

PERFORMANCE WORK STATEMENT

1.0 BACKGROUND

The mission of the Department of Veterans Affairs (VA) is to provide excellent benefits and services to the Veterans of the United States. In meeting these goals, the three VA administrations (VHA, VBA, and NCA) as well as staff offices, to include the Office of Information and Technology (OI&T), continually strive to provide high quality, effective, and efficient business, benefits, cemetery/burial, healthcare and technology processes and services to those responsible for providing care to the Veterans, at the point-of-care as well as throughout all the points of the Veterans' care, in an effective, timely and compassionate manner. The Department of VA is responsible for ensuring the efficient and effective operation of its assets and resources to meet the mission requirements of the VA's Secretary, Under Secretaries, Assistant Secretaries, and other key officials. VA Enterprise Research and Advisory services are needed to help VA accomplish its mission and initiatives, build a well-trained and informed workforce, and improve assistance and guidance to programs and projects across all of VA.

2.0 APPLICABLE DOCUMENTS

In the performance of the tasks associated with this Performance Work Statement (PWS), the Contractor shall comply with the following:

1. 44 U.S.C. § 3541, "Federal Information Security Management Act (FISMA) of 2002"
2. Federal Information Processing Standards (FIPS) Publication 140-2, "Security Requirements For Cryptographic Modules"
3. FIPS Pub 201-2, "Personal Identity Verification of Federal Employees and Contractors," August 2013
4. 10 U.S.C. § 2224, "Defense Information Assurance Program"
5. Carnegie Mellon Software Engineering Institute, Capability Maturity Model® Integration for Development (CMMI-DEV), Version 1.3 November 2010; and Carnegie Mellon Software Engineering Institute, Capability Maturity Model® Integration for Acquisition (CMMI-ACQ), Version 1.3 November 2010
6. 5 U.S.C. § 552a, as amended, "The Privacy Act of 1974"
7. 42 U.S.C. § 2000d "Title VI of the Civil Rights Act of 1964"
8. VA Directive 0710, "Personnel Security and Suitability Program," June 4, 2010, <http://www.va.gov/vapubs/>
9. VA Handbook 0710, Personnel Security and Suitability Security Program, May 2, 2016, <http://www.va.gov/vapubs>
10. VA Directive and Handbook 6102, "Internet/Intranet Services," July 15, 2008
11. 36 C.F.R. Part 1194 "Electronic and Information Technology Accessibility Standards," July 1, 2003
12. 12. Office of Management and Budget (OMB) Circular A-130, "Managing Federal Information as a Strategic Resource," July 28, 2016
13. 32 C.F.R. Part 199, "Civilian Health and Medical Program of the Uniformed Services (CHAMPUS)"
14. An Introductory Resource Guide for Implementing the Health Insurance Portability and Accountability Act (HIPAA) Security Rule, October 2008

15. Sections 504 and 508 of the Rehabilitation Act (29 U.S.C. § 794d), as amended by the Workforce Investment Act of 1998 (P.L. 105-220), August 7, 1998
16. Homeland Security Presidential Directive (12) (HSPD-12), August 27, 2004
17. VA Directive 6500, “Managing Information Security Risk: VA Information Security Program,” September 20, 2012
18. VA Handbook 6500, “Risk Management Framework for VA Information Systems – Tier 3: VA Information Security Program,” March 10, 2015
19. VA Handbook 6500.1, “Electronic Media Sanitization,” November 03, 2008
20. VA Handbook 6500.2, “Management of Breaches Involving Sensitive Personal Information (SPI)”, October, 28, 2015
21. VA Handbook 6500.3, “Assessment, Authorization, And Continuous Monitoring Of VA Information Systems,” February 3, 2014
22. VA Handbook 6500.5, “Incorporating Security and Privacy in System Development Lifecycle”, March 22, 2010
23. VA Handbook 6500.6, “Contract Security,” March 12, 2010
24. VA Handbook 6500.8, “Information System Contingency Planning”, April 6, 2011
25. OI&T ProPath Process Methodology (reference process maps at <http://www.va.gov/PROPATH/Maps.asp> and templates at <http://www.va.gov/PROPATH/Templates.asp>)
26. 26. One-VA Technical Reference Model (TRM) (reference at <http://www.va.gov/trm/TRMHomePage.asp>)
27. National Institute Standards and Technology (NIST) Special Publications (SP)
28. VA Directive 6508, “Implementation of Privacy Threshold Analysis and Privacy Impact Assessment,” October 15, 2014
29. VA Handbook 6508.1, “Procedures for Privacy Threshold Analysis and Privacy Impact Assessment,” July 30, 2015
30. VA Directive 6300, Records and Information Management, February 26, 2009
31. VA Handbook, 6300.1, Records Management Procedures, March 24, 2010
32. OMB Memorandum, “Transition to IPv6”, September 28, 2010
33. VA Directive 0735, Homeland Security Presidential Directive 12 (HSPD-12) Program, October 26, 2015
34. VA Handbook 0735, Homeland Security Presidential Directive 12 (HSPD-12) Program, March 24, 2014
35. OMB Memorandum M-06-18, Acquisition of Products and Services for Implementation of HSPD-12, June 30, 2006
36. OMB Memorandum 05-24, Implementation of Homeland Security Presidential Directive (HSPD) 12 – Policy for a Common Identification Standard for Federal Employees and Contractors, August 5, 2005
37. OMB memorandum M-11-11, “Continued Implementation of Homeland Security Presidential Directive (HSPD) 12 – Policy for a Common Identification Standard for Federal Employees and Contractors, February 3, 2011
38. OMB Memorandum, Guidance for Homeland Security Presidential Directive (HSPD) 12 Implementation, May 23, 2008
39. Federal Identity, Credential, and Access Management (FICAM) Roadmap and Implementation Guidance, December 2, 2011

40. NIST SP 800-116, A Recommendation for the Use of Personal Identity Verification (PIV) Credentials in Physical Access Control Systems, November 20, 2008
41. OMB Memorandum M-07-16, Safeguarding Against and Responding to the Breach of Personally Identifiable Information, May 22, 2007
42. NIST SP 800-63-2, Electronic Authentication Guideline, August 2013
43. NIST SP 800-157, Guidelines for Derived PIV Credentials, December 2014
44. NIST SP 800-164, Guidelines on Hardware-Rooted Security in Mobile Devices (Draft), October 2012
45. Draft National Institute of Standards and Technology Interagency Report (NISTIR) 7981 Mobile, PIV, and Authentication, March 2014
46. VA Memorandum, VAIQ #7100147, Continued Implementation of Homeland Security Presidential Directive 12 (HSPD-12), April 29, 2011 (reference <https://www.voa.va.gov/documentlistpublic.aspx?NodeID=514>)
47. VA Memorandum, VAIQ # 7011145, VA Identity Management Policy, June 28, 2010 (reference Enterprise Architecture Section, PIV/IAM (reference <https://www.voa.va.gov/documentlistpublic.aspx?NodeID=514>))
48. IAM Identity Management Business Requirements Guidance document, May 2013, (reference Enterprise Architecture Section, PIV/IAM (reference <https://www.voa.va.gov/documentlistpublic.aspx?NodeID=514>))
49. Trusted Internet Connections (TIC) Reference Architecture Document, Version 2.0, Federal Interagency Technical Reference Architectures, Department of Homeland Security, October 1, 2013, https://www.fedramp.gov/files/2015/04/TIC_Ref_Arch_v2-0_2013.pdf
50. OMB Memorandum M-08-05, “Implementation of Trusted Internet Connections (TIC), November 20, 2007
51. OMB Memorandum M-08-23, Securing the Federal Government’s Domain Name System Infrastructure, August 22, 2008
52. VA Memorandum, VAIQ #7497987, Compliance – Electronic Product Environmental Assessment Tool (EPEAT) – IT Electronic Equipment, August 11, 2014 (reference Document Libraries, EPEAT/Green Purchasing Section, <https://www.voa.va.gov/documentlistpublic.aspx?NodeID=552>)
53. Sections 524 and 525 of the Energy Independence and Security Act of 2007, (Public Law 110–140), December 19, 2007
54. Section 104 of the Energy Policy Act of 2005, (Public Law 109–58), August 8, 2005
55. Executive Order 13693, “Planning for Federal Sustainability in the Next Decade”, dated March 19, 2015
56. Executive Order 13221, “Energy-Efficient Standby Power Devices,” August 2, 2001
57. VA Directive 0058, “VA Green Purchasing Program”, July 19, 2013
58. VA Handbook 0058, “VA Green Purchasing Program”, July 19, 2013
59. Office of Information Security (OIS) VAIQ #7424808 Memorandum, “Remote Access”, January 15, 2014, <https://www.voa.va.gov/DocumentListPublic.aspx?NodeId=28>
60. Clinger-Cohen Act of 1996, 40 U.S.C. §11101 and §11103
61. VA Memorandum, “Implementation of Federal Personal Identity Verification (PIV) Credentials for Federal and Contractor Access to VA IT Systems”, (VAIQ# 7614373) July 9, 2015, <https://www.voa.va.gov/DocumentListPublic.aspx?NodeId=28>

62. VA Memorandum “Mandatory Use of PIV Multifactor Authentication to VA Information System” (VAIQ# 7613595), June 30, 2015,
<https://www.voa.va.gov/DocumentListPublic.aspx?NodeId=28>
63. VA Memorandum “Mandatory Use of PIV Multifactor Authentication for Users with Elevated Privileges” (VAIQ# 7613597), June 30, 2015;
<https://www.voa.va.gov/DocumentListPublic.aspx?NodeId=28>
64. “Veteran Focused Integration Process (VIP) Guide 1.0”, December, 2015,
<https://www.voa.va.gov/DocumentView.aspx?DocumentID=4371>
65. “VIP Release Process Guide”, Version 1.4, May 2016,
<https://www.voa.va.gov/DocumentView.aspx?DocumentID=4411>
66. “POLARIS User Guide”, Version 1.2, February 2016,
<https://www.voa.va.gov/DocumentView.aspx?DocumentID=4412>

3.0 SCOPE OF WORK

The Department of VA is looking for an enterprise level Executive Program and Research support relationship that will provide extensive coverage of information technologies and management to serve the unique needs of VA executives and leaders. Research offerings need to align with specific role based solutions to the VA to provide even higher value and impact. VA executives have requested that senior leadership be provided with the on-going status of research usage to document successes and to make course corrections throughout the contract period if deemed necessary. The contractor will work with VA leadership to identify each organization’s top initiative and to proactively provide research, access to analysts and industry experts and to ensure all research requirements of VA are being addressed.

The Contractor shall provide enterprise Research and Advisory (R&A) services to VA in the following areas of Healthcare, Information Technology, Benefits, Cemetery/Burial Services and Business Management in providing and supporting the health and welfare of Veterans:

Healthcare shall cover the current Government and evolving Healthcare delivery trends in the following areas to include: cloud computing, mobility, security, infrastructure, operations, portfolio management, applications, telecommunications, customer relationship management, change control management, enterprise resource planning, and supply chain management software.

Information Technology shall cover the areas of emerging, current, evolving and legacy technologies to determine new ways that technology can be applied to improve support for the VA Mission and initiatives and technical topics impacting VA technologies across the enterprise with sp. Current technical topics impacting VA include: cloud computing, application management/platforms, identity and access management, information security/privacy, networks, telecommunications mobility, infrastructure and operations, data centers, data management and analysis, content and collaboration technologies, business intelligence and information management, information systems, advanced system analysis and engineering, business process improvement, enterprise architecture, program and portfolio management, security and risk management, and sourcing and vendor relationships.

Business Management shall cover the areas of business intelligence and emerging management practices with specific emphasis on assessing government organization structure and processes, governance, sourcing and vendor relationships and partnerships, information management and

analytics, big data and data mining, security, application management, supply chain strategies, and industry insurance advisory services.

4.0 PERFORMANCE DETAILS

4.1 PERFORMANCE PERIOD

The period of performance (POP) shall be one (1) year from date of award, with four (4) one-year option periods, if exercised by the Government.

Any work at the Government site shall not take place on Federal holidays or weekends unless directed by the Contracting Officer (CO).

There are ten (10) Federal holidays set by law (USC Title 5 Section 6103) that VA follows:

Under current definitions, four are set by date:

New Year's	Day January 1
Independence	Day July 4
Veterans Day	November 11
Christmas Day	December 25

If any of the above falls on a Saturday, then Friday shall be observed as a holiday. Similarly, if one falls on a Sunday, then Monday shall be observed as a holiday.

The other six are set by a day of the week and month:

Martin Luther King's Birthday	Third Monday in January
Washington's Birthday	Third Monday in February
Memorial Day	Last Monday in May
Labor Day	First Monday in September
Columbus Day	Second Monday in October
Thanksgiving	Fourth Thursday in November

4.2 PLACE OF PERFORMANCE

Tasks under this PWS shall be performed at Contractor facilities with the exception of occasional analyst/guidance meetings between Contractor and VA management.

4.3 TRAVEL

The Government anticipates travel under this effort to perform the tasks associated with the effort, as well as to attend program-related meetings or conferences through the period of performance. Include all estimated travel costs in your firm-fixed price line items. These costs will not be directly reimbursed by the Government.

5.0 SPECIFIC TASKS AND DELIVERABLES

The Contractor shall perform the following:

5.1 TASK PROJECT MANAGEMENT

5.1.1 PROJECT MANAGEMENT PLAN

The Contractor shall draft a Project Management Plan (PMP) that lays out the Contractor's approach, timeline and tools to be used in execution of the contract. The PMP should take the form of both a narrative and graphic format that displays the schedule, milestones, risks and resource support. The PMP shall also include how the Contractor shall coordinate and execute planned, routine, and ad hoc data collection reporting requests as identified within the PWS. The initial baseline PMP shall be concurred upon and updated monthly thereafter. The Contractor shall update and maintain the VA PM approved PMP throughout the period of performance.

Deliverables:

A. Project Management Plan

5.1.2 REPORTING REQUIREMENTS

The Contractor shall provide the Contracting Officer's Representative (COR) with Monthly Progress Reports in electronic form in Microsoft Word and Project formats. The report shall include detailed instructions/explanations for each required data element, to ensure that data is accurate and consistent. These reports shall reflect data as of the last day of the preceding month.

The Monthly Progress Reports shall cover all work completed during the reporting period and work planned for the subsequent reporting period. The report shall also identify any problems that arose and a description of how the problems were resolved. If problems have not been completely resolved, the Contractor shall provide an explanation including their plan and timeframe for resolving the issue. The Contractor shall monitor performance against the PMP and report any deviations. It is expected that the Contractor will keep in communication with VA accordingly so that issues that arise are transparent to both parties to prevent escalation of outstanding issues.

Deliverables:

A. Monthly Progress Report

5.2 GENERAL REQUIREMENTS

The Department of VA seeks a vendor that can provide enterprise-level research products and consulting services with respect to the aforementioned areas above and requires services that include timely published research and best practices; briefings on current research; dialogues with analysts who author this material; a body of reference material that defines and describes in detail the various technologies that the aforementioned areas comprise; and a web-based IT architecture decision support capability to assist in the selection of solutions/technologies, based on the enterprise's conditions and preferences.

Based on the unique needs of VA executives and leaders, the Department of VA is in search of an enterprise level Executive Program and Research products that support relationship that will provide extensive coverage of the aforementioned areas that meet the following requirements:

- The Contractor shall provide a broad range of accurate, reliable, recognized, independent and relevant research and consulting/advisement.
- The Contractor will maintain an extensive library of business and technology research.
- The Contractor's library of research and analyses will, at a minimum, be accessible by market, topic, and industry.

- Market access will consist at a minimum of hardware, software, IT services, and communications.
- Access by IT topic will focus on and include at a minimum: application development, cloud environments, business intelligence, customer relationship management, data management, emerging technologies, enterprise architecture, IT operations, mobile and wireless communications, networking, security and web services; or their equivalents.
- The Contractor's research and opinion will be considered definitive by leading organizations world-wide.
- The Contractor will support a large client base within the Federal Government, as well as, within the Federal Executive Community.
- The Contractor will provide access to business cases that apply to the aforementioned industries with respect to the challenges facing the VA.
- The Contractor will provide access to a large base of expert analysts focused on a variety of IT and business related research areas.
- The Contractor will provide authoritative insight that is independent, accurate, and unbiased.
- The Contractor shall provide access to subject matter experts (SMEs) and analysts, and shall provide forums for collaboration and networking with Government and private sector peers to VA.
- The Contractor shall provide reports and other artifacts from commercial and academic channels of research. The Contractor shall also provide artifacts on topics that are highly specific to VA and not generally available thereby requiring ad-hoc research efforts. Ad hoc requests are not expected to exceed twelve (12) in number during the period of performance. The Contractor is required to notify the Contracting Officer in writing (via email) prior to commencing work on any ad-hoc research projects.
- The Contractor shall provide a subscription-based service to all VA OI&T staff (Enterprise license, unlimited access to approximately 8,000 VA OI&T employees), to access business-focused, cross-functional, peer-informed information on immediately actionable solutions to technology management challenges. The subscription service shall provide research information based on IT consumer and cross-functional best practices, proven Federal agency best practices, peer benchmarks, executive networking, advisory support, decision and diagnostic tools, live and online learning events enabling VA staff at all levels with the decisions that drive their success as leaders in their respective functional areas of responsibility.
- The Contractor shall provide unlimited concurrent user website access 24 hours/day, 7 days per week, and 365 days per year (excluding routine maintenance time).
- The Contractor will abide by a written set of ethics to ensure the highest standards of business practice. These ethics will include ensuring the confidentiality of its client's information, as well as ensuring that there is no conflict of interest and their analysts/staff have no vested interest in a particular technology or business practice.
- The Contractor will provide short-term, independent, objective consulting services to help ensure that the Agency is leveraging our most critical technologies appropriately and identifying and evaluating emerging technologies and/or methodologies that map to the Agency's strategic objectives in order to successfully meet our business challenges. The range of services will include at a minimum:
 - The use of proven analytical tools, benchmark data, recognized and accepted process models, templates, measurement techniques, industry standard process

frameworks, best practices, comparative analytics, and/or proven methodologies supported by documented case studies.

- Assessing, planning, developing, defining, and evaluating investment and service delivery strategies to optimize business functions through leveraging existing technologies as well as through the potential use of new or emerging technologies and/or methodologies.
- Demonstrating how IT initiatives enable the business strategy and deliver measurable business contributions at optimal cost.
- Assessing our organizational readiness and interoperability of a new technology and/or methodology/approach and create a roadmap to guide pre and post implementation activities.
- Tailoring proven methodologies to ensure pragmatic and actionable results; and
- Transference of knowledge through a collaborative work environment.
- Dedicated Account Team – The Contractor shall provide an account manager and team to serve as the liaison between VA and the research advisory Contractor services. The dedicated account team must possess a thorough understanding of VA’s mission, its strategic objectives, and its vision in order to best map its services to the Agency’s needs. The account team will possess a broad understanding of VA’s infrastructure, architecture, and business processes. The account administration responsibilities will include:
 - Oversight of VA research requests to ensure analyst inquiries are scheduled within 5 to 10 business days.
 - Submit, at a minimum, quarterly utilization reports to VA’s account manager.
 - Schedule quarterly account meetings with VA’s account manager to review services, research inquiries, optimization of services, and utilization report.
 - Provide training to new account holders.
 - Provide recommendations and insight into new approaches to meet the demands of VA’s challenges.
 - Provide appropriate Contractor resources to support specific research requirements, such as on-site discussions to address the client’s key topics including but not limited to security architecture, IT standards, and business transformation, etc.

5.3 General Research Content

The Contractor will provide at a minimum: special reports, case studies, research materials, direction of emerging technology and its potential affects; vendor products, market studies; latest industry developments, and custom email alerts.

General research content shall be designed to help professionals achieve measurable business results. VA seeks access to a large repository of expert analysis and opinion on pertinent subjects; including searchable databases of leading-edge research, customized alerts, and personal consults with experienced analysts. General Research Content shall provide research and advice for decision making.

General Research Content shall include access (search, read and download) to the following:

- Case Studies that reflect important client issues, and industry trends
- Special Reports –with research themes that cut across technology or industry-specific research, or provide in-depth strategic analysis of markets, trends, industry developments, vendors, products and services
- Published Research Materials that have an emphasis on companies, products, markets, decision framework, tactical guidelines, case studies, and strategic planning assumptions, emerging technologies and their potential affects.
- Alerts – Event-driven bulletins that address each of the subject markets
- News Takes – Industry-focused newsletters providing timely analysis on the top stories in industry, capturing recent announcements and the potential impacts on the market
- Custom Email Alerts which shall provide VA with the ability to set up alerts that may be sent to their email, or delivered via RSS feeds for any “key word search” that meets their criteria.
- Written and Audio research reports at a minimum:
 - Vendor and product evaluation reports, such as key findings, recommendations, practicality, background, analysis, and reference materials.
 - Special reports pertaining to underlying research themes that address a broad spectrum of technologies, latest IT trends, industry developments, vendors, products, and services.
 - Timely published research focused on global industries, products, markets, decision frameworks, case studies, and strategic planning assumptions.
 - Toolkit resources with specific portfolio templates or questionnaires to provide advice or guidance.
- Other content media to include: presentations, blogs, webinars, audio-casts, video-casts, teleconferences, business cases, web-site pages, and strategic planning documents

5.4 Mid-Level Management and Senior Staff Services

The Contractor will provide the following research and advisory services to VA’s mid-management account holder responsible in determining, recommending, and acquiring new solutions/technologies for the Agency.

- Service shall include access to the Contractor’s General Research Content through their vendor established website.
- Teleconferences on specific topics of interest/need.
- Analyst reviews of business-related documents.

- Analyst inquiry sessions required for their individual business purposes, as well as for the interpretation of application of Contractor's published research.
- Local, regional, or national events focused on the specific IT and Business areas identified above.

Mid-Level and Senior Staff Service shall provide access to research and advice about aforementioned areas above and the functional responsibilities of their specific roles and allow for inquiry with industry Analysts. This service will make it easier for Users to find the information necessary to make informed data-driven decisions. At a minimum, the offering shall focus on following roles:

- Application Management
- Business Intelligence and Information Management
- Business Process Improvement
- Enterprise Architecture
- IT Infrastructure and Operations
- Program and Portfolio Management
- Security and Risk Management
- Sourcing and Vendor Relationships

Deliverables:

- Access to all mid-level management and senior staff services Role Web Pages
- Access to an industry on-line community that provides insight and experience from both analysts and peers.
- News and Analysis
- Access to General Research Content via vendor established webpage
- Access to data and/or reports that provide other federal agency performance in comparison to our own.
- A large selection of written research reports, such as:
 - Vendor and Product Ratings
 - Special Reports
 - Published Research
- Online Tools and Resources
- Access to industry analysts and document review
- Teleconferences on Business/IT topics
- Special Event Tickets – Admission to one (1) Special Conference hosted by the provider per year
- Bi-monthly Webinars and Local Briefings shall be provided by the contractor

5.5 Enterprise/Business Leader Service

The Contractor will provide the following research and advisory and support services to VA's IT and Business leaders or their designee, within the areas of security and risk management, infrastructure and data center operations, enterprise architecture, business intelligence, applications management, business process improvement, sourcing and vendor relationships and portfolio management.

- Account team who will serve as the primary point-of-contact for all of the Contractor's services. This team will work with the Manager/Leader or his designee to identify key areas of interest upon which their research and services are to focus along with a service delivery model that meets the needs of the manager. This team will possess a broad knowledge of IT and recognized business practices.

- A web site geared toward a management-level presentation of specific IT or Business-aligned content.
- Teleconferences that are geared toward the specific IT or Business portfolio.
- Expert, timely analyst review and comment on designated high-level documents.
- Local, regional, or national events focused on the specific IT and Business peers who share common interests.
- Contractor to provide a research workflow engine that allows VA individual research users to input various initiatives to automatically generate delivery of the most relevant research, suggested analysts, and suggested peers to interact with, based upon their detailed timing requirements. The engine must provide each user with a personalized page and timely notifications for each individual initiative.
- Access to an exclusive online community that provides insight and experience from the Contractor's analysts, as well as, from IT and Business peers who share common interests.

Enterprise and Business Leader Services shall be for senior leaders in large, complex enterprises who manage functions for a business unit of the entire enterprise. The service shall be managed by an account team consisting of a Leadership Partner and Client Manager who will tailor program deliverables to the unique needs of each senior leader.

Deliverables:

- Member Servicing – An assigned Team Leader who shall be provided as the primary point of contact
- Annual On-site Meeting
- Teleconferences specifically targeted toward IT or Business portfolio issues
- Peer Community Events, Online Access and Content – Member Forum Meetings and access to an online community of IT and Business peers.
- Websites geared toward a management-level presentation of specific IT or Business-aligned content
- Bi-monthly Webinars and Local Briefings
- Provide industry analysts to facilitate review and comment on designated high-level documents
- Content
 - Access to an IT/Business Leaders Role-Based Web Page
 - Online Tools and Resources
 - Access to data and/or reports that provide other federal agency performance in comparison to our own
- Conference Events focused on specific IT and business areas

5.6 Supply Chain Professionals

The Contractor shall deliver actionable insight and best practices to help supply chain professionals build, manage and transform their supply chains.

- Access to expert supply chain analysts and research focused on supply chain processes and technologies.
- Insights for key verticals: Consumer/Retail, Industrial/High-Tech, Access to a private online chat community

- Attendance for one (1) Conference specifically geared toward Supply Chain Professionals
- Ongoing, expert advice from an experienced supply chain professional
- The ability to confer, collaborate and compare notes with experienced supply chain executives
- Networking opportunities, including member meetings, web conferences, and access to online portal
- Provide an aligned research analyst

Deliverables include, but are not limited to:

- Access to supply chain research and tools through a customizable vendor established webpage
- Industry specific insights
- Access to a global support forum
- Analysts inquiry and a reference to topic executive-level conference ticket
- Market News, Weekly Picks and Industry Picks
- Participation in Advisor's inquiries
- Analyst webinars
- Ongoing coaching from an experienced Leadership Partner
- Access to established member forums
- Access to established peer networks

5.7 Conferences

The Contractor will provide VA with access to their hosted events within the United States on specific topics, technologies, and industries that are in alignment with VA's strategic direction and vision as well as their Annual Conference, an annual, globally recognized conference within the U.S. with leading technology keynote speakers to engage in discussions on corporate strategy, product direction, emerging technologies, impacts on organizations/agencies as a result of economical, demographic and governmental influences..

5.8 Industry Advisory Service

The Contractor will provide specific industry-focused research and content where the agenda is client-driven. Industry Advisory Services shall provide data and insights with an agenda related to specific industry issues, markets dynamics and emerging/enabling information technologies.

Deliverables:

- Research Content
 - Industry-specific Technology Research
 - IT Leaders Research
 - Select Harvard Business School Press Content
- Inquiry Access
 - Standard Analyst Inquiry provides access to Industry Analysts for the Industry sector pre-selected.

5.9 Technical Professionals

The contractor will provide multi-user access through a customizable home page for up to 40 users within the VA with detailed insight on technical design and project execution

The contractor will provide In-depth research and expert guidance:

- Detailed technology reports spanning security, data management, and infrastructure and operations
- Analyst inquiries and document reviews
- How-to frameworks, case studies, decision support tools and best practices
- Unbiased vendor recommendations and evaluation criteria to compare competing products effectively
- Field research papers
- Templates/graphics that are reusable for VA

Deliverables include (but are not limited to):

- Access to published research
- Access to reference architecture
- A global support forum
- Analyst webinars
- Unlimited analyst dialogues for up to 60 minutes each
- Unlimited document reviews with analyst feedback
- Industry Conference tickets

5.10 Technology Planner Essentials

The contractor shall provide an Interactive Web service for improving infrastructure analysis and planning to include server consolidation, IT efficiency and Servers/Storage. The contractor will provide VA with analysis and tools that assist in:

- Determining cost savings through detailed consolidation planning tools
- Creating plans to transform infrastructure with fact-based justifications
- Optimizing the Department's budget with tools to right size server selection
- Rooting out sources of inefficiency in the data center
- Determining efficiency by location to prioritize infrastructure upgrades
- Evaluating and comparing products
- Gaining insight into list pricing, typical discounts and detailed specifications

Server Consolidation – The contractor will provide the ability to compare the performance and environmental characteristics of different servers and model what-if consolidations scenarios.

IT Efficiency – Ability to analyze server assets across data centers to identify the least-efficient servers. Benchmark installed servers against replacement options.

Servers and Storage – Provide an extensive library of server and storage product information covering all major current and obsolete products. Enable detailed comparisons of product capabilities.

5.10 Role-Specific Research and Advisory Services

The Contractor will provide the following services to the roles specified:

- **Senior Executive Level Service** – the Contractor will provide the following research and advisory and support services to VA's senior-level or their designee.

- A service delivery team who will serve as the primary point-of-contact for all of the Contractor's services. This team will work with the Executive or designee to identify key areas of interest upon which their research and services are to focus along with a service delivery model that will meet the needs of the Executive. This team will possess a broad knowledge of IT and recognized business practices.
- A web site geared toward an executive-level presentation of role-specific content.
- Senior level executive teleconferences.
- Exclusive access to executive-level focused research through timely, expert analyst engagements.
- Expert, timely analyst review and comment on designated high-level documents.
- Summarized targeted research on an as-needed basis.
- Access and introduction to a global network or peers through various channels.
- Invitations to local, regional and national Executive-level events
- An annual, globally recognized conference within the U.S. with leading technology keynote speakers to engage in discussions on corporate strategy, product direction, emerging technologies, impacts on organizations/agencies as a result of economical, demographic and governmental influences
- Contractor to provide a research workflow engine that allows VA individual research users to input various initiatives to automatically generate delivery of the most relevant research, suggested analysts, and suggested peers to interact with, based upon their detailed timing requirements. The engine must provide each user with a personalized page and timely notifications for each individual initiative.

Deliverables shall include, but not be limited to:

- Exclusive access to executive level focused research reports – Up to 12 reports per year, distributed in hard copy and available on the vendor established website.
- Reports shall be available for up to five named users.
- IT Executives – Access to websites that provide IT executive's role which highlight targeted role-specific content.
- Senior Executive Teleconferences - Up to 12 teleconferences per year, in which the member, and select directly reporting staff may participate. The teleconferences are hosted by Research Report Authors who discuss the topics of their Research Reports.
- Reference Level Access
- Dedicated Relationship Delivery Team or a Service Delivery Team
 - Onsite Meetings
 - Research Hot Topics
 - Research Recommendations and Summarized targeted research on an as-needed basis
 - Advisory Services
 - Onsite Member Briefing
 - Coaching Sessions
- Standard Analyst Inquiry (Unmetered)
- Research Inquiries (Unmetered) providing expert, timely analyst review and comment on designated high-level documents
- Event Invitations
 - Special Event– Two complimentary attendances per membership year for attendance by Member to an annual special event or conference. One of these

- attendances may be transferred to the designated delegate and both attendances shall entitle the attendance to full VIP privileged at said event or conference.
- Local Events – Nontransferable invitation for attendance, by the Member only, at local content based event in Member’s region or country.
- Member forum – Nontransferable invitation for attendances, by the Member only, to attend a regional/national event focusing on real-world cases and practices.
- Networking – Member may request a meeting or conference call with other global clients (peers) around a specific topic/issue in order to exchange information about best practices or areas of expertise.

5.11 Special Studies, Analysis, and/or Consulting

Throughout the course of the period of performance, Departmental Entities within VA may require consulting services to address specific studies, issues or concerns. The scope of the studies may include benchmarking agency performance, strategic analysis, risk analysis, information technology management, emerging technologies, among other IT related areas. VA seeks the ability to request Special Studies, Analysis and/or Consulting Services. The scope of each engagement will be defined at the Call level.

6.0 GENERAL REQUIREMENTS

6.1 ENTERPRISE AND IT FRAMEWORK

The Contractor shall support the VA enterprise management framework. In association with the framework, the Contractor shall comply with OI&T Technical Reference Model (One-VA TRM). One-VA TRM is one component within the overall Enterprise Architecture (EA) that establishes a common vocabulary and structure for describing the information technology used to develop, operate, and maintain enterprise applications. One-VA TRM includes the Standards Profile and Product List that collectively serves as a VA technology roadmap. Architecture, Strategy, and Design (ASD) has overall responsibility for the One-VA TRM.

The Contractor shall ensure Commercial Off-The-Shelf (COTS) product(s), software configuration and customization, and/or new software are PIV-enabled by accepting HSPD-12 PIV credentials using VA Enterprise Technical Architecture (ETA), http://www.ea.oit.va.gov/VA_EA/VAEA_TechnicalArchitecture.asp, and VA Identity and Access Management (IAM) approved enterprise design and integration patterns, http://www.techstrategies.oit.va.gov/enterprise_dp.asp. The Contractor shall ensure all Contractor delivered applications and systems are compliant with VA Identity Management Policy (VAIQ# 7011145), Continued Implementation of Homeland Security Presidential Directive 12 (VAIQ#7100147), and VA IAM enterprise identity management requirements (IAM Identity Management Business Requirements Guidance document), located at <https://www.voa.va.gov/documentlistpublic.aspx?NodeID=514>. The Contractor shall ensure all Contractor delivered applications and systems provide user authentication services compliant with NIST Special Publication 800-63, VA Handbook 6500 Appendix F, “VA System Security Controls”, and VA IAM enterprise requirements for direct, assertion based authentication, and/or trust based authentication, as determined by the design and integration patterns. Direct authentication at a minimum must include Public Key Infrastructure (PKI) based authentication supportive of Personal Identity Verification (PIV) and/or Common Access Card (CAC), as determined by the business need. Assertion based authentication must include a SAML implementation. Additional assertion

implementations, besides the required SAML assertion, may be provided as long as they are compliant with NIST 800-63 guidelines. Trust based authentication must include authentication/account binding based on trusted HTTP headers. The Contractor solution shall conform to the specific Identity and Access Management PIV requirements are set forth in OMB Memoranda M-04-04 (<http://www.whitehouse.gov/sites/default/files/omb/memoranda/fy04/m04-04.pdf>), M-05-24 (<http://www.whitehouse.gov/sites/default/files/omb/memoranda/fy2005/m05-24.pdf>), M-11-11 (<http://www.whitehouse.gov/sites/default/files/omb/memoranda/2011/m11-11.pdf>), National Institute of Standards and Technology (NIST) Federal Information Processing Standard (FIPS) 201-2, and supporting NIST Special Publications.

The Contractor solution shall support the latest Internet Protocol Version 6 (IPv6) based upon the directive issued by the Office of Management and Budget (OMB) on September 28, 2010 (<https://cio.gov/wp-content/uploads/downloads/2012/09/Transition-to-IPv6.pdf>) & (<http://www.cybertelecom.org/dns/ipv6usg.htm>). IPv6 technology, in accordance with the USGv6: A Technical Infrastructure for USGv6 Adoption (<http://www.nist.gov/itl/antd/usgv6.cfm>) and the NIST SP 800 series applicable compliance (<http://csrc.nist.gov/publications/PubsSPs.html>), shall be included in all IT infrastructures, application designs, application development, operational systems and sub-systems, and their integration. All public/external facing servers and services (e.g. web, email, DNS, ISP services, etc.) shall support native IPv6 users, including all internal infrastructure and applications shall communicate using native IPv6 operations. Guidance and support of improved methodologies which ensure interoperability with legacy protocol and services, in addition to OMB/VA memoranda, can be found at <https://www.voa.va.gov/documentlistpublic.aspx?NodeID=282>.

The Contractor solution shall meet the requirements outlined in Office of Management and Budget Memorandum M08-05 mandating Trusted Internet Connections (TIC) (<http://www.whitehouse.gov/sites/default/files/omb/assets/omb/memoranda/fy2008/m08-05.pdf>), M08-23 mandating Domain Name System Security (NSSEC) (<http://www.whitehouse.gov/sites/default/files/omb/assets/omb/memoranda/fy2008/m08-23.pdf>), and shall comply with the Trusted Internet Connections (TIC) Reference Architecture Document, Version 2.0 https://www.fedramp.gov/files/2015/04/TIC_Ref_Arch_v2-0_2013.pdf.

The Contractor IT end user solution that is developed for use on standard VA computers shall be compatible with and be supported on the standard VA operating system, currently Windows 7 (64bit), Internet Explorer 11 and Microsoft Office 2010. In preparation for the future VA standard configuration update, end user solutions shall also be compatible with Office 2013 and Windows 8.1. However, Office 2013 and Windows 8.1 are not the VA standard yet and are currently not approved for use on the VA Network, but are in-process for future approval by OI&T. Upon the release approval of Office 2013 and Windows 8.1 individually as the VA standard, Office 2013 and Windows 8.1 will supersede Office 2010 and Windows 7 respectively. Applications delivered to the VA and intended to be deployed to Windows 7 workstations shall be delivered as a signed .msi package and updates shall be delivered in signed .msp file formats for easy deployment using System Center Configuration Manager (SCCM) VA's current desktop application deployment tool. Signing of the software code shall be through a vendor provided certificate that is trusted by the VA using a code signing authority such as Verizon/Cybertrust or Symantec/VeriSign. The Contractor shall also ensure and certify that their solution functions as expected when used from a standard VA computer, with non-admin, standard user rights that have been configured using the United States Government Configuration Baseline (USGCB) specific to the particular client operating system being used.

The Contractor shall support VA efforts IAW the Veteran Focused Integration Process (VIP). VIP is a Lean-Agile framework that services the interest of Veterans through the efficient streamlining of activities that occur within the enterprise. The VIP Guide can be found at <https://www.voa.va.gov/DocumentView.aspx?DocumentID=4371>. The VIP framework creates an environment delivering more frequent releases through a deeper application of Agile practices. In parallel with a single integrated release process, VIP will increase cross-organizational and business stakeholder engagement, provide greater visibility into projects, increase Agile adoption and institute a predictive delivery cadence. VIP is now the single authoritative process that IT projects must follow to ensure development and delivery of IT products

The Contractor shall utilize ProPath, the OI&T-wide process management tool that assists in the execution of an IT project (including adherence to VIP standards). It is a one-stop shop providing critical links to the formal approved processes, artifacts, and templates to assist project teams in facilitating their VIP compliant work.

6.2 CONTRACTOR PERSONNEL SECURITY REQUIREMENTS

The following security requirement must be addressed regarding Contractor supplied equipment: Contractor supplied equipment, PCs of all types, equipment with hard drives, etc. for contract services must meet all security requirements that apply to Government Furnished Equipment (GFE) and Government Owned Equipment (GOE). Security Requirements include: a) VA Approved Encryption Software must be installed on all laptops or mobile devices before placed into operation, b) Bluetooth equipped devices are prohibited within VA; Bluetooth must be permanently disabled or removed from the device, c) VA approved anti-virus and firewall software, d) Equipment must meet all VA sanitization requirements and procedures before disposal. The COTR, CO, the Project Manager, and the Information Security Officer (ISO) must be notified and verify all security requirements have been adhered to.

1. Position Sensitivity and Background Investigation - The position sensitivity and the level of background investigation commensurate with the required level of access is:

Low/NACI
Moderate/MBI
X High/BI

Position Sensitivity	Background Investigation (in accordance with Department of Veterans Affairs 0710 Handbook, "Personnel Suitability and Security Program," Appendix A)
Low / Tier 1	Tier 1 / National Agency Check with Written Inquiries (NACI) A Tier 1/NACI is conducted by OPM and covers a 5-year period. It consists of a review of records contained in the OPM Security Investigations Index (SII) and the DOD Defense Central Investigations Index (DCII), Federal Bureau of Investigation (FBI) name check, FBI fingerprint check, and written inquiries to previous employers and references listed on the application for employment. In VA it is used for Non-sensitive or Low Risk positions.

Position Sensitivity	Background Investigation (in accordance with Department of Veterans Affairs 0710 Handbook, "Personnel Suitability and Security Program," Appendix A)
Moderate / Tier 2	Tier 2 / Moderate Background Investigation (MBI) A Tier 2/MBI is conducted by OPM and covers a 5-year period. It consists of a review of National Agency Check (NAC) records [OPM Security Investigations Index (SII), DOD Defense Central Investigations Index (DCII), FBI name check, and a FBI fingerprint check], a credit report covering a period of 5 years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, law enforcement check; and a verification of the educational degree.
High / Tier 4	Tier 4 / Background Investigation (BI) A Tier 4/BI is conducted by OPM and covers a 10-year period. It consists of a review of National Agency Check (NAC) records [OPM Security Investigations Index (SII), DOD Defense Central Investigations Index (DCII), FBI name check, and a FBI fingerprint check report], a credit report covering a period of 10 years, written inquiries to previous employers and references listed on the application for employment; an interview with the subject, spouse, neighbors, supervisor, co-workers; court records, law enforcement check, and a verification of the educational degree.

Contractor Responsibilities:

- a. The Contractor shall prescreen all personnel requiring access to the computer systems to ensure they maintain the appropriate Background Investigation, and are able to read, write, speak and understand the English language.
- b. The Contractor shall bear the expense of obtaining background investigations.
- c. For a Low Risk designation the following forms are required: 1.OF-306 and either 2. DVA Memorandum – Electronic Fingerprints or FD-258 Fingerprint card. For Moderate or High Risk the following forms are required: 1. VA Form 0710 and either 2. DVA Memorandum – Electronic Fingerprints or FD-258 Fingerprint card. These should be submitted to the CO or COTR after award has been made.
- d. Within 3 days after award, the Contractor shall provide a staff roster to the CO and COTR to enable the initiation of the Electronics Questionnaire for Investigations Processes (e-QIP) to begin their background investigations.
- e. The Contractor personnel will receive an email notification from the Electronics Questionnaire for Investigations Processes (e-QIP) identifying the website link that includes detailed instructions regarding completion of the investigation documents (SF85 or SF85P). The Contractor personnel shall submit all required information related to their background investigations utilizing the Office of Personnel Management's (OPM) Electronic Questionnaire for Investigations Processing (e-QIP).
- f. The Contractor is to sign the signature page and send to the COTR and CO for electronic submission to the Security and Investigations Center (SIC).
- g. The Contractor shall be responsible for the actions of all personnel provided to work for VA under this contract. In the event that damages arise from work performed by Contractor provided personnel, under the auspices of this contract, the Contractor shall be responsible for all resources necessary to remedy the incident.
- h. If the background investigation is not completed prior to the start date of the contract, the Contractor employee may work on the contract once the investigation has been initiated and sent to the OPM. However, the Contractor will be responsible for the actions of the Contractor personnel

they provide to perform work for VA. The investigative history for Contractor personnel working under this contract must be maintained in the databases of either the OPM or the Defense Industrial Security Clearance Organization (DISCO).

i. The Contractor, when notified of an unfavorable determination by the Government, shall withdraw the employee from consideration in working under the contract.

j. Failure to comply with the Contractor personnel investigative requirements may result in termination of the contract for default.

6.3 METHOD AND DISTRIBUTION OF DELIVERABLES

The Contractor shall deliver documentation in electronic format, unless otherwise directed in Section B of the solicitation/contract. Acceptable electronic media include: MS Word

2000/2003/2007, MS Excel 2000/2003/2007, MS PowerPoint 2000/2003/2007, MS Project 2000/2003/2007, MS Access 2000/2003/2007, MS Visio 2000/2002/2003/2007, AutoCAD 2002/2004/2007/2010, and Adobe Postscript Data Format (PDF).

6.4 PERFORMANCE METRICS

The table below defines the Performance Standards and Acceptable Performance Levels for Objectives associated with this effort.

Performance Objective	Performance Threshold	Acceptable Levels of Performance
Provide seat-holder with requested documents in a timely manner	95% of the research documents shall be received by the subscribers within 48 hours.	Satisfactory or higher
Ensure all tickets allocated for subscribers are provided in a timely manner.	100% of all tickets are to be provided to the subscribers, as scheduled.	Satisfactory or higher
Ensure all licensed subscribers with the Department of Veterans Affairs are trained on how best to navigate their web-site and process for gaining access to an analyst.	100% of licensed subscribers requesting training will be trained within 48 hours of request.	Satisfactory or higher
Ensure all optional annual industry vendor sponsored event tickets allocated for subscribers are provided in a timely manner.	100% all tickets are to be provided to the subscribers, as scheduled.	Satisfactory or higher

The Government will utilize a Quality Assurance Surveillance Plan (QASP) throughout the life of the contract to ensure that the Contractor is performing the services required by this PWS in an acceptable manner. The Government reserves the right to alter or change the surveillance methods in the QASP at its own discretion. A Performance Based Service Assessment Survey will be used in combination with the QASP to assist the Government in determining acceptable performance levels.

6.5 FACILITY/RESOURCE PROVISIONS

The Government shall provide office space, telephone service and system access when authorized contract staff work at a Government location as required in order to accomplish the Tasks associated with this PWS. All procedural guides, reference materials, and program documentation for the project and other Government applications will also be provided on an as-needed basis.

The Contractor shall request other Government documentation deemed pertinent to the work accomplishment directly from the Government officials with whom the Contractor has contact. The Contractor shall consider the COTR as the final source for needed Government documentation when the Contractor fails to secure the documents by other means. The Contractor is expected to use common knowledge and resourcefulness in securing all other reference materials, standard industry publications, and related materials that are pertinent to the work.

VA shall provide access to VA specific systems/network as required for execution of the task via a site-to-site VPN or other technology, including VA specific software such as Veterans Health Information System and Technology Architecture (VistA), ClearQuest, ProPath, Primavera, and Remedy, including appropriate seat management and user licenses. The Contractor shall utilize Government-provided software development and test accounts, document and requirements repositories, etc. as required for the development, storage, maintenance and delivery of products within the scope of this effort. The Contractor shall not transmit, store or otherwise maintain sensitive data or products in Contractor systems (or media) within the VA firewall IAW VA Handbook 6500.6 dated March 12, 2010. All VA sensitive information shall be protected at all times in accordance with local security field office System Security Plans (SSP's) and Authority to Operate (ATO)'s for all systems/LAN's accessed while performing the tasks detailed in this PWS. For detailed Security and Privacy Requirements refer to ADDENDUM A and ADDENDUM B.

6.6 GOVERNMENT FURNISHED PROPERTY

Not applicable.