

**Sample Performance Based Requirement Template for use with Task Orders**

PERFORMANCE REQUIREMENT	PERFORMANCE STANDARD	METHOD OF MEASUREMENT	PERFORMANCE METRICS	PERFORMANCE INCENTIVES	TASK ORDER LINKAGE REFERENCE
<p><b>Task __A__</b></p> <p>Provide an efficient and fully staffed Help Desk from 7:00AM to 5:00PM Monday through Friday</p>	<p>Staffing &amp; efficiency shall be maintained at acceptable levels at all times to assure prompt and courteous service and critical support to the user community despite fluctuating workloads and/or any peaks and valleys in the number of transactions handled.</p>	<p>To measure the efficiency of Help Desk operators, the utilized Help Desk software shall permit monitoring of the time between initial ring and call pickup.</p>	<p>All incoming calls to the Help Desk shall be answered on or before the fifth ring 97% of the time.</p>	<p>For each month when performance metrics are met or exceeded, a bonus of <u>5</u>% of the monthly payment shall be placed into a 'pool'.</p> <p>For each month when performance metrics are not met, a deduction of <u>10</u>% of the monthly payment shall be recorded into this same 'pool'.</p> <p>The Government will pay the Contractor all amounts accumulated into the 'pool' on a quarterly basis.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>
<p><b>Task __B__</b></p> <p>Provide timely response to all service calls for software related support.</p>	<p>Response time standards will be included in each task order.</p>	<p>Monthly reviews of Contractor logbooks or of Help Desk software generated documentation for service calls to document response times will be performed by <b>(insert name of appropriate CDC branch/title)</b>.</p>	<p>Documented response times shall meet or exceed established standards for 95% of all service calls.</p> <p>For any month that documented response times fall below standards for 92.5% of all service calls or for any two consecutive months when response times fall below standards for 95% of all service calls, the Contractor shall investigate and report on reasons and corrective actions taken to prevent re-occurrence.</p>	<p>For each month where the response time standards are met or exceeded for 97.5% of all service calls, a bonus of <u>5</u>% of the monthly payment shall be placed into a 'pool'.</p> <p>For each month where response times fall below standards for 92.5% of all service calls, a deduction of <u>10</u>% of the monthly payment shall be recorded into this same 'pool'.</p> <p>The Government will pay the Contractor all amounts accumulated into the 'pool' on a quarterly basis.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>Task __C__</b></p> <p>Provide timely resolution for all problems identified during service calls for all software related support.</p>	<p>Acceptable time standards for the satisfactory resolution of identified problems will be included in each task order.</p>	<p>Monthly reviews of Contractor logbooks or of Help Desk software generated documentation for service calls to document response times will be performed by <b>(insert name of appropriate CDC branch/title)</b>.</p>	<p>Documented problem resolution times shall meet or exceed established standards for 95% of all service calls.</p> <p>For any month the problem resolution times fall below standards for 92.5% of all service calls or for any two consecutive months when problem resolution times fall below standards for 95% of all service calls, the Contractor shall investigate and report on reasons and corrective actions taken to prevent re-occurrence.</p>	<p>For each month where the resolution time standards are met or exceeded for 97.5% of all service calls, a bonus of <u>5</u>% of the monthly payment shall be placed into a 'pool'.</p> <p>For each month where resolution times fall below standards for 92.5% of all service calls, a deduction of <u>10</u>% of the monthly payment shall be recorded into this same 'pool'.</p> <p>The Government will pay the Contractor all amounts accumulated into the 'pool' on a quarterly basis.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>Task __D__</b></p> <p>Assure a very high degree of customer satisfaction with all Help Desk and service support activities.</p>	<p>A minimum of 90% of the surveyed customer base must be satisfied with the overall level of service provided.</p>	<p>The Contractor shall either develop or propose a COTS automated customer satisfaction tool. Before the tool is implemented, CDC shall approve in writing the software proposed and the output format.</p> <p>Project Officers shall conduct a monthly review of output reports generated by the survey tool.</p>	<p>No deviation to the set performance standard is acceptable because of the critical nature of this item.</p> <p>For any month that the survey shows overall customer satisfaction results below 90%, the Contractor shall investigate and report on reasons and corrective actions taken to prevent re-occurrence.</p>	<p>For each month when customer satisfaction results exceed 95%, a bonus of _5_% of the monthly payment shall be placed into a ‘pool’.</p> <p>For each month when customer satisfaction results are less than 85%, a deduction of _10_% of the monthly payment shall be recorded into this same ‘pool’.</p> <p>The Government will pay the Contractor all amounts accumulated into the ‘pool’ on a quarterly basis.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>Task __E__</b></p> <p>Contractor to exert best efforts at all times to fill any contract vacancies in a timely manner with qualified staff.</p>	<p>An acceptable allotted time for filling each required position shall be specified in each individual task order. Any vacancy that remains open for more than the specified allotted time after the start of work shall be deemed a risk to contract performance.</p> <p>Similarly, staffing replacements for any in progress work shall be made within the same specified time frames for each position.</p>	<p>Technical Monitors shall periodically review staffing as an ongoing part of their task order oversight responsibilities. If staffing concerns on any individual task order threaten to jeopardize work performance, they shall promptly report their findings to the Project Officers.</p> <p>Project Officers shall monitor Contractor’s staffing via monthly reports containing complete employee listings.</p>	<p>No deviation to the set performance standard is acceptable because of the critical nature of this item.</p> <p>The Contractor shall specifically address, in each monthly report, actions being taken to rectify any staffing vacancies extending beyond the specified allotted time frames.</p>	<p>Both positive and negative performance will be documented in past performance reports as appropriate.</p> <p>In addition, an upward adjustment shall be made to the task order fee for any vacancy filled in less than the allotted time. A negative adjustment shall be made to the task order fee for any vacancy requiring longer than the allotted time to fill. In both cases, the adjustment shall be calculated as the earned daily fee times the number of days either less than or beyond the specified allotted time.</p> <p>[The earned daily fee shall be calculated as the total negotiated task order fee divided by the total number of hours in the task order with that result then multiplied by eight (8) hours per day.]</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>Task __F__</b></p> <p>Provide timely and efficient Data Entry Services</p>	<p>The performance standards for data entry production and accuracy rates shall be set forth in individual task orders.</p>	<p>Assigned CDC Technical Monitors shall track data entry production and accuracy rates and shall report results for Contractor performance to the Project Officer on a monthly basis.</p>	<p>Established production and accuracy rates shall be met for 95% of the overall volume of data entry work performed during the month.</p> <p>This performance metric for the overall volume of data entry work shall not supercede any specific requirements for production rates or accuracy that may be contained in individual task orders.</p>	<p>For all months where standards are met or exceeded on 97.5% of all work performed, a bonus of _5_% of the monthly payment shall be placed into a ‘pool’.</p> <p>For all months where standards are not met or exceeded on 92.5% of all work performed, a deduction of _10_% of the monthly payment shall be recorded into this same ‘pool’.</p> <p>The Government will pay the Contractor all amounts accumulated into the ‘pool’ on a quarterly basis</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>Task __G__</b></p> <p>Create a storage library of current CDC IT policies; procedures; configurations for hardware, software, LAN/MAN/WAN; and all software documentation and licenses.</p>	<p>Create the storage library within 30 business days of Task Order issuance and maintain throughout the life of the contract.</p>	<p>Random monitoring by the PO or his/her designee thereafter for current status.</p>	<p>Deviation shall be permitted only with the explicit consent of the PO or his/her designee.</p>	<p>Both positive and negative performance will be documented in past performance reports as appropriate.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>
<p><b>Task __H__</b></p> <p>Perform asset management tracking via electronic database.</p> <p><b>[COMMENT: In order for this requirement to be implemented, an initial CDC asset inventory must first be prepared, either from accurate CDC records or by physical inventory performed by the Contractor.]</b></p>	<p>Develop, implement and maintain an electronic database to track all inventoried CDC assets. Database shall be kept current with at least weekly updates and shall be available for online viewing and audit by those persons that given written 'read only' authorization by the PO or his/her designee.</p>	<p>Random monitoring of implementation and database maintenance by the PO or by his/her designee.</p>	<p>No Deviation</p>	<p>Both positive and negative performance will be documented in past performance reports as appropriate.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>Task __I__</b></p> <p>Perform IT Architecture change tracking via electronic database</p> <p><b>[COMMENT: In order for this requirement to be implemented, an initial baseline IT Architecture must first be prepared, and documented by the Contractor to verify current configurations for all hardware and software.]</b></p>	<p>Develop, implement and maintain an electronic database to track all changes to the baseline IT Architecture. Database shall be kept current with at least weekly updates and shall be available for viewing and audit by those persons that given written 'read only' authorization by the PO or his/her designee.</p>	<p>Random monitoring by the PO or his/her designee thereafter for current status.</p>	<p>No Deviation</p> <p>NO CHANGES to the approved IT architecture may be made to equipment, hardware/software without the express written approval of the PO or his/her designee.</p>	<p>Both positive and negative performance will be documented in past performance reports as appropriate.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

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<p><b>TASK __J__</b></p> <p>Verify that all contractor developed software conforms to CDC specified standards and functional requirements.</p> <p><b>[COMMENT:</b> Applicable for use with Task Orders issued to the Contractor for 'end result' deliverables for software development.]</p>	<p>Functionality of the software to meet required systems architecture and processing capabilities as defined in each issued Task Order.</p> <p><b>[COMMENT:</b> Other requirements such as compatibility of interfaces, delivery dates, documentation, etc. must be addressed in each individual Task Order.]</p>	<p>Prior to delivery of new software, the Contractor shall be required to demonstrate the operational capability of the system software.</p> <p>For new releases of existing software, Independent verification and validation (IV&amp;V) shall be performed as specified in the Task Order to assure that all previous functionality is maintained.</p> <p><b>[COMMENT:</b> IV&amp;V may either be by CDC or by another independent Contractor.]</p> <p>Customer satisfaction as measured through limited validated customer complaints, feedback, and surveys.</p>	<p>All requirements mandated by law or regulation must be 100% compliant.</p> <p><b>[COMMENT:</b> Functionality defined in the requirements must be prioritized and tolerances for deviation assigned for each component.]</p> <p>__%__ of operational capability is acceptable, as determined and specified in each Task Order.</p> <p><b>[COMMENT:</b> % Value to be determined by CDC requirements, on a case-by-case basis.]</p>	<p>100% payment for meeting all mandated requirements. Nonconformance with minimum specified requirements is unacceptable.</p> <p>Payment is contingent on amount or degree of functionality delivered, according to priority of each specified function. An appropriate reduction in payment may be made for any component not meeting predefined standards.</p> <p><b>[COMMENT:</b> Priority values to be determined by CDC requirements on a case-by-case basis. Percentage of payment for each component shall be predetermined and specified in each individual Task Order.</p>	<p>To be identified at the time task order is issued. This may also include references to contract provisions.</p>

**Note:**

Bonus and deduction percentages shown in the Performance Incentives column are only shown as examples. Percentages used should be negotiated with the Contractor on a case by case basis as each Task Order is issued. Because incentives, both positive and negative, are an inducement for Contractor performance, it is necessary to balance value to the Government and meaningful incentives to the Contractor. Appropriate percentages should therefore be carefully evaluated considering the benefit derived or the negative impacts caused by Contractor performance outside specified parameters. For Task Orders of long duration, it may be useful to establish 'performance periods' and to allow re-negotiation of incentive percentages at the end of each performance period.