

PERFORMANCE WORK STATEMENT

14 April 2011
REVISION 7

1.1 General

1.1.1 Objective

The U.S. Customs and Border Protection (CBP), Office of Technology Innovation & Acquisition (OTIA) Secure Border Initiative (OTIA / SBI) Program Management Office (PMO) desires to establish a TO that provides program management support services across the entire OTIA / SBI organization. The contractor shall support the PMO by providing various professional skill sets both full-time employees and well as surge and on-demand support on an as needed basis to support the many functional areas that make up the OTIA / SBI organization. The contractor shall provide TO management, apply risk management, quality management and personnel change management to effectively and efficiently support the PMO.

1.1.2 Scope

Contractor support is primarily for the PMO. However, at the direction of the Government, the contractor shall interface with and provide support to other Government entities within CBP that are involved with the OTIA / SBI. The contractor shall also interface with other contractors that support the PMO. Currently, contractor-provided program management support represents a significant portion of the PMO's effort of meeting mission goals and objectives.

The scope of this TO includes consulting, program management support, possible trade studies, and administrative assistance supporting the PMO with mission goals, objectives and daily tasks. The contractor shall support the PMO in the following functional areas:

- Performance, Planning and Metrics;
- Budget & Financial Management Support;
- Program Management Support;
- Program Control Support;
- Systems Engineering Support;
- Organizational Development & Quality Management Support;
- Planning & Business Operations;
- Operational Requirements;
- Integrated Logistics Support & Planning;
- Deployment;
- Environmental Planning & Real Estate Support;
- Organization & Administration Support; and
- Transitional Planning & Support

The contractor shall support the PMO in aspects of planning, developing, revising, coordinating, managing and implementing program and project management documents, processes, tools and procedures. The contractor shall function as the expert for services provided by ensuring work products are complete, and provide analytical tools and techniques to ensure continual progress toward implementing the OTIA / SBI projects and programs.

1.2 Background

Secretary Chertoff created the SBI early in his tenure at the Department of Homeland Security (DHS) to bring clarity of mission, effective coordination of DHS assets, and greater accountability to the work of DHS in securing the Nation's borders. Contractor-provided services will continue to play an important role in assisting the CBP achieve these goals.

Achieving effective control of the border requires an optimal mix of personnel, technology, and infrastructure, as well as response assets, which will provide maximum tactical advantage in each unique border environment. OTIA / SBI programs and contractor success requires flexibility and responsiveness throughout the entire immigration system to include maximizing contractor personnel and their skill sets. The contractor shall support the PMO and Program Managers (PMs) as they manage the technological solution for border control at and between our ports of entry. The contractor shall support OTIA / SBI and follow on border surveillance, detection, and deterrence systems as the PMO builds a Common Operating Picture (COP) of the border environment within a command center environment, which will provide uniform data to all

DHS agencies and be interoperable with stakeholders external to DHS. Elements of border security are carried out by many organizations within the DHS. The DHS established the Secure Border Coordination Council (SBCC), which is chaired by the Deputy Secretary, and consists of seven additional members including the Executive Director of the Secure Border Coordination Council Office; the Assistant Secretary for Policy; the Commissioner of CBP; the Assistant Secretary for ICE; the Director of USCIS; the Commandant of the USCG; and the Assistant Secretary for I&A. The responsibilities of the SBCC are as follows: The Commissioner of CBP established an Executive Steering Committee (ESC), comprised of the Commissioner, Deputy Commissioner, and Associate Commissioners of all CBP line organizations, and the PMO Executive Director. The ESC acts as an advisory and decision-making body for OTIA / SBI -related matters.

The goal of the PMO is to field the most effective proven technology, staffing and response platforms; and integrate them into a single comprehensive border security solution. Other divisions that fall under the PMO include Business Management Operations; Operational Integration; and Systems Engineering. Under this TO, the contractor shall support all OTIA / SBI organizations.

1.3 Management Support

The contractor shall support all entities within OTIA / SBI. The contractor shall also assist the Government by participating in Integrated Product Teams (IPTs) for the purpose of facilitating and accomplishing program activities. Contractor support to the PMO includes the following:

1.3.1 Task Order Management

The contractor shall provide the management, project control and TO administration necessary to manage the TO. The Government encourages using commercially available automated tools and then applying expertise on processes and metrics that support TO management. The objective of the tools is to provide quicker access, improved accuracy, and enhanced accessibility for OTIA / SBI clients, real-time monitoring of status/deliverables, tracking the quality of work products and gauging overall customer satisfaction. The contractor shall provide management support specifically to PMO organizations. For this TO, support includes coordination of invoice submittals and reviews, travel requests, requests and authorizations for additional work hours, Problem Notification Reports (if applicable); and the managing and overseeing all activities performed by contractor and subcontractor personnel to satisfy the requirements identified in this TO. The contractor shall identify a Senior Lead Program Manager (PM) who shall provide management, direction, administration, quality assurance, and leadership to the execution of this TO. The contractor shall provide the Contracting Officer (CO) and Contract Specialist, the Contracting Officer's Technical Representative (COTR) with a brief report, using MS PowerPoint format, summarizing the contractor's staffing plan for the TO. As part of this report the contractor shall provide the CO and COTR with an active, sortable post-negotiation MS Excel spreadsheet listing of TO on-board and planned contractor personnel with the following fields at a minimum: employee name; SBI/OTIA directorate office or program supported; status; labor category; contractor; total projected hours, and # of FTEs,

1.3.2 Provide Project Status Report

For this TO, the contractor shall provide a Project Status Report (PSR) using MS Office Suite applications, by the 10th calendar day of each month via electronic mail to the TO Project Manager and TO COTR. The PSR shall primarily focus on major initiatives, high priorities, medium and high risks, expenditures, and shall include the following:

- Significant activities during reporting period (Include: On-going activities, upcoming activities and recent activities completed; and progress to date on all above mentioned activities). Executive level summary.
- Problems and corrective actions taken by the contractor. Also include issues or concerns and proposed resolutions to address them;
- Personnel gains, losses and status (e.g., departures, planned inbound, background investigations or other issues);
- Government actions required;
- Schedule specific to particular contractor support work (when applicable, show major projects, major milestones, and TO deliverables; and planned and actual start and completion dates for each).

1.3.3 Task Order Status Meetings

The contractor PM shall convene a monthly TO Status Meeting with the Task Order PM, COTR, and other key Government stakeholders (e.g., other OTIA / SBI project managers). The Government anticipates the meetings shall be held at Washington DC or Arlington, VA. These meetings may be held on an individual directorate level. The purpose of this meeting is to ensure all stakeholders are informed of the monthly activities and status report, provide opportunities to identify other activities and establish priorities, and coordinate resolution of identified problems or opportunities. Within the scope of this Task Order, the COTR shall direct the contractor to perform or prioritize tasks, as identified determined by technical requirements. The contractor shall provide high-level, bulleted minutes of these meetings to the Task Order PM and COTR within five business days following the meeting, including attendance, issues discussed, decisions made and action items assigned.

1.3.4 Prepare Trip Reports

The contractor shall provide a Trip Report for all Government-approved travel. The contractor shall keep a summary of all long-distance and local travel, to include at a minimum, the OTIA / SBI organization for which the travel was performed, the name of the employee, location of travel, duration of trip, and point-of-contact (POC) at travel location.

1.4 Performance, Planning and Metrics

The contractor shall assist in the central coordination for data management, performance measures, reports, and analysis on OTIA / SBI programs and activities. In addition, the contractor shall assist in developing and maintaining CBP's OTIA / SBI strategic planning documents, coordinating and providing CBP-wide responses to border security data requests from Administration, Congressional, and other stakeholders. This shall include, but is not limited to:

- Assist in developing strategies and approaches to new directions, proposing alternative strategies as appropriate, and proposing appropriate metrics and infrastructure support;
- Assist in providing accurate and timely responses to multiple high-profile border security reports; and
- Monitor and track program compliance with and responsiveness to Governance, OMB, DHS, GAO, and OIG guidance, findings and reports and other Federal policies and regulations.

1.5 Budget & Financial Management Support

The contractor shall assist the government in formulating and executing the OTIA / SBI program and project budgets, including planning, programming, budgeting, and execution of the OTIA / SBI program and project budgets. This shall include, but is not limited to:

- Ensure the efficient, timely, and effective implementation of program budget formulation, OMB Exhibit 300 formulation, program cost baselines, contractor cost baselines, and financial execution. The contractor should assume more than one Exhibit 300 may be required;
- Ensure the alignment of budgets with strategic and programmatic goals, and adherence to fiscal guidance and DHS/CBP budget policy;
- Develop, review and implement project-level spend plans; and conduct regular and recurring reviews of OTIA / SBI resource utilization to identify issues that might impact the program's overall objectives;
- Develop and prepare routine, periodic reports on the allocation, status, tracking, commitment, obligation, and expenditure of funds; and
- Prepare and process funding documents, identify program funding variances, recommend appropriate reprogramming actions and/or corrective actions; and report reconciled status of funds.

The contractor shall also provide cost estimating support (analysis, models, research, and documentation) to develop all forms of cost estimates to include, but not be limited to, System Life Cycle Cost Estimates, Independent Government Cost Estimates, individual project estimates, and other ad hoc estimates as required. These estimates will support: the Program Office's contract/task order award process, budgetary cycle inputs, investment decisions, and other program products; and requirements to provide cost information to Congress, OMB, and others.

The contractor shall participate in program meetings and technical interchanges to remain current with program requirements. All estimates shall be thoroughly developed and documented to HQ DHS and Government Accountability Office (GAO) Cost Assessment Guide standards to facilitate Government review,

third party replication and validation, and future updates or enhancements. The Contractor shall participate in the review and reconciliation of other system contractor estimates. Results of estimating support shall be presented in a variety of formats such as verbal presentations, narrative reports, and briefing charts.

1.6 Program Management Support

The contractor shall participate in the continual definition and documentation of the OTIA / SBI program and OTIA / SBI projects. This shall include but is not limited to:

- Assist the Government with the organization, management, and control of all program management-related documents and artifacts, establish and implement document management control procedures and processes, and maintain existing program documentation and historical program files;
- Assist program leadership with managing the integration of the OTIA / SBI suite of tools across the OTIA / SBI and CBP;
- Assist in pre-award functions associated with awarding a new task order at the program and project levels, including integrated planning with other pre-award activities, and coordinating the activities associated with getting the authorization to award; advise and assist the OTIA / SBI PMs regarding contract or task order issues involving scope, compliance, modifications and alternative contract solutions; and assist the OTIA / SBI PMs with identifying requirements and deliverables, and other specifications that should be included in a modification or new contract or task order. Prior to providing procurement support, the Contractor shall sign all Non-Disclosure Agreement and Organizational Conflict-of-Interest documents applicable to each program office.
- When requested, work with the System Prime, Asset Management Division (AMD), U.S. Army Corps of Engineers (USACE) and CBP to create and maintain an integrated schedule of planned construction and installation of Tactical Infrastructure for the program;
- Provide integrated program expertise for controlling, disseminating, and reporting on the program and its various projects including compiling, analyzing and reporting on status for all OTIA / SBI projects;
- Coordinate, attend, and document meetings and project reviews to capture ongoing program and project data and information, including developing meeting agendas, capturing and tracking risks, issues and action items, and capturing and publishing meeting minutes;
- Assist in developing requirements, format, and content of program and project plans, and working with IPTs to maintain program and project plans. And assist in the establishment of, preparation for, conduct of, and follow-up to regular project reviews;
- Assist in the development, execution and management of Service Level Agreements (SLAs), Memorandum of Agreement/Understanding (MOA/MOU), Inter-Agency Agreements (IAAs) and other relevant documentation;
- Analyze and report progress against task orders, facilitate the approval process of all project deliverables and work products, ensure that action items are identified, properly managed and resolved, and coordinate task order closeout activities to ensure cost, schedule, and performance goals are successfully achieved.
- Ensure coordination of environmental activities, surveys, permit requests, etc are completed in time for geographic deployments
- Coordinate, manage and monitor all activities related to the project execution, monitoring the action item database and risk management activities
- Ensure the system design is accurately portrayed in the geographic lay-down
- Monitor progress by inspecting project sites to assess adherence to design specifications

The PMO conducts Program Management Reviews (PMRs) with various contractors. The contractor shall support the PMO, as necessary, to meet review objectives. The OTIA / SBIPMO Executive Director has implemented Acquisition Management Reviews for OTIA / SBI projects. The contractor shall assist the PMO by providing data, information, and presentation slides to the PMs as requested; the contractor shall also assist with the actual oral presentation if requested.

Although the Government does not require the contractor develop and deliver many OTIA / SBI program artifacts, the contractor shall support the PMO and PMs with reviewing, managing and revising program artifacts. For examples, those artifacts include the following but may include additional artifacts:

- Program Management Plan
- Program/Project Spend Plan(s)
- Communication Plan
- Risk Management Plan
- Test and Evaluation Master Plan (TEMP)

- Integrated Master Plan (IMP)
- Integrated Master Schedule (IMS)
- Requirements Development and Management Plan
- Systems Engineering Management Plan (SEMP)

1.7 Program Control Support

The Contractor shall perform integrated program control activities to ensure comprehensive program and project management status information is effectively and efficiently portrayed in a timely manner through integrated schedules, major program reviews, and performance metrics. This shall include, but is not limited to:

- Define appropriate schedule activities and combine the schedule activities for select stakeholders, maintain and update the schedules, provide quantitative and qualitative analysis of the schedules and integrate findings within status reports and other products as necessary;
- Maintain an Integrated Master Schedule (IMS) and Integrated Master Plan (IMP) for the Program Office. In some instances, when other system contractors have developed an IMS or IMP; the contractor shall assist the Program Office with tracking milestones and resources and maintaining the schedules and plans;
- Participate in the review of the System Prime's schedule management;
- Assist program and project managers at the beginning of each new task order to ensure that Value Engineering and Earn Value Management principles are applied, and perform assessments to ensure compliance with EVM principles and standards;
- Provide analysis of EVM data provided by other system contractors in their monthly Cost Performance Reports (CPRs), Cost/Schedule Status Reports (C/SSRs), or other data provided; identify and report deficiencies, performance trends, and other findings in CPR analysis reports and program and project status reports as necessary;
- Maintain and update, as required, the Integrated Baseline Review (IBR) process, analyze and evaluate the IBR data and record action items, risks, and issues identified during IBRs to ensure that they are addressed prior to closing out the IBR activity;
- Develop and maintain a program and project summary status and health report; and
- Assist in developing and maintaining the program and project Government Work Breakdown Structure (GWBS) with associated responsibility, performance, budget, and acquisition matrices. Coordinate with other system contractors in the expansion of the GWBS to the Contractor Work Breakdown Structure (CWBS).

1.8 Operational Requirements Support

The contractor shall assist the Government in developing program operational requirements in the form of functional specifications, sector and geographic requirements; serve as liaison with CBP operational components to provide current and desired operational capabilities and requirements; and ensure requirements meet the needs of the user community and comply with operational policies, mandates, rules, and regulations. This support shall include but is not limited to:

- Coordinating with other CBP and DHS organizations impacting OTIA / SBI requirements, providing requirements, requirements analysis, and requirements management functions;
- Support the OTIA / SBIPMO as it validates the technical and interface requirements baselines to ensure that requirements meet the needs of the user community, comply with policies, mandates, rules and regulations; and are achievable, verifiable, unambiguous, complete and contained in all mission profiles, operational and maintenance concepts, and utilization environments;
- Assist in the maintenance, validation, configuration management, and dissemination of a systems lay-down database, identifying geographical location, environmental, and real estate information on planned deployment sites;
- Collect and analyze data to evaluate operational difficulties and the end-user's needs; and recommend solutions to problems or gaps found in the defined CBP operational requirements;
- Support the PMO, as necessary, as the PMO maintains manning and staffing requirements to assess and predict manpower needs in light of OTIA / SBI systems and infrastructure introduction; and
- Update and maintain Requirements Development and Management plans, and documentation of OTIA / SBI Operations Concepts, as the Program Office uses an evolutionary spiral and capability-based approach.

1.9 Systems Engineering Support

The contractor shall assist the Government in developing and applying system and design specifications, performance baselines, testing processes and activities, engineering processes, technical risk management, configuration management, software development, enterprise architecture integration; and reliability, maintainability, availability and sustainability. This support shall include but is not limited to:

- Align OTIA / SBI as a system within the DHS and CBP enterprise to ensure program alignment, mapping to the business architecture and technology standards, including defining the framework or structure of components and the relationships among components and the principles and guidelines that govern their design and evolution over time;
- Submitting technical documents to the appropriate review boards for inclusion in the DHS and CBP Enterprise Architecture Technical Reference Model, to ensure the OTIA / SBI components and systems are compatible with existing and future infrastructure;
- In collaboration with the Program Office and other system contractors, assist in the functional analysis and allocation of the requirements developed under Mission Engineering to system hardware and software configuration items. Ensure those requirements are captured by other system contractors in B-Level specifications (i.e., Development and Production stage specifications);
- Assist with Government participation in all Systems Engineering activities and act as Subject Matter Experts (SMEs) for the oversight and assistance of: Development Test & Evaluation; Integration Testing; Security Certification; Operational Test & Evaluation; development of Special Purpose Test Equipment; Test Facilities and Environments; and Assessment Testing to verify technical performance, operational effectiveness, and operational suitability;
- Provide Configuration and Change Management (CM) support, to include document and deliverable management and control, develop, implement and maintain a configuration management baseline and change control procedures, define OTIA / SBI Program change control procedures and documentation templates and coordinate establishing and executing OTIA / SBI Configuration Control Boards (CCBs) as required;
- Maintain a CM library of all systems, interfaces, items, detailed and material specifications, and processes developed by other system contractors;
- Assess the development, design, and/or creation of software that satisfies OTIA / SBI Command, Control, Communications, and Intelligence (C3I) system operational needs or objectives and the introduction, maintenance, and removal of software solutions for C3I, including the integration of COTS/GOTS software from the various product vendors into the common architecture of the OTIA / SBI Toolbox solution;
- Participate in all Systems Engineering activities and act as SMEs for developing and integrating all prime mission products into the OTIA / SBI Toolbox items, which consists of the OTIA / SBI prime mission products;
- Assist in developing and executing program and project technical reviews and audit disciplines tied to systems engineering gate reviews and events. In collaboration with the OTIA / SBI Program Office and other system contractors, coordinate technical reviews and audits, establish entrance and exit criteria, review and audit standards, and track resulting action items and deficiencies;
- Conduct offsite and onsite independent trade studies to support functional allocation of requirements, evaluate alternative architectures and solutions sets, support cost and performance trade-offs, and examine proposed changes;
- Provide experienced-level engineering subject matter expertise, as needed, in the disciplines listed below, to provide the Government with the capability to correctly evaluate the details of other system contractor's solution set. This expertise shall be exercised through technical analysis and developing technical papers, briefings, and performance predictions. The disciplines required include:
 - Ground surveillance radar design and in-situ performance including signal processing;
 - EO/IR systems design and performance including signal and video processing;
 - Remote power systems;
 - Wide-band wireless communications systems;
 - Seismic, IR and acoustic ground sensors and sensor networks;
 - Broadband communications networks including microwave, fiber and wi-fi and wi-max;
 - Air-to-ground communications and data relay;
 - Systems engineering and integration;
 - Civil engineering including at a minimum, structure, hydrologies, and geotechnical;
 - Software development and integration including rapid application and spiral development;
 - Remote sensing including airborne and space-borne sensing;
 - National intelligence architecture;

- Signal processing, sensor track correlation and fusion, scene understanding and alerting;
- The interaction of sensors with the real world environment and prediction and measurement of resulting system performance;

- Participate in all Systems Engineering activities and be the SME in the development and integration of communications systems, including reviewing communication-related specifications and overseeing trade studies, identifying communications services and requirements (voice & data), facilitating spectrum management, and resolving integration issues among legacy equipment and proposed communication solutions;
- Participate in all Systems Engineering activities and act as the SME for the development, integration and accreditation of OTIA / SBI Information Technology (IT) Infrastructure, including Networks, Data Center, Information Security, Servers, Data Systems, and Utility Software, including reviewing information security specifications, ensuring compliance with federal regulations, overseeing the implementation of security protocols, and facilitating the certification and accreditation activities;
- Develop and analyze, as required, “back of the envelope” modeling to assess system performance capacities, costs, availability, and program execution. Such models shall be used at the spreadsheet and workbook level, vice major simulation systems;
- In collaboration with the PMO and other system contractors, develop or update and maintain a joint Systems Engineering Management Plan (SEMP) that incorporates the other system contractor’s systems engineering processes; and
- Provide deployment and installation, technical and program support in the field, including logistics, oversight, quality assurance, and integration testing support as needed.

1.10 Organizational Development and Quality Management

The contractor shall assist the Government in developing strategies for organizational development (including but not limited to allocation of tasks to organization elements, definition and assessment of key processes, strategic planning, and development of the workforce). The contractor shall also support development of a robust quality and process management infrastructure. The contractor shall maintain cognizance with a broad set of theories and models for organizational development and quality management, and shall recommend application of the appropriate theories and models to the PMO. Activities shall include but not be limited to:

- Provide OTIA / SBI management with timely quality assurance information, to include early identification of issues and problems that can impact program success;
- Identify opportunities for quantitative measurements that can enhance management oversight, awareness, and control of process improvement decisions and efforts;
- Advise the program office on other system contractor’s and material suppliers’ conformance to quality and process management requirements and practices; and
- Assist in identifying, managing, mitigating, and closing program cost, schedule, and technical risks.

1.11 Integrated Logistics Support and Planning

The contractor shall assist in maintenance and support planning for program solutions including deployment planning and management, site preparation support, development and implementation of operator and maintenance training required to support OTIA / SBI technologies, and site readiness assessments in coordination with the appropriate operational elements. This shall include but is not limited to:

- Provide training expertise and support curriculum development, serving as a focal point for interaction and cooperation with the interagency community on training-related issues;
- Coordinate the integration between the Office of Training and Development (OTD), the Office of Information and Technology (OIT), DHS internal and external stakeholders, and OTIA / SBI offices on all OTIA / SBI training initiatives, from business case formulation to program evaluation and modification;
- Ensure that supply sources are accessible to operational components in the field to sustain the availability of program assets; and ensure that government assets are properly accounted for in the property and financial system of record, and include real property and land acquisition;
- Provide support for field offices, support and integration sites to include logistics tracking, technical coordination between the other system contractors and program office, oversight, metric collection, and assistance in troubleshooting; and

- Support the development of Integrated Logistics Support Plans (ILSP), and support the development of program-required documentation (e.g., acquisitions plans, program management plans, operational test and evaluation plan, and transition plans).

1.12 Environmental Planning & Real Estate Support

The Government requires contractor assistance with implementing environmental planning for OTIA / SBI programs in accordance with CBP policy and DHS Management Directive 5100, to ensure program compliance with environmental laws and regulations.

The contractor may analyze potential effects on the environment due to implementing the OTIA / SBI programs, prepare reports and documentation, provide environmental guidance to SBI / OTIA project managers; and advise the PMs on the process of obtaining environmental approvals from the relevant agencies and stakeholders. This shall include but is not limited to:

- Coordinate with the CBP and DHS designated authority for determination whether the use of a Categorical Exclusion (CATEX) requiring a Record of Environmental Consideration (REC) is appropriate, approval and signature for a REC for a CATEX, a Finding of No Significant Impact (FONSI) for an Environmental Assessment (EA), and a Notice of Intent (NOI) and/or Record of Decision (ROD) for an Environmental Impact Statement (EIS);
- Analyze OTIA / SBI technical solutions for impacts on CBP/OTIA / SBI facilities planning and operational requirements for facilities owned, leased, or occupied by CBP personnel supporting operations impacted by the OTIA / SBI program;
- Advise the project managers on appropriate lead time for real estate acquisition and planning schedules for any facilities construction required to support OTIA / SBI;
- Analyze any proposals from other system contractors for facilities construction as part of the OTIA / SBI solution, and make a recommendation as to its suitability for the program;
- Coordinate with CBP and DHS authorities to acquire real estate necessary to support OTIA / SBI deployments, including participating in deployment planning to determine long lead time requirements for real estate, determine location specific real estate requirements and help identify current land owners;
- Ensure that all preconditions for site leasing or land use agreements have been met, define requirements for leasing, and define requirements for inter-governmental agreements for land use;
- Utilize national online real estate databases to search property records; and maintain a database of real estate data including rights-of-entry, lease information for OTIA / SBI, and track expirations of lease and land use agreements; and
- Participate in the process to acquire land parcels either by lease or purchase, to include providing legal description of property, formal appraisal/ market survey, waiver valuation (if < \$10,000), title search/ preliminary title report.

1.13 Organization and Administrative Program Support

The Contractor shall assist the PMO with day-to-day mission support and office operations necessary to support the PMO program staff including office management activities, information technology support, training, property/inventory, office security, emergency planning, files management, and receptionist/administrative support. This shall include but is not limited to:

- Development and maintenance of standardized office policies, processes and procedures;
- Ensure a smooth transition process for all new hires, thereby enhancing team work and morale, assist in the development and execution of orientation training for all new hires;
- Develop and implement processes to track all correspondence, deliverables, action items and issues and ensure the timely and accurate execution of all task requests from outside the PMO;
- Execution of office logistics planning, including space/facilities planning, allocation and utilization for the office, and emergency preparedness;
- Develop processes to support planning and tracking of OTIA and PMO resources, including development of staffing plans, position descriptions, and human capital plans; which includes a manning and staffing requirements model and forecasts to assess and predict the OTIA or PMO manpower needs;
- Maintain and update the OTIA / SBI Training Plan, manage and coordinate training activities, and conduct or coordinate training across the program; develop and conduct training in support of the PMO's office process improvement activities and other project management areas;
- Perform all activities associated with the identification and control of OTIA / SBI correspondence and be responsible for identifying, cataloging, filing, and controlling program data files;

- Plan, organize, and participate in project-related meetings; capture action items at all meetings and assign them to appropriate parties; document all minutes at meetings initiated by the PMO's office and attended by the contractor; and distribute minutes to attendees and/or IPT members;
- Provide administrative staff support for the day-to-day administrative activities necessary to support program senior staff, including managing calendars, logistics and documentation of executive level meetings, coordinate travel to program sites, training, conferences, and other events;
- Provide support in the area of property management and maintain OTIA / SBI property management records; oversee implementation of a property management system in compliance with OTIA / SBI policies;
- Continued development and maintenance of collaboration environments such as SharePoint including organization, functionality addition and training; and
- Provide training management, data tracking, and tracking of training-related issues.

1.14 Transitional Planning and Support

At a to-be-determined time before the expiration of this TO and base contract, the contractor shall provide an Exit Transition Plan that shall identify transition support activities for all transition efforts for follow-on requirements to minimize disruption of services. The Exit Transition Plan and support shall include the following:

- Inventory all Government Furnished Equipment (GFE) and Government Furnished Information (GFI) in Contractor possession;
- Status of all deliverables;
- Problems encountered during period of performance;
- Current issues, problems, or activities in process that require immediate action;
- Delivery of all documentation, including all updates to Standard Operating Procedures, in hard copy and electronic formats;
- The plan on how the contractor intends to transition follow-on requirements, and the list of key personnel involved in this effort;
- Final deliverables due; and
- Identify and provide a schedule of routine events for continuity of program (e.g., reports and processes).

The COTR shall approve this plan and transition support. Exit transition support shall commence prior to the base contract expiring. Upon award of a follow-on contract, the contractor shall work with the new contractor to provide knowledge transfer and transition support as required by the COTR PMO,.

1.15 Implementation Plan for Program Management Office Support Services (PMOSS)

1.15.2. OTIA / SBI and ManTech Organizations

1.15.2.1 OTIA / SBI Organization

The PMOSS TO # 3 shall only support OTIA offices, directorates, branches, and programs managed by them. The current OTIA organization includes the following: OTIA Executive Director / Component Acquisition Executive and staff, PMO (Program Management), Acquisition Policy and Oversight, Systems Engineering, Integrated Logistics & Sustainment Support, Business Management Operations, Technology Management and the Operational Integration and Analysis. ManTech resources do not directly support other CBP organizations such as the Office of Field Operations which works closely with the SPO.

ManTech will directly support the PMO while the PMO supports other CBP organizations such as the Office of the Border Patrol, the Office of Field Operations, and CBP's Office of Facilities Management and Engineering. As requested by the COTR in response to PMO requirements, ManTech will support the PMO as executive leadership responds to requests from DHS, CBP and Congress regarding the PMO and OTIA programs.

1.15.2.2 ManTech Organization

ManTech will provide a contingent of program managers, project leads and numerous personnel to support the SPO. As CBP's background investigation process allows, ManTech will incrementally increase personnel resources. ManTech will provide a dedicated IDIQ contract Program Manager and a dedicated task order PM. ManTech project leads and personnel will report directly to the ManTech PMs. In addition to on-site personnel, ManTech provides other personnel from its office, located at 2001 Jefferson Davis Hwy, Suite 1209, Arlington, VA.

1.15.3. Services Provided by ManTech

ManTech will provide technical, business and program management support across many functional areas within the PMO. ManTech support includes a wide range of functions and technical expertise. For detailed information, the reader should refer to the IDIQ contract, TO #1 (Order HSBP1010J28985) and Task Order # 3.

The various OTIA directors will work closely with ManTech to provide program guidance regarding OTIA's dynamic requirements. OTIA directors work closely with the COTR on such guidance to ensure that all requirements are identified and fulfilled in a timely manner.

1.15.4. Government-site vs. Contractor-site

ManTech will provide services to CBP, primarily, on-site at the OTIA location in Arlington, VA. ManTech will maintain off-site personnel for the purpose of contract management and financial management.

Work performed off-site by ManTech's project team will be while supporting OTIA PMs as the PMs communicate and meet with other system contractors and material suppliers, and while engaging in local and long distance travel to various OTIA / SBI field sites either at the southern or northern borders.

ManTech shall follow the established process for onboarding and coordinate each personnel addition with the COTR, who will coordinate provisioning of office space, computers, etc. with the OTIA Director for Administration. After CBP/Internal Affairs completes background investigations, OTIA will permit ManTech to commence the onboarding process for contractor personnel on-site. Contractor personnel will not be allowed access to the building or CBP information processing systems without either a security pass or being personally escorted within the building.

1.15.5. Project Management

1.15.5.1 Project Management

Senior OTIA leadership assigned PMOSS project management responsibility to the PMOSS Program Manager / COTR. The COTR will have a minimum of one sub-COTR for every OTIA directorate if possible. Sub-COTRs augment oversight of the contractor's efforts provided by OTIA Directors.

The PMOSS PM / COTR will lead the monthly progress meetings. However, OTIA directors and PMs will lead their respective project meetings, and sub-COTRs are expected to attend as many meetings as possible. Within the scope of this task order, OTIA directors and PMs provide guidance with regard to assignments of a technical nature to contractor personnel. The COTR retains overall authority for providing the contractor with such direction as task order level of effort, workload prioritization, and resource allocation. When questions arise regarding any technical guidance, direction, or prioritization to ManTech, the COTR shall be contacted for resolution.

1.15.5.2 Contract Management

The COTR will be the central contact for the sub-COTRs and CO. Various requests, reports, or contract issues should flow through the COTR before being released to the CO. The COTR plans to have a sub-COTR for every OTIA / SBI directorate. Ideally, each sub-COTR will also be a performance monitor.

The COTR and Sub-COTRs are the only individuals authorized to approve requests for long-distance travel and overtime work.

The OTIA / SBI directors must coordinate such requests through the COTR or Sub-COTRs; and part of ManTech's quality/risk management is to ensure that OTIA / SBI directors follow proper procedures regarding travel and overtime requests. Additionally, Sub-COTRs must report upward through the COTR regarding risks or issues so that the COTR can coordinate action items with the CO.

1.15.6. Risk Management

The COTR will manage risk in basically two ways: In addition to working with ManTech on a daily basis when risks are more apparent, the COTR will receive ManTech's monthly Progress Report which will address risks associated with PMOSS contracted support. The COTR conducts floor checks, reviews ManTech's monthly report, and maintains continuous communication with OTIA / SBI directors.

1.15.6.1 Cost Risk

The COTR believes cost risk is low because (1) ManTech proposed reasonable labor rates; (2) on-boarding ManTech personnel will be spread throughout the year to allow OTIA / SBI to efficiently fund the TO; and (3) ManTech is incentivized via the fixed fee process to maintain cost controls, and the contractor's past performance will be reported to the Government's past performance reporting system.

1.15.6.2 Schedule Risk

The COTR believes schedule risk is low because (1) ManTech has a small number of deliverables to provide to the Government, and (2) ManTech's TO schedule is not tied to any schedule associated with system contractor's performance or schedule. Thus, ManTech will be able to meet ManTech's contractual obligations regardless of whether or not system contractors meet the PMO's performance expectations and delivery schedule.

1.15.6.3 Performance Risk

The COTR believes performance risk is low because of Government oversight planned and the QA process (e.g. having a dedicated PMOSS PM and more than one COTR); and the fact that ManTech is incentivized via the fixed fee process to provide excellent services, maintain a high level of technical expertise to support the PMO, and be as responsive as possible to the PMO's needs.

1.15.7. Quality Assurance

The COTR has addressed Quality Assurance (QA) in two ways. First, the IDIQ contract has several areas and processes that ManTech must follow which will help QA. For examples, the contract clearly describes the time frames for inspection and acceptance of deliverables; and the contract clearly describes a quality-focused approach for receiving and approving invoices. The contract also addresses the requirements and process for replacing ManTech's key personnel.

In addition to the QA embedded in the contract and TO, the contract has an established Quality Assurance Surveillance Plan (QASP). The QASP provides information pertaining to the roles and responsibilities of the PM, COTR, sub-COTRs and OTIA / SBI directors. The QASP also re-iterates QA information found in the contract.

The inherent nature of a performance-based CPFF task order and fixed fee process lends itself to support QA efforts. "Quality" of deliverables is a criterion that should be delivered by ManTech.

1.15.8. Security

Although background investigations fall under the purview of CBP/Internal Affairs, the PMOSS team will support Internal Affairs and the OTIA / SBI administration office as much as possible. The COTR will ensure that all ManTech personnel entering the OTIA / SBI facility or accessing CBP information technology systems are "badged" and duly authorized to do so, or are escorted by someone that is duly authorized access. The PMOSS team will ensure that ManTech follows the security guidelines identified in the base contract and this Task Order.

1.15.9 Classified Work Requirement Statement

The Contractor shall provide personnel with SECRET credentials to provide program management support, and who have the ability to attend meetings to discuss critical capabilities, trade studies, and data sources at the SECRET level within the DHS, CBP, and OTIA communities.

A Contract Security Classification Specification (DD Form 254) (See Attachment 1) and Federal Acquisition Regulation (FAR) Clause 52.204-2 have been incorporated into this Task Order. FAR prescribes administrative procedures for safeguarding information within industry and the specific, required clause that must be written into classified contracts: Subpart 4.4, Safeguarding Information Within Industry, and FAR 52.204-2, Security Requirements.

Some Contractor personnel shall have access to Secret information. This paragraph applies to the extent that this Task Order involves access to information classified CONFIDENTIAL or SECRET. The Contractor shall comply with the Security Agreement (DD Form 441), including the National Industrial Security Program Operating Manual (DOD 5220.22-M) and any revisions thereto.

In addition to the clauses in Contract HSBP1010D02337 the following clauses relating to security apply to this Task Order:

HSAR Clause 3052.204-71 Contractor Employee Access, Alternate I (June 2006)

FAR Clause 52.204-2 Security Requirements