MIGRATION PLANNING GUIDANCE ATTACHMENT G

EVALUATION TEMPLATES

UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

Working for America

May 23, 2008
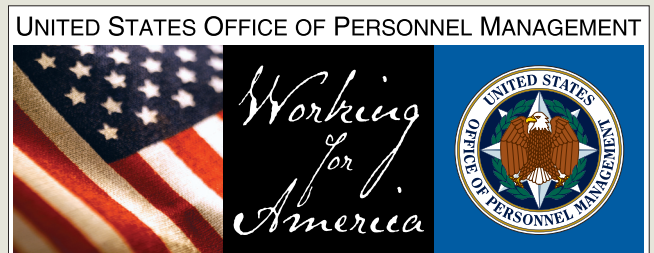
HRLOB Migration Planning Guidance: <mark><< OFFEROR >></mark> – Tech Evaluation Team

Team Member (Print name): _____   Signature _____   Date _____

Evaluation Criteria Matrix - Technical Capability and Approach Evaluation   [Date: Month/Year]

Overview

Offeror proposals will be evaluated in six overall factors
- Technical Capability and Approach
- Management Capability and Approach
- Functional Capability and Approach
- Corporate Capability and Past Performance
- Risk
- Price

The Price evaluation will be performed separately by the agency and is not covered by these evaluation matrices. The Risk evaluation will be performed for each of the first four (main) factors mentioned above using a separate evaluation matrix. The four main evaluation factors are broken down into evaluation sub-factors and elements (if applicable) for detailed analysis as appropriate. The following example illustrates this breakdown

Evaluation Factor: Technical Capability and Approach
      Evaluation Sub-factor: Architecture and Integration
            Evaluation Element: Integration and Connectivity

This evaluation matrix supports the factor of Technical Capability and Approach and is divided into evaluation sub-factors and elements. Evaluators should take the following approach to evaluating Offeror responses using this matrix

- Evaluate the technical proposal response at the element level. See "How to complete the Technical Evaluation Matrix" below for additional instructions
- Determine a proposal evaluation rating for each sub-factor based on the sub-factor criteria. Evaluators should consider their element ratings and any other available information when rating the sub-factors. Evaluators must provide comments to substantiate their sub-factor ratings, particularly where the sub-factor rating differs markedly from the element ratings
- Input the Operational Capability Demonstration (OCD) rating for each element and sub-factor where applicable in the matrix below from the completed OCD Evaluation Form (see separate OCD Evaluation Form for instructions)
- Input the Final Rating in the matrix below based on the quality of the Offeror's proposal and their performance at the OCD (if applicable)

NOTE: Certain elements may not require evaluation in certain circumstances. For example, some elements may not be demonstrated as part of an OCD.

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Team Primary Responsibilities Areas

There are a total of sixteen sub-factors that make up the evaluation criteria for the four main evaluation factors. The primary responsibility for these areas is as follows:

Team	Sub-factors	Pages
Technical Capability and Approach	• Architecture and Integration • Operational and Federal Security Standards • Hosting • Deployment Approach • Service and Support • Quality Control	Evaluation Matrix – Technical (Tech Team) p. 5-31 Evaluation Matrix – Risk (Tech Team) p. 3-7
Management Capability and Approach	• Project Management Approach • Earned Value Management • Compliance & Management Constraints	Evaluation Matrix – Mgmt Cap (Mgmt Cap Team) p. 5-19 Evaluation Matrix – Risk (Mgmt Cap Team) p. 3-4
Functional Capability and Approach	• Features and Functionality • Change Management • Training • Capability of the Solution	Evaluation Matrix – Functional (Func Team) p. 5-18 Evaluation Matrix – Risk (Func Team) p. 3-5
Corporate Capability and Past Performance	• Provider Profile & Corporate Capability • Past Performance • Client References	Evaluation Matrix – Corp Cap p. 6-19 Evaluation Matrix – Risk (Corp Cap) p. 3-5

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How to complete the Technical Evaluation Matrix

Each proposal should be evaluated based on its own merits. In determining a proposal rating, evaluators should examine the Offeror's proposal and rate the Offeror's proposed solution based on the criteria listed in the matrix below in the column labeled "Element/Proposal Evaluation Criteria." Evaluators should circle their color rating in the column labeled "Proposal Review Rating" and input proposal strengths and weaknesses in the adjacent columns. The column labeled "OCD Rating" should be completed by evaluators <u>after</u> attending the Offeror OCD and completing the OCD Evaluation Form (a separate document). Evaluators should base their final rating for the Offeror on both their rating of the written proposal and the OCD, and should use the three-color evaluation scale listed in Table 1 below. Evaluators should circle the appropriate final rating in the column labeled "Final Rating" in the matrix below, and input supporting comments in the column labeled "Final Rating Comments":

Table 1. Final Rating Scale

Color	Final Rating	Definition
GREEN	Acceptable	Offeror proposes a security and technical approach or solution that meets most of the prescribed security and technical constraints.
YELLOW	Needs Improvement	Offeror proposes a security and technical approach or solution that meets many of the prescribed security and technical constraints. Offeror's approach or solution will need improvement prior to migration.
RED	Unacceptable	Offeror proposes a security and technical approach or solution that is unacceptable.

For technical elements rated anything other than a Green, evaluators must provide appropriate explanatory comments in the "Proposal Weaknesses" or the "Final Rating Comments" column of the Evaluation Matrix. The evaluator's comments should reflect the rationale for assigning the particular rating. Additionally, evaluators are encouraged to note relevant strengths and weaknesses of the Offeror's proposal that were important in assigning the selected rating. When assigning a Yellow or Orange rating, the evaluator must specify specific deficiencies to facilitate follow-up with the Offeror.

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The following table defines each column in the Evaluation Matrix:

Column	Definition
Sub-factor	Top level evaluation criteria upon which selection of Offeror will be based.
Element / Proposal Evaluation Criteria	Provides guidance for determining evaluation ratings for proposal elements.
Proposal Review Rating	The evaluation rating (color) assigned to each sub-factor and element as a result of the proposal review.
Proposal Strengths	Aspects of the proposal that clearly and quantifiably exceed the standard for the sub-factor or element.
Proposal Weaknesses	Aspects of the proposal that clearly and quantifiably fail to meet the standard for the sub-factor or element.
OCD Rating	The OCD evaluation rating (color) assigned to each sub-factor and element from the completed OCD Evaluation Form.
Final Rating	Final evaluation rating (color) assigned to each sub-factor and element based on the quality of the Offeror's proposal and their performance at the OCD.
Final Rating Comments	Rationale to support final rating.

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
TECHNICAL CAPABILITY							
	1. ARCHITECTURE AND INTEGRATION **GREEN** – Offeror provides an acceptable architecture and integration approach within the mainstream of technology, hosted in good or world-class facilities and has a proven track record of providing quality service to other customers of the Offeror. Offeror currently meets a sufficient number of security and technical constraints for HR LOB SSCs to fulfill Federal agency needs. **YELLOW** – Offeror proposes an architecture and integration approach or solution that meets many of the prescribed security and technical constraints. Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient architecture and integration information. Additional information is needed from the Offeror to fully assess this item **RED** – Offeror's architecture and integration approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**	**GREEN** **YELLOW** **RED**	
Architecture and Integration	**c.2.B.1 Solution Architecture** RFP p. ## **GREEN** – The Offeror provides an acceptable description of their proposed SSC-specific architecture and how it supports the HR LOB Enterprise Architecture. This description shall detail the complete solution architecture and review how the proposed architecture is compliant with objectives, web services, existing agency data standards, and illustrate the interrelationships with the HR Line of Business (LOB) Enterprise Architecture. The Offeror's description includes an explanation of the Offeror's proposed approach to designing and developing the proposed architecture. This description of the proposed solution includes the planned use of Commercial off the Shelf (COTS) solutions, COTS "bolt-	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	ons" and Enterprise Application Integration (EAI) technology, the level of automation integrated into the solution, the level of scalability, and an explanation of how COTS "bolt-ons" and EAI technology integrate with the proposed architecture, and other Federal government HR systems services. In addition, the Offeror describes their approach for supporting technology evolution and how new technologies can be incorporated into the proposed architecture. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Architecture and Integration	**c.2.B.2 Integration and Connectivity** RFP p. ## **GREEN** – The Offeror has adequately described how the proposed technology will integrate with existing Federal and agency systems and any Help Desk as needed to support the agency requirements, including: any planned efforts to interface with other Human Resources eGovernment (e-Gov) initiatives; other HR point solution providers; planned single sign-on, synchronization; integration methodology; identity management; and how their solution can integrate with the agency's payroll provider to accommodate agency customers who not be receiving payroll services from the Offeror. The Offeror identifies past HR Information Technology (IT) and administration solution implementations and describes the lessons learned from those implementations. The proposed integration and connectivity approach is acceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.						
Architecture and Integration	**c.2.B.3 Data Management** RFP p. ## GREEN – The Offeror provides an acceptable approach regarding data integrity and authentication, overall data security data storage requirements, and data synchronization between other systems. As part of their response, the Offeror acknowledges and describes their system solution's ability to account for and manage agency data needs as described in the HR LOB Data Model v.1, and the Guide to Personnel Data Standards. The Offeror should describe how their current data dictionary aligns with the HR LOB data model. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		
Architecture and Integration	**c.2.B.4 Interfaces** RFP p. ## GREEN – The Offeror adequately describes its current interfaces and its flexibility for creating customized interfaces, and it is acceptable. The Offeror clearly specifies the boundary at which it assumes responsibility for data, how this boundary is managed, and what tools the agency will require to	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	transmit data to the Offeror's solution. The Offeror also discusses its level of experience in developing and supporting interfaces to migrate data from existing legacy systems. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						

Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	2. OPERATIONAL AND FEDERAL SECURITY STANDARDS **GREEN** – The Offeror's solution will provide an acceptable level of data protection and IT security commensurate with or greater than Federal government's legal requirements and needs, and Offeror currently meets a sufficient number of operational, security and other technical constraints for HR LOB Shared Service Centers (SSCs) to fulfill agency needs. The security procedures provide reassurance that the Offeror understands the importance the Federal government places on maintaining the privacy of program data. **YELLOW** – Offeror proposes a Federal security standards approach or solution that meets many of the prescribed operational, security and technical constraints. Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information regarding Operational and Federal security standards. Additional information is needed from the Offeror to fully assess this item. **RED** – The Offeror's Operational and Federal security standards approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**	**GREEN** **YELLOW** **RED**	

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.1 Personnel Security** RFP p. ## **GREEN** – The Offeror adequately describes an acceptable approach for personnel security and agrees to perform personnel screening as part of granting access to the computer systems. In accordance to Appendix III to OMB Circular No. A-130, the Offeror will review each position and assign a level of risk. The level of risk should have a type of screening appropriate to the personnel who are required to perform each position. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.2 Physical Environment Protection** RFP p. ## **GREEN** – The proposed solution for providing physical security for computer systems to prevent theft, tampering, and destruction is acceptable. In addition, the Offeror has an acceptable plan for protecting the information systems against environment hazards. The Offeror describes the mechanisms in place for physical and environment protection as prescribed by National Institute of Standards and Technology (NIST) 800-53. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	RED – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.3 Continuity of Operations Planning and Contingency Planning** RFP p. ## **GREEN** – The Offeror fully describes how the proposed solution complies with the guidance contained in the Federal Preparedness Circular 65, and the explanation is acceptable. If a government agency categorizes the HR LOB SSC solution as essential, the Offeror must be able to have the HR LOB SSC solution operational within 12 hours of COOP activation. The Offeror adequately describes an acceptable approach for contingency planning as required by Appendix III to OMB Circular No. A-130, NIST 800-53 and NIST 800-34. At a minimum, this approach should discuss the planning, testing and training the contingency plan, back-up operations, alternate storage and processing sites, alternate telecommunication services. The Offeror also adequately describes the scope and results of the latest disaster recovery exercise, any deficiencies and how those deficiencies are being resolved. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and	**A2.3.4 Configuration Management** RFP p. ## **GREEN** – The Offeror has formal configuration management and change control processes around their hardware,	**GREEN** **YELLOW** **ORANGE**			**GREEN** **YELLOW** **RED**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
Other Technical Require-ments c.2.b.16)	software, and firmware components, and the processes acceptable. The Offeror describes their approach for configuration management and configuration control procedures. At a minimum, the approach is acceptable and adequately describes how the Offeror: (1) establishes and maintains baseline configurations on hardware, software, firmware and documentation for the HR LOB SSC solution and (2) manages change through the development lifecycle. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	RED			NR		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.5 System Maintenance** RFP p. ## GREEN – The Offeror provides a description of their approach for performing system maintenance as required by NIST 800-53. At a minimum, this approach is acceptable and adequately describes: (1) how the Offeror performs periodic maintenance on information systems and what type of maintenance logs are produced; and (2) provides effective controls on the tools, techniques, mechanisms, and personnel used to conduct information system maintenance. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.6 System Information and Integration** RFP p. ## **GREEN** – The Offeror must have implemented controls that ensure the integrity of the information systems. The Offeror adequately describes their approach to ensuring system integrity as required by NIST 800-53. At a minimum, the approach is acceptable and adequately describes how the Offeror: identifies, reports, and corrects information and information system flaws; protects the system from malicious code; and monitors information system security alerts and advisories and take appropriate actions. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.7 Media Protection** RFP p. ## **GREEN** – The Offeror must provide media protection on the information systems. The Offeror adequately describes their approach to providing media protection as identified in NIST 800-53. At a minimum, the approach is acceptable and adequately describes the mechanisms in place for protecting information system media, limiting access to information; and sanitizing the information system media before disposal. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.8 Incident Response** RFP p. ## **GREEN** – The Offeror must have an acceptable formal incident response process. The Offeror adequately describes how it adheres to OMB's Circular No. A-130, Appendix III and FISMA. In addition, the Offeror adequately describes their approach for responding to incidents as defined in the NIST 800-53 and 800-61. At a minimum, the approach is acceptable and adequately describes the plans to handle incidents (e.g., the reporting, tracking, documenting, monitoring and notification processes). **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.3.9 Security Awareness and Training** RFP p. ## **GREEN** – The Offeror must ensure that the Offeror's and subcontractor's personnel involved in the management, use and operation of HR LOB SSC solution have received training appropriate to their assignment in accordance with NIST 800-53, NIST SP 800-50, and Appendix III to OMB Circular No. A-130. The Offeror provides an adequate description of their security awareness training program, and the training program is acceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require- ments c.2.b.16)	A2.4.1 Identification and Authentication RFP p. ## GREEN – The Offeror's HR LOB SSC solution must provide identification and authentication controls. The Offeror adequately describes the mechanisms used in their HR LOB SSC solution for identification and authentication controls, and these mechanisms meet NIST 800-53 and NIST 800-63 standards. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		
Operational and Federal Security Standards (Operational, Security and Other Technical Require- ments c.2.b.16)	A2.4.2 Access Control RFP p. ## GREEN – The Offeror's solution must provide access control. The Offeror adequately describes how their HR LOB SSC solution performs access control and ensures separation of duty for users, devices, or process invoked on behalf of a user, and this approach is acceptable. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE– Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.4.3 Audit and Accountability** RFP p. ## **GREEN** – The Offeror's HR LOB SSC solution must provide audit and accountability controls. The Offeror adequately describes the granularity of audit records and how its HR LOB SSC solution meets NIST 800-53 audit and accountability controls. The approach is acceptable and indicates whether the Offeror (or Federal Government) can monitor, analyze, investigate and report the unlawful, unauthorized, or inappropriate information system activity and whether the HR LOB SSC solution generates records that can be uniquely traced to originating users so that they can be held accountable for their actions. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.4.4 System and Communication Protection** RFP p. ## **GREEN** –The Offeror's HR LOB SSC solution must provide system and communication protection as defined by NIST 800-53. The Offeror adequately describes how their solution provides application partitioning, boundary protection, and transmission integrity, and the method is acceptable. In addition, the Offeror successfully identifies if mobile	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	code is used and mobile code safeguards are used (i.e., preventing unauthorized access, manipulation of resources, and malicious actions using user's identity, etc.). **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.4.4.1 Use of Mobile Code** RFP p. ## **GREEN** – The Offeror agrees to abide the Department of Defense (DOD) policy on the use of mobile code. The Offeror should review NIST SP800-28, NIST SP800-44, and NIST SP800-46 for additional guidance for mobile code. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.5.1 Privacy Protection** RFP p. ## **GREEN** – The proposed solution meets or exceeds the requirements of the Privacy Act (FPA) of 1974, Additionally, for the purposes of the 5 U.S.C. 552a(i) (US Code for records maintained on individuals) the Offeror and its employees agrees to be held to the same standards as Federal employees. At a minimum, the Offeror agrees to create and update the Privacy Impact Assessment (PIA) for HR LOB SSC	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	systems that gather personal information. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.5.2 Information Technology Accessibility Standards** RFP p. ## **GREEN** – The Offeror has adequately indicated whether each product or service is compliant or non-compliant with the accessibility standards at 36 CFR 1194. Further, the proposal indicates where full details of compliance can be found through a voluntary product accessibility template (VPAT) or other means (e.g., vendor's website or other exact locations). **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.5.3 Section 508 Requirements** RFP p. ## **GREEN** – The Offeror has indicated that it meets the applicable accessibility standards at 36 CFR 1194. 36 CFR 1194 implements Section 508 of the Rehabilitation Act of 1973. The Offeror has adequately described how it abides by this law and ensures that all information created or used under this proposal conforms to the Section 508 requirements. The Offeror also ensures that all web sites and applications	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	which are part of the HR LOB SSC solution are compliant with Section 508 standards. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.5.4 IV&V Testing and Acceptance** RFP p. ## **GREEN** – The Offeror acknowledges that the Federal Government reserves the right to subject the Offeror's services to Independent Validation and Verification (IV&V) and/or User Acceptance testing. If any defects are identified, the Offeror agrees to remediate the defect and the Federal government has the right to retest as required before the Federal government accepts the software. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Operational and Federal Security Standards (Operational, Security and Other Technical Require-ments c.2.b.16)	**A2.5.5 Data Storage Management** RFP p. ## **GREEN** – The Offeror adequately describes its approach for adhering to data storage requirements for human resource (HR) and other non-payroll related records as defined in the National Archives and Records Administration (NARA) General Records Schedule (GRS) 1, which is published at http://www.archives.gov/records-	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (From OCD Evaluation Form)	Final Rating (see Table 1) (Circle One)	Final Rating Comments
	mgmt/ardor/grs01.html, and for payroll and pay administration records as defined in the NARA GRS 2, which is published at http://www.archives.gov/records-mgmt/ardor/grs02.html, and proposed approach is acceptable. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						

HRLOB Migration Planning Guidance: << OFFEROR >> – Tech Evaluation Team

Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	3. HOSTING **GREEN** – Offeror provides an acceptable hosting approach and solution, and Offeror currently meets a sufficient number of security and technical constraints for its SSC to fulfill Agency needs. **YELLOW** – Offeror proposes a hosting approach or solution that meets many of the prescribed security and technical constraints. Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient hosting information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's hosting approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**	**GREEN** **YELLOW** **RED**	
Hosting	**c.2.B.12 Hosting Support** RFP p. ## **GREEN** – The Offeror acknowledges that it will be responsible for ensuring that systems are accessible to all end-users and Agency personnel and remain fully operational 24/7 or during time periods defined in the Service Level Agreement. The Offeror adequately describes their approach to system maintenance, version upgrades and problem diagnosis and resolution from the perspective of periods of time that access to systems may be temporarily suspended, and provide average system availability/uptime, and the proposed approach is acceptable. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	4. DEPLOYMENT APPROACH **GREEN** – Offeror provides an acceptable deployment approach and solution, and Offeror currently meets a sufficient number of security and technical constraints for HR LOB. **YELLOW** – Offeror proposes a deployment approach or solution that meets many of the prescribed security and technical constraints. Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's deployment approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**	**GREEN** **YELLOW** **RED**	
Deployment Approach	**c.2.B.6 Hardware and System Software Installation, Configuration and Capacity Planning** RFP p. ## **GREEN** – The Offeror adequately identifies its strategy and approach for establishing an Agency support environment at a SSC. The Offeror's approach includes acquisitions and the installation of the necessary hardware, software, and networking equipment at the SSC (and/or the System Integrator's facility, as necessary) providing HR IT development and sustainment environments, and the proposed approach is acceptable. The Offeror adequately describes their approach for configuring all hardware, software, and networking equipment at the SSC Center (and at HR LOB and/or the System Integrator's facility, as necessary), and the proposed approach is acceptable. The Offeror describes its system capacity for processing and storage, and the formal steps it has taken to ensure that the addition of new customers will not adversely impact the system capacity for	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	processing and storage while maintaining response time for current customers. The Offeror also discusses its strategy for expanding its capacity, if needed. The Offeror identifies an acceptable solution for providing HR IT development and sustainment environments. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.						
Deployment Approach	c.2.B.8.a Synchronization of Version Upgrades RFP p. ## GREEN – The Offeror adequately describes how the HR LOB SSC proposed methodology, approach, management process, and solution identifies and mitigates potential risks and key challenge areas related to synchronization of version upgrades for HR LOB SSC increment configurations, selected COTS products, and third-party "bolt-ons/extensions". The proposed methodology, approaches and processes are acceptable. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		
Deployment Approach	c.2.B.13 Overall Transition Strategy RFP p. ## GREEN – The Offeror proposes an	GREEN YELLOW			GREEN YELLOW		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	acceptable overall transition strategy and approach and describes how their proposed production roll-out approach will ensure a timely migration while minimizing the impact to the SSC user community. Additionally, the Offeror successfully conveys how the proposed integration techniques affect the SSC program office, agency staff, users, and contractors responsible for maintenance and operation of interfacing systems. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**ORANGE** **RED**			**RED** **NR**		
Deployment Approach	**c.2.B.19 Data Migration** RFP p. ## **GREEN** – The Offeror adequately addresses the requirements that support the migration of all legacy data contained in the existing agency system installation to the Offeror's proposed solution product. The Offeror also addresses its ability to satisfy the stated requirements to migrate existing agency data into the proposed product, the schedule and pricing associated with these activities, and the technical and risk mitigation strategies described by the Offeror to address these migration requirements. The Offeror provides the following information Defines the software solution(s) being proposed. This includes all software required to operate the	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	system, in its entirety, and the vendor providing the software. • Describes the process for migrating the agency's existing data in its current state with no loss in quality. This should detail the schedule, risks, and risk mitigation methods for conducting and completing the data migration task. At a minimum, this should provide a detailed definition and description of the processes utilized to ensure that information contained in these legacy systems is fully captured and migrated to the proposed solution. • Describes all software tools, along with their associated licensing requirements and pricing, being proposed to support the data migration effort. If the Offeror has a requirement for the agency to purchase additional software that would enable the data migration activities proposed, that must be indicated in this description of the Offeror's process. • Describes the process and methodology for testing and verifying the accuracy of the data migration process. • Describes the quality control milestones used to ensure an adequate measurement of cost and task performance during the data migration effort. It is expected that the agency will use these milestones to monitor task performance. • Describes their abilities to migrate historical data.						

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	YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.						
	5. SERVICE AND SUPPORT GREEN – Offeror provides an acceptable service and support approach and solution, and Offeror currently meets a sufficient number of security and technical constraints for HR LOB SSCs to fulfill Federal agency needs. YELLOW – Offeror proposes a service and support approach or solution that meets many of the prescribed security and technical constraints. Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient service and support information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's service and support approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR	GREEN YELLOW RED	
Service and Support	**c.2.B.7 Licenses** RFP p. ## GREEN – The Offeror adequately describes their approach to managing any software licenses, and all other licenses or leases that may become necessary to acquire, maintain, and discontinue over the lifecycle of the project, and the approach is acceptable. YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		
Service and	**c.2.B.8 Release/Upgrade Strategy**	GREEN			GREEN		

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Support	RFP p. ## GREEN – The Offeror adequately describes: an acceptable approach and strategy for maintaining and sustaining a qualified solution, to include maintaining integration and interoperability with the COTS products and version upgrades that comprise their solution for the agency, and how it will perform and finance technology refresh on its current system. The description also includes a review of the management approach for: version upgrades; minimizing changes to configurations, "bolt-ons" and extensions; life cycle management of custom extensions and other system "bolt-ons"; the logistics of incorporating changes into production and on-going and new implementation and configuration activities; and minimizing the impact to users of the HR LOB SSC solution due to upgrades. The Offeror also adequately describes how government-wide information security rules have been incorporated into an acceptable technical approach and methodology, including "workarounds". YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	YELLOW ORANGE RED			YELLOW RED NR		
Service and Support	**c.2.B.10 Service Level Agreements** RFP p. ## GREEN – Offeror adequately describes how their specific practices and processes relate to completing reports, interfaces,	GREEN YELLOW ORANGE			GREEN YELLOW RED		

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	conversions, and extensions tasks, and, how these practices and processes minimize deficiencies and correction time during testing. The Offeror describes an agency specific acceptable approach and methodology for performance standards development and measurement within a Service Level Agreement (SLA), updating the SLA, and for addressing deficiencies in performance per the SLA reported performance deficiencies. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**RED**			**NR**		
Service and Support	**c.2.B.11 Help Desk Support** RFP p. ## **GREEN** – The Offeror adequately describes an acceptable approach for providing Help Desk services during deployment and sustainment. The Offeror proposes any additional metrics that can be used to measure quality (e.g., levels of support, hours of operations, and integration with development and sustainment activities). **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
	6. QUALITY CONTROL **GREEN** – Offeror provides an acceptable quality control approach and solution, and Offeror currently meets a	**GREEN** **YELLOW**			**GREEN** **YELLOW**	**GREEN** **YELLOW**	

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Sub-factor	Element / Proposal Evaluation Criteria	Proposal Review Rating (Circle One)	Proposal Strengths	Proposal Weaknesses	OCD Rating (Circle One)	Final Rating (see Table 1 Final Rating Scale) (Circle One)	Overall Comments (to support final rating)
	sufficient number of security and technical constraints for its SSC to fulfill Agency needs. YELLOW – Offeror proposes a quality control approach or solution that meets many of the prescribed security and technical constraints. Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient quality control information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's quality control approach or solution is unacceptable.	ORANGE RED			RED NR	RED	
Quality Control	c.2.B.5 Quality Control Testing RFP p. ## GREEN – The Offeror adequately describes an acceptable approach for: • executing testing strategies at the SSC • providing functional and technical support to Federal government/Agency testing (IV&V) efforts • ensuring the system solution is fully tested by the Offeror prior to the beginning of Government/Agency testing YELLOW – Offeror's approach or solution will need improvement prior to migration. ORANGE – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. RED – Offeror's proposed approach or solution is unacceptable.	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		
Quality Control	c.2.B.9 Systems Engineering (SE) RFP p. ## GREEN – The Offeror adequately describes an acceptable approach for applying a qualitative, complete, disciplined, and systematic SE process during all phases of the product design, configuration, deployment, and sustainment lifecycle, including: a detailed description of any	GREEN YELLOW ORANGE RED			GREEN YELLOW RED NR		

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	company specific practices or processes used/proposed and the impact of these practices or processes on the Offeror's ability to reduce software and middleware complexity, improve design understandability, simplify version control and configuration updating. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.						
Quality Control	**c.2.B.14 Contingency Planning** RFP p. ## **GREEN** – The Offeror adequately describes the proposed continuity of operations process (COOP) and demonstrates how it supports geographically separated locations; the production environment; fail over, recovery, and backup/restore capabilities; and alert processes based on performance metrics, and the proposed approach is acceptable. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE** – Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**GREEN** **YELLOW** **ORANGE** **RED**			**GREEN** **YELLOW** **RED** **NR**		
Quality Control	**c.2.B.15 Government Audits** RFP p. ##. **GREEN** – The Offeror adequately describes an acceptable approach for complying with the latest version of all applicable standards including but not limited to:	**GREEN** **YELLOW** **ORANGE**			**GREEN** **YELLOW** **RED**		

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	providing support for Department-wide audits, reviews, assessments, investigations; and providing support for review and qualification procedures for Federal systems in accordance with Federal government standards. **YELLOW** – Offeror's approach or solution will need improvement prior to migration. **ORANGE**– Offeror has provided insufficient information. Additional information is needed from the Offeror to fully assess this item. **RED** – Offeror's proposed approach or solution is unacceptable.	**RED**			**NR**		

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