

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

**Statement of Work
for the
CX Digital Support Services**

July 30, 2018

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SOW for CX Digital Support Services

Statement of Work (SOW) for the CX Digital Support Services Team

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. The purpose of Phase 1 was to determine how to radically improve the way in which USDA designs services and interacts with the American citizens it serves. This transformation is supported by changes in the underlying technology to deliver increased operational efficiency. 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 a centralized CX Digital Support Service team providing support at various levels across USDA. Phase 2 includes continuous support to help USDA mission areas better understand their user-needs via strategy prior to implementation. The CX Support Service team will work with USDA mission areas who are planning or working on digital development efforts to apply human-centered-design to ensure that these projects are focused on their customer's needs, and not just product features. The CX Digital Support Service will develop and apply resources, tools, training, measurement instruments, and best practices throughout USDA to modernize and integrate with IT development efforts. The CX Digital Support Service team will also design a coherent measurement framework that prioritizes innovation for continuous improvement.

1.2 Objective

The purpose of this Statement of Work (SOW) is to create a sustainable CX Digital Support Service Team that will work with the USDA. The primary focus of this team will be to

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work with USDA to put the customer at the center and make sure the customer's needs are being implemented and infused when planning and implementing a digital solution.

The CX Digital Support Service Team will develop and apply human centered design methods that are a practical, repeatable approach to arriving at innovative solutions. These methods will be applied across USDA to guide mission areas and programs, putting customers at the center, and informing answers to difficult problems.

The procurement of the CX Digital Support Service Team services will build upon the momentum achieved by the President's Management Agenda for Improving the Customer Experience that will transform the customer experience.

The main focus will be infusing a customer centric approach around all things related to a digital solution, as well as disseminating those customer related needs not tied to technology to the proper channels.

1.3 Scope of Work

The contractor must provide professional support services to the CX Digital Support Service Team which is the central organization to provide consistent and cohesive management support for the application of CX practices across USDA. The contractor must provide all resources necessary to accomplish the tasks and deliverables described in this SOW to help establish the CX Digital Support Service team and perform the following:

- Deliver CX Strategy into all new projects
- Embed CX Methods into USDA's agile implementation efforts
- Assist the Government to stand up a CX Digital Support Service Team

The contractor must also provide re-skilling services to enable USDA OCIO staff to assume the full responsibilities of the CX Digital Support Service Team, and continue the momentum created 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

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On-site contractor support must be available during customer agency normal operating (8:00 - 5:00 ET).

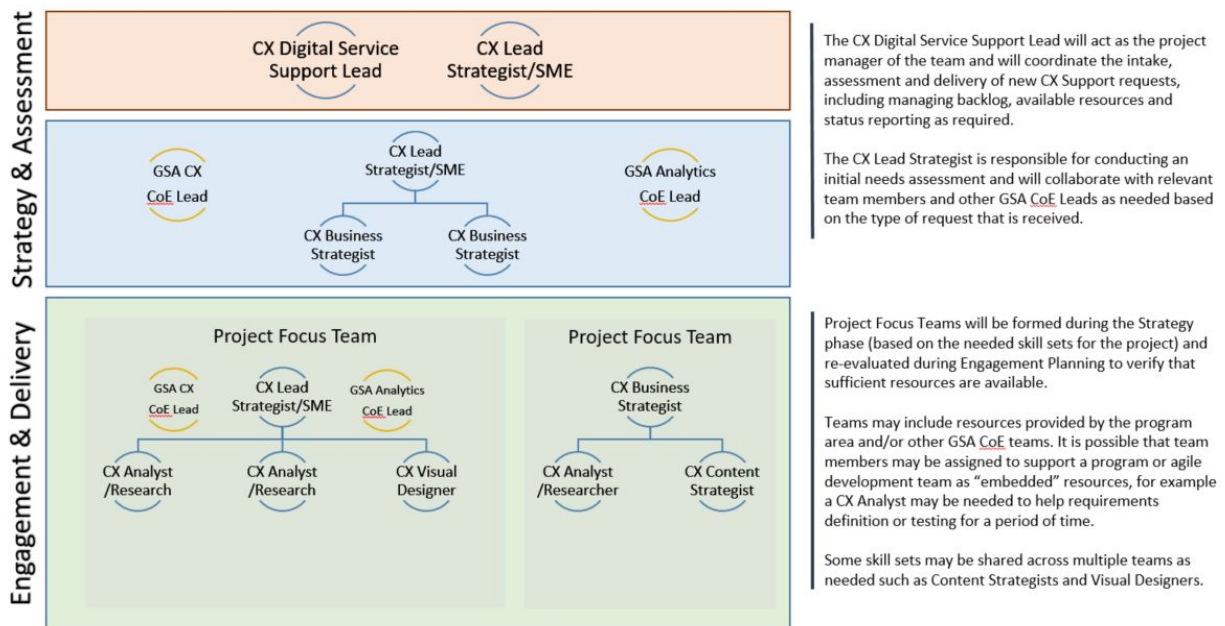
2.0 Specific Requirements/Tasks

2.1 Specific requirements

The contractor must provide professional services to establish and operate a CX Digital Support Service team under the direction of the CX CoE and USDA leadership. The contractor will embed CX strategy and design thinking into the capabilities across USDA Mission Areas to ensure that agile and human-centered design methods are used in a balanced way that supports the overall improvement of the customer experience.

Figure 1: Illustrative CX Digital Support Service Model provides an example of the make up and operating model for the CX Digital Support Service Team. The Government estimates that an efficient CX Digital Support Service Team will have between 10-13 contractor provided CX professionals, inclusive of the key personnel required (not in addition to), who divide their work based on individual project needs. The team will work with mission-area stakeholders, and program leaders as projects come forward and work across other COE and CIO offices to ensure projects are in line with department-wide policies. Project selection will be the responsibility of the Government.

Fig. 1: Illustrative CX Digital Support Service Team Model (Sample using contractor staff of 12)



2.1.1 Estimated Staffing and Strategy

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The Government estimates that the staffing necessary to accomplish the work described consists of approximately 10 - 13 contractor provided CX professionals working full-time during the period of performance, or their equivalent. This is only an estimate and staffing may fluctuate due to ongoing support needs during the period of performance. Any changes in workload will be managed consistent with the terms and conditions of this contract and by mutual agreement of the parties.

2.1.1.2 Deliver CX Strategy into all new projects

The Contractor must provide USDA with support to formulate and maintain a CX strategy, in order to accomplish USDA key objectives. The contractor will provide a first draft of the strategy and provide services to assist the Government in its finalization. The given strategy should provide a clear roadmap, consisting of a set of guiding principles or rules, that defines the actions people in the USDA mission areas should take and the things they should prioritize to achieve desired goals.

The contractor must provide professional services to customize each CX Strategy session to the needs of the USDA mission area and their users, with the goal of moving from identifying a problem to presenting a customer-focused solution(s). The Contractor Team must collaborate across the CoEs to help inform a path to a solution.

2.1.1.3 The Contractor must develop and perform an intake and an assessment for all incoming interested parties across USDA that want to engage with this team, culminating in a Letter of Engagement. The Government estimates that approximately 5 Letters of Engagement will be required during each year of performance.

Intake and Assessment tasks include:

- CX Strategy Sessions and reviewing mission area documentation to establish Strategic Goal Alignment,
- Problem Identification,
- CX maturity and impact.
- Recommendation at the conclusion of the assessment of whether to proceed or not
- Create a Letter(s) of Engagement with USDA

Letter of Engagement Deliverable:

- The Letter of Engagement will include:
 - stakeholders
 - signatures
 - period of engagement
 - scope of work
 - deliverables
 - points of contact

2.1.1.4 The Contractor must conduct the discovery work identified for the given project from the intake and initial assessment, and develop an engagement plan. The engagement

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plan may include the development of: personas, user stories, journey maps, a research plan, and documentation of engagement/implementation support. At the end of the engagement the contractor must provide an Engagement Completion Report, documenting their findings.

Tasks:

- Conduct Discovery Work, enabling methods identified in the Letter of Engagement
- Develop an Engagement Plan

Deliverables:

- Engagement Completion Report

2.1.2 Embed CX Methods into USDA's agile implementation efforts:

The Contractor must work with an established USDA agile development team to ensure that the development of new products, and improvements to existing products are conducted using a CX approach. This includes coaching USDA IT and program employees on adopting an iterative, test and learn approach to continual improvement and implementation.

2.1.2.1 CX Delivery/Development Team Level - Contractor Areas of Responsibility:

- Embed a balanced skill set of customer experience practitioners
- Assist business partners/Agency in discovery efforts as well as review and testing of the developed stories to ensure they meet the CX needs of the overall epic
- Provide additional support to teams, from the CX Content Strategists and CX Visual Designers capabilities, as needed to deliver complete customer-focused experiences
- Integrate feedback from customers into appropriate work products
- Conduct meetings with product managers, based on the sprint plan
- Assist the Government to groom and prioritize backlog
- Assist the Government to develop user stories
- Participate as members of the sprint team
- Contribute to the development of the minimum viable products (MVPs)

Deliverables:

- Develop a staffing plan for each project the team will work on
- Develop a sprint plan as part of the agile team

2.1.2.2 Capacity Building and Training for Transition

In order to meet USDA's strategic goal of being a customer-focused, data-driven agency, USDA needs to build internal capacity and ensure the sustainability of CX practices across all mission areas.

The contractor must provide professional services to assess CX capacity building needs at USDA and provide a written report documenting findings and recommendations.

As the result of the assessment, the Contractor must provide a report of recommended capacity building and training areas that USDA employees need in order to help

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transition away from CoE support and continue customer experience work on their own. The Government estimates that approximately 5 training plans (1 per project) will be required during each year of performance.

The Contractor must plan and conduct trainings around various topics such as:

- user research
- design service
- design interaction
- design content
- design journey mapping
- design-thinking
- innovation thinking
- problem identification/problem solving
- guidance on CX expertise position descriptions

2.1.3 Stand up a CX Digital Support Service Team

The Contractor must assist the Government to build the infrastructure and processes to manage CX projects. This team is meant to be a first point of entry when USDA is at the beginning stages of thinking about a digital solution to resolve a business need to work with USDA.

2.1.3.1 The Contractor must develop and maintain a CX Digital Support Service Service Catalog. The catalog will explain all the possible services this team would offer to USDA. This catalog must include examples of work the team can do and include examples of work the team has already completed.

2.1.3.2 The Contractor must develop and maintain an editorial calendar (i.e.channels, stakeholders, timeline) for all ongoing and completed work. This calendar captures marketing and communication plans for all CX projects.

2.1.3.3 At the end of each project, the Contractor must develop content about the projects performed that can used and repurposed for marketing purposes. This can also include creation of presentations, blog posts and visuals.

2.1.3.4 The Contractor must track the operational performance of all CX work (i.e. cost savings, increased referrals, etc) to be utilized by USDA and the other CoEs . This task includes developing and maintaining Operational Metrics/Performance Indicators and collaborating with Data Analytics CoE to work on developing those team metrics and leverage their dashboard to visualize the data.

2.2 General requirements

In addition to specific scope requirements described in this SOW, the contractor must:

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- Maintain all work products on the CoE Google Team Drive or other specified location within the CoE Google Drive.
- Utilize Trello for day-to-day agile task tracking and MS Project for a project schedule management.
- Develop and maintain a detailed project schedule, including a Work Breakdown Structure (WBS).
- Conduct scrum/Agile development rituals and utilize the appropriate tools to foster an agile environment.
- Develop artifacts in support of sustained modernization efforts by USDA after the contract period of performance has ended, including proposed organizational structures, training materials to re-skill USDA staff, and standard operating procedures.
- Participate in and contribute to the CoE Business Management Office (BMO) status reporting activities, such as the weekly status report to USDA and program status review once every other week
- Integrate with the GSA/USDA CoE BMO to support the program oversight mechanisms, organizational change protocols, risk escalation, and communication.
 - Support the generation and delivery (electronic and hardcopy) of status reports, executive level briefings, talking points, emails, and other communication materials.
 - Contribute to the updates to the CoE website in coordination with the CoE BMO.
 - Contribute to and participate in the CoE BMO status and project review meetings.
 - Manage and escalate project risks to the CoE BMO and USDA leadership.
- Collaborate with the COE Business Management Office (BMO) to create and implement an effective organizational change management strategy and program to facilitate and drive adoption.

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

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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
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 via email to designated Government officials. 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 and software to the Government quarterly and upon termination of the contract services or expiration of the contract period.

3.1.4 Monthly status report

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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, at CO/COR and the Lead's discretion;
- (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 Specific deliverables

Deliverable	Description	Due Date	SOW Reference
Engagement Letter	Letter to include: stakeholders signatures, period of engagement, scope of work, deliverables, and points of contact		
Engagement Plan	Plan specific to the project to include		

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	personas, user stories, journey maps, research plan, documentation of engagement and/or implementation support		
Engagement Completion Report	Final report on findings, recommendations, work completed		
Staffing Plan	Description of types of talent needed for specific projects, number of staff needed for given project		
Agile Sprint Plan	Description of what will be done while part of the sprint team		
Capacity building and Training Plan	Description of types of training recommended for a given project or USDA employees		
Project Content	content that describes the project work being conducted or completed for communication purposes		
Operational Metrics/Performance Indicators	Performance tracking of the contractors work		

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.

5.0 Required Travel

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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 USDA 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 some office equipment (office work area, e-mail account, network access)
- (3) The Government will provide certain data processing ADP equipment and software, as it may determine necessary, to the Contractor for the exclusive purpose of performing the services as defined in the task order
- (4) 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. The Government shall have unlimited rights to these documents. Modification and distribution of end products for use at other installations will be at the discretion of the Government.

All text, electronic digital files, data, new capabilities or modification of existing applications, source code, documentation, and other products generated, modified or created under this contract shall become the property of the Government. The information shall be returned to the Government unless otherwise specified herein.

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7.0 Additional SOW Requirements

7.1 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.

7.2 Staffing

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.

7.3 Key Personnel

"Key Personnel" are those persons whose CVs were submitted for evaluation of the contractor's quote and upon which an offer of award was made.

7.3.1 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.

7.3.2 Specific Key Personnel requirements

The following are the personnel designated as "Key."

7.3.2.1 CX Digital Support Lead

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Will provide project management and logistical support to the CX Digital Support Service Team.

It is expected that one Lead will be required to support the Core Team while larger implementation projects may require a separate dedicated manager.

- Responsible for managing budgets and schedules for multiple projects including coordination of travel as needed.
- Define, iterate and refactor critical components such as our vision, mission, strategy, business model, and operating model
- Will manage communications and engagement with team members, customers and stakeholders (including other 3rd party contractors) as required to disseminate timely, relevant information on projects and project status.
- Will support the USDA and CX COE with identification of new projects, resource management and recruiting for CX expertise.
- Ensure all of our client engagements are planned, executed, and closed out effectively and efficiently, resulting in unique experiences and transformational results for clients

7.3.2.2 CX Strategist Lead

Senior CX strategist that will plan, develop and lead CX Strategy and research engagements, contribute to capacity building activities (such as facilitating workshops/trainings) and support implementation efforts by serving on Scaled Agile Portfolio Teams as needed to help shape customer-focused development and design decisions.

- Lead early efforts with these agency partners to define what problem they're trying to solve and identify what's needed to ensure successful next steps.
- Align stakeholders, talking to end users, turning vague ideas into concrete priorities, and minimizing risk in the product development process.
- Work with the spirit of partnership, a sense of humility and empathy for our USDA partners and the people who use their systems.
- Consulting experience along with a background in a user-centered design or strategy discipline such as digital strategy, service design, user experience design, content design/strategy, user research, product or software development.
- Responsible for facilitating CX strategy sessions with USDA programs/mission areas and other stakeholders
- Evaluate processes, systems and applications to identify potential CX problems, and develop recommendations for improvement/resolution
- Work to ensure that customer needs are considered during the prioritization and alignment of business objectives/value streams to epics and other planned work products or improvements
- Develop detailed CX research proposals and project plans
- Lead rigorous customer research, measurement and analysis projects. This which could include the management of other CX resources (analysts, researchers, content strategists, etc.)
- Develop detailed insights and recommendations documentation and be prepared to deliver those results in multiple formats (online publications, oral presentation, webinars, etc.)

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7.3.2.3 Lead CX Analyst/Researcher

- Participate in research projects to identify areas where customers struggle in a process (aka pain points), and document what changes need to happen to alleviate those pain points
- Facilitate interviews to gather feedback from end-users to help understand their perspective and inform design decisions
- Compile and perform data analysis on research findings and contribute to recommendations and written documentation of insights and research methodologies
- Develop content/contribute to the development of research artifacts including assessments, personas, user stories, journey maps, etc.
- Develop content/contribute to the development of articles, blog posts, CX templates and other channel support to demonstrate the value of CX work at USDA
- Participate in the development and facilitation of capacity building workshops and trainings
- Coordinate with agile development teams to translate customer needs insights into user stories and test cases.

7.3.2.4 Lead Visual Designer

- Collaborate with agency partners, product managers, other designers, and engineers to deliver user-centered and beautiful digital experiences for audiences both inside and outside of government.
- Beyond visual design, also work with partners to craft strategies for understanding, defining, creating, and managing visual identities.
- Establish, measure, and evolve design patterns which makes the work consistent and efficient.
- Work with user experience researchers to teach, participate in, and sometimes lead usability testing and user-centered design.
- Work with content designers and engineers to develop interactive experiences that treat all aspects of the experience as essential.
- Have experience with at least one other user-centered design discipline such as communications/content design, front end design, interaction design, or service design.
- Develop high-quality visual design elements for inclusion in publications, presentations and online formats
- Visualize highly complex data into easy-to-read and understand artifacts such as customer journey maps.

7.3.2.5 Lead Content Designer

- Collaborate with agency partners, product managers, other designers, and engineers to deliver user-centered content for audiences both inside and outside of government.

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- Beyond copywriting, work with partners to craft strategies for creating, managing, and publishing content.
- Work with user experience researchers to teach, participate in, and sometimes lead usability testing and user-centered writing.
- Work with visual designers and engineers to develop interactive experiences that treat all aspects of the experience as essential.
- Besides creating and maintaining clear, accessible content, you'll also help our partners improve (or develop) their user-centered content practices and promote content best practices across government.
- Plan, write and publish content for the CX blog
- Create content plans, align a site's content with its organization's goals, audit existing content, plan for migration, etc.

7.4 Security requirements

7.4.1 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.

7.4.2 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 award and prior to commencing work.

8.0 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.

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(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)