

**United States Department of Agriculture
and
General Services Administration
IT Modernization Centers of Excellence**

**Statement of Work
for the
Business Modernization Office Support**

July 30, 2018

TABLE OF CONTENTS

1.0 General	3
2.0 Specific Requirements/Tasks	4
3.0 Delivery or Deliverables	7
4.0 Meetings	11
5.0 Required Travel	11
6.0 Government Furnished Property/Equipment/Information	12
8.0 Additional Requirements	12
9.0 Additional clauses	15

**Statement of Work (SOW)
for the
Business Modernization Office Support**

1.0 General**1.1 Background**

The mission of the United States Department of Agriculture (USDA) is to provide leadership on food, agriculture, natural resources, rural development, nutrition, and related issues based on public policy, the best available science, and effective management.

USDA has a vision to provide economic opportunity through innovation, helping rural America to thrive; to promote agriculture production that better nourishes Americans while also helping feed others throughout the world; and to preserve our Nation's natural resources through conservation, restored forests, improved watersheds, and healthy private working lands.

As part of USDA's efforts to achieve these goals, the Department partnered with the Office of American Innovation (OAI) to serve as the lighthouse agency for GSA's IT Modernization Centers of Excellence (CoE). Working as one team, USDA and the CoEs are working to modernize IT across the Department. Phase 1 was a comprehensive Department-wide assessment and planning effort. Phase 2, the implementation/execution phase, entails implementing the agreed approaches defined in Phase 1. This procurement is in support of Phase 2 of the CoE process at USDA.

A key component to the success of Phase 2 is the maturation of the CoE Program Management Office (PMO) into a Business Modernization Office (BMO). The BMO will encompass traditional PMO responsibilities, in addition to driving change and strategic alignment across the CoE Phase 2 efforts at USDA.

1.2 Objective

The objective of the CoE Business Modernization Office is to bring the CoEs together, by coordinating strategic vision and project delivery, to ensure program and stakeholder coordination, strategic alignment, organizational change management, effective decision making and risk mitigation mechanisms, and ultimately successful CoE deliveries.

The BMO will assist the CoE in ensuring sustainability of modernization efforts by positioning USDA to take over the modernization efforts from the CoE through activities, such as re-skilling, organizational design, and transition activities.

1.3 Scope of Work

The contractor must provide management support services to assist the CoE BMO and USDA OCIO in managing the CoE Phase 2 projects. Services include:

- **Program Management** services
- **CoE Program Support** services to assist in the coordination of the 5 CoE teams' Phase 2 activities and deliveries
- **Strategic Communications** services to ensure quality and consistent CoE messaging
- **Organizational Change Management** services focused on creating understanding and garnering buy-in across the enterprise on IT Modernization efforts
- **Re-skilling** services to provide opportunities for USDA OCIO staff, to enable the office to assume the roles, responsibilities, and momentum initiated by the CoE

1.4 Period of Performance

The performance period of this contract is from the effective date of this order and continuing for 12 months, with one option period of up to 12 additional months.

1.5 Place of Performance

The primary place of performance will be at Government facilities within the Washington, DC metropolitan area.

1.6 Normal Operating Hours

On-site contractor support must be available during customer agency normal operating (0800 - 1700).

2.0 Specific Requirements/Tasks

2.2 Program Management

The Contractor must designate a Program Manager (PM), a key person (see 8.2.2.1 below) who will be responsible for the performance of the CoE BMO contractor delivery team's work.

2.3 CoE Program Support Services

The Contractor must provide day-to-day support services to assist the CoE BMO in coordinating and integrating the five CoE Phase 2 implementation activities by defining and implementing program management processes, and roles and responsibilities.

2.3.1 BMO Design and Program Management Support Services

The contractor must provide Portfolio and Program Management services to assist in strengthening and scaling the BMO to meet the Phase 2 capacity needs. The contractor must:

- (1) Conduct a current state assessment of the CoE BMO to identify where new program and portfolio processes and associated documentation (workflow diagrams, standard operating procedures) are needed to strengthen the BMO
- (2) Define CoE Phase 2 program key performance measures
- (3) Provide the strategic support services necessary to ensure the sustainment of accelerated IT modernization efforts at USDA
 - (a) Ensure agile methodologies are utilized
 - (b) Provide training materials and coaching activities to build PMO/BMO capacity within USDA OCIO staff

2.3.2 Day to Day Support Activities

The contractor must provide a team of Program Managers/Analysts to provide day-to-day program support services, assisting the BMO to:

- (1) Implement and support the processes and frameworks defined in 2.3.1
- (2) Coordinate and conduct bi-weekly Program Status Reviews to provide CoE leadership insight into the health of each CoE project.
- (3) Analyze the CoE Phase 2 activities to provide Return on Investment (ROI) and cost avoidance projections

2.3.3 Coordination Activities

In addition, the contractor must provide services to assist the BMO to ensure coordination and integration among the Phase 2 deliveries and across USDA

- (1) Facilitate weekly integrated CoE team meetings, including developing agendas, methods of connecting on current efforts, and areas for collaboration; capture and track meeting minutes and actions
- (2) Work with the CoE teams to identify project dependencies and opportunities for integration to ensure holistic solutions for USDA.

2.4 Strategic communications

The Contractor must provide professional services to ensure quality and consistent messages are delivered in one clear voice for all matters related to CoE Phase 2 activities at USDA. The contractor must:

- (1) Analyze the communication needs of Phase 2 CoE efforts and develop a Communications Management Plan which outlines who needs what information, when

they need it, who is responsible for delivering it, the frequency of delivery, and medium of dissemination (i.e., email, briefing)

- (2) Provide the day-to-day support in the generation and delivery of regular and ad hoc status reports, executive level briefings, talking points, emails, and other communication materials

2.5 Organizational change management

The Contractor must provide Organizational Change Management (OCM) services to develop an organizational change management program focused holistically on the changes being introduced to the USDA enterprise by the CoE Phase 2 implementations.

- (1) Conduct a discovery into each CoE Phase 2 solution to assess and document the change impact to USDA
- (2) Develop an integrated Organizational Change Management strategy and plan focused on the future state introduced by the Phase 2 teams; in collaboration with the 5 CoE Teams
- (3) Support the CoE BMO Lead in leading the organizational change management program across the Phase 2 activities
 - (a) Coordinate and integrate the CoE teams accordingly, as specific CoE Teams will have an OCM plan focused on their area, but align to the BMO OCM Strategy and Plan
 - (b) Develop a Stakeholder Engagement Plan, which includes the approach, activities, milestones, and dates
- (4) Provide training materials and coaching activities to build organizational change management capacity and sustainability within USDA OCIO

2.6 Re-skilling

The Contractor must provide the training support required to position the USDA OCIO to be able to fully take over the roles and responsibilities from the CoE teams for subsequent phases of the USDA IT Modernization program.

- (1) Baseline the current set of skills of the USDA Office of the CIO
- (2) Work with each of the CoE teams to capture the current and future skill sets required
- (3) Identify skills gaps and develop Learning Paths organized by CoE area, which allows for the growth of new skills within the OCIO
 - (a) Coordination with USDA Human Capital team
 - (b) Collaboration with the CoE Teams for generation of training materials in support of the Learning Paths
- (4) Develop milestones and timelines for the Learning Paths
- (5) Define and implement measures and capabilities to monitor progress over time of new skill development

2.7 Project schedule

The task-level activities and associated deliverables to be accomplished will be managed via a single Project Schedule work plan. The initial Project Schedule will be based upon the contractor's awarded quote including dependencies (e.g., access to government or client information or other government resources) to complete the activity. An initial Project Schedule Plan, based on the awarded quote, is due within 20 days of award.

In addition to the Project Schedule, monthly progress reports will be provided to the CoE leadership, CO and COR. Monthly progress reports will track to the task-level elements in the Project Schedule and describe progress made during the prior month, describe work products or deliverables completed, describe any significant problems or issues encountered, and recommend actions to resolve identified problems.

3.0 Delivery or Deliverables

3.1 General deliverables

The following deliverables are required for all CoE-related work, due on the dates indicated in the table below:

Deliverable	Description	Due Date	SOW Reference
Monthly Status Report	Brief synopsis of the contract team's activities, accomplishments, and risks.	<i>The 15th calendar day of the month following the reporting period.</i>	3.1
Project Schedule	A plan detailing the activities, schedule, resources to implement the assessment recommendations and SOW tasks. Microsoft project is preferred.	<i>Within 30 days of PoP start date; updated plan submitted 5 business days prior to month end</i>	2.7
Transition Plan	A plan detailing the support activities, milestones, artifacts to transition work from CoE to USDA.	<i>90 days before end of Period of Performance</i>	3.1
Program Status Reviews	Manage the coordination (inputs, scheduling logistics) of the CoE teams'	<i>Bi-weekly</i>	2.3

	status briefings of schedule, risks, and activities.		
Project Close Out Report	Develop a closeout report including a summary of milestones and achievements completed over the period of performance to include a deliverables table, risk register recap, lessons learned summary, and recommendations for the continuation of these support services. Report should also include a financial summary of contract funding obligated against the total invoiced.	<i>30 days before end of Period of Performance</i>	3.1
Sustainment Artifacts	Documents for USDA to sustain CoE effort post contract end; includes, but not limited to Proposed organizational structures, standard operating procedures	<i>NLT 90 days prior to base year end</i>	2.1

3.1.1 Contractor submission

Deliverables are to be transmitted electronically through Government’s web-based procurement system, and via email to BMO leadership. All deliverables must be produced using Google G Suite or Microsoft Project.

3.1.2 Government review

Government personnel will have 10 workdays to review deliverables and resubmissions and provide written acceptance/rejection.

3.1.3 Deliverable and Data Rights

All test materials, documents, notes, records, software tools acquired, and/or software modified or produced by the Contractor under this contract shall become the property of the U.S. Government, which shall have unlimited rights to all materials and determine the scope of publication and distribution. The Contractor shall be required to deliver electronic copies of all documents, notes, records to the Government.

3.1.4 Monthly status report

Monthly status reports must include status of work definition forms, schedules, deliverables, current and cumulative task funding status (direct labor and travel funding status to be reported separately as required), risks and risk mitigation techniques, outstanding

issues, and proposed resolution approaches and actions to resolve any outstanding issues. The report must identify milestones and deliverables completed and progress towards major milestones and deliverables. The report must identify activities and deliverables planned but not completed including the government acknowledgement and approval of the incomplete work. Status of work definition forms shall include a summary description and schedule of all work definition forms completed during the reporting period, all work definition forms currently on-going during the reporting period and all known work definition forms assigned for future reporting periods. The monthly invoice must be submitted simultaneously with the monthly status report.

3.1.5 Transition

The contractor is responsible for successful transition to a successor organization, which may be a contractor or USDA office. During the transition to the Government, or a new Contractor, the Contractor must perform all necessary transition activities, including:

- (1) Minimal interruption of contracted services to the BMO and other customers during transition period;
- (2) Participation in meetings with the Government or new Contractor to effect a smooth transition and provide detailed information on the operation of all deliverables
- (3) Handoff from contractor resources to replacements, either Government or new Contractor, during transition period consistent with the transition plan;
- (4) Any other knowledge transfer activities necessary for a full and complete transition to any successor organization; and,
- (5) All transition documentation must be delivered to USDA in MS Office Suite format.

3.2 Additional Deliverable Requirements

Deliverable	Description	Due Date	SOW Reference
Standard Operating Procedures	Develop and maintain standard operating procedures related to operational activities not to exceed 20 SOPs (e.g. website maintenance, data call processes, communications control gate reviews, internal meeting coordination)	<i>On-going, as needed</i>	2.2
CoE BMO Current State Assessment	Findings of current state and recommendations for improvement	<i>Within 45 days of award</i>	2.3
CoE BMO program management processes and	Various documents (i.e., governance charters, workflow diagrams, reports, etc.) and document types to position	<i>As defined in the agreed upon Project Plan</i>	2.3

supporting materials	the CoE BMO to be the centralized management function leading, overseeing, and integrating the CoE implementation activities - as identified in the Current State Assessment		
CoE BMO Templates	Preset format for specific CoE BMO documents, to serve as the foundation for format and structure, for the various teams to leverage to ensure standardization and foster efficiencies	<i>As defined in the agreed upon Project Plan</i>	2.3
Stakeholder Engagement Plan	Project Plan detailing the approach, activities, milestones, and dates	<i>Within 60 days of PoP start date</i>	2.4
Communications Management Plan	Project Plan detailing the approach, activities, milestones, and dates	<i>Within 60 days of PoP start date</i>	2.4
Organizational Change Management Assessment	Categorization of the various changes to be introduced by the CoE Phase 2 efforts, change risk impacts, and recommendations	<i>Within 45 days of PoP start date</i>	2.5
Organizational Change Management Strategy	Goals, objectives, and measures of the CoE Phase 2 Organizational Change Management Program	<i>Within 60 days of PoP start date</i>	2.5
Organizational Change Management Plan	Project Plan detailing the approach, activities, milestones, and dates to achieve Organizational Change Management Strategy	<i>Within 60 days of PoP start date</i>	2.5
OCIO Staff Skill Set Baseline Inventory	Report detailing the current inhouse skill sets of the USDA OCIO government staff	<i>Within 60 days of PoP start date</i>	2.6
CoE Skill Set Inventory	Report detailing the CoE Skill Sets	<i>As defined in the agreed upon Project Plan</i>	2.6
Skill Set Gap Assessment	Report of the results of an assessment of the OCIO staff skill sets against the CoE Skill Set	<i>As defined in the agreed upon Project Plan</i>	2.6

CoE focused Learning Paths	Reskilling Learning Paths organized by CoE	<i>As defined in the agreed upon Project Plan</i>	2.6
Training Materials and Reskilling activities	Training materials and reskilling activities in support of the Learning Paths. Materials format (i.e. video, document, pilots, etc.) may vary and will be agreed upon at onset of Task 2.6.	<i>As defined in the agreed upon Project Plan</i>	2.6
Learning Path Timeline	Learning Path activities and milestones along a timeline, reflecting the reskilling journey an individual will follow to learn a new skill set	<i>As defined in the agreed upon Project Plan</i>	2.6
Reskilling Measures and Monitoring Capabilities	Metrics tracking the progress against the Learning Paths; systematic capabilities to monitor the metrics	<i>As defined in the agreed upon Project Plan</i>	2.6

4.0 Meetings

4.1 Monthly Project Status Reviews

Monthly status meetings to be conducted no later than the 15th day of each month. The Contractor is responsible for reporting the previous month's activities (including any risks, issues, or concerns, and actual or recommended actions for their mitigation), and projected activities for the following month.

4.2 Meeting Materials

For all meetings the BMO coordinates or leads, the contractor shall be responsible for providing meeting materials (i.e., agenda, meeting minutes), administrative, and facilitation support. Meetings will be conducted at either the contract's place of performance, or through an alternative method of communication (such as a teleconferencing), as approved by the Contracting Officer.

5.0 Required Travel

Commuting to/from work locations or moving between work locations is not travel and will not be reimbursed. Badged contractor employees will be able to make use of GSA provided ground transport (shuttles) to/from some locations, when available.

The Contractor may also perform travel between the primary places of performance and non-local facilities as required during the performance period of this task order. The COR must approve all non-local travel prior to costs being incurred. Travel requests, to include projected costs, must be submitted to COR approval no later than five work days prior to travel. Travel will be handled, to include the reimbursement of expenses, in accordance with the terms and conditions of the contract and the Federal Travel Regulation guidance. All non-local travel arrangements will be the responsibility of the contractor including, but not limited to, airline, hotel, and rental car reservations. The Contractor should make all efforts to schedule travel far enough in advance to take advantage of reduced airfares. The Contractor must stay in Government furnished lodging as available.

6.0 Government Furnished Property/Equipment/Information

The government will provide the following resources to the Contractor for task performance:

- (1) The Government will provide workspace at a government facility for contractor personnel
- (2) The Government will provide all necessary normal office equipment (office work area, e-mail account, network access)
- (3) The Government will provide access to available technical information as required and upon Contractor request for the performance of this task order

All Government-provided products and facilities remain the property of the Government and shall be returned upon completion of the support services. Contractor personnel supporting this requirement shall return all items that were used during the performance of these requirements by the end of the performance period.

All documented processes, procedures, tools and applications, developed under this SOW become the property of the Government.

8.0 Additional Requirements

In addition to the above, the contractor must:

- Maintain all work products on the CoE Google Team Drive or other specific location on CoE Google Drive.
- Utilize Trello for day-to-day agile task tracking and MS Project for a project schedule management tool.
- Conduct scrum/Agile development rituals and utilize the appropriate tools to foster an agile environment.

8.1 Personnel retention

The Contractor must make every effort to retain personnel in order to ensure continuity until contract completion. The Contractor must make every effort to avoid a gap in service. The Contractor must ensure that personnel satisfy the applicable security requirements to reduce staffing delays. The Contractor must ensure continuity of operations during periods of personnel turnover and long-term absences. Long-term absences are considered those longer than one week in duration.

The offeror must staff this order with only those personnel possessing qualifications and experience that reflect an ability to perform all responsibilities for the labor category(s) specifically quoted by the offeror to satisfy the requirements of this SOW.

8.2 Key Personnel

8.2.1 Key Personnel substitution

In the event a Key Personnel member becomes unavailable during the course of the performance of the work, the Contractor must immediately notify the CO, COR and CoE lead.

In the event a Key Personnel member will be substituted during performance, the Contractor must provide complete CVs for proposed substitutes in the same level of detail as those submitted with the initial quote, and any additional information requested by the Contracting Officer no later than 10 business days after notifying the Government of the need for a substitution. Proposed substitutes should have comparable qualifications to those of the persons being replaced. The Contracting Officer will notify the Contractor within 15 business days after receipt of all required information of the consent on substitutes. No change in hourly rates may occur as a result of Key Personnel substitution. The value of any gaps in expected service as a result of changes in personnel will be deducted from the contractor's monthly invoice.

8.2.2 Specific Key Personnel requirements

8.2.2.1 Program Manager

- (1) Organizes, directs, and manages contract operation support functions, involving multiple complex and inter-related project tasks
- (2) Manages teams of contract support personnel at multiple locations
- (3) Maintains and manages the client interface at the senior levels of the client organization
- (4) Meets with customer and Contractor personnel to formulate and review task plans and deliverable items
- (5) Ensures conformance with program task schedules and costs
- (6) Direct project team personnel, manage cost and schedule, ensure contract compliance, and serve as principal customer interface.
- (7) PMP certified
- (8) 8 years managing prime contracts

- (9) Bachelor's degree or higher

8.2.2.2 BMO Subject Matter Expert

- (1) Experience establishing IT PMO organizations
- (2) Strong expertise in Project Portfolio Management methodologies
- (3) Proven experience coordinating multiple concurrent projects and multiple organizations and knowledge of and ability to apply industry best practices for project management, budget planning, and business case development
- (4) Project Management Professional (PMP) certified and/or Certified Scrum Master
- (5) 8 years managing CIO
- (6) PMO organizations
- (7) Bachelor's degree or higher

8.2.2.3 Organizational Change Management (OCM) Lead

- (1) Leads the design and execution of the CoE Organizational Change Management Plan that will foster the implementation of organizational change in such areas as business processes, policy, culture, environment or workplace
- (2) Works with senior executives to develop strategies to lead and manage major change
- (3) 8 years leading OCM efforts that are derived from IT changes
- (4) Degree in related field required

8.2.2.4 Strategic Communications Lead

- (1) Responsible for the development and implementation of the communications plan on the processes, methods, and type of content the organization will leverage for stakeholder engagement activities
- (2) Writes a variety of technical articles, reports, announcements, brochures, and/or manuals for documentation for a wide range of uses
- (3) Coordinates the display of graphics and the production of documents
- (4) Ensures content is of high quality and conforms to standards
- (5) 5 years experience providing strategic communications within IT organizations
- (6) Degree in related field required

8.3 Background check

All Contractor personnel assigned to this task must have had a successfully adjudicated National Agency Check with (Written) Inquiries (NACI). All Contractor personnel must comply with the specific security requirements.

8.4 Identification of non-disclosure requirements

Due to the sensitive nature of the data and information being worked with on a daily basis, all Contractor personnel assigned to the task order are required to complete the

Government provided non-disclosure statement within 10 calendar days after task order award and prior to performing any work.

9.0 Additional clauses

FEDERAL ACQUISITION REGULATION (48 CFR CHAPTER 1) SOLICITATION CLAUSES
([HTTP://WWW.ARNET.GOV/FAR/](http://www.arnet.gov/far/))

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 the performance period of the order, including any extension; provided that the Government gives the Contractor a preliminary written notice of its intent to extend 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 2 years and 6 months. (End of clause)