**SAMPLE – For Reference Only** – This sample is a redacted copy of a work statement accomplished under a NITAAC GWAC. A Statement of Work (SOW) is typically used when the task is well-known and can be described in specific terms. Statement of Objective (SOO) and Performance Work Statement (PWS) emphasize performance-based concepts such as desired service outcomes and performance standards. Whereas PWS/SOO's establish high-level outcomes and objectives for performance and PWS's emphasize outcomes, desired results and objectives at a more detailed and measurable level, SOW's provide explicit statements of work direction for the Contractor to follow. However, SOW's can also be found to contain references to desired performance outcomes, performance standards, and metrics, which is a preferred approach. **This sample is not all inclusive, therefore the reader is cautioned to use professional judgment and include agency specific references and regulations to their own PWS/SOO/SOW.**

Program and Project Management Support Services

Statement of Work

# Specific Tasks

The Contractor shall perform the following tasks during the base period and, if exercised, Options I through IV.

# Program Management Support

The Contractor shall provide program and project management support services to the CIO and other Divisions to include: Applications Development, Systems Engineering and Network Operations, Information Assurance, and Web Services IT division areas.

The Contractor shall provide senior level acquisition and program and project management support personnel capable of providing methods, processes, and tools to strive for cost, schedule, and performance efficiencies. The Contractor shall be capable of review and analysis of contract Statements of Work (SOW)/Statements of Objectives (SOO), development plans, test plans, development schedules, and system architecture. Responsibilities shall include, but are not limited to, the following duties:

1. The Contractor shall provide program management support for IT innovation projects. The Contractor shall maintain knowledge of <AGENCY> programs and other projects.
2. The Contractor shall attend key meetings with <AGENCY> to maintain situational awareness of the issues, actions, and requirements affecting the Department.
3. The Contractor shall assist in the development and production of technical briefings and presentations associated with <AGENCY>. The Contractor shall participate in requirements definition, top level design, integration, and testing.
4. The Contractor shall provide inputs to and assist in developing contractual documentation planning and preparation (e.g. Requests for Proposal (RFP), Requests for Quote (RFQ), Task Requirements Notices (TRN), Statement of Objectives (SOO), Statement of Work (SOW), and Service Level Agreements (SLAs). Work outputs will meet the requirements of the Federal Acquisition Regulation (FAR) as supplemented by all applicable DoD policies and will be provided within the timeframe assigned.
5. The Contractor shall assist in the review of the statement of work for Information Technology and Business Process Management services.
6. The Contractor shall provide senior level acquisition strategies and risk mitigation plans for major CIO procurements.
7. The Contractor shall prepare White Paper Technology assessments on potential innovative processes and applications that would benefit the <AGENCY> and <AGENCY>.
8. The Contractor shall provide management support in developing and responding to program data calls, white papers, and requests for information from multiple sources. The Contractor personnel will develop initial and final revisions within the time required to support scheduled deadlines.
9. The Contractor shall analyze business and technical issues to gain an understanding of how the technology will be implemented and utilized with current <AGENCY> processes.
10. The Contractor shall determine and maintain schedule of milestones and deliverables for IT programs and projects.
11. The Contractor shall document high-level business and technical process requirements.
12. The Contractor shall review commercial-off-the-shelf (COTS) technical Requirements and test plans.
13. The Contractor shall provide expert knowledge in IT systems, data base management, warfare system integration across multiple mission areas and platforms.
14. The Contractor shall monitor, collect, and validate metrics reported by the IT Operations Contractor.
15. The review shall ensure that the metrics being reported are key metrics, that the measurement being used to report progress is reasonable and supports the metric, and that the measurements are accurate, timely, and repeatable. Random sampling of at least one metrics measurement shall be done on a monthly basis and be reported to the CIO. Recommendations for improvements to the metrics process shall be provided as part of the monthly report.
16. The Contractor shall be a customer interface for all new projects (new projects or major changes to existing services) submitted to <AGENCY> for review; assist with the preparation of required documents such as the Project Definition Plan; and guide the customer thru the <AGENCY> review boards. The Contractor shall be familiar with IT rules regarding Defense Business Systems (DBS), Data Center restrictions, and other current IT policies. The Contractor shall assist the customer in determining if the IT effort is developmental or operational in nature and if developmental guide the customer thru the DBS process.
17. The Contractor shall conduct an annual customer satisfaction survey. The results of the survey will be compared/contrasted with the prior year results and trended. The results of the survey will be summarized in a written analysis and briefed, with recommendations to the OCIO.

# Strategic Planning, Portfolio Management (PFM)

The Contractor will develop guidance and policies for the CIO that is consistent with the <AGENCY> is in compliance with XXX.

The Contractor is responsible for performing the following tasks:

1. The Contractor shall provide senior level Strategic Planning/Portfolio Management (PfM) support personnel capable of assisting in the development and implementation of PfM methods, processes, and tools.
2. The Contractor shall assist the CIO to develop and implement continuous integrated activities to manage CIO portfolios analysis, selection, control, and evaluation processes. The process will provide a balanced strategy for making decisions and recommendations based on enterprise strategic planning, integrated architectures, and outcome-based performance measures to achieve desired mission capabilities.
3. The Contractor shall develop and implement analysis activity that addresses the critical front-end requirements for strategic planning, performance and results management, benchmarking, elimination of unnecessary functions, process improvement, and definition of capabilities and gaps.
4. The Contractor shall develop and implement selection activities that identify the best mix of Investments within available resources to meet integrated <AGENCY> mission goals. Portfolio selection decisions are made using integrated architectures, transition plans, technical criteria, and programmatic trade-offs to satisfy performance measures, and achieve desired outcomes.
5. The Contractor shall develop and implement control activities focused on acquiring the capabilities selected for the portfolio. It consists of acquisition and oversight activities at the portfolio level that complement and supplement traditional acquisition and oversight activities.
6. The Contractor shall support the collection of execution data and conduct analysis of data collected and develop reporting mechanisms for leadership reviews.
7. The Contractor shall assist in conducting periodic reviews of the programs and systems within their purview to ensure acquisitions continue to meet selection criteria and architectural goals and remain consistent with transition plans.
8. The Contractor shall develop and implement evaluation activity focused on measuring and assessing the outcomes of portfolio investments to determine whether expected benefits were achieved. The Contractor shall provide support in developing metrics (both outcome and output) that provides mechanisms for evaluation for post-implementation reviews.

# Strategic Communications and Administrative Support

The Contractor is responsible for providing on-site Strategic Communications and administrative support services to the office of the <AGENCY>. The Contractor shall perform the following tasks:

1. The Contractor is responsible for the preparation of Briefing Materials and Reports.
   * The Contractor shall prepare briefing materials for weekly and monthly Business Operations (BizOps) reporting requirements. The Contractor shall collect the required inputs from <AGENCY> staff, assemble and format the data, provide guidance on content and style, and present draft materials to the CIO for review.
   * The Contractor shall prepare final briefing materials based on the CIO's input.
   * The Contractor shall prepare executive briefing materials for the CIO on IT systems or special projects. The Contractor shall accompany the CIO to key meetings for the purpose of providing feedback on the effectiveness of the briefing materials.
   * The Contractor shall brief <AGENCY> executive management, both formally and on an ad hoc basis as needed, concerning issues and special projects.
2. The Contractor shall develop, maintain, and execute Internal Communications Plans and Programs.
   * The Contractor shall develop and execute strategic communications plans and programs to increase awareness of <AGENCY> capabilities, processes, and products within <AGENCY>and the <AGENCY>. The Contractor shall meet with appropriate <AGENCY> staff members, contractors, or other <AGENCY> personnel to discuss communication needs and participates as a member of project teams as needed.
   * The Contractor shall manage and implement improvements to <AGENCY> communications methods and systems. The Contractor shall monitor the success of the CIO's initiatives through on-line stats, surveys, and occasional research. The Contractor shall work with other <AGENCY> staff to improve communication methods and systems as well as <AGENCY>'s communications office to develop and maintain a well- structured communications strategy for <AGENCY>. The Contractor shall develop and execute marketing campaigns within <AGENCY> to introduce new IT processes, IT enhancements, and new IT capabilities to <AGENCY> personnel. The Contractor shall meet with appropriate CIO staff members, contractors, or other <AGENCY> personnel to discuss communication needs and participate as a member of project teams as needed. The Contractor maybe required to act as the referral person for questions on <AGENCY> communications materials.
   * The Contractor shall develop direct communications programs as required, monitor roll-out of the campaign, and check for success level at conclusion. The Contractor will have the authority to send out <AGENCY> IT Alerts on behalf of the CIO after CIO approval. The Contractor shall ensure that <AGENCY> Intranet Web pages (IT Central) remain up-to-date and accurate.
3. The Contractor shall provide administrative support services for <AGENCY> Chief Information Officer (CIO).
4. The Contractor shall provide Administrative Officer support for the entire IT office to include support in the following areas: Corporate Planning Branch, <AGENCY> Transition Manager, Information Assurance/Security Manager, and the following three Divisions: Applications Development, Systems Engineering/Network Operations, and Web Services.
   * The Contractor shall provide a Communication Manager/Administrative Support person to act as the Administrative Officer to <AGENCY> and to be the liaison for the CIO to Personally Identifiable Information (PII) Program Managers.
   * The Contractor shall provide management and coordination of daily schedule and administrative support by a Senior Executive Advisor.
   * The Contractor shall provide direct support in execution of all day-to-day responsibilities of the CIO.
   * The Contractor shall provide action item tracking, meeting coordination, facilitation, and attendance; and develop briefing and presentation material.
   * The Contractor shall support <AGENCY> business, management, and innovation projects administratively as required.
   * The Contractor shall provide input on matters and issues consistent with BIZOPS.
   * The Contractor shall assist in the office program/project planning, staff coordination, financial reviews, technology assessments, data analyses and program specific financial issues.
   * The Contractor shall be responsible for oversight of controlled IT property of the CIO office (i.e. blackberry, laptops, cell phone, etc.).
   * The Contractor shall ensure that IT assets are registered within Office of Naval Research primary IT system registry.
   * The Contractor shall manage and track all issues related to the PII program in <AGENCY>.
   * The Contractor shall be responsible for developing tools to assist in performing the administrative duties support the CIO organization to include:

* Action Item Tracker Asset accountability
* Correspondence repository
* Maintain travel budgets and accounts
* Supplies inventory and budget

1. The Contractor shall assist in developing and reviewing presentations, speeches, or other briefing materials for the CIO. The Contractor shall arrange for necessary speaking aids (e.g. audio-visual equipment or conference lines). The Contractor shall attend the presentations and offer feedback to the CIO.

# Configuration Control

The Contractor shall assist the <AGENCY> CIO in complying with configuration management requirements by performing the following tasks.

1. The Contractor shall develop, implement, and manage the <AGENCY> configuration management boards for designated applications, systems, networks, processes, and governance documentation.
2. The Contractor shall document approved configuration changes for designated applications, systems, and networks.
3. The Contractor shall develop and maintain configuration management Configuration Management (CM) related policies, guidance, charters, and procedures.
4. The Contractor shall conduct CM related awareness and training.
5. The Contractor shall streamline organizational CM related processes.
6. The Contractor shall develop, implement, and manage the <AGENCY> change management boards for designated applications, systems, networks, processes, and governance documentation.
7. The Contractor shall document approved changes for designated programs and projects.
8. The Contractor shall develop and maintain CM related policies, guidance, charters, and procedures.
9. The Contractor shall conduct CM related awareness and training.
10. The Contractor shall streamline organizational CM related processes.
11. The Contractor shall coordinate and review all Standard Operating Procedures (SOPs) to include recommending changes and managing the SOP library.

# Policy and Program Compliance

The Contractor shall provide expertise as needed to ensure that any initiative or effort conducted by <AGENCY> or associated contractors is compliant with all appropriate guidance. This will include compliance with <AGENCY>, policies and directives. The Contractor shall maintain close attention to the activities of policy creating organization in order to advise the CIO of such changes and or requirements.

The Contractor shall work in close communication with the <AGENCY>'s Information Assurance (IA) team to ensure consistency and transparency in the understanding and implementations of policies and regulations and shall conduct periodic assessments of compliance to report to the CIO on the status of <AGENCY>'s systems and services related to compliance.

The Contractor shall conduct DoD Information Assurance Certification and Accreditation Process (DIACAP) Validation Activities – validation includes all tasks related to the execution of validation procedures (VP) that are associated with assigned IA controls. Each VP describes requisite preparatory steps and conditions, actual validation steps, expected results, and criteria and protocol for recording actual results. VPs may include associated supporting background material, sample results, or links to automated testing tools. This validation shall include Federal Information Security Management Act (FISMA) of 2002 requirements.

The Contractor shall assist the government lead to ensure compliance with <AGENCY> Application and Database Management System (DADMS), DoD IT Portfolio <AGENCY> (DITPR-<AGENCY>), and other IT data repositories. The Contractor shall assist the government lead with the review and update of DADMS and DITPR-<AGENCY> on at least a quarterly basis to ensure it reflects the current <AGENCY> systems and applications. In addition, the Contractor shall provide Subject Matter Expertise related to the review of IT Procurement Requests submitted thru the <AGENCY> automated tool. Specific support tasks include:

1. XXX (Applications, Servers, Networks):
   * Provide research and data management support for compliance of <AGENCY> applications, servers, and networks in DADMS.
   * Maintain status of applications and networks to assure compliance with waivers, last date allowed (LDA) extensions, version updates, etc.
   * Support <AGENCY> hardware and software inventory validation effort.
   * Support <AGENCY> response to Cyber Asset Reduction and Security (CARS) on excepted network status, hardware counts, or other data calls.
2. XXX-<AGENCY> (Systems):
   * Conduct Defense Business System (DBS) versus Application analysis which includes maintaining communication with Functional Area Managers (FAMs), <AGENCY> CIO, and other command stakeholders.
   * Support Annual Reviews.
   * Coordinate <AGENCY> response to data calls from <AGENCY>CIO, etc. for DBSs.
   * Provide support to <AGENCY> system owners for data gathering and entry, accreditation assistance, and periodic compliance checks.
3. IT Portfolio Management:
   * LDA review and Waiver process.
   * Coordinate <AGENCY> response to FAM version change requests.
   * Maintain software maintenance certification.
   * Communicate <AGENCY> issues with FAMs.
4. <AGENCY>-IDAS:
   * Support the <AGENCY> Customer Service Representatives (CSRs) within the command by communicating effectively with <AGENCY> internal stakeholders regarding the compliance requirements, training on the Information Technology Procurement Requests (ITPR) process, and status of relevant compliance tasks.
   * Assist in or proxy for initial <AGENCY> ITPR submissions and if required review any incomplete or incorrect information with the submitter.
5. The Contractor shall assist in the conduct of the periodic Review and Revalidation (R&R) of Telecommunications infrastructure supporting <AGENCY> to ensure compliance with Telecomm and Unified Capabilities guidance. This effort will be in support of the <AGENCY> R&R Approver Official.

# Deliverables

Deliverables are typically in the form of written reports, briefings, spreadsheets, and recommendations. The deliverables for this effort include, but are not limited to, white papers, point papers, Business Case Analysis (BCAs), memorandums, briefs, and meeting notes.

The Contractor shall deliver the products to the Contracting Officer's Representative (COR), or to an individual designated by the COR by the specified dates provided below. If no format is given, the Contractor shall propose a format to be used, at the time of assignment, to be approved by the COR. The contract number shall be used on all reports and correspondence presented in the performance of the contract. All reports, manuals, audio/visual aids, etc.., generated in execution of the contract shall become the property of the Office Naval Research.

The Contractor shall provide the following deliverable items. The table below provides a list of the deliverable items with their delivery date(s), followed by a description of the items to be delivered.

| **Deliverable** | **Required Delivery Date** |
| --- | --- |
| 1. Monthly Performance Progress and Financial Report | Every thirty (30) days and by the 10th of every month |
| 1. Meeting Minutes and Presentation Material | Within two (2) business days after the meeting |
| 1. Point Papers | No later than five (5) days after the request |
| 1. Command Strategic Business and Operations Plan | Generated and published annually with quarterly updates |
| 1. Business Case Analysis, Analysis of Alternatives (AoA) and Plan of Action Milestones | As required by the Contracting Officer Representative and no later than thirty (30) days following each request |
| 1. Customer Survey and Analysis | Annually |

1. **Monthly Performance Progress, and Financial Report(s).**The Contractor shall submit Monthly Performance, Progress, and Financial Report(s) every thirty (30) days and by the 10th of every month. The report(s) shall indicate the labor hours incurred by each labor category, along with a description of the work performed during that period, any setbacks encountered, and how they were handled. In addition, the report(s) shall provide details on the expenditures for that period, by labor, travel, and cumulative expenditures to date. Contractor format is acceptable and electronic submission is encouraged. Following the submission of the report(s), in-progress reviews (IPRs) will be conducted on a monthly basis.
2. **Meeting Minutes and Presentation Material.** The Contractor shall provide all meeting minutes and presentation materials annotated with notes, agendas, and action items. Contractor format is acceptable. The Contractor shall provide the meeting minutes and presentation material within two (2) business days after each meeting. Contractor format is acceptable and electronic submission is encouraged.
3. **Point Papers**. The Contractor shall provide formal Point Papers, two-three (2-3) pages in length that describes the area being reviewed and provides technical assessments regarding its applicability at <AGENCY> to include the benefits and disadvantages. The scope of the papers is broad and can range from evaluating future technologies; evaluating the impact of IT guidance changes; evaluating software to determine if <AGENCY> should move to later versions of software or different software; or comparing actual performance data to industry standards/<AGENCY> benchmarks. Contractor format is acceptable. The Contractor shall provide the Point Papers no later than five (5) days following each request.
4. **Command Strategic Business and Operations Plan.** The Contractor shall review and keep current with the <AGENCY> Command Strategic Plan and develop a CIO Strategic Business Plan which maps out how the <AGENCY> IT infrastructure complements the Command Strategic Plan as well as the <AGENCY>CIO IT Strategic Plans or identifies changes necessary to stay consistent with those higher-level plans. The Contractor is required to update the Plan on an annual basis. In addition, the Contractor is required to assist with the formulation of the annual CIO Operations Plan which implements the long-range items targeted in the Strategic Plan on an annual and detailed basis to document the CIO’s annual goals and priorities. The Operations Plan should be generated and published annually with quarterly updates if required. Contractor format is acceptable.
5. **Business Case Analysis, Analysis of Alternatives (AoA), and Plan of Action Milestones (POAMS).** The Contractor shall provide a formal report that describes the problem to be solved, identifies alternatives to solve the problem, compares the technical benefits and/or disadvantages of those alternatives, provides full life cycle costs for each alternative (development, purchase, maintenance, technology refreshment, and disposal), and provides recommendations for the best alternative. In addition, the report should include POAMs for each alternative that identify the steps and duration for the implementation of each alternative. Contractor format is acceptable. The Contractor shall provide the Analysis, AoA, and POAMs as required by the Contracting Officer Representative no later than thirty (30) days following each request.
6. **Customer Survey and Analysis’s.** The Contractor shall provide a web-based customer satisfaction survey to be conducted annually. The results of the survey will be compared and contrasted to prior customer surveys. The Contractor shall provide a written report of the analyzed data to include recommendations. The results will also be provided to the OCIO via and oral brief. The survey will consist of a series of questions to <AGENCY> IT users which will determine what IT services have been used and if those services were provided in a satisfactory manner including the resolution of any problems. IT users will anonymously respond to the automated survey tool.