projects using OMB's earned value discipline[3].
- Provide master scheduling capabilities to rollup projects for a resource allocation and alerts.
- Provide SMEs as appropriate throughout the life of the project.
- Provide risk / issue / action item tracking and management.

---

[2]Subject to change.
[3] See OMB, ANSI/EIA-748-A, Planning, Budgeting, Acquisition and Management of Capital Assets.

Category C Tasks

Management Services: Ongoing Project Management

Task Area Provides ongoing Project Management support services for ITD.

Desired Outcome: To provide quality ongoing IT project management support for the Department of Education organizations by providing effective, best practice project management support for the successful implementation of products, services and features on to EDNet. The primary goal is to provide base-level support in project completion against schedule and budget estimates, while delivering the expected functionality with world-class quality.

Description of Services: Provide qualified and experienced project management support personnel and PMI or equivalently certified[4] project managers, as needed, who follow and implement "best practice" project management methodologies, along with the various security and configuration controls of EDNet, help to insure that applications, systems and emerging technologies meet certification and accreditation standards of, but not limited to the U.S. Office of Management & Budget (OMB 130), National Institutes of Standards and Technologies (NIST), Clinger-Cohen Act, FISMA, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the ITD mission. The Contractor shall assist FTE management in the proper budgeting and financial management of ITD programs and projects; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed. The contractor shall identify, plan and execute a project so that the systems and documentation that result from following the Systems Development Life Cycle (SDLC) demonstrate conformance with both departmental and federal standards for the management planning, tracking and controlling of projects and tasks.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 2 to 4 FTEs per year.

---

[4] Equivalently Certified is defined by OMB as "Experienced managing projects of similar size and scope, within ten (10) percent of baseline cost, schedule and performance goals, as the project to which currently assigned OR a government project management certification or a commercial certification such as the Project management Institute (PMI), AND dedicated to the project or program on a full-time basis."

Performance Requirements Summary:

Project Management

- Support the management of projects to ensure they are within scope, budget and on schedule.

- Provide master scheduling services for all projects, allowing for the rollup of projects for a resource allocation and alerts.

- Manage projects using OMB's earned value discipline[5].

- Provide ongoing support for risk / issue / action project tracking and management.

---

[5] See OMB OMB, ANSI/EIA-748-A, Planning, Budgeting, Acquisition and Management of Capital Assets.

Network Services: Server Operations

Task Area: Develops Plans and Programs for the Operation, Maintenance, and Enhancement of Server operations, intranet and extranet administration.

Desired Outcome: The Server Operations (SO) division shall develop plans, directives, policies and procedures in support of the efficient use and management of server operations, Database Administration, Customer Applications, Security, and Change Management.

Description of Services: The Contractor shall provide business process and analysis, project management, financial management and administration support, and policy and planning services in support of management and use of SO resources. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business case, business requirements, technical reports, and white papers in support of the SO mission. The contractor shall assist in analyzing customer satisfaction surveys, and create and publish online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of SO programs and projects; assist in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires 32 to 34 FTEs a year[6].

Performance Requirements Summary:

Server Operations

- **Provide database administration and general administrative support** on SQL server, Oracle, Hummingbird, Project server and Lotus Notes applications throughout the Department. This includes Monitoring of ORACLE databases, Monitoring of SQL Databases, Insure all scheduled jobs have completed successfully, Stay current

---

[6] Includes FTEs associated with National Center for Education Statistics (NCES).

with available Security Patches and fixing vulnerabilities, Work with other Server operation teams to optimize their application databases. Provide support to helpdesk technicians on Custom Application Errors.

- **Provide ad hoc custom application support** to customers on specialize applications, including programming and limited time database admin support per request. Also assist and familiarize ED developers with standards and best practices in the Department.

- **Support the Department's mission critical Security Operations** component by providing technical expertise in the use of intrusion detection & prevention systems (e.g. Entercept and CISCO IDS) integrated with Net Forensics Security Information Management Console to monitor firewall activities, router ACL violations, enterprise anti-virus alerts and emerging internet threats. Ensure that EDNet continues to operate in a safe computing environment by following published Incident Handling Response Standard Operating Procedures (SOPs). The contractor shall be responsible for vulnerability scanning and associated activities. This expertise is to be utilized in daily operations support of the local facility, production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulations drills.

- Provide support for the evolution, development, and maintenance of **Intrusion Detection Surveillance (IDS) products and services**. The Contractor shall have responsibility that the IDS systems are managed and controlled in accordance with approved policies, standards and procedures. The Contractor shall ensure that changes to the production system's infrastructure are applied with proper planning, testing and notification and that negative impacts to the customer or the production environment are minimized as a result of changes to the system.

Change Management

- **Provide continuous support of systems operation** to including development and maintenance of all Standard Operating Procedures (SOPs) in support of the EDNet system, development and maintenance of all Memorandums of Understanding (MOUs) between the EDNet owners and Principal Office systems housed on the network, maintain expert knowledge of the Federal Information Security Management Act (FISMA) and all applicable security regulations to include ED security training, NIST guidance and OMB A-130, maintain and complete the annual NIST self-evaluation, serve as the EDNet librarian of all SOPs for all teams that support EDNet, ensure that SOPs, plans, and related documentation are in

compliance with FISMA, and monitor all EDNet teams for such compliance.

- **Provide Configuration Management Plan support**, by being responsible for change management to include running the Change Control Review Board, the CCRB tracking system, attending all Technical Review Boards (TRBs) and Security Review Board (SRB) meetings to ensure proper integration of all of the review boards as well as ensuring continued compliance with FISMA requirements, and specifically Certification & Accreditation compliance. The CM team shall also be responsible for administering and record keeping of all Technical Review Boards to include ensuring compliance with the TRB process, and shall assist EDNet staff and Program Office Coordinators in aligning with those processes.

- **Maintenance of the system's baseline configuration** capture and documentation, provide analysis and consultation ensuring the configuration compliance against the baseline continues to be maintained, and performing Configuration Identification, Configuration Change Control, Configuration Status Accounting, and CM Audits.

- **Provide and maintain Change Control, Documentation and NIST / FISMA / C&A Compliance.**

National Center for Educational Statistics (NCES) Support

The Offeror shall support NCES' mission critical server operations components by providing technical expertise in the Microsoft Windows, Linux, and F5 BigIP infrastructure. This expertise shall be utilized in daily operations support of the local facility, in support of the production infrastructure and to restore infrastructure operational capabilities during disaster recovery efforts and simulation drills.

- **Provide database maintenance and administration** of Microsoft SQL system including monitoring and maintenance of SQL Databases that are used with the NCES Web Site. Insure all scheduled jobs have completed successfully. Maintain SQL backups. Stay current with available Security Patches and vulnerability patching.

- **Provide Server and Microsoft IIS support**, including monitoring and maintenance of IIS servers that compose the NCES Web Site. Insure all scheduled jobs have completed successfully, stay current with available Security Patches and fixing vulnerabilities. Configure and maintain NCES' Compaq Storage Area Network (SAN). Configure and maintain F5 BigIP load balancers and Linux IDS server. Configure and maintain NCES' backup system. Administer various other applications such as WebTrends, Verity UltraSeek, IPCheck, SNORT, Microsoft Site Server, Microsoft SQL 2000, ESRI GIS Mapping System, and other systems as needed.

- **Provide ad hoc custom application support** to outside developers on specialized applications, including programming and limited time database admin support per request. Also assist and familiarize developers with ED and NCES' standards and best practices.

- **Support the Department's mission critical Security Operations.** Work with other Server Operations Teams to insure that all systems are in compliance with ED standards (e.g., up to date on security patches, run periodic scans to determine if any vulnerabilities exist, etc.).

- **Provide Web development and programming support**, including new applications as well as maintaining legacy applications using VBScript, JavaScript, HTML, ASP, and Style Sheets. Provide video editing as well as web based video presentation. Develop multimedia applications using Macromedia Flash. Design web graphics using Adobe Photoshop and Illustrator. Create animations using Cinema 4D. Provide support for the NCES Graphing tool.

- **Provide design for new systems, applications, and databases** as required.

- **Act as point of contact for other developers working with NCES.**

Network Services: Converged Communications and Networking

Task Area: Develops Plans and Programs for the Operation, Maintenance, and Enhancement of Converged Communications and Networking.

Desired Outcome: The Converged Communications and Networking (CCN) division shall develop plans, directives, policies and procedures in support of the efficient use and management of network, telecommunications, and multimedia resources, including a full range of voice, video and data services, facilities, and equipment, including Smartnet equipment.

Description of Services: The Contractor shall provide business process and analysis, project management, financial management, administration support, and policy and planning services in support of management and use of telecommunications resources, to include, but not limited to a full range of voice, video and data communications. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services; assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the CCN mission. Assist in developing and analyzing customer satisfaction surveys, and creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of CCN programs and projects; assist in the development of bills of material; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

Estimated Workload: This work currently requires 1 FTE a year

Network Services: Engineering

Task Area Provide Engineering services for ITD.

Desired Outcome: Provide ongoing Engineering support including writing, enterprise architecture and technical reviews.

Description of Services: The Engineering division shall develop and maintain plans, directives, policies and procedures in support of the efficient use and management of enterprise network research, development and engineering. The Contractor shall be fully aware of existing and proposed federal regulations and industry best practices including, but not limited to, Clinger-Cohen Act, FISMA, NIST, OMB Circular A-130, GPRA, FAR, and Privacy Act. The Contractor shall provide recommendations to FTE management regarding the deployment, use and security issues surrounding the use of emerging technologies, products and services, and assisting in the analysis and selection of vendor-provided products and services. The Contractor shall provide internal communications planning services, including but not limited to, presentations, statistics, business cases, business requirements, technical reports, and white papers in support of the Engineering mission. Assist in developing and analyzing customer satisfaction surveys, and creating and publishing online content for the employee Intranet and print-based material such as a departmental directives, user guides, administration manuals, standard operating procedures, quick reference cards, handouts, and training material. The Contractor shall assist FTE management in the proper budgeting and financial management of Engineering programs and projects; assist in the development of bills of materials; develop third-party Statement of Work (SOW) and Memoranda of Understanding (MOU) documents, as needed.

The Contractor shall provide resources to occasionally perform rapid application development[7] and development of prototypes using the SDLC process.

The contractor shall provide a draft project plan that shall include details on cost, schedule, and scope within ten (10) business days of task issuance.

Estimated Workload: This work currently requires between 2 FTEs a year.

Performance Requirements Summary:

---

[7] The Rapid Application Development (RAD) methodology was developed in response to the need for quickly delivering systems. An application development approach includes small teams (generally 2 – 6 developers) using joint application development (JAD) and iterative-prototyping techniques to construct interactive systems of low to medium complexity within short time frames (generally 60 to 120 days).

- Technical Enterprise Architect
- Assistive Technology Engineering (testing, compliance, etc.)

Attachment III   *Mod. 0006*

	Monthly Yr 2	Total Yr 2	Monthly Yr 3	Total Yr 3	Monthly Yr 4	Total Yr 4	Monthly Yr 5	Total Yr 5
Program Overhead	$ 74,075.85	$ 888,910.20	$ 73,601.76	$ 883,221.12	$ 73,601.76	$ 883,221.12	$ 73,601.76	$ 883,221.12
Disaster Recovery	$ 32,713.55	$ 392,562.60	$ 32,504.18	$ 390,050.16	$ 32,504.18	$ 390,050.16	$ 32,504.18	$ 390,050.16
Telecom Billing	$ 37,774.23	$ 453,290.76	$ 37,532.47	$ 450,389.64	$ 37,532.47	$ 450,389.64	$ 37,532.47	$ 450,389.64
Desktop/Server Eng.	$ 58,979.85	$ 707,758.20	$ 58,602.38	$ 703,228.56	$ 58,602.38	$ 703,228.56	$ 58,602.38	$ 703,228.56
	$ 203,543.48	$ 2,442,521.76	$ 202,240.79	$ 2,426,889.48	$ 202,240.79	$ 2,426,889.48	$ 202,240.79	$ 2,426,889.48

	Monthly Yr 6	Total Yr 6	Monthly Yr 7	Total Yr 7	Monthly Yr 8	Total Yr 8	Monthly Yr 9	Total Yr 9
Program Overhead	$ 73,601.76	$ 883,221.12	$ 73,601.76	$ 883,221.12	$ 73,601.76	$ 883,221.12	$ 73,601.76	$ 883,221.12
Disaster Recovery	$ 32,504.18	$ 390,050.16	$ 32,504.18	$ 390,050.16	$ 32,504.18	$ 390,050.16	$ 32,504.18	$ 390,050.16
Telecom Billing	$ 37,532.47	$ 450,389.64	$ 37,532.47	$ 450,389.64	$ 37,532.47	$ 450,389.64	$ 37,532.47	$ 450,389.64
Desktop/Server Eng.	$ 58,602.38	$ 703,228.56	$ 58,602.38	$ 703,228.56	$ 58,602.38	$ 703,228.56	$ 58,602.38	$ 703,228.56
	$ 202,240.79	$ 2,426,889.48	$ 202,240.79	$ 2,426,889.48	$ 202,240.79	$ 2,426,889.48	$ 202,240.79	$ 2,426,889.48

	Monthly Yr 10	Total Yr 10
Program Overhead	$ 73,601.76	$ 883,221.12
Disaster Recovery	$ 32,504.18	$ 390,050.16
Telecom Billing	$ 37,532.47	$ 450,389.64
Desktop/Server Eng.	$ 58,602.38	$ 703,228.56
	$ 202,240.79	$ 2,426,889.48

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

		1. CONTRACT ID CODE	PAGE OF PAGES
			1 3

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicable)
0007	SEP 30, 2006	EDOCIO-06-000333	

6. ISSUED BY CODE CPOA	7. ADMINISTERED BY (If other than Item 6) CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224	See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207066229			
			9B. DATED (SEE ITEM 11)
			10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
		x	
Ms. Maryke Guild (301) 794-2108			10B. DATED (SEE ITEM 13)
CODE 00001238	FACILITY CODE		APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended. ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)	
See Schedule	Modification Amount: $3,840,000.00 Modification Obligated Amount: $3,840,000.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	
	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D. OTHER (Specify type of modification and authority) B.1 301-21 Amount Increase/Decrease

E. IMPORTANT: Contractor ☒ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification 0007 is to increase the Category C Labor and ODCs for ED-05-PO-0908. Modification 0007 does not change the scope of work or period of performance for ED-05-PO-0908.

Accordingly, Modification 0007 applies to Section B.1 of ED-05-PO-0908.

See the following pages for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA
(Signature of person authorized to sign)		(Signature of Contracting Officer)

16C. DATE SIGNED
9/30/01

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
0086	Category C (PA)	1.00	SE	214,000.00	214,000.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000 $214,000.00				
0087	Category C (OCR)	1.00	SE	2,000,000.00	2,000,000.00
	Accounting and Appropriation Data: 0700A2006.A.2006.EIE00000.711.2572A.000.000.0000.000000 $2,000,000.00				
0088	Category C (NIFL)	1.00	SE	87,000.00	87,000.00
	Accounting and Appropriation Data: 0400M2005.B.2006.EIE00000.766.2572A.000.257.0000.000000 $87,000.00				
0089	Category C (OIG)	1.00	SE	999,000.00	999,000.00
	Accounting and Appropriation Data: 1400A2006.A.2006.EIE00000.744.2572A.000.000.0000.000000 $999,000.00				
0090	Cat C	1.00	EA	240,000.00	240,000.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000 $240,000.00				
0091	ODCs	1.00	SE	300,000.00	300,000.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.3101C.A17.000.0000.000000 $300,000.00				

ED-05-PO-0908 is Hereby Modified as Follows:

Delete the contents of Section of B.1 ED 301-17, *Provision for Pricing and Payment*, and replace with the following:

B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT

A. The total fixed price of this contract for Category A services is $27,456,995.13. The not-to-exceed amount for Category B is $2,390,094.53. The not-to-exceed amount for Category C labor is hereby increased from $14,011,175.83 by $3,540,000.00 to $17,551,175.83. The ceiling for Category C hours is hereby increased from 154,580 by 40,300 to 194,880. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is hereby increased from $2,778,744.02 by $300,0000.00 to $3,078,744.02. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

END OF MODIFICATION 0007

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
0008	OCT 24, 2006		

6. ISSUED BY   CODE   CPOA

Contracts & Acquisitions Mgt., Group A
US Dept of Education, 550 12th Street, SW, 7th Floor
Washington DC 20202-4210
Eugene Hopkins EKH 202-245-6224

7. ADMINISTERED BY (If other than Item 6)   CODE

See Block 6

---

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)

COMPUTER SCIENCES CORPORATION   DUNS: 883778896
7700 HUBBLE DR   Cage Code: 1SXC4
LANHAM SEABROOK MD 207062293

Ms. Maryke Guild (301) 794-2108

CODE 00001238   FACILITY CODE

(X)	
	9A. AMENDMENT OF SOLICIATION NO.
	9B. DATED (SEE ITEM 11)
x	**10A. MODIFICATION OF CONTRACT/ORDER NO.** GS35F4381G/ED-05-PO-0908
	10B. DATED (SEE ITEM 13) APR 26, 2005

---

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)

See Schedule

Modification Amount: $0.00
Modification Obligated Amount: $0.00

---

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE		
	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) Section H.1, EDAR 3452.243-7, KEY PERSONNEL

E. IMPORTANT: Contractor [x] is not, [ ] is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification 0008 is to update the Key Personnel identified under the Program Manager, Deputy Program Manager, Chief Technology Architect, and Category B Service Project Manager positions of Section H.2. Modification 0008 does not change the scope, period of performance or funding identified for ED-05-PO-0908, or any associated Work Requests or Task Orders.

Accordingly, Modification 0008 applies to Section H.2 of ED-05-PO-0908.

See the following page for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219	
15B. CONTRACTOR/OFFEROR	**15C. DATE SIGNED**	**16B. UNITED STATES OF AMERICA**	**16C. DATE SIGNED**
(Signature of person authorized to sign)		(Signature of Contracting Officer)	10/24/06

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

ED-05-PO-0908 is Hereby Modified as Follows:

Delete H.2, ED 307-21, KEY PERSONNEL DESIGNATION (3/85) in its entirety and replace with the following:

In accordance with the clause entitled "Key Personnel", the following key personnel are considered to be essential to the work being performed:

Jerry Ryznar, Program Manager
Jensen Larsen, Chief Technology Architect, Category B Service Project Manager, and Deputy Program Manager for Operations
Marie Lavallee, Program Management Office (PMO) Manager
George Altiery, Service Delivery Manager
TBD, Process Improvement Manager

END OF MODIFICATION 0008

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 5

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicable)
0009	OCT 27, 2006		

6. ISSUED BY	CODE CPOA	7. ADMINISTERED BY (If other than Item 6)	CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224		See Block 6	

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207062293		
		9B. DATED (SEE ITEM 11)
	x	10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
Ms. Maryke Guild (301) 794-2108		10B. DATED (SEE ITEM 13)
CODE 00001238 FACILITY CODE ·		APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)	
See Schedule	Modification Amount: $0.00
	Modification Obligated Amount: $0.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

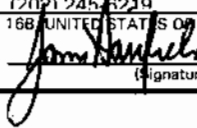| CHECK ONE	
	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
✕	D. OTHER (Specify type of modification and authority) FAR 43.103(a)3

E. IMPORTANT: Contractor ☐ is not, ☒ is required to sign this document and return ___3___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification 0009 is to revise the personnel/vacancy requirements under the Section III of the Performance Work Statement entitled "Category B (Fixed Price/Time-and-Materials Project Services)" and "Category C (Sustaining Time-and-Materials Support)." Modification 0009 is at no additional cost to the Government and the total dollar value of ED-05-PO-0908, to include task orders and ODCs, remains at $50,477,009.51.

Accordingly, Modification 0009 applies to Attachment 1 of Section J.

See the following pages for additional details (Changes are indicated as italicized and underlined text).

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) RAYMOND W. GLASS SR. PRIN. CONTRACTS ADMIN	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-621?
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED 10/27/06	16B. UNITED STATES OF AMERICA (Signature of Contracting Officer)	16C. DATE SIGNED 11/8/06

NSN 7540-01-152-8070 Previous edition unusable	STANDARD FORM 30 (REV. 10-83) Prescribed by GSA FAR (48 CFR) 53.243

ED-05-PO-0908 is Hereby Modified as Follows:

(1) Delete the contents of the Subsection entitled "Category B (Fixed/Time and Materials Project Services)," located under Section III of Attachment 1 (Performance Work Statement) of Section J, and replace with the following:

Category B (Fixed Price / Time and Materials Project Services)
Maintain **availability of subject matter experts (SMEs)** as needed number of defined projects per year. The contractor shall:

- Be responsible for maintaining two personnel rosters. The first comprised of qualified Business Executives and the second comprised of Qualified Personnel[1] that may or may not be working on the contract that ED can pull from in the case of a critical operational issue.

  - Business Executives may be called to lead tiger teams[2], compromised of personnel from various technical disciplines, among other things for short to medium duration tasks.

  - Personnel may be called to support: customer service improvement events, virus attack, system-wide problem resolution, serious email issues, market analysis, security, wireless solutions, computer forensics, load testing, data center expertise including: infrastructure, moves, cabling, HVAC, electrical / UPS, equipment, maintaining a technology roadmap, training, etc.

  - Both rosters shall be composed of personnel who have successfully completed ED's security requirements, including ED's security training and security paperwork.

  - It is expected that operational personnel shall be available within twenty-four (24) hours and Subject Matter Experts (SME) shall be available within two (2) weeks upon a request for assistance from ED.

- Use an Earned Value Management System that complies with OMB and any other relevant regulatory requirements to provide

---

[1] Qualified Personnel shall have security paper work and training completed before being added to the roster.

[2] Tiger Teams are cross-functional teams performing focused and tightly scoped projects.

earned value information to ED for use in its reporting requirements.

- Provide resources for approximately 36,000 hours per year who are to be used at ED's discretion in executing ITD's Product Development Process outlined in Section I, Introduction.

Most projects shall occur within the Washington DC area, See Appendix A for a detailed list of Washington DC area locations. Some example projects include major moves (100 regional staff from one building to another), or an enterprise software upgrade from one version to the latest version (i.e., Exchange 2000 to Exchange 2003). Category B will be the preferred method for ED to acquire SME during the lifetime of this contract.

The contractor shall provide SMEs in a variety of technical fields, including, but not limited to, project management, business management, technical architecture (i.e., network, web, database, application development, etc.), security architecture, product experts, programmers conversant in the most current computer languages, network engineering, etc. The contractor shall assign resources to work within ED's Product Development Process and provide personnel with demonstratable skills, competence and experience necessary for a CMMI Level 3 process environment. The contractor shall at a minimum:

- Provide capable personnel who are able to perform the work as determined by projects' needs

- Maintain personnel with minimal turnover, defined as less than twenty (20) percent turnover during the lifetime of any specific Category B project

- *The Contractor shall present to the COR a qualified candidate within ten (10) business days of a vacancy occurring. A qualified candidate is one whose education and experience conforms to the education and experience requirements of the labor category*

- Invoice on a per project basis

- Provide a yearly audit of all Project activity

- Comply with OMB and other regulatory earned value requirements[3]

---

[3] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

- Meet the acceptable quality levels for relevant Category B service, see Section IV Performance Standards and Acceptable Quality Levels

The contractor's solution shall, at a minimum, provide the features shown in Table 9.

Table 9: Features

Features
An **integrated project management** solution.
Provision of SME and/or Business Executives appropriate for each project.
Ownership of problems from identification to solution / resolution.
Management of projects to scope, schedule and budget.

(2) Delete the contents of the Subsection entitled "Category C (Sustaining Time-and-Materials Support)," located under Section III of Attachment 1 (Performance Work Statement) of Section J, and replace with the following:

Category C (Sustaining Time and Materials Support)
Demonstrate **availability of qualified personnel** for continuous staffing of IT processes managed by ED. The contractor shall:

- Manage projects using an OMB compliant earned value management system[4].

See Appendix A for geographic locations of ED offices, most continuous support staff shall be located in the Washington DC area.

The contractor shall provide Qualified Personnel who shall meet the continuous day to day demands of the ITD Implementation / Transition Plan and ongoing daily operations. Tasks described here are outside of the scope of tasks described in Categories A and B. All intellectual property developed while meeting Category C objectives shall be the sole property of the Government. The contractor shall, at a minimum:

---

[4] OMB Circular A-11, Part 7, Planning, Budgeting, Acquisition and Management of Capital Assets.

- Provide capable personnel who are able to cover the work schedule as determined by ED

- Maintain personnel with minimal turnover, defined as less than ten (10) percent attrition per year

- *The Contractor shall present to the COR a qualified candidate within ten (10) business days of a vacancy occurring. A qualified candidate is one whose education and experience conforms to the education and experience requirements of the labor category*

- Track attendance and hours in accordance with Government regulations at the project level

- Invoice on a monthly basis at the project level

- Provide a yearly audit of all time and material activity at the project level

- Furnish level of effort estimates for any new task items at the project level

- Provide any required earned value detail to ED for its reporting requirements at the project level

- Meet the acceptable quality levels for relevant Category C service, see Section IV Performance Standards and Acceptable Quality Levels

The contractor's solution for all Category C services shall provide, at a minimum, the features contained in Table 10. Features.

Table 10: Features

Features
Provision of qualified personnel appropriate for each task.
Ownership of problems from identification to solution / resolution.
Management of tasks to scope, schedule and budget.

END OF MODIFICATION 0009

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 2

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
0010	FEB 08, 2007		

6. ISSUED BY CODE CPOA	7. ADMINISTERED BY (If other than Item 6) CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224	See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207062293		
		9B. DATED (SEE ITEM 11)
		10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
	✗	
Ms. Maryke Guild (301) 794-2108		10B. DATED (SEE ITEM 13)
CODE 00001238 FACILITY CODE		APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers ☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)	Modification Amount: $0.00
See Schedule	Modification Obligated Amount: $0.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
✗	D.	OTHER (Specify type of modification and authority) FAR 52.244-2, Subcontracts

E. IMPORTANT: Contractor ☒ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification 0010 is to provide consent to the Contractor for the proposed Allied Technology Systems subcontracting relationship under ED-05-PO-0908.

Accordingly, Modification 0010 creates Section I.10.

See the following page for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		(Signature of Contracting Officer)	2/8/07

NSN 7540-01-152-8070	STANDARD FORM 30 (REV. 10-83)
Previous edition unusable	Prescribed by GSA FAR (48 CFR) 53.243

ED-05-PO-0908 is Hereby Modified as Follows:

Section I.10 is hereby created as follows:

I.10 307-12 CONSENT TO SUBCONTRACT (AUGUST 1998)

Consent is hereby given to the Contractor to subcontract with Advanced Technology Systems, Inc. in a labor category rate amount not-to-exceed CSC's final proposal revision dated 14 March 2005.

END OF MODIFICATION 0010

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. Cont.	D Code	Page 1	of Pages 3

2. Amendment/Modification No.	3. Effective Date	4. Requisition/Purchase Req. No.	5. Project No. (if applicable)
WR0001	Aug 12, 2005		

6. Issued By	Code CPOA	7. Administered By (If other than Item 6)	Code
Contracts & Acquisitions Mgt., Group A U.S. Dept. of Education 550 12th Street, SW, 7th Floor Washington, DC 20202-4210 Victor Cairo 202-245-6199		SEE BLOCK 6	

8. Name and Address of Contractor (No., Street, County, and Zip Code)		(X)	9A. Amendment of Solicitation No.
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DRIVE LANHAM MD 207062295	Vendor ID: 00001238 DUNS: 883778896 CAGE: 1SXC4		9B. Date (See Item 11)
			10A. Modification of Contract/Order No.
		X	ED-05-PO-0908
			10B. Date (See Item 13)
			Apr 26, 2005

Code		Facility Code	

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers [ ] is extended [ ] is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDG-MENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. Accounting and Appropriation Data (if required)
See Schedule $ US   15,259.18

13. THIS ITEM APPLIES ONLY TO MODIFICATIONS OF CONTRACT/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

(x)	
	A. This change order is issued pursuant to: (Specify authority) The changes set forth in item 14 are made in the Contract Order No. in item 10A.
	B. The above numbered Contract/Order is modified to reflect the administrative changes (such as changes in paying office, appropriation date, etc.) Set fourth item 14, pursuant to the authority of FAR 43.103 (b)
	C. This supplemental agreement is entered into pursuant to authority of:
X	D. Other (Specify type of modification and authority) C.3 ED 302-5b Task Order Procedures- Work Request

E. IMPORTANT: Contractor [X] is not, [ ] is required to sign this document and return _____ copies to the Issuing office.

14. Description of Amendment/Modification (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification is to issue Work Request 1 "EDEN Assessment", against Category B Services.

See page three for modification text.

Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. Name and Title of Signer (Type or Print)			16A. Name and title of Contracting Officer (Type or Print)	
			James Hairfield Contracting Officer James.Hairfield@ED.GOV	(202) 245-6219
15B. Contractor/Offeror	15C. Date Signed		16B. United States of America	16C. Date Signed
(Signature of person authorized to sign)			(Signature of Contracting Officer)	Sep 1, 2005

NSN 7540-01-152-8070	30-105	STANDARD FORM 30 (REV. 10-83)
PREVIOUS EDITIONS UNUSABLE		Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE

Item No.	Supplies/Services	Quantity	Unit	Uni. se	Amount
0019	Work Request 1 "EDEN ASSESSMENT" CATEGORY B Accounting and Appropriation Data: 0800A2005.A.2005.EIE00000.701.2572A.000.000. 0000.000000 US$ 15,259.18 BOC: 2572A PR #: EDOCIO-05-000474	1	SE	15,259.18	15,259.18

1. The attached Work Request 1 "EDEN Assessment" is hereby incorporated.

2. Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT (4/97) and substitute the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category B is $45,292.94. The not-to-exceed amount for Category C labor is $3,958,291.50. The ceiling for Category C hours is 48,908. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amount set forth above. The Contract is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

Work Request
Contract No. ED-05-PO-0908
Firm Fixed Price

1.   **Work Request Number:**   1

2.   **Project Title and Description**: EDEN Assessment

Provide an objective assessment of the data model, structures and related software in place from the EDEN contractors to determine an appropriate course of action for the Department. The scope of this assessment will cover the following questions:

- What is the condition of the SAIC data model (s) and are they sufficient or would they be sufficient with minor modifications to support EDEN reporting needs?
- What are the capabilities provided by the EDS DARS work product to date, how does it differ from the SAIC data models, and what could ED expect to receive from EDS if EDS were to "complete" their project and deliver a result.
- How much of the EDS DARS work product to date is still usable or would be usable if ED were to revert to the original SAIC data model?

3.   **Deliverable(s):** The deliverable from this project will be a brief (2 - 5 page) written report summarizing the contractor's assessment and recommending a course of action.

4.   **Duration:** August 12, 2005 - August 18, 2005

5.   **Assumptions**: The task will be conducted subject to the following assumptions and availability of resources:

- Contractor will receive a copy of the Perot Systems Assessment and Recommendation document
- Contractor will receive a briefing and related documentation from the PBDMI management team regarding the SAIC data model and the expectations of DARS.
- ED will arrange for the contractor to visit EDS at their Virginia site (or at ED facilities) to review the DARS data model and related software and plans

6.   **Labor Cost:**
The breakdown below represents a best estimate of the types of labor categories this work may require. The contractor may choose to allocate across these labor categories based on work required and staff expertise.

Labor Category	Hours	Rate	Extension

5. **Other Direct Costs**:

$
$

G&A (on ODCs): $
Total Other Direct Costs: $

Work Request Price $15,259.18 (FFP)

6. **Work Authorization**:

Valerie a Faulk
COR

_8/12/05_
Date

[signature]
Contracting Officer

_8/12/05_
Date

Delivery and Acceptance:

Completion Date: _____

_____
Contractor's Signature   Date

COR _____ Date _____ CO _____ Date _____

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 / 3

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicable)
WR02	FEB 18, 2006	EDOCIO-06-000116	

6. ISSUED BY CODE	CPOA	7. ADMINISTERED BY (If other than Item 6) CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Victor Cairo VXC 202-245-6199		See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(X)	9A. AMENDMENT OF SOLICITATION NO.
COMPUTER SCIENCES CORPORATION 7700 HUBBLE DR LANHAM SEABROOK MD 207066229	DUNS: 883778896 Cage Code: 1SXC4		
			9B. DATED (SEE ITEM 11)
			10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
Ms. Marvke Guild (301) 794-2108		x	
			10B. DATED (SEE ITEM 13) APR 26, 2005

CODE 00001238	FACILITY CODE	

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a)By completing items 8 and 15, and returning _____ copies of the amendment (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)
See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
✗	D.	OTHER (Specify type of modification and authority) C.3 ED 302-5B TASK ORDER PROCEDURES - WORK REQUEST

E. IMPORTANT: Contractor ☐ is not, ☒ is required to sign this document and return ___1___ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
The purpose of this modification is to issue Work Request 2 "PCP: Replacement Work Surface."

See page three for modification text

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) RAYMOND W. GLASS SR. CONTRACTS ADMINISTRATOR	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219
15B. CONTRACTOR/OFFEROR *(signature)* (Signature of person authorized to sign)	15C. DATE SIGNED 4/18/06	16B. UNITED STATES OF AMERICA *(signature)* (Signature of Contracting Officer)	16C. DATE SIGNED APR 19

NSN 7540-01-152-8070 Previous edition unusable	STANDARD FORM 30 (REV. 10-83) Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE Continued

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
0039	WORK REQUEST 2	1.00	SE	855.21	855.21
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				
0040	WORK REQUEST 2	1.00	SE	11,378.00	11,378.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				

1. The attached Work Request 2 "PCP Replacement Work Surface" is hereby incorporated.

2. Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category B is $1,399,709.15. The not-to-exceed amount for Category C labor is $12,110,691.50. The ceiling for Category C hours is 141,264. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amount set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

Work Request
Contract No. ED-05-PO-0908

1. **Work Request Number: 02**

2. **Project Title and Description**: Potomac Center Plaza Move, (see attached SOW)

3. **Deliverable(s)**: Move 96 Workstations.

4. **FFP**: The Firm Fixed Price amount of Work Request 2 is $12,233.21.

5. **Work Authorization**:

Valerie A. Fowler   _3/16/06_
COR   **Date**

Jim Key   _3/16/04_
Contracting Officer **Date**

Delivery and Acceptance:

Completion Date: _____   _____
                                        Contractor's Signature   Date

COR _____ Date _____   **CO** _____ Date _____

Work Request 2 - Potomac Center Plaza Move Scope

Scope
CSC will support the internal building move for PCP move desktop PCs/office equipment from the employees cubical area for OCIO, OCR, OESE while OM Facilities Services have installers replace damage cubical desk tops. The scope of the effort involves the coordinate efforts of the IMAC/Tier II Team and Cable Team; primarily centering around OM/FS contractors and OCIO. The move will take place 3 consecutive weekends, 1st weekend February 18th, employees 2nd weekend February 25th and the 3d weekend March 4th.

See attached Schedule for all three weekends.

Site Location:
Potomac Center Plaza (PCP)
Washington, DC 20004

Background

The current move plan calls for a completion rate of approximately 96 employees. Following successful completion of this move, assigned on-site Tier II support staff will be made available for any additional assistance required to ensure each staff member moved has access to all their mission critical applications and data that supports their groups as well as access to all associated peripheral equipment at 0700 Monday morning.

Technical Approach - To the extent possible, we will attempt to adhere to the below technical approach.

- **Disconnects begin at 5:00 p.m.** Assuming a 15-minute level of effort for each disconnect activity to include CPU's, monitors, local and Network printers and other associated peripherals. All peripheral devices will be packed into plastic bags with assigned location/user labels provided by OM.
- **Cabling technicians will be onsite Saturday.** Assistance will be available for any cabling requirements as the cubicles are assembled.

- **Reconnects will begin with the IMAC/Tier II moving the IT Equipment back in the employees cubical after OM/FS has replaced the damage desktops. The move will begin at 8:30 on Sunday following their completions.** Beginning at the completion of the OM/FS replacement effort. A qualified Tier II intermediate technician team will assist IMAC/Tier II in the reconnect phase to assure a smooth completion. Assuming a 30-minute level of effort for each re-connect activity to include CPU's monitors, local and Network printers and other associated peripherals. All peripheral devices will be moved and set-up at locations matching the location/user labels affixed during the disconnect phase.

Post Move – Provide post move support as part of normal day-to-day desk top operations.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT		1. CONTRACT ID CODE		PAGE OF PAGES
				1	3

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.		5. PROJECT NO. (If applicable)
WR03	MAR 29, 2006	EDOCIO-06-000113		

6. ISSUED BY CODE	CPOA	7. ADMINISTERED BY (If other than Item 6) CODE	
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Victor Cairo VXC 202-245-6199		See Block 6	

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(X)	9A. AMENDMENT OF SOLICITATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207066229			
			9B. DATED (SEE ITEM 11)
		x	10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
Ms. Marvke Guild (301) 794-2108			10B. DATED (SEE ITEM 13) APR 26, 2005

CODE 00001238	FACILITY CODE	

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers   [ ] is extended,   [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a)By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)
See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) C.3 ED 302-5B TASK ORDER PROCEDURES - WORK REQUEST

E. IMPORTANT: Contractor [ ] is not, [x] is required to sign this document and return ____1____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
The purpose of this modification is to issue Work Request 3 "Seattle: FSA Regional Training Facility Relocation", against Category B Services.

See page three for modification text

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) RAYMOND W. GLASS SR. CONTRACTS ADMINISTRATOR		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED 3/30/06	16B. UNITED STATES OF AMERICA (Signature of Contracting Officer)	16C. DATE SIGNED 4/4/06

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
0038	Work Request 3 Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000	1.00	SE	11,221.76	11,221.76

1. The attached Work Request 3 "Seattle: FSA Regional Training Facility Relocation" is hereby incorporated.

2. Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category B is $1,387,475.94. The not-to-exceed amount for Category C labor is $12,110,691.50. The ceiling for Category C hours is 141,264. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amount set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

Work Request
Contract No. ED05PO0908

1. **Work Request Number: 03**

2. **Project Title and Description:** Seattle: FSA Regional Training Facility Relocation

3. Deliverable(s): **None – Labor Only – Team will be on site as scheduled to disconnect and pack users PC workstation at the current site for the equipment move vender to move equipment to the new site. Team will reconnect all PC workstations, test, and validate from the ED Inventory List provided by the Customer and OCIO. This task will be completed with in the approved schedule provided all systems furniture installs have been completed. The period of performance shall be from 03/23/06 thru 03/28/06. Refer to Attachment A, Seattle: FSA Regional Training Facility Relocation.**

    Thursday evening – Disconnect computer equipment
    Sunday – Reinstall equipment and test connectivity and post instruction sheet.

4. The Firm Fixed Price amount of the Work Request is: $11,221.76

5. **Work Authorization:**

    _____   _____
    COR   **Date**

    _____   _____
    Contracting Officer   **Date**

    Delivery and Acceptance:

    Completion Date: _____   _____
                                                                    Contractor's Signature   Date

    COR _____ Date _____ **CO** _____ Date _____

<u>Work Request 3 - Seattle FSA Regional Training Facility Relocation Scope</u>

Scope

CSC will support the requirements for the proposed internal building move for SEATTLE FSA RTF from their current location, up to the 25th floor. This baseline includes the move of the wire closet equipment as well as desktop PCs/office equipment from the current floor to 25th Floor.

CSC will disconnect and prepare equipment to be moved. The movers will pack, move, and unpack the equipment. CSC will connect the equipment as well as test and ensure that it is 100% operational. It is assumed that the resource for the router and switch move comes from the WDC HQ office and is present a day before the move begins and remains a day after the move is completed in case any follow-on support is required. The local PC support technical resource is assumed to be provided from the main Seattle ED office support team.

Site Location:
US. Department of Education,
Seattle FSA Regional Training Facility
701 fifth Avenue, 25th floor.
Seattle, WA 98104

Background

The move of the office and training center is being initiated by the building owner, and as such is providing for move of all existing services and facilities – with no changes. Following successful completion of this move, assigned on-site Tier II support staff will be made available for any additional assistance required to ensure each staff member moved has access to all their mission critical applications and data that supports their groups as well as access to all associated peripheral equipment at 0700 Monday morning.

Technical Approach

- **Disconnects begin at 5:00 p.m. Friday for a successful weekend move.** Assuming a 15-minute level of effort for each disconnect activity to include CPU's, monitors, local and Network printers and other associated peripherals. All peripheral devices will be packed into plastic bags with assigned location/user labels provided by OM.

- **Reconnects will begin with the IMAC/Tier II moving the IT Equipment to the new cubical after the movers have located same near the workstations. The move will begin at 8:30 A.M. on Saturday following their completions.** Beginning upon completion of the move of the equipment to the new work station a qualified Tier II intermediate technician team will assist IMAC/Tier II in the reconnect phase to assure a smooth completion. Assuming a 20-minute level of effort for each re-connect activity to include CPU's monitors, local and Network printers and other associated peripherals. All

peripheral devices will be moved and set-up at locations matching the location/user labels affixed during the disconnect phase.

- **Move, disconnect and reconnect Network Infrastructure equipment to the new location on the scheduled move date.** The disconnect and re-connect of any required server and/or infrastructure communication equipment as the router, access switches and UPS equipment etc. Billable time for five days on site including the weekend (Sat and Sun) March 23rd thru March 27th.

- **Post Move** beginning the day after the Reconnect Phase is complete, (**Monday at 7:00AM**) and continuing as needed. The NCC technical resource will be present to render any network level support needed to ensure network is 100% operational. Post Move support for relocations will be performed as part of Tier II personnel primary duties.

Contractor Assumptions

- The Department's physical security and building equipment removal process will need to be expedited, as applicable, during the physical move process. This includes providing off-hours access to CSC and designated subcontractor personnel to required areas of building. This also includes expediting the security process required for physical removal of servers and devices from the buildings on designated move weekends.
- Cost estimates represented here are directly effected by start times and procedures both outlined above and contained in related planning, scheduling, procedural, or task assignment documentation.
- The scope reflect 43 workstation moves, disconnects and reconnects and relocation of access switch from one LAN closet.
- OCIO is responsible for the repair of any equipment damaged or otherwise altered during the physical move under this effort. Such repairs (minor in nature) will fall under normal Help Desk policy and procedures.
- For the purposes of the work request, equipment that has been successfully moved will be considered delivered and accepted by the Department.

Period of Performance

The period of performance shall be from March 23, 2006 and ending March 28, 2006.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE	PAGE OF PAGES
	1 3

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
WR04	JUN 29, 2006	EDOCIO-06-000141	

6. ISSUED BY   CODE   **CPOA**

Contracts & Acquisitions Mgt., Group A
US Dept of Education, 550 12th Street, SW, 7th Floor
Washington DC 20202-4210
Victor Cairo VXC 202-245-6199

7. ADMINISTERED BY (If other than item 6)   CODE

See Block 6

---

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)

COMPUTER SCIENCES CORPORATION   DUNS: 883778896
7700 HUBBLE DR   Cage Code: 1SXC4
LANHAM SEABROOK MD 207066229

Ms. Maryke Guild (301) 794-2108

(X)	
	9A. AMENDMENT OF SOLICIATION NO.
	9B. DATED (SEE ITEM 11)
x	**10A. MODIFICATION OF CONTRACT/ORDER NO.** GS35F4381G/ED-05-PO-0908
	10B. DATED (SEE ITEM 13) APR 26. 2005

CODE 00001238   **FACILITY CODE**

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)
See Schedule

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	
	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D. OTHER (Specify type of modification and authority) C.3 ED 302-5B TASK ORDER PROCEDURES WORK REQUEST

E. IMPORTANT: Contractor ☒ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification is to issue Work Request 4 "Capital Place Move", against Category B Services.

See page three for modification text.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	**15C. DATE SIGNED**	**16B. UNITED STATES OF AMERICA** (Signature of Contracting Officer)	**16C. DATE SIGNED** 6/30/0?

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
0048	Work Request 4	1.00	SE	21,347.00	21,347.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000				

1. The attached Work Request 4 "Capital Place Move" is hereby incorporated.

2. Delete B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT in its entirety and replace with the following:

A. The total fixed price of this contract for Category A services is $10,161,185.87. The not-to-exceed amount for Category B is $1,554,828.20. The not-to-exceed amount for Category C labor is $12,110,691.50. The ceiling for Category C hours is 141,264. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $1,721,969.27. The Department of Education is not liable for any costs incurred which exceed the amount set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

Work Request
Contract No. ED05PO0908

1. **Work Request Number: 04**

2. **Project Title and Description:** Capital Place Move

3. **Deliverable(s):** Test and Certification Report and As built documentation.

4. The Firm Fixed Price amount of the Work Request is: $21,347.00

5. **Work Authorization:**

   Valerie A. Fawler

   COR

   _6/30/2006_

   Date

   Contracting Officer

   _6/30/2006_

   Date

   Delivery and Acceptance:

   Completion Date: _____

   _____
   Contractor's Signature   Date

   COR _____ Date _____ CO _____ Date _____

6. **List of Attachment:**

   1. Work Request Statement of Work

Work Request No. 4
Network Connectivity
US DEPARTMENT OF EDUCATION FACILITY
Capital Place
555 New Jersey Avenue N.W.
Washington, DC. 20208

1.0 Introduction

The US Department of Education (DoED) is renovating its office space at 550 New Jersey Avenue, Washington DC. This project requires contracted services for protecting the existing operational network as well as moving the server room equipment to the new Central Wire Closet (CWC); connecting existing wire closet facilities to new fiber runs installed and certified by others; and moving the first floor wire closet to the new first floor Secondary Wire Closet. As part of this renovation effort, the CWC will be relocated from the basement to room 313. This document and its associated standards document ("Department of Education CWC Standards") describe the tasking for and infrastructure to be installed.

The data services at this site are implemented using data thru fiber and UTP connectivity. With this install the existing data and telecommunications facilities requirements do not change. These design elements are determined by the DoED prior to completion of the Design Intent Drawings.

2.0 Overview

This work is specific to the Department of Educations site known as Capital Place. The Capital Place site is configured as three different buildings. The three addresses are 50 F Street (building 3), 80 F Street (building 2), and 555 New Jersey Avenue (building 1). The Department is currently using offices housed on floors 1C (the basement) through 6 in buildings 1, 2, and 3. Capital Place site is being renovated in response to reduced building space needs. In this reduction, the basement and part of the first floor is being returned to GSA for their reuse. In so doing, the DoED CIO is rolling back their presence in the basement (level 1C) and the first floor.
They are scheduled to turn over space in building 3 on the first floor and building 2 in the basement.

The Departments Computer Network currently has wire closets serving their offices located on each of the floors basement through the 6th floor. In building 1 there are is the 4B, 5A, 5B, 6A, and 6B closets. In building 2 there is 3B, and 2B, 101F, and 1C – B (basement). With this renovation the facilities in the 3B closet will be moved to the newly built CWC on the third floor (room 313), along with the core switches and WAN connections located in 1C-B (basement). The servers located in the server room in the basement will also be moved to the CWC. To clear the

Department out of the 101F closet, the data switch and patch panels currently located in LAN room 101F will be moved to the newly built LAN room or Secondary Wire Closet (SWC) in room 100. The purpose of this work request is to implement the infrastructure that will be installed by the GSA General Contractor (GC) using the new facilities (new CWC, new SWC on 1st floor, and new fiber connections between all closets and the CWC). In preparation for moving the CWC and prior to the July 1, 2006 government acceptance of the CWC date; the contractor is needed to coordinate the activities leading up to the move of the data circuits from the basement to the CWC and provide protective access for the GC subcontractors to the LAN rooms for fiber installation and testing. Following the placement and certification of the fiber (by the GC subcontractors) and the completion and government acceptance of the CWC starting approximately July 8, 2006 and to be completed prior to July 25, 2006 ; the contractor is needed to:

    relocate reconfigure existing network equipment and networked servers,
    Connect supplied (by others) patch cables,
    Verify that all network services are fully ready to turn over to operations,
    Document completed installations,
    Inventory and relocate all old EDNet equipment being disconnected for surplus to storage
room 101C for disposal by the government.

Additionally, approximately mid August the 1st floor SWC will be ready. The data switch currently located in room 101F needs to be moved to the SWC at room 100. The contractor will be needed to:

    relocate reconfigure existing network equipment,
    Connect supplied (by others) patch cables,
    Verify that all network services are fully ready to turn over to operations,
    Document completed installations,
    Inventory and relocate all old EDNet equipment being disconnected for surplus to storage
room 101C for disposal by the government.

3.0 Place of Performance and Period of Performance

Place of Performance - The technical activities performed under this contract shall be at the site located at:

Capitol Place, Buildings A&B
555 New Jersey Avenue, N.W.
Washington, DC 20208
and
80 F Street, N.W.
Washington, DC 20208

Period of Performance – June 29, 2006 thru August 30, 2006.

4.0 Deliverables

The selected contractor and sub-contractor will prepare and present of the following minimum set of deliverables. Other deliverables may be requested by the Government as required and will be addressed separately on as needed basis.

1. Estimated Project Material and Labor Price Schedule, and Project Plan	With project proposal – based on supplied design layout and requirements
2. Test and Certification Report	Upon completion of work, once the floors are tested and verified to be operational.
3. As built documentation	Soft Copy only, Autocad 2002. 60 Days after final site work.

All documentation will be delivered to the DoED\OM Project Manager within 60 calendar days of completion of the job to create a customer record or as required by schedule. This includes all appropriate as-built reference materials. All documentation will be submitted in Microsoft Office software format, such as Word, Excel, PowerPoint, or Visio.

During construction, the Contractor shall keep an accurate record of all deviations between the work as shown on the drawings and what is actually installed. Upon completion of work and acceptance by DoED the Contractor shall provide As-built drawings of the complete system including, but not limited to, As-builts, in the form of floor maps minimum size 36" x 24" that will include all cable locations/data and jack numbers. As-built drawings shall be provided in (AutoCAD 2002) format.

The deliverables shall include the materials for all aspects of the job, data closet equipment, miscellaneous fastening hardware, tye wraps, Velcro wraps, etc.
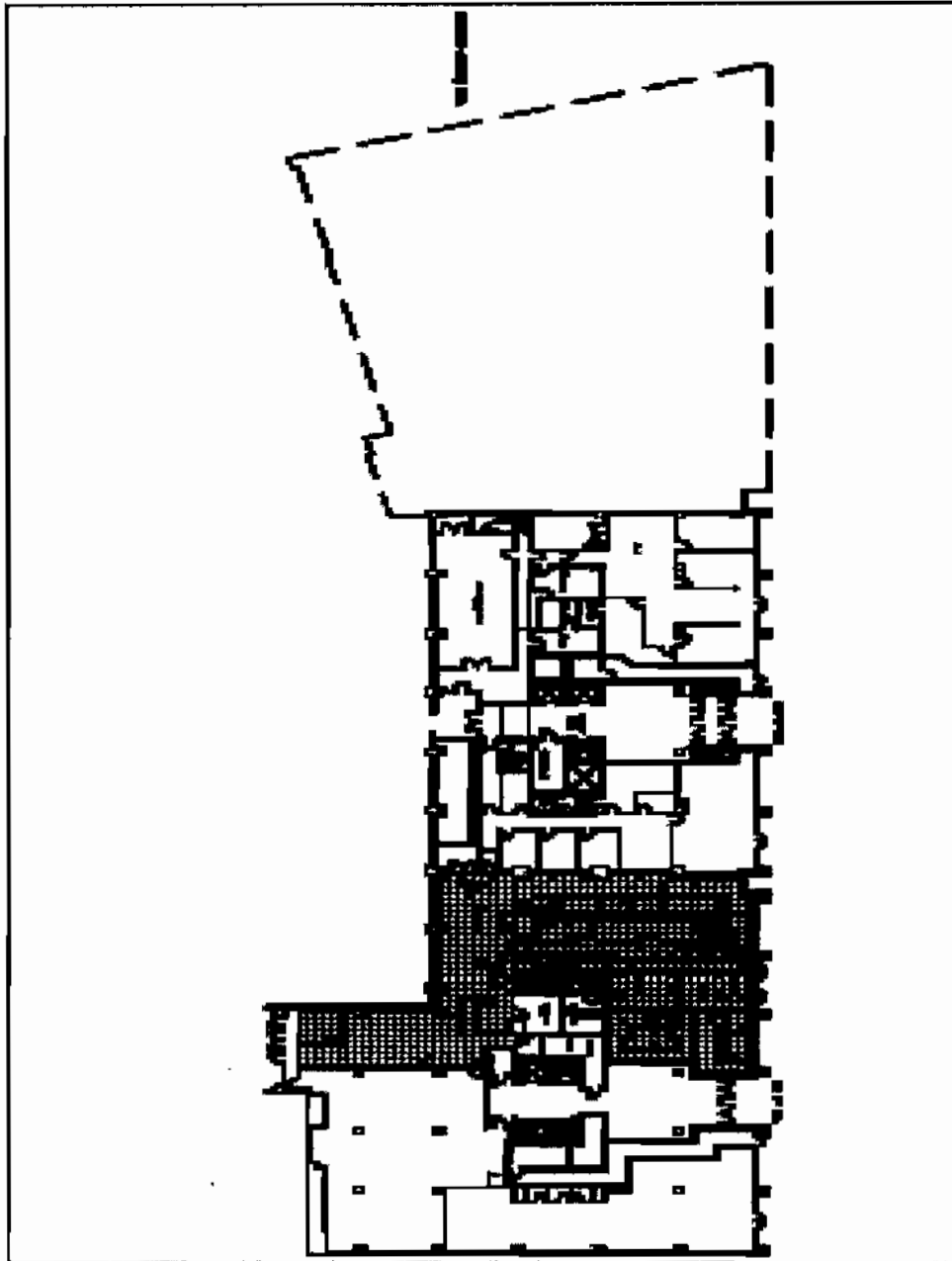
Figure 1 Buildings 1,2 and 3 of Capital Place.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 / 2

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
W4M1	SEP 01, 2006		

6. ISSUED BY CODE CPOA	7. ADMINISTERED BY (If other than Item 6) CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224	See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR LANHAM SEABROOK MD 207066229 Cage Code: 1SXC4		
		9B. DATED (SEE ITEM 11)
	x	10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
Ms. Maryke Guild (301) 794-2108		10B. DATED (SEE ITEM 13) APR 26, 2005
CODE 00001238	FACILITY CODE		

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (if required)	Modification Amount: $0.00
See Schedule	Modification Obligated Amount: $0.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	
	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D. OTHER (Specify type of modification and authority) 52.249-14, Excusable Delays

E. IMPORTANT: Contractor [ ] is not, [X] is required to sign this document and return __3__ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification W4M1 is to extend the period of performance of Work Request 4. Modification W4M1 does not change the scope of work or funding in any way.

Accordingly, Modification W4M1 applies to Section 3.0 of "Work Request Statement of Work."

See the following pages for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) Raymond Glass Sr. Principal Contracts Administrator	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6719
15B. CONTRACTOR/OFFEROR _(Signature of person authorized to sign)_	15C. DATE SIGNED 9/1/06	16B. UNITED STATES OF AMERICA _(Signature of Contracting Officer)_	16C. DATE SIGNED SEP 01, 2006

| NSN 7540-01-152-8070
Previous edition unusable | STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243 |

Work Request 04 of ED-05-PO-0908 is Hereby Modified as Follows:

Delete the contents of Section 3.0 of Attachment 1, _Work Request Statement of Work,_ and replace with the following:

3.0 Place of Performance and Period of Performance

Place of Performance – The technical activities performed under this contract shall be at the site located at:

> Capitol Place, Building A&B
> 555 New Jersey Avenue, N.W.
> Washington, DC 20208

> and

> 80 F Street, N.W.
> Washington, DC 20208

Period of Performance – 29 June 2006 to 30 September 2006

END OF MODIFICATION W4M1

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 · 2

2. AMENDMENT/MODIFICATION NO. WRM2	3. EFFECTIVE DATE SEP 27, 2006	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)

6. ISSUED BY	CODE CPOA	7. ADMINISTERED BY (If other than Item 6)	CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224		See Block 6	

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207066229		
		9B. DATED (SEE ITEM 11)
	x	10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
Ms. Maryke Guild (301) 794-2108		10B. DATED (SEE ITEM 13) APR 26, 2005
CODE 00001238 FACILITY CODE		

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)	
See Schedule	Modification Amount: $0.00 Modification Obligated Amount: $0.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE		
	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) 52.249-14, Excusable Delays

E. IMPORTANT: Contractor [x] is not, [ ] is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification WRM2 is to extend the period of performance of Work Request 4. Modification W4M2 does not change the scope of work or funding in any way.

Accordingly, Modification W4M2 applies to Section 3● of "Work Request Statement of Work."

See the following page for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6419	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
_____ (Signature of person authorized to sign)		_____ (Signature of Contracting Officer)	9/27/06

NSN 7540-01-152-8070 Previous edition unusable	STANDARD FORM 30 (REV. 10-83) Prescribed by GSA FAR (48 CFR) 53.243

Work Request 04 of ED-05-PO-0908 is Hereby Modified as Follows:

Delete the contents of Section 3.0 of Attachment 1, _Work Request Statement of Work_, and replace with the following:

3.0 Place of Performance and Period of Performance

Place of Performance – The technical activities performed under this contract shall be at the site located at:

> Capitol Place, Building A&B
> 555 New Jersey Avenue, N.W.
> Washington, DC 20208
>
> and
>
> 80 F Street, N.W.
> Washington, DC 20208

Period of Performance – 29 June 2006 to 31 December 2006

END OF MODIFICATION W4M2

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 2

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
W4M3	DEC 31, 2006		

6. ISSUED BY	CODE	CPOA	7. ADMINISTERED BY (If other than Item 6)	CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224			See Block 6	

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207062293			
			9B. DATED (SEE ITEM 11)
			10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
		x	
Ms. Maryke Guild (301) 794-2108			10B. DATED (SEE ITEM 13)
CODE 00001238	FACILITY CODE		APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)	Modification Amount: $0.00
See Schedule	Modification Obligated Amount: $0.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE		
	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) 52.249-14, Excusable Delays

E. IMPORTANT: Contractor [x] is not, [ ] is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification W4M3 is to extend the period of performance of Work Request 4 under ED-05-PO-0908. Modification W4M3 does not change the scope of work or funding in any way.

Accordingly, Modification W4M3 applies to Section 3.0 of "Work Request Statement of Work."

See the following page for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6249	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		(Signature of Contracting Officer)	1/26/07

NSN 7540-01-152-8070 Previous edition unusable	STANDARD FORM 30 (REV. 10-83) Prescribed by GSA FAR (48 CFR) 53.243

Work Request 04 of ED-05-PO-0908 is Hereby Modified as Follows:

Delete the contents of Section 3.0 of Attachment 1, _Work Request Statement of Work,_ and replace with the following:

3.0 Place of Performance and Period of Performance

Place of Performance – The technical activities performed under this contract shall be at the site located at:

> Capitol Place, Building A&B
> 555 New Jersey Avenue, N.W.
> Washington, DC 20208

> and

> 80 F Street, N.W.
> Washington, DC 20208

Period of Performance – 29 June 2006 to 31 March 2007

END OF MODIFICATION W4M3

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

		1. CONTRACT ID CODE	PAGE OF PAGES
			1 / 6

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
WR05	JUL 05, 2006	EDOCIO-06-000175	

6. ISSUED BY CODE CPOA	7. ADMINISTERED BY (If other than Item 6) CODE
Contracts & Acquisitions Mgt., Group A US Dept of Education, 550 12th Street, SW, 7th Floor Washington DC 20202-4210 Eugene Hopkins EKH 202-245-6224	See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896 7700 HUBBLE DR Cage Code: 1SXC4 LANHAM SEABROOK MD 207066229		
		9B. DATED (SEE ITEM 11)
		10A. MODIFICATION OF CONTRACT/ORDER NO. GS35F4381G/ED-05-PO-0908
	x	
Ms. Maryke Guild (301) 794-2108		10B. DATED (SEE ITEM 13)
CODE 00001238 FACILITY CODE		APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a)By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)	
See Schedule	Modification Amount: $16,885.47
	Modification Obligated Amount: $16,885.47

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE		
	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) Section C.3, ED 302-5B, Task Order Procedures Work Request

E. IMPORTANT: Contractor ☒ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification WR05 is to issue Work Request 5 in support of the Capitol Place EDCAPS Training Facility move.

Modification WR05 increases the total exercised value of ED-05-PO-0908 from $45,813,465.27 by $16,885.47 to $45,830,350.74.

Accordingly, Modification WR05 issues Work Request 5 and applies to Section B.1 of ED-05-PO-0908.

See the following pages for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) James Hairfield, Contracting Officer (202) 245-6219	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		(Signature of Contracting Officer)	8/18/06

SCHEDULE Continued

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000 Cost Applied: $16,885.47				
0074	CAT B Funds - Work Request 05 - Capitol Place Move	1.00	SE	16,885.47	16,885.47

ED-05-PO-0908 is Hereby Modified as Follows:

Work Request 5

1. Work Request 5 is hereby issued in accordance with the terms and conditions of ED-05-PO-0908. The Contractor's proposal, dated 20 July 2006, entitled "Work Request 5-Capitol Place EDCAPS Training Facility IT Equipment Moves and Installs" is hereby incorporated by reference.

2. List of Attachments:

   (A) Work Request 5
   (B) Monitor Requirement

Refer to ED-05-PO-0908 and replace the contents of Section B.1 with the following:

B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT

A. The total fixed price of this contract for Category A services is $27,456,995.13. The not-to-exceed amount for Category B has increased from $1,651,791.29 by $16,885.47 to $1,668,676.76. The not-to-exceed amount for Category C labor is $14,011,175.83. The ceiling for Category C hours is 154,580. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $2,778,744.00. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

ATTACHMENT A

Work Request 5

Contract Number ED-05-PO-0908

1. **Work Request Number:** 5

2. **Project Title and Description:** Capital Place EDCAPS Training Facility IT Equipment Moves and Installs.

   Deliverable(s): None-Labor Only – IMAC Team and/or IT IDC Team will need to move 43 CPU, 43 Monitors and 1 printer from the IT Imaging and Distribution Center to a identified Temporary Space CAP Room 101 which will be used as a Temporary EDCAPS Training Facility in Capital Place until the permanent facility on the 3rd floor is completed. Boxed equipment will need to be unpacked and boxes discarded for trash. The PC workstations shall be installed in the training areas identified, tested for connectivity and inventory validated for transfer of equipment from IT IDC to Capital Place. The contractor shall ensure that Attachment B, *Monitor Requirement,* appears on each monitor.

   Deliverable(s): None-Labor Only – IMAC Team and/or IT IDC Team will need to again move the 43 CPU, 43 Monitors and 1 printer from the Temporary Space CAP Room 101to the Permanent Capital Place EDCAPS Training Facility. Boxed equipment will need to be unpacked and boxes discarded for trash. The PC workstations shall be installed in the training areas identified, tested for connectivity and inventory validated for transfer of equipment from IT IDC to Capital Place. The contractor shall ensure that Attachment B, *Monitor Requirement,* appears on each monitor.

   Deliverable(s): None – Labor Only – IMAC Team and/or IT IDC Team will need to move 29 CPUs, 29 Monitors and 1 Network Printer from the IT Imaging and Distribution Center, located in Landover, MD, to the Permanent Capital Place EDCAPS Training Facility. The PC workstations shall be installed in the training areas identified, tested for connectivity and inventory validated for transfer of equipment from IT IDC to Capital Place. The contractor shall ensure that Attachment B, *Monitor Requirement,* appears on each monitor.

3. **Period of Performance:** 05 July 20006 to 30 September 2006

4. **Type:** The Firm Fixed Price amount of the Work Request is: $16,885.47

5. **Work Authorization:**

Valerie A Fowler   8/17/06
COR   **Date**

Jam Hart   8/17/06
Contracting Officer   **Date**

Delivery and Acceptance:

Completion Date: _____

_____
                                    Contractor's Signature   **Date**

COR _____ Date _____ CO _____ Date _____

Capital Place EDCAPS Training Facility

Welcome to the new Capital Place EDCAPS Training Facility. As part of the quality assurance check, technicians checked each desktop to verify connectivity. As a result, the logon id and domain may be that of the technician performing the QA check.

When you log on to your computer, please change your log on information to:

User name: (INPUT USER NAME)

Password: ********(Enter your password)

Domain: ED

If you encounter any problems, please do not hesitate to contact Ed Customer Service, 202-708-HELP (4357), Option 2.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

		1. CONTRACT ID CODE	PAGE OF PAGES
			1 20

2. AMENDMENT/MODIFICATION NO.	3. EFFECTIVE DATE	4. REQUISITION/PURCHASE REQ. NO.	5. PROJECT NO. (If applicble)
WR06	SEP 21 2006	EDOOOM-06-000095	

6. ISSUED BY	CODE	CPOA	7. ADMINISTERED BY (If other than Item 6)	CODE

6. ISSUED BY: CODE CPOA

Contracts & Acquisitions Mgt., Group A
US Dept of Education, 550 12th Street, SW, 7th Floor
Washington DC 20202-4210
Eugene Hopkins EKH 202-245-6224

7. ADMINISTERED BY (If other than Item 6): See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)		(X)	9A. AMENDMENT OF SOLICIATION NO.
COMPUTER SCIENCES CORPORATION DUNS: 883778896			
7700 HUBBLE DR Cage Code: 1SXC4			9B. DATED (SEE ITEM 11)
LANHAM SEABROOK MD 207066229			
			10A. MODIFICATION OF CONTRACT/ORDER NO.
			GS35F4381G/ED-05-PO-0908
		x	
Ms. Maryke Guild (301) 794-2108			10B. DATED (SEE ITEM 13)
CODE 00001238	FACILITY CODE		APR 26, 2005

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

☐ The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers ☐ is extended, ☐ is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)	
See Schedule	Modification Amount: $10,293.00
	Modification Obligated Amount: $10,293.00

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE		
	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) Section C.3, ED 302-5B, Task Order Procedures Work Request

E. IMPORTANT: Contractor ☒ is not, ☐ is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification WR06 is to issue Work Request 6 entitled EDPAS Software Change Requirements.

The total value of Work Request 6 is $10,293.00 and it is hereby fully funded. The total value of ED-05-PO-0908 is hereby increased from $45,998,729.51 by $10,293.00 to $46,009,022.51.

Accordingly, Modification WR06 issues Work Request 6 and applies to Section B.1 of ED-05-PO-0908.

See the following pages for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)	
		James Hairfield, Contracting Officer (202) 245-6219	
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		(Signature of Contracting Officer)	9/22/06

NSN 7540-01-152-8070	STANDARD FORM 30 (REV. 10-83)
Previous edition unusable	Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE Continued					
ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE	AMOUNT $
	Accounting and Appropriation Data: 0800A2006.A.2006.EMH00000.500.2572A.000.000.0000.000000 Cost Applied: $10,293.00				
0080	Work Request 06 - EDPAS Software Change Requirements	1.00	SE	10,293.00	10,293.00

ED-05-PO-0908 is Hereby Modified as Follows:

Work Request 6

1. Work Request 6 is hereby issued in accordance with the terms and conditions of ED-05-PO-0908. The Contractor's proposal, dated 19 September 2006, entitled "Software Change Requirements" is hereby incorporated by reference.

2. List of Attachments:

   (A) Work Request 6
   (B) Statement of Work

Refer to ED-05-PO-0908 and replace the contents of Section B.1 with the following:

B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT

A. The total fixed price of this contract for Category A services is $27,456,995.13. The not-to-exceed amount for Category B has increased from $1,751,814.53 by $10,293.00 to $1,762,107.53. The not-to-exceed amount for Category C labor is $14,011,175.83. The ceiling for Category C hours is 154,580. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $2,778,744.00. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

ATTACHMENT A

Work Request 6

Contract Number ED-05-PO-0908

1. **Work Request Number:** 6

2. **Project Title and Description:** EDPAS Software Change Requirements

   Deliverable(s): CSC will incorporate the software changes specified in the Statement of Work, to include testing as identified under Section 1.5 of CSC's Proposal, entitled "Software Change Requirements.

3. **Period of Performance:** Date of Award to 30 September 2006

4. **Type:** The Firm Fixed Price amount of the Work Request is: $10,293.00

5. **Work Authorization:**

   Valerie A. Fowler   _9/21/06_
   COR   Date

   _____   _9/21/01_
   Contracting Officer   Date

   Delivery and Acceptance:

   Completion Date: _9/30/06_   _Raymond W. Glass_ _10/18/06_
                                   Contractor's Signature   Date

   COR _Valerie Fowler_ Date _10/20/06_   CO _____ Date _10/20/06_

ATTACHMENT B

EDPAS
Software Change Requirements
Statement of Work

Version 1.0

8 August 2006

Change History

DOCUMENT APPROVAL / CHANGE HISTORY RECORD

Document No.: EDNet-XXX-000-NNNN
Title: EDPAS Change Requirements
Contract No.: GS-35F-4381G
Task Order No: ED-05-PO-0908

Rev	Date	Approval Signatures	Pages Affected	Remarks
1.0		Author:	All	Initial Release
		Mgr:		
		CM:		

Table of Contents

Introduction

Overview

The Department of Education (ED) has established, implemented, and is currently operating a five-tier performance appraisal system known as the Education Performance Appraisal System (EDPAS). Right Management Consultants developed the IC2000 software that supports the automation of the EDPAS system. Right Management Consultants has dissolved the department responsible for developing the EDPAS software and will no longer provide support/upgrades to the existing EDPAS software.

The Department of Education has initiated a policy change that requires a change to the EDPAS software.

Purpose

This document will review the current EDPAS process and define the requirements for the change to the IC2000 EDPAS software.

Objective

The current EDPAS Performance Plan contains a paragraph providing guidance for developing the performance standards. The paragraph exists on the performance plan in Element I - Organizational Priorities, and Element II – Customer Service. The new Performance Appraisal System policy requires employees and supervisors to develop and employees to enter descriptors for EDPAS Elements I and II that define what each employee must do to ensure that their organizational unit will meet the critical element. These individual descriptors will replace the current generic guidance for developing the performance standards.

Scope

The current IC2000 software requires modification to comply with the department's policy change. The modification must be available no later than October 1, 2006.
The software will be modified to provide a means by which the descriptor text may be entered into the database. The Performance Plan and the Rating of Record will be modified to reflect the descriptor text. The modification will affect both the Nonsupervisor and Supervisor performance plans and ratings. The modifications will meet the Department of Education Internet Section 508 standards.

Approach

This document contains the detailed requirements for this effort as defined by the Department of Education. Defined changes will be incorporated into the existing software by the developer and tested to ensure compliance with the requirements. CSC will establish a test database and perform testing to ensure the change(s) satisfy the functional requirements of ED's policy change(s), and that all processes execute properly.

EDPAS CURRENT Process
Performance Plan Entry
Prior to the beginning of the performance appraisal period, the employee participates in the development of his/her individual Performance Plan. The Performance Plan contains the performance objectives and desired outcomes that the employee should focus his/her efforts toward. At the end of the cycle, the supervisor will assess the employee's progress at meeting these performance objectives.

Nonsupervisory level positions in ED consists of two critical performance elements:
Element I - Organizational Priorities
Element II – Customer Service
Supervisory level positions include the critical elements listed above and contain a third critical performance element:
Element III – Management and Leadership
Element I & II - Each employee must identify at least three and no more than eight performance standards for each element. The employee enters the individual performance standards using the EDPAS software.

Element III – Contains five core standards for all supervisors. Supervisors may identify up to three additional performance standards. The software automatically populates these standards and the employee enters the additional standards using the EDPAS software.
The Performance Plan is printed and required signatures are obtained.
The EDPAS software allows for the supervisor to view an employee's plan at any time.
Progress Reviews
At the mid-point of the performance appraisal period the supervisor will conduct a progress review with the employee. This is a review of the employee's progress and no official rating is assigned. The Performance Plan is signed by the supervisor and the employee to certify that the progress review was conducted.

The supervisor then enters into the EDPAS software the date that the progress review was conducted so that progress review completion of all employees may be tracked electronically.
Performance Evaluation
At the end of the rating cycle a performance appraisal will be completed for each employee. The supervisor will assign a rating to each of the performance standards under all elements.

When the evaluation of all criteria has been completed, an overall rating is computed and justifications for each element are entered.

The rating is printed and required signatures are obtained.

EDPAS MODIFICATION DeTAILS
The software will be modified to replace current generic text (guidance for developing organizational priorities standards) on the EDPAS Performance Plan and the EDPAS Performance Rating, and provide a means by which an employee may enter descriptor text (stating what an employee must do to ensure their organizational unit meets the critical element) to be displayed on the employee's Performance Plan and the Performance rating.
EDPAS Performance Plan Modification

New Performance Plan Field Requirement
There will be eight new fields required on the Performance Plan. Six will be static text entries and two fields will be text boxes that require data entry from the employee. The fields are to replace the current text as indicated below.

Plan Field 1 - Text Box: 'Performance standards will be written at the "Successful" level, must be consistent with Achievement Level 3 of Appendix D of PMI 430-2, and include individual measures. The standards written at the "Successful" level will then be used in conjunction with the other achievement level descriptions in Appendix D as benchmarks for assessing performance above or below the "Successful" level at the end of the appraisal period.'
Added before Organizational Priorities.

Plan Field 2 - Text Box: 'See Section IX (A)(1) of PMI 430-2 for guidance on developing this element.'
Added in Element I of Nonsupervisor and Supervisor plans. Replaces current text 'Guidance for Developing Organizational Priorities Standards'.

Plan Field 3 - Text Box: 'See Section IX (A)(2) of PMI 430-2 for guidance on developing this element.'
Added in Element II of Nonsupervisor and Supervisor plans. Replaces current text 'Guidance for Developing Customer Service Standards'.

Plan Field 4 - Text Box: 'See Section IX (A)(3) of PMI 430-2 for guidance on developing these standards.'
Added in Element III of Supervisor plans. Replaces current text 'Guidance for Developing Additional Management and Leadership standards'.

Plan Field 5 - Text Box: 'Reminder: Supervisors and employees should identify a minimum of three (3) and a maximum of eight (8) job specific standards.'
Added in Element I and Element II of Nonsupervisor and Supervisor plans.

Plan Field 6 – Text Box: 'A clear and concise statement of employee responsibilities/expected results related to this element follows:'
Added in Element I and II of Nonsupervisor and Supervisor plans.

Plan Field 7 – Data Entry:
- Field length - 2000 maximum characters
- Field cannot be blank
- Data entered by employee at the time of performance plan creation
- Default text for entry screen should read 'Enter expected responsibilities/results'

Added in Element I of Nonsupervisor and Supervisor plans.

Plan Field 8 – Data Entry:
- Field length - 2000 maximum characters
- Field cannot be blank
- Data entered by employee at the time of performance plan creation
- Default text for entry screen should read 'Enter expected responsibilities/results'

Added in Element II of Nonsupervisor and Supervisor plans.

Process for New Performance Plan Data Entry Field

The individual creating his/her plan will enter the descriptor text into EDPAS. View access to employee performance plans is presently available to the supervisor. Descriptors must be entered for Element I and Element II of Nonsupervisor and Supervisor plans.

Performance Plan Format

The new Performance Plan formats are as shown below.

EDPAS Performance Plan for Nonsupervisors

Employee:	Title:
Pay Plan/Series/Grade:	Rating Period:
Organization:	Dates:

The following scale will be used to evaluate/rate employee's performance against each standard.

Unacceptable Applicable	Minimally Highly Successful	Successful	Not Successful	Outstanding
1	2	3	4	5

Performance standards will be written at the "Successful" level, must be consistent with Achievement Level 3 of Appendix D of PMI 430-2, and include individual measures. The standards written at the "Successful" level will then be used in conjunction with the other achievement level descriptions in Appendix D as benchmarks for assessing performance above or below the "Successful" level at the end of the appraisal period. **(Plan Field 1)**

I. Organizational Priorities (Critical)

See Section IX (A)(1) of PMI 430-2 for guidance on developing this element. **(Plan Field 2)**

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Plan Field 6)**

(Display expected responsibilities/results here) **(Plan Field 7)**

Reminder: Supervisors and employees should identify a minimum of three (3) and a maximum of eight (8) job specific standards. **(Plan Field 5)**

Performance Standards

1.
2.
3.
4.
5.
6.
7.
8.

II. Customer Service (Critical)

See Section IX (A)(2) of PMI 430-2 for guidance on developing this element. **(Plan Field 3)**

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Plan Field 6)**

(Display expected responsibilities/results here) **(Plan Field 8)**

Reminder: Supervisors and employees should identify a minimum of three (3) and a maximum of eight (8) job specific standards. **(Plan Field 5)**

Performance Standards

1.

2.

3.

4.

5.

6.

7.

8.

		Progress Review	
Employee Signature	Date		
		Employee's Initials	Date
Supervisor's Signature	Date		
		Supervisor's Initials	Date
Approving Official Signature	Date		

EDPAS Performance Plan For Supervisors	
Employee:	Title:
Pay Plan/Series/Grade:	Rating Period:
Organization:	Dates:

The following scale will be used to evaluate/rate employee's performance against each standard.

Unacceptable Applicable	Minimally Not Successful	Successful	Highly Successful	Outstanding	
1	**2**	**3**	**4**	**5**	

Performance standards will be written at the "Successful" level, must be consistent with Achievement Level 3 of Appendix D of PMI 430-2, and include individual measures. The standards written at the "Successful" level will then be used in conjunction with the other achievement level descriptions in Appendix D as benchmarks for assessing performance above or below the "Successful" level at the end of the appraisal period. **(Plan Field 1)**

I. Organizational Priorities (Critical)

See Section IX (A)(1) of PMI 430-2 for guidance on developing this element. **(Plan Field 2)**

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Plan Field 6)**

(Display expected responsibilities/results here) **(Plan Field 7)**
Reminder: Supervisors and employees should identify a minimum of three (3) and a maximum of eight (8) job specific standards. **(Plan Field 5)**

Performance Standards

1.

2.
3.
4.
5.
6.
7.
8.

II. Customer Service (Critical)

See Section IX (A)(2) of PMI 430-2 for guidance on developing this element. **(Plan Field 3)**

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Plan Field 6)**

(Display expected responsibilities/results here) **(Plan Field 8)**
Reminder: Supervisors and employees should identify a minimum of three (3) and a maximum of eight (8) job specific standards. **(Plan Field 5)**

Performance Standards

1.

2.

3.

4.

5.

6.

7.

8.

III. Management and Leadership (Critical)

See Section IX (A)(3) of PMI 430-2 for guidance on developing these standards. **(Plan Field 4)**

Management and leadership play a critical part in accomplishing the Department's goals and mission. **The five standards listed below are required for every manager.** Up to three additional standards may be added for a total of eight.
Performance Standards

1. Demonstrates leadership by communicating organizational direction; setting clear values and high performance expectations; and encouraging employee development through, for example, mentoring and coaching, and individual development plans.
2. Aligns and manages work processes, available resources, and technology to meet organizational goals and priorities, establishes sound performance plans, which are communicated to employees at the start of the appraisal period, and provides accurate and timely employee performance evaluations.
3. Communicates regularly and openly discusses with employees within the work unit work assignments and new or changed assignments.
4. Makes assignments in a fair manner consistent with employees' grade levels and solicits employee interest/input; performance expectations are clear and feedback is provided regularly relative to performance.
5. Recruits, develops, and retains high performing employees, recommends appropriate awards for their accomplishments, and deals promptly and appropriately with performance and conduct problems.
6.
7.
8.

Employee Signature	Date		
		Employee's Initials	Date
Supervisor's Signature	Date		
		Supervisor's Initials	Date
Approving Official Signature	Date		

EDPAS Performance Rating Modification

New Rating Field Requirement

The rating will be modified to display Plan Field 7 as described in section 3.1.1 above, change two existing text fields, and add a new text field.

Rating Field 1 - Text Box: '[ ] **Rating of Record** - The performance rating prepared at the end of an appraisal period for performance over the entire period, including the assignment of a summary rating of Outstanding, Highly Successful, Successful, Minimally Successful, and Unacceptable.

Replaces current text on Rating for Nonsupervisors and Supervisors.

Rating Field 2 - Text Box: ' [ ] **Interim Rating** - An interim rating provides feedback to the employee's supervisor and the employee on the employee's accomplishments when the employee or supervisor vacates his/her position or when the employee is detailed or temporarily promoted for 120 days or more. A written interim rating is prepared, signed, and issued by the supervisor and does not require approval by the approving official. It shall be considered by the supervisor responsible for developing the rating of record.

Replaces current text on Rating for Nonsupervisors and Supervisors.

Rating Field 3 – Text Box: 'A clear and concise statement of employee responsibilities/expected results related to this element follows:'
Added in Element I and Element II of Nonsupervisor and Supervisor Ratings.

Rating Field 4 – Display the data collected as described in section 3.1.1. Plan Field 7.
Added in Element I of Nonsupervisor and Supervisor Ratings.

Rating Field 5 – Display the data collected as described in section 3.1.1. Plan Field 8.
Added in Element II of Nonsupervisor and Supervisor Ratings.

Performance Rating Format

The new Rating formats are as shown below.

EDPAS Rating For Nonsupervisors	
Employee:	Title:
Pay Plan/Series/Grade:	Rating Period:
Organization:	Dates:

Check One:

[ ] **Rating of Record** - The performance rating prepared at the end of an appraisal period for performance over the entire period, including the assignment of a summary rating of Outstanding, Highly Successful, Successful, Minimally Successful, and Unacceptable. **(Rating Field 1)**

[ ] **Interim Rating** - An interim rating provides feedback to the employee's supervisor and the employee on the employee's accomplishments when the employee or supervisor vacates his/her position or when the employee is detailed or temporarily promoted for 120 days or more. A written interim rating is prepared, signed, and issued by the supervisor and does not require approval by the approving official. It shall be considered by the supervisor responsible for developing the rating of record. **(Rating Field 2)** Achievement level descriptions for assigning scores for the performance standards are contained in Appendix D of PMI 430-2. The worksheet for arriving at element ratings and the summary Rating of Record is in Appendix E of PMI 430-2. Standard and Element ratings will be assigned using the following scale.

Unacceptable Applicable	Minimally Not Successful	Successful	Highly Successful	Outstanding	
1	2	3	4	5	

I. Organizational Priorities (Critical) - Element Rating:

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Rating Field 3)**

(Display expected responsibilities/results here) **(Rating Field 4)**

Standard Ratings:

_____ 1.

_____ 2.

_____ 3.

_____ 4.

_____ 5.

_____ 6.

_____ 7.

_____ 8.

Justification: (Discuss Tangible Accomplishments that support ratings for the standards and elements - continuation sheets may be attached)

II. Customer Service (Critical) - Element Rating: _____

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Rating Field 3)**

(Display expected responsibilities/results here) **(Rating Field 5)**

Standard Ratings:

_____ 1.

_____ 2.

_____ 3.

_____ 4.

_____ 5.

_____ 6.

_____ 7.

____ 8.
  Justification: (Discuss Tangible Accomplishments that support ratings for the standards
  and elements - continuation sheets may be attached)
[ ] Rating of Record:

[ ] Interim Rating:

_____

Supervisor's Signature	Date
Approving Official's Signature	Date
Employee's Signature	Date
Employee wishes to respond Yes	No	

Employee response may be attached to rating of record or interim rating.

EDPAS Rating For Supervisors	
Employee:	Title:
Pay Plan/Series/Grade:	Rating Period:
Organization:	Dates:

[ ] **Rating of Record** - The performance rating prepared at the end of an appraisal period for performance over the entire period, including the assignment of a summary rating of Outstanding, Highly Successful, Successful, Minimally Successful, and Unacceptable. **(Rating Field 1)**

[ ] **Interim Rating** - An interim rating provides feedback to the employee's supervisor and the employee on the employee's accomplishments when the employee or supervisor vacates his/her position or when the employee is detailed or temporarily promoted for 120 days or more. A written interim rating is prepared, signed, and issued by the supervisor and does not require approval by the approving official. It shall be considered by the supervisor responsible for developing the rating of record. **(Rating Field 2)** Achievement level descriptions for assigning scores for the performance standards are contained in Appendix D of PMI 430-2. The worksheet for arriving at element ratings and the summary Rating of Record is in Appendix E of PMI 430-2. Standard and Element ratings will be assigned using the following scale.

Unacceptable Applicable	Minimally Not Successful	Successful	Highly Successful	Outstanding	
1	2	3	4	5	

I. Organizational Priorities (Critical) - Element Rating:

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Rating Field 3)**

(Display expected responsibilities/results here) **(Rating Field 4)**

Standard Ratings:

_____ 1.
_____ 2.
_____ 3.
_____ 4.
_____ 5.
_____ 6.
_____ 7.
_____ 8.

Justification: (Discuss Tangible Accomplishments that support ratings for the standards and elements - continuation sheets may be attached)

II. Customer Service (Critical) - Element Rating: _____

A clear and concise statement of employee responsibilities/expected results related to this element follows: **(Rating Field 3)**

(Display expected responsibilities/results here) **(Rating Field 5)**

Standard Ratings:

___ 1.
___ 2.
___ 3.
___ 4.
___ 5.
___ 6.
___ 7.
___ 8.

Justification: (Discuss Tangible Accomplishments that support ratings for the standards and elements - continuation sheets may be attached)

III. Management and Leadership (Critical)   - Element Rating:

Standard Ratings:

Performance Standards

___ 1. Demonstrates leadership by communicating organizational direction; setting clear values and high performance expectations; and encouraging employee development through, for example, mentoring and coaching, and individual development plans.

___ 2. Aligns and manages work processes, available resources, and technology to meet organizational goals and priorities, establishes sound performance plans, which are communicated to employees at the start of the appraisal period, and provides accurate and timely employee performance evaluations.

___ 3. Communicates regularly and openly discusses with employees within the work unit work assignments and new or changed assignments.

___ 4. Makes assignments in a fair manner consistent with employees' grade levels and solicits employee interest/input; performance expectations are clear and feedback is provided regularly relative to performance.

___ 5. Recruits, develops, and retains high performing employees, recommends appropriate awards for their accomplishments, and deals promptly and appropriately with performance and conduct problems.

___ 6.
___ 7.
___ 8.

Justification: (Discuss Tangible Accomplishments that support ratings for the standards and elements - continuation sheets may be attached)

[ ] Rating of Record:

[ ] Interim Rating:

Supervisor's Signature   Date

Approving Official's Signature   Date

Employee's Signature   Date

| Employee wishes to respond | Yes | | No | | |

Employee response may be attached to rating of record

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

	1. CONTRACT ID CODE	PAGE OF PAGES
		1 / 10

2. AMENDMENT/MODIFICATION NO. WR07	3. EFFECTIVE DATE FEB 15, 2007	4. REQUISITION/PURCHASE REQ. NO. EDOCIO-06-000357	5. PROJECT NO. (If applicble)

6. ISSUED BY	CODE	CPOA	7. ADMINISTERED BY (If other than Item 6)	CODE

6. ISSUED BY CODE CPOA

Contracts & Acquisitions Mgt., Group A
US Dept of Education, 550 12th Street, SW, 7th Floor
Washington DC 20202-4210
Eugene Hopkins EKH 202-245-6224

7. ADMINISTERED BY (If other than Item 6) CODE

See Block 6

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and ZIP Code)	(X)	9A. AMENDMENT OF SOLICIATION NO.

COMPUTER SCIENCES CORPORATION   DUNS: 883778896
7700 HUBBLE DR   Cage Code: 1SXC4
LANHAM SEABROOK MD 207062293

9B. DATED (SEE ITEM 11)

10A. MODIFICATION OF CONTRACT/ORDER NO.
GS35F4381G/ED-05-PO-0908

x

Ms. Maryke Guild (301) 794-2108

10B. DATED (SEE ITEM 13)
APR 26, 2005

CODE 00001238   FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

[ ] The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers [ ] is extended, [ ] is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment your desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPIATION DATA (If required)	
See Schedule	Modification Amount: $24,994.83
	Modification Obligated Amount: $24,994.83

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A.	THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B.	THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C.	THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
X	D.	OTHER (Specify type of modification and authority) Section C.3, ED 302-5B, Task Order Procedures Work Request

E. IMPORTANT: Contractor [X] is not, [ ] is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of Modification WR07 is to issue Work Request 7 entitled "FSA Move."

The total value of Work Request 7 is $24,994.83 and is hereby fully funded. The total value of ED-05-PO-0908 is hereby increased from $51,677,009.51 by $24,994.83 to $51,702,004.34.

Accordingly, Modification WR07 issues Work Request 7 and applies to Section B.1 of ED-05-PO-0908.

See the following pages for additional details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)
	James Hairfield, Contracting Officer (202) 245-6719

15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. UNITED STATES OF AMERICA	16C. DATE SIGNED
(Signature of person authorized to sign)		(Signature of Contracting Officer)	2/15/07

NSN 7540-01-152-8070
Previous edition unusable

STANDARD FORM 30 (REV. 10-83)
Prescribed by GSA FAR (48 CFR) 53.243

SCHEDULE Continued

ITEM NO.	SUPPLIES/SERVICES	QUANTITY	UNIT	UNIT PRICE $	AMOUNT $
0093	(New Line Item) Work Request 7 - FSA Move	1.00	EA	15,000.00	15,000.00
	Accounting and Appropriation Data: 0800A2006.A.2006.EIE00000.701.2572A.A17.000.0000.000000 $15,000.00				
0094	(New Line Item) Work Request 7 - FSA Move	1.00	EA	9,994.83	9,994.83
	Accounting and Appropriation Data: 0202A2007.A.2007.EIE00000.725.2572A.000.000.0000.000000 $9,994.83				

ED-05-PO-0908 is Hereby Modified as Follows:

Work Request 7

1. Work Request 7 is hereby issued in accordance with the terms and conditions of ED-05-PO-0908.

2. List of Attachments:

   (A) Work Request 7

Refer to ED-05-PO-0908 and replace the contents of Section B.1 with the following:

B.1 ED 301-17 PROVISION FOR PRICING AND PAYMENT

A. The total fixed price of this contract for Category A services is $27,456,995.13. The not-to-exceed amount for Category B has increased from $3,590,094.53 by 24,994.83 to $3,615,089.36. The not-to-exceed amount for Category C labor is $17,551,175.83. The ceiling for Category C hours is 194,880. The not-to-exceed amount of Category C Other Direct Costs (ODCs) is $3,078,744.02. The Department of Education is not liable for any costs incurred which exceed the amounts set forth above. The Contractor is further required to give written notice any time it estimates that the current funding ceiling is inadequate to cover the cost of its continued performance for a period of more than sixty (60) days or until the end of the current term of the contract if less than sixty (60) days.

B. Payment of the amounts stated in B.1A shall be made in accordance with the incorporated clause entitled "Payments Under Time and Materials and Labor-Hour Contracts", "Payments Under Fixed Price Research and Development Contracts", or "Payments", whichever is applicable, and with any other supplementary payment scheme which may be otherwise negotiate and specified.

C. In consideration for services performed under this contract, the Contractor shall be paid in accordance with the prices set forth in Attachment II.

Attachment A

Work Request 7
Contract Number: ED-05-PO-0908

1. **Work Request Number:** 7

2. **Project Title and Description:** *FSA Move*

3. **In accordance with the specifications set forth in Attachment A and B, the Contractor shall be responsible for the following deliverables:**

   A) Testing of cable drops.
   B) Move of 127 PC workstation setups, assigned local and network printers and associated peripherals, to include packing.
   C) Reconnection, testing, validation and labeling of PC workstation setups, assigned local and network printers and associated peripherals.
   D) Post move support in the form of Tier II and/or IMAC Technicians for no less than two (2) days.
   E) Network Technical Support

4. **Period of Performance:** The period of performance shall be from 16 Feb 2007 to 12 March 2007.

5. **Type:** The Firm Fixed Price amount of the Work Request is: $24,994.83

6. **List of Attachments:**

   I) FSA Move Statement of Work
   II) "Welcome to Your New Office" Screen Shot

   J) Work Authorization:

   Valerie A. Fowler
   Contracting Officer's Representative

   _2/20/07_
   DATE

   Jonathan
   Contracting Officer

   _2/20/07_
   DATE

   K) Delivery and Acceptance:

_____   _____
Contractor   DATE

_____   _____
Contracting Officer's Representative   DATE

_____   _____
Contracting Officer   DATE

ATTACHMENT I

STATEMENT OF WORK

FSA Move

FSA Union Center Plaza (UCP) Employee Move Project: PART 1-1-4   FSA UCP PC Disconnect, Moves and Reconnect

Location:
Union Center Plaza (UCP), FSA Office
830 First Street NE
Washington, DC. 20202

Background
The Department of Education requires that the CPUs, monitors, local and network printers and other associated peripherals located on the 3rd, 8th, 9th, and 11th floors of the Union Center Plaza (UCP) be moved to the lobby and lower level floors within the same building. Specific personnel and equipment to be moved will be identified by FSA and provided to the contractor.

Technical Approach:

- **Cable Technical Support**

    In accordance with the FSA Seating Plan that will be provided to the Contractor, the Contractor shall test the cable drops in order to ensure that each of the stations meet CAT5e standards for activation of the drops. All testing shall occur prior to the move and Government approval is required prior to the installation or repair of any data drops.

    Deliverable: Labor

- **All disconnects and moves shall begin at the identified schedule provided by OM/FSA in coordination with OCIO. The Contractor shall be required to:**

    o Physically disconnect approximately 127 PCs workstation set-ups and assigned network printers
    o Physically pack-up and move the CPUs, monitors, local and network printers and other associated peripherals. .
    o Pack all peripheral devices into plastic bags with assigned location/user labels.
    o Ensure that all printer cartridges are bagged and all printer access panels be secured with tape prior to move.

Deliverable: All Employee IT equipment properly bagged and prepared for relocation and the sign off of the relocation IT Asset Move Validation Worksheet provided by the OCIO Project Manager.

- **User Reconnects will begin after all of the IT equipment has been relocated, or the following morning.** Once the relocation effort is complete, the Contractor shall provide a qualified IMAC intermediate technician team and the necessary Tier II assistance. All reconnection shall be checked when completed. At a minimum, the re-connect activities shall include:

    o The reconnection of the CPUs, monitors, local and network printers and other associated peripherals.
    o The labeling of printers with new print queue information if the printer queue names are modified.
    o The powering up and validation of network connectivity.
    o The running of the Department's printer script file in order to establish printer connectivity and the printing of a test page.
    o The reconnection of fax machines, to include the validation of connectivity and the correct number assignment after re-patching the number located on the patch panels' current port to a port in the new space.
    o The re-programming of the fax machines with new numbers, if required.
    o The re-labeling of the fax machines with the new IT Asset Move Validation Worksheet numbers, if required.
    o The validation of ED equipment via the ED barcodes and the IT Asset Move Validation worksheet that will be created for this move.
    o The posting of the "Welcome to Your New Office" sheet on each monitor, which has been enclosed as Attachment C.

Deliverable: All IT equipment shall be reconnected, tested for functionality, inventoried, which shall be validated and signed off of the relocation tracking worksheet that will be provided by Project Manager.

- **Post Move Support** Beginning the day after the Reconnect Phase has been completed the Contractor shall provide Post Move support in the form of Tier II and/or IMAC Technicians for no less than two (2) days. In so doing, the technician support shall act as IMAC floorwalkers to assist employees with problems that are the result of the move. At a minimum, the Contractor shall be required to provide the following Post Move support:

    o Assistance to those employees experiencing login/connectivity difficulties/problems.
    o As requested, the repositioning any equipment

Deliverables: Post Move support labor only.

- **Network Technical Support**

  The required switches, patch cables, and workstation terminations will be installed, certified and tested as required by industry standards.

  Deliverable: Labor

Assumptions

- All electrical requirements will be the responsibility of the FSA. Requirements definition will be arrived by consensus with CSC and CIO engineering.

- The scope reflects a 127-employee move calculation. Contractor will physically move and install the entire employee IT workstation equipment for the setup of the workstation environment (CPU, Monitors, Printers, Fax, other associated Peripherals)

- Existing Category 5e Network Infrastructure will remain in place. That is, the current drops in the Lower Level and First floor offices at UCP are currently routed to the existing Lower Level Wire Closet. No rerouting of cables will be necessary unless the drops exceed the 300-foot device-to-device ethernet limit. If drops are replaced they will follow the industry best practices that are currently employed by the Department – LAN drops routed to secondary wiring closet on same floor as the service drop. All industry standards for Category 5e remain in effect.

- Where certification compliance for Category 5e is met, no new cable will be installed. The existing CAT5E cable will remain in place.

- The scope includes the installation of the required switches in the basement level secondary wiring closet, patch cables, workstation terminations, and re-certification. The switches and patch cables are to be provided by the Government. If additonal patch cable is required, CSC shall submit an ODC request.

- Drop terminations and cable routing are to be inspected by the Government in advance of the scheduled move phase.

- Existing Network Infrastructure will remain in place.

- This move will not require new cubicles or the reformatting of the workstations.

- FSA will be responsible for the move of their own lab servers and associated devices. This equipment is not part of the Work Request. The contractor will not be responsible for the disconnection and reconnection of this server. Further, the

resources and staffing plan for this effort are not equipped to perform the disconnection and re-connection of any of the required servers and/or infrastructure communication equipment.

- OCIO is not responsible for the repair of any equipment damaged or otherwise altered during the physical move under this effort. Such repairs (minor in nature) will fall under normal Help Desk policy and procedures for damage equipment.

"Welcome to Your New Office" Screen Shot

Welcome to your new office!

As part of the quality assurance check, technicians checked each desktop to verify connectivity. As a result, the logon id and domain may be that of the technician performing the QA check.

When you log on to your computer, please change your log on information to:

User name: (INPUT USER NAME)

Password: ********(Enter your password)

Domain: ED

If you encounter any problems, please do not hesitate to contact Ed Customer Service, 202-708-HELP (4357), Option 2.