STATEMENT OF WORK

CONNECTIONS II

# Order Identification Number: [######] Unified Communications Solution

## Issued by:

### [Agency Logo]

## [Name of Agency]

## [Address of Agency]

# DATE: [DD MM YYYY]

|  |
| --- |
| **About this SOW Template**  This Statement of Work (SOW) Template has been provided by GSA to help customer Agencies contract for communications and networking solutions at the Local Area Network (LAN), building, campus, and enterprise level for the **Connections II contract**. The template is designed as a guide for developing a SOW and contains an example statement of work and requirements that can be readily tailored to meet Agency procurement needs.  At a minimum, the SOW must include the description and quantity of supplies and equipment to be delivered, the staffing needs to be provided, and support services to be performed as well as the evaluation criteria upon which the evaluation will be based.  Orange text should be replaced with Agency-specific information.  Context boxes in this template contain informational material or instructions that should be deleted by the Agency when finalizing this document.   * **BLUE context boxes** such as this one contain informational material, no action required. * **YELLOW context boxes or highlighting** contain instructions, or suggested requirement language/narratives and possible options the Agency may choose to include or discard when developing the SOW requirements. * **ORANGE Text** are placeholders where Agency provides a numeric value (e.g. n for number of days, or number of pages) or replace with its own Agency name, etc.   In most instances, a context box describes what requirements should be captured or included in a section; it may have a brief Q&A to guide the Agency in describing to the offeror the desired solution including products/equipment and staffing or support services the agency intends to obtain.  Sections of this SOW template may be deleted if they are not relevant to the SOW, and new sections may be added to meet the agency’s specific needs.  The text “***DRAFT SOW TEMPLATE”*** watermark and the references in the page footers should also be removed for the final copy.  **REMOVE THIS PAGE WHEN FINAL DRAFT IS GENERATED** |

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# Project Description

This is the [Agency] Statement of Work for the following task(s) utilizing the General Services Administration’s Connections II contract:

## Project Title

## Unified Communications Solution Project

## Purpose

Unified communications integrates multiple methods of communication—such as e-mail, faxing, instant messaging, voice and video calling and conferencing, mobile communication, and even desktop sharing—to produce improved efficiencies for the Agency enterprise-wide.

The [Agency] has requirements for a single unified interface and an enterprise-wide unified communications platform to connect, collaborate, and exchange information. The implementation of an Agency-wide unified communication platform aims to improve collaboration, reduce operational costs, improve productivity, and enhance the ability of its workforce to support mission critical business processes.

This statement of work is for the development and implementation of an enterprise-wide Unified Communication (UC) solution to improve the flow of information across the Agency's organization. The UC solution aims to leverage new ways of collaborating to reduce cost of travel and enabling agency workers to work and support its mission anywhere and anytime.

## Background

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| To provide background information relevant to this SOW, this section should include at a minimum the following subsections. |

### Organization and Mission

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| This is where the Agency provides brief description of its organization and mission. |

[Add Agency-specific information here]

## Objectives

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| This is where the Agency may provide additional justification and benefits of deploying unified communications. |

The objective of this SOW is to define a cost-effective, secure, and scalable unified communications platform that supports the foundation for an enterprise-wide converged voice, video, and data network. The Agency seeks to overcome the inefficiencies of disparate phone systems to increase communication between Agency employees, and improve the effectiveness of provisioned telephony services.

The expected unified communications solution will be a fully managed platform such that all hardware, software, phone equipment, and support services will be provided, managed, and maintained by the offeror.

[Additional Agency-specific information can be inserted here]

## Scope

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| **Unified Communication**s (UC) is communications integrated to optimize business processes. By integrating real-time and non-real-time communications with business processes and presenting a consistent unified user interface and user experience across multiple devices and media types, UC lets people connect, communicate and collaborate seamlessly. The results are improved efficiency and effectiveness, reduced costs, increased revenues, and enhanced customer relationships.  This Unified Communication Solutions SOW is designed and engineered to support and integrate Voice over Internet Protocol (VoIP), voice subsystems and applications including unified messaging, instant messaging, presence, voice mail, email, fax, and video/ audio/web conferencing and provide capabilities for users to access messages with any device, anywhere and anytime.  **Assumptions:**  To successfully implement and manage unified communications across the enterprise, a careful analysis and assessment of the Agency’s network infrastructure is essential in designing a platform that support the desired Unified Communications solutions.  However, delivering IP-enabled Voice and UC solutions require more than just basic network connectivity. The government requirements for UC services, including the supply, installation and the management and support of IP telephony infrastructure and unified communication platform, must be clearly described in the SOW for the offeror to propose a technical solution and management approach that are cost effective and easy to implement through either leveraging the government’s existing network infrastructures or which could integrate the best of cloud-based user applications and/or Cloud-based IP Telephony services.  This UC SOW template is designed based upon the following assumptions:   * The Agency voice system is IP enabled and runs on an existing network-based Voice communications with a set of telephony features including voice mail using the Voice over Internet Protocol (VoIP). * Call processing and other telephony functions are transported over the offeror's IP-enabled Voice network. * The Agency’s Voice service is specifically designed to be a network based VoIP replacement vs. traditional switched voice legacy/PBX local service. |

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| This section should describe briefly the scope (products and support services) that the agency intends to obtain. A brief summary of the scope of acquisition may include professional support services (labor types), equipment, software, and hardware components associated with implementing a fully converged enterprise VoIP and Unified Communications platform.  The scope should focus on the tasks, related activities, staffing/labor, and equipment requirements to deliver a complete Unified Communication solution.  Depending on Agency needs and the size and complexity of the project, the scope for a Unified Communication Solution may include all or a combination of the following:   1. **Unified Messaging** – Presence, instant messaging, text, and the capability to access and manage e-mail, voice mail and fax messages via the same Inbox or interface. 2. **Unified User Interface** – Access unified communications capabilities from a variety of devices and in a variety of ways (whether real-time, non-real time) and the need for data sharing and collaboration across the enterprise. 3. **Mobile Integration** – User has ability to have calls forwarded to the phone/device user happens to be using, including desk phone and mobile phones.   **Out-Of-Scope**: The requirements for hosting, access and connectivity and whether the UC platform will be implemented premise-based or cloud –based, are out-of-scope and will not be covered in this SOW.  However, the Agency may specify in the SOW the preferred UC delivery model and connectivity type that can be integrated with and provided by the Networx vendors.  The agency may also require the offeror to act as system integrator and coordinate with the Agency’s service provider in the integration of a UC platform into the existing architecture. UC delivery model may include premise-based, network-based, cloud-based or hybrid models.   * **The requirements assume that the Agency Voice network is UC ready or at least has the essentials to be UC ready; otherwise, the Agency must first migrate from a classic TDM based legacy voice platform to IP-enabled Telephony (VoIP).** * **Agencies with TDM based classic voice service are advised to use the Managed Network Transition SOW to migrate to VoIP, if required**. |

### General Description of Requirements

Unified Communications is the linking of communications applications within business processes. It features the ability to reach any devices on a network and includes a *Presence* element that lets parties know who is available and unavailable on each device. The UC platforms provide a wide spectrum of communication services including IP-based telephony, IP PBX, FAX, voice mail, email, presence management, instant messaging and web and audio/video conferencing.

The requirements for an end-to-end unified communication solution, including the supply, installation and the management and support of Internet Protocol (IP) telephony infrastructure, will be the basis for the evaluation of offeror’s proposal based on a technical solution and management approach that are cost effective, scalable and easy to implement while leveraging the government’s existing network infrastructures.

[Add Agency-specific information here]

### Existing Communications and Network Infrastructure

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| Agency may also add a logical architecture diagram or other configuration diagram of the existing Voice systems configuration, site locations in terms of size and categorization (host, independent, and remote). This can be labeled Appendix I-1 Current Voice Configuration Diagram; an example diagram is provided in Appendix I-1 |

See ***Attachment I – Network Diagrams and Figures*** for a sample diagram.

[Add Agency-specific information here]

### Anticipated Limitations and Constraints

[Add Agency-specific information here]

## Acquisition Selected

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| The order type for the Unified Communications SOW defaults to **Firm Fixed Price.**  TheAgency may choose instead to specify a **Time and Materials** (T&M) type task order. ATime-and-Materialstask ordermay be used when it is not possible for the Agency at the time of placing the task order to estimate accurately the extent or duration of the work or to anticipate costs with any reasonable degree of confidence. (FAR 16.601 (c) Time-and-materials contracts).  A time-and-materials task order provides for acquiring supplies or services on the basis of (1) Direct labor hours at specified fixed hourly rates that include wages, overhead, general and administrative expenses, and profit; and (2) Actual cost for materials (except as provided for in 31.205-26(e) and (f)). |

This is a Firm Fixed Price Task Order against the GSA Connections II Indefinite-Delivery, Indefinite-Quantity (IDIQ) Contract.

The offeror shall adhere to the terms and conditions specified in the Connections II Contract in addition to the service specific requirements in this solicitation.

## Period of Performance

The Tasks agreed upon by [Agency] and the offeror will remain in effect for the life of the Connections II Task Order. The offeror shall provide technical support, and shall procure and install [or recommend] the equipment for these Tasks.

The term of the order will be from the date of award through a base period plus [n] option periods. The overall period of performance is specified in the following table.

**Table 1.7-1: Date of Task Order Award**

|  |  |  |
| --- | --- | --- |
|  | **Start Date** | **End Date** |
| Base Year | <<Performance\_Start\_Date>> | <<Performance\_End\_Date\_Base\_Periodr>> |
| Option Period 1 | <<Performance\_Start\_Date\_Option\_Period\_1>> | <<Performance\_End\_Date\_Option\_Period\_1>> |
| Option Period 2 | <<Performance\_Start\_Date\_Option\_Period\_2>> | <<Performance\_End\_Date\_Option\_Period\_2>> |
| Option Period 3 | <<Performance\_Start\_Date\_Option\_Period\_3>> | <<Performance\_End\_Date\_Option\_Period\_3>> |
| Option Period [n] | <<Performance\_Start\_Date\_Option\_Period\_4>> | <<Performance\_End\_Date\_Option\_Period\_4>> |
|  |  |  |

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| Note: This table is for illustration purposes only. The Agency has the option to add or remove years in order to complete the UC Deployment. The Connections II contract was awarded in October 2011. Connections II contract ends January 19, 2021. An order placed before January 19, 2021 can last until January 19, 2026. |

## Place of Performance/Hours of Operation

The offeror shall comply with the geographic requirements specified in this solicitation to provide support for unified communications solution. The deployment, installation, and provisioning of the Unified Communications solution shall be installed at the sites/support locations identified in Appendix B.

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| Appendix B contains a column for hours of operation for each site. If all sites have common hours of operation or if hours of operation can otherwise be conveniently summarized (e.g., one set of hours for headquarters location, another of branch locations) then the Agency may choose to put that information here and delete the column in the Appendix. A full listing of all locations in two places, however, should be avoided. |

Sizing for each location is expressed in terms of the number of users, as defined in Appendix B.

The offeror shall adhere to the hours of operation described herein. Any work performed after normal business hours will be allowed as necessary upon prior approval and coordination with the **[Agency] COTR**.

## Fair Opportunity

This SOW will be released for Fair Opportunity under **FAR Part 16.505**.

## Regulatory Requirements and Compliance Guidelines

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| This is where the Agency should provide the general description of the compliance requirements, OMB directives, and general policy and guidelines that the offeror must stipulate compliance with, provide acknowledgement of, or must complete to meet the requirements stated herein. |

The offeror shall review the following requirements and guidelines:

### Regulatory Requirements

For Unified Communications, there are three primary standards organizations laying the foundation for interoperability: IETF, ITU, and IEEE.

* Internet Engineering Task Force (IETF)
* International Telecommunication Union (ITU)
* Institute of Electrical and Electronics Engineers (IEEE)

The Unified Communications Solution shall comply with the following standards, as applicable:

1. All applicable IETF RFCs for IP-based voice, data, and video applications, such as VoIP (SIP), TCP/IP, mail (SMTP, POP3, IMAP4, LDAP)
2. Common telephony and network standards (as applicable), such as:
   1. SIP/SDP for call setup and trunking
   2. SRTP and G.711/G.722/H.264 codecs
   3. DSCP and LLDP for network traffic prioritization and device provisioning
   4. TLS and MTLS for session security
   5. ICE/STUN/TURN for NAT traversal and media relay for clients outside the firewall
   6. XMPP/SIP/PIDF for IM/presence federation
3. The specific Standards and recommendations, as identified in the Agency Task Order SOW.
4. All appropriate standards for any applicable underlying access and transport services supporting UC platform

[Additional Agency-specific information can be inserted here]

#### Compliance Guidelines

[Additional Agency-specific information can be inserted here]

# Statement of Work

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| **A Primer on Unified Communications (UC)**  Traditional campus communications were built for government employees who stayed in their own offices. However, many Agencies are becoming more global, and the workforce is becoming more blended. The Agency workforce now work from home or roam between their home base and other buildings on the government's large network enterprise.  With a mobile workforce emerging, government agencies need to find a technology that allows its mobile workers to be connected anywhere and anytime. Unified Communications (UC) is that technology, allowing organizations to respond to these communications challenges by “unifying” enterprise communications**.**  Unified Communicationsis a series of processes and tools that work together to enable seamless, real-time collaboration for the Agency’s organization, customers and external departments or other Federal government users. Unified Communication is achieved by combining independently-run communications tools – such as voice, email, conferencing (audio, web video), instant messaging, presence (see definition below), collaboration portals and more – to streamline how Agency users and customers communicate, and collaborate regardless of location.  When Agency acquires a wide range of contractor-provided telecommunications services, these are usually hosted on a common physical infrastructure to save cost. Organizations are using their data networks to support a wide range of IP-based unified communications services, including voice and video. Merging IP-enabled communications onto the data network reduces operational costs because there is just one infrastructure to support and maintain.  **Unified Communications features and capabilities**.  UC capabilities are enabled via many devices, including desktop phones and mobile (smart phones, tablets, and other devices), wireline and IP phones, soft clients, and video conferencing devices.  ***Presence*** is one of these key enabling technologies and is a common feature of UC for real-time communication services. The most common use of presence today is to display an indicator icon on instant messaging clients, typically from a choice of graphic symbols with easy-to-convey meanings, and a list of corresponding text descriptions of each of the states indicating unavailability or availability. Common status on the user's availability are "free for chat", "busy", "away", "do not disturb", "out to lunch".  The requirements in this section are suggestive and it is up to the agency to determine the most suitable solution that meets their goals and objectives, whether for a turnkey unified messaging solution or a fully managed unified communications service. |

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| This section should describe in detail the technical requirements for the support services (labor), equipment, and equipment services that the agency intends to obtain.   * For the majority of tasks for standard or baseline requirements, the Agency may simply identify the total number of support personnel (staffing), quantity and types of equipment and devices, and performance (volume/usage requirements). * For complex requirements, the Agency may attach any other relevant documentation (e.g., “As is” logical and physical network diagrams, endpoint count for Enterprise Voice System by site/support locations, population or volume of users, telephony platform currently in place).   The Agency should consider addressing the following at a minimum, and as appropriate to their specific requirements, since offerings for an end-to-end Unified Communication solution may vary by Connections II offeror:   1. Assessment of Current Network Infrastructure and Systems 2. Project Management Planning, Roadmap and UC Design 3. Implementation and Deployment 4. Maintenance, Technical Support and Training |

This Statement of Work is in support of the [Agency] Unified Communications (UC) solution to enable Agency users and customers to connect, collaborate, and exchange information enterprise-wide. The offeror shall propose a complete UC solution to provide the channels for real-time, multimedia interaction – from email and instant messaging to VoIP, mobility and video/audio conferencing.

The offeror shall propose a complete end-to-end solution in providing design and engineering services, software, user licensing, and all hardware components (e.g., call processing and voicemail servers, voice gateways, session border controllers, audio/video endpoints and multi-point control units) associated with a fully converged enterprise VoIP and Unified Communications infrastructure.

The Unified Communication solution shall be designed and engineered to support the Agency’s enterprise-wide voice, subsystems and applications to include, but not be limited to, a managed unified communication solution for voice, instant messaging (IM), presence, mobility, email and fax.

Collaboration and data sharing capability for users to share information shall also be supported.

The UC solution proposed shall support video and audio conferencing and digital data connections that can be provided both internally among directly-connected Agency users and customers and externally to other Federal agency networks.

The offeror shall provide Unified Communications professional services and the expertise to carry out an agency-specific UC project from start to finish. Adequate staffing and personnel requirements including UC specialists to guide the Agency in its development and implementation of a UC platform shall be proposed.

The following sections describe the full range of offeror support services, equipment, and equipment services that may be needed, including the performance measures to be used to assess the quality and timely delivery of the following required tasks:

* **Task 1** (Assessment of Current Network Infrastructure and Systems) requirements focus on performing an assessment of the current state and condition of the Agency’s Voice systems and network infrastructure and help provide the government with multiple options to select suitable IP telephony and UC supplier. The sub-task includes requirements for assisting the Agency to validate the functionality, performance, and quality of converged networking solutions on a variety of different phone and call manager/media gateway and UC server platforms.
* **Task 2 (**Project Plan, Roadmap, and UC Design) requirements address the approach and activities required for planning, designing and developing a roadmap to implement complete unified communication capabilities and features that meet the requirements.
* **Task 3** (Implementation and Deployment) provides requirements for seamless implementation and deployment of a unified communication platform and application suites across the enterprise or at select Agency locations.
* **Task 4** (Maintenance and Ongoing Training and Technical Support) describes the requirements for operations and management support as well as technical support. The Agency may also require an ongoing instructional training as needed.

## Task 1: Assessment of Current Network Infrastructure and Systems

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| This is where the Agency provides requirements for the offeror to provide assessment and analysis of Agency’s “As is” network-based Voice infrastructure and systems. The offeror may also be required to research for any additional information needed to enable and integrate UC into the Agency’s existing network and to anticipate limitations and constraints of the existing communications and network infrastructure.  ***Section 2.1 – Task 1*** describes the requirements for providing assessment and analysis of the Agency’s existing voice and data infrastructure along with existing voice subsystems, Operation Support Systems (OSS) functions and other common or shared services.  At a minimum, this section should address the following elements for voice systems and infrastructure.   1. Voice Systems & Configuration 2. Network System Architecture 3. Audio/Video Conferencing 4. WAN / LAN Connectivity 5. Site locations Inventory and Categorization    1. Locations with Legacy Voice / Private Branch Exchange (PBX)    2. Locations configured with VoIP over the LAN using IP/SIP phones    3. Hybrid locations (Voice systems supported by SIP, PRI, and/or Analog) 6. Common Services Infrastructure/Operations Support Systems |

The Initial Assessment and Analysis of the Agency’s existing communication infrastructure and Voice systems include the following activities or sub-tasks:

* **Sub-task 1:** Assessment and Analysis of Existing Voice Network Infrastructure
* **Sub-task 2:** Assessment Report & Findings
* **Sub-task 3**: UC Supplier & Technology Comparison and Selection

### Sub-task 1: Assessment and Analysis of Existing Voice Network Infrastructure

The offeror shall perform an assessment and analysis of the Agency’s existing Voice systems and network infrastructure including understanding the Voice configuration.

Table 2.1.1-1 identifies the core elements supporting Voice systems and common infrastructure including but not limited to:

1. Voice Systems & Configuration
2. Network Architecture
3. Audio/Video/Web Conferencing
4. Wide Area Network/Local Area Network (WAN/LAN) Connectivity
5. Site locations Inventory and Categorization
6. Operations Support Systems (OSS) and Common Services Infrastructure

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| At the core of UC is the underlying network. With voice and video converging to the same network that transmits an organization’s data, demands rise exponentially. Successful deployment of a unified communication solution requires a solid, open, and scalable network infrastructure. To achieve a seamless UC implementation requires an evaluation of the Agency’s current voice, data and applications environments.  Table 2.1.1-1 provides a suggested assessment checklist of network elements including features, functions, capabilities and other underlying resources that may need to be identified and assessed for its current state, condition and availability to support the integration of a unified communication solution.  Depending on the Agency’s needs for unified communication, and whether the Agency may already have an inventory list of its Voice systems and site configuration, Task 1 can be streamlined to focus only on the selection of a UC supplier and technology that meet the agency’s requirements. |

**Table 2.1.1 -1 Assessment Checklist for Unified Communications Solution**

| **Core Elements** | **Technical Requirements** |
| --- | --- |
| 1. **Voice Systems & Configuration** | 1. The offeror shall identify and assess telephony platforms currently in place:  * Legacy TDM (Time Division Multiplexers) / PBXs (Private Branch Exchanges) * Electronic Key Telephone Systems (EKTS), * IP Telephony systems , * Centrex services  1. The offeror shall identify and assess Site Configurations (host, remote or independent site) and make an assessment of the telephony platforms currently in use (number of sites, telephony platforms and total population or users at each site) 2. The offeror shall assess existing Voicemail capabilities including:  * Enterprise Voice Messaging System (EVMS) - voicemail message broadcasting and forwarding capabilities and   + 1. Subscriber features include personal message management, personal lists and multiple greetings     2. System features consist of multiple classes of service, system distribution lists and digital networking     3. Network features include digital protocol gateways, enhanced lists and broadcast capabilities. * Centralized voice messaging systems capable of supporting large number of voicemail subscribers * Standalone voicemail platforms |
| 1. **Audio/Video/Web Conferencing** | 1. The offeror shall evaluate the current state and configuration of the video conferencing and audio conferencing systems used by the Agency including features and capabilities supporting audio, video, and web conferencing suites and the sites/locations capabilities where deployed. |
| 1. **Network System Architecture and Configuration** | 1. The offeror shall evaluate and assess the Agency's Private Network architecture and configuration (i.e. Network-based IP Virtual Private Network (NB-IP VPN), MPLS (Multiprotocol Label Switching) WAN, or Ethernet LAN, etc.) to provide secure, reliable transport of critical applications across the enterprise including a unified communications application suite; this may include performance and capacity assessment of the network enterprise to integrate UC application. 2. The offeror shall assess the current state and availability of the network-based architecture supporting the Voice communication systems including features and capabilities currently in use. (e.g. MPLS backbone, access circuits, DMVPN (Dynamic Multipoint VPN), IPSec (Internet Protocol Security), MGRE (Multipoint Generic Routing Encapsulation) Tunnels, BGP and EIGRP routing protocols, load-balancing, Firewall and Intrusion Detection Prevention services). |
| 1. **WAN / LAN Connectivity** | The offeror shall identify and assess the Agency's WAN connectivity (e.g. Ethernet vs. Multiprotocol Label Switching Wide Area Network/Local Area Network (**MPLS WAN/LAN):**   1. Access redundancy 2. Hub and spoke sites classification 3. Routing protocols used within the MPLS infrastructure   The offeror shall identify and assess the Agency's **On Premises LAN and WAN Infrastructure.**   1. Inventory List shall provide a summary of the equipment at the sites’ edge, depending on the size of the circuit. 2. Beyond offeror-provided equipment at the site’s edge, the offeror shall determine what the routers are or Layer 2 or 3 switches deployed (i.e., edge router). 3. The offeror shall determine how FISMA compliance is achieved (i.e. developed comprehensive guidelines, standards and procedures (GSPs) for its routers and Layer 2 and 3 switches). |
| 1. **Site Locations and Categories** | The offeror shall identify and assess the Agency's site locations based on type of Telephony in place, population (number of users), Traffic (usage and call volumes), and Class of Service.   1. **Site Categories** 2. Locations with Legacy Voice/PBX 3. Locations configured with VoIP over the LAN and SIP phones 4. Locations with Voice systems supported by a combination of SIP, PRI, and/or Analog 5. Locations categorized as either host, independent, or remote, etc. 6. **Site locations Inventory** 7. Sites range based on population size (large vs. small or independent sites) 8. Site access type/network connectivity at each major hub sites 9. Sites with redundant connectivity to MPLS network 10. **Quality of Service (QoS) and Traffic differentiation** 11. MPLS network by Classes of Service to distinguish traffic |
| 1. **Common Services Infrastructure: Shared Services/ Operations Support Systems (OSS)** | The offeror shall identify the following shared services:   1. Shared Workspace / Document Management 2. Shared Services (e.g., Active Directory, LAN/WAN Infrastructure, etc.)   *Common Services Infrastructure comprises services that offer reusable capabilities common across the enterprise that all communication systems and applications can use and leveraged.*  *The offeror shall assess OSS and common services infrastructure for the design and implementation of a Unified Communication solution; the intention is to leverage and reuse “common” services the Agency already have.*  *Making a careful assessment of common/shared services provides the opportunity to consolidate functions that are common across applications and the option to virtualize those functions in the network to be used across the enterprise to save cost. (e.g. the viability of migrating into a Cloud-based UC)* |

### Sub-task 2: Assessment Report & Findings

1. The offeror shall prepare and submit a complete and detailed report on its findings for network assessment including network planning, network optimization, and integration of a scalable UC solution into the current network architecture.
2. The report shall outline the “as-is” and “to-be” of the Agency’s communication infrastructure and shall include any gap analysis to determine what the agency needs and which common services infrastructure can be leveraged to implement a complete unified communication platform and solution that is reliable, scalable, easy to use, and easy to manage.

### Sub-task 3: UC Supplier & Technology Comparison and Selection

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| ***Note to the Agency:***  Task 1 and more specifically Sub-task 3 requirements are prerequisites for planning and design.  However, Sub-task 3 may be optional and can be skipped if the Agency already has a preferred UC solution in mind.    The goal of sub-task 3 is to perform an evaluation and assessment of what’s available in the commercial marketplace for UC supplier and technology and assists the agency in selecting a UC solution that best meet their needs.  Depending on the size and scope of the project, the Agency can decide whether their preference is for a “plug-and-play” (turnkey) solution or for an end-to-end complete unified communication deployment across their enterprise.  The requirements under this section are NOT intended for the offeror to perform an extensive research study about the unified communications technology, but rather to simply assist and guide the Agency in making informed decisions concerning which UC solution best meets the Agency needs based on what they currently have and funding limitations.]  The Agency’s determination of which Unified Communication application suite and technology to use is critical. Under this SOW, the term “Unified Communication application suite” is a function of “Equipment” and “Equipment Services” which are two of the price elements that must be clearly described in a Connections II SOW. Without knowing which equipment/solution to use, it will be less efficient to plan and design the implementation of the Agency’s Unified communication platform.  Below are suggested requirements. The Agency can modify or add requirements to meet their needs. |

The offeror shall assist in providing the government with a better understanding of the high-level costs and savings associated with implementation. The offeror shall assist, guide, and work with the Agency in evaluating various unified communications application suites and software solutions that best meet agency’s needs for a unified communication platform.

1. The offeror shall coordinate with the Agency in sourcing and identifying the most suitable and appropriate UC suppliers and technology. A Supplier/Technology comparison summary of unified communications solutions and applications suites that are currently available in the marketplace may be provided to the Agency. Such a comparison should include:
   * The pros and cons of the various unified communications solution options offered
   * UC Vendor Comparison Guide
2. The UC solution suitability shall be determined based on specific criteria, including desired UC capabilities and features and other suitability criteria that meet the Agency needs. UC Solution Criteria to consider:
   * Does the UC solution allow the Agency to pick its own network provider?
   * Does the UC solution work with the Agency’s desktop phones and mobile devices?
   * Will the UC solution integrate with the Agency's existing software and business applications?
   * Will the UC solution scale as the Agency needs grow and change, without requiring a forklift upgrade?
3. The UC solution shall be offered when available in the commercial marketplace. The pricing proposed shall not exceed the current pricing on the GSA Schedule for similar software solution and technology.
4. The enhanced voice services provided by the UC Solution shall be equal to or better than the Voice services now available in terms of reliability, security and service quality.

The offeror shall provide a checklist and validation process to help analyze and inventory existing data messaging and voice messaging platforms.

The validation process shall include gathering data and other information (i.e. a structured interview process with the Agency) that help define the desired end-state for a Unified Communication platform. The resulting interview (or data collection technique) shall be the basis in producing a detailed roadmap. The requirement for developing a UC roadmap is described in more detail in Task 2 for moving towards the defined end-state (or desired end-state) using a phased approach.

## Task 2: Planning, Roadmap, and Design

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| This is where the Agency provides requirements for the offeror to design, plan, and develop a roadmap of the “To be” Unified Communications platform including program management planning, roadmap, and logical design.  ***Section 2.2 – Task 2*** describes the requirements for developing a project management plan, creating a roadmap, and designing a deployment strategy to implement the unified communication solution at all Agency locations.  At a minimum, this section should address the following elements and features for planning and designing of a complete UC including capabilities and features that meet the government requirements.  UC Logical Design consideration may include:   * Real-time communications – Enterprise Voice / Telephony, Presence, Voice calls to video, and Video/Audio/Web conferencing * Non-real time communications – Email, Fax, Voicemail, Text Messaging * Collaboration and data sharing – Shared Workspace / Document Management, Electronic bulletin boards (Whiteboards), e-Calendar/Scheduling * Mobility * Shared Services (e.g. Active Directory, LAN/WAN Infrastructure, etc.) * Performance and SLA – Availability, Reliability, IP Packet Loss, Jitter and Latency |

The Project Planning, Roadmap, and Unified Communication Design include the following activities or sub-tasks:

### Sub-task 1: Project Management Plan

### Sub-task 2: Roadmap

### Sub-task 3: UC Logical Design

### Sub-task 1: Project Management Plan

The offeror shall establish and execute [or recommend] a UC Project Management Plan (PMP) to ensure that all activities from the kick-off meeting to the final UC infrastructure deployment are executed properly as planned and on schedule.

* + - 1. The offeror shall establish a Project Management (PM) function to provide management and operations support to the Agency and serve as a single point of contact for the Agency to manage and administer the UC Deployment order.
      2. The offeror shall provide project management support that includes management and oversight of all activities performed by offeror personnel, including subcontractors, to satisfy the requirements identified in this Statement of Work. The offeror shall identify a Project Manager (PM) by name, to provide management, direction, administration, quality assurance, and leadership for the execution of this task order. The PM will be the primary point of contact for all program activities
      3. The offeror shall describe in the PMP proposed Labor Types for professional and technical expertise that fully meet the requirements in Tasks 1 to 4 to support UC Deployment solutions, including as applicable: life cycle management, analysis, planning, design, specification, implementation, integration and management of unified communication application suite and related equipment before and after deployment.
      4. The UC Deployment Strategy shall be documented to ensure that the network-based Voice system, computing, application, and service components are enabled in a sequence that maximizes the benefit to the Agency’s business mission. The UC Deployment Strategy document shall address the following:
  1. Identification of Deployment activities (i.e. UC capabilities for Unified Messaging, Mobile integration, and Unified User Interface)
  2. Identification of Deployment priorities and possible phases
  3. Deployment milestones, to include the enterprise UC configurations/architecture and risk mitigation (Roadmap and Milestones shall be reviewed and finalized upon award)
  4. Deployment criteria for legacy, upgraded, and new capabilities
  5. Dependencies (for example, among the enterprise architecture, network management, and network and operation security)
  6. Risks and mitigation strategies
  7. Strategies for ensuring interoperability and security during deployment
  8. Deployment governance that includes but is not limited to: policy, roles and responsibilities, management structure, management controls, management actions, performance measurement, and reporting
  9. Testing
     + 1. The PMP shall delineate the activities required to prepare and support the UC Deployment. The deployment timeline can be scheduled and prioritized in phases by site location population and UC capabilities. The PMP shall capture and establish the SOW goals, identify a critical path, create general timelines to provision required hardware and software, and implement appropriate operational procedures. The PMP shall contain at a minimum:
  10. Project management approach for Tasks 1, 2, 3, and 4.
  11. Project Team Organization (Roles & Responsibilities)
  12. Program Tracking and Communication Plan
  13. Project Schedules & Milestones
      + 1. The PMP shall describe how the Deployment activities will be integrated with third-party services provided by other Government Agencies or by commercial vendors.
        2. The PMP shall serve as a repository documenting the processes and methodology for meeting the requirements of each task described in this Statement of Work.
        3. The PMP shall be updated periodically for any changes to the program plans, activities, schedules, and any other related issues that may potentially impact the timely completion of the UC Deployment.
        4. An initial draft PMP shall be provided to the Government with the proposal. Upon award the Government will provide comments, which shall be incorporated into the final PMP. The offeror shall provide to the Agency both the draft and final document deliverables in MS Word format, and any required briefings/presentations in MS PowerPoint format.

### Sub-task 2: Roadmap

The offeror shall develop a Unified Communications Roadmap for moving the Agency’s Voice network towards a unified communications platform. The roadmap shall start with a structured analysis of the Agency's current business and end-user needs, the existing technology, and the Agency's communications goals.

The unified communications roadmap shall identify:

1. The vision for an end-state unified communications that meet the requirements.
2. The high-level costs and benefits associated with moving a large enterprise’s data and voice messaging platforms to a single platform
3. An implementation plan based on current messaging and implementation best practices.
4. Specific availability, storage, network capacity, security and other hindrances or obstacles that must be addressed to implement a unified communication model

The offeror shall propose subject matter experts and UC specialists to create a detailed roadmap, using a phased approach that meets the requirements and achieves the desired end-state. The roadmap shall provide the Government with a clear and realistic strategy for implementation, taking into consideration the high-level costs it would take and the expected benefits of deploying a unified communication platform.

To ensure the UC solutions will be operational within the production environment, the offeror shall offer Proof of Concept Lab services at the government site to test UC solutions before deployment.

### Sub-task 3: Unified Communication Logical Design

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| The requirements for security and successful deployment of UC across a multi-office enterprise are dependent upon a list **of network prerequisites**.  These pre-requisites include domain name services (DNS), Active Directory Server (ADS) or other directory service, IIS or other specific web server, SQL server, and servers for each communications application as needed. The physical placement, routing, access, security settings and revision levels of all these components must also be taken into account when planning, designing, and integrating a robust unified communication platform.  Network engineers generally recommend designing a network in three (3) modules: (1) Access module; (2) Core module; and (3) Distribution module. The scope of requirements in this SOW is mainly focused on the Core and Distribution module, the network backbone to support UC platform and application suite. |

The Unified Communication solution shall be designed and engineered to meet Agency requirements for unified messaging, mobile integration, and unified user interface. The UC logical design shall include desired capabilities and features to support real-time and non-real time messaging and communication workflow as well as capabilities for data sharing and collaboration.

The offeror shall perform the following tasks:

1. Lead the engineering, design and implementation of UC platform and Voice technologies
2. Lead the team on voice and data UC requirements, system evaluation to develop appropriate voice and data technical recommendations and architectural solutions.

#### UC Capabilities and Features

The logical design for the proposed solution shall take into consideration UC capabilities and features that can be provided both internally among directly-connected Agency users and customers and externally to other Federal agencies.

1. The proposed solution shallsupport all aspects of delivering the Client's Unified Communications (UC) infrastructure components and applications suite.
2. The proposed solution shall provide a common user interface and leverage IP network technologies to enable real-time collaboration via voice, video or data channels.
3. The proposed solution shall be built on a single, scalable UC platform with voice services and communications applications delivered universally through a single point of integration.
4. The single-platform UC model shall provide dial plan consistency and least-cost on-network and off-network routing as well as support the direct replacement of enterprise voice services as legacy networks are phased out or as new geographical locations are introduced.
5. Any logical UC implementation shall be supported by world-class design, deployment and technical service capabilities.
6. The offeror shall integrate services such as instant messaging and video with collaboration apps and deliver it all via a single user interface linked by a presence engine.
7. User experience shall be enhanced by providing the following UC capabilities:

* Instant messaging tools for brief conversations or messages, replacing traditional email
* Ability to check a person's availability over a presence engine before making a voice call;
* Ability to move seamlessly from a voice call to video for enhanced collaboration, supported by the ability to share user's desktop and applications during all interactions.

At a minimum, the proposed design for a Unified communication solution shall provide enhanced collaboration tools to traditional voice communication. A list of capabilities and features are outlined in Table 2.2.3-1.

The Unified communication solution proposed shall meet the government requirements for:

1. Unified Messaging
2. Mobile Integration
3. Unified User Interface

**Table 2.2.3-1 Unified Communications Capabilities and Features**

| **UC Solution Type** | **Technical Requirements (Capabilities & Features)** |
| --- | --- |
| Unified Messaging | Capabilities and Features   * The Unified Messaging (UM) shall provide users access to voice mail, e-mail and fax messages through the same inbox or interface. * Users shall be able to access and manage e-mail, voice mail and fax messages via the same interface. * **Voice Messaging features** shall provide access to messages from desk phones, PCs, and mobile devices via various interfaces including browsers, Outlook and Lotus Notes. * The UM feature shall provide access to e-mail, voice mail and fax messages from phones, e-mail or browsers. * The **Active Directory**, which acts as a container for all the UM objects created and their configuration settings, shall be designed to logically represent a telephony hardware device and a telephony dial plan for the enterprise to support a specific feature of Unified Messaging. * UM Active Directory objects shall enable the integration of Unified Messaging into Active Directory and the existing telephony infrastructure. The following UM objects shall be supported:   + Unified Messaging Dial Plans   + Unified Messaging Mailbox Policies   + Unified Messaging IP Gateways   + Unified Messaging Hunt Groups   + Unified Messaging Auto Attendants   + Unified Messaging Servers   + Unified Messaging Users |
| Mobile Integration | Capabilities and Features   * Mobile integration shall provide users a single identity that lets them handle business calls with equal ease via their desk and mobile phones. * Mobile integration shall provide user the ability to have calls forwarded to whatever phone they happen to be using, as well as to employ a single number for making and receiving all calls. * Mobile integration shall support handing off calls from cellular to Wi-Fi connections and vice versa on smart phones when arriving at or leaving company premises. * Mobile features shall enable user to initiate phone call, retrieve voice mail, corporate directories, access instant messaging and participate in video conferencing. * Mobile features shall be accessible from mobile phones and via laptops and tablets as well as provides access to corporate directories and visual voice mail, and features seamless handoff between cellular and Wi-Fi calls. * Calls to or from mobile devices shall take place anywhere and anytime as if they are to/from the desk phone numbers. |
| Unified User Interface | Capabilities and Features   * User shall have the ability to access unified communications capabilities from a variety of devices and in a variety of ways. * Unified User Interface shall be supported such as presence, instant messaging, integrated soft phones, voice conferencing, video calling and conferencing. * Voice activation shall have seamless integration with other business communication systems and applications. * The unified user interface shall support the following:  1. Real-time communications – instant messaging, presence, voice calls to video, voice calls to email 2. Non-real time communications – email, text messaging (SMS), fax, voice mail 3. Collaboration and data sharing – electronic bulletin boards, e-Calendar, Audio/Video/Web conferencing  * Users shall be able to access messages from the following device:  1. IP phones 2. Mobile phones 3. Web browsers 4. E-mail clients 5. Desktop clients 6. Tablets  * Unified User interface shall provide the following capabilities:  1. Instant messaging between two users or multiparty (up to x number of participants). 2. Users can display their presence status—for example, “Available”, “Away”, “Do Not Disturb”, “Busy”, or Offline—to let others know their availability for communication. 3. Presence integration with Agency's Email application automatically updates presence when users are in a meeting. 4. Audio and video conversations between two users or multiparty (up to x number of participants), utilizing web camera, speakers and microphones. 5. File Transfer capabilities to send files between users with no maximum file size; however certain “executable” files types shall be prohibited (e.g., .exe, .vbs, .pst). 6. Scheduled and ad hoc web conferencing for conducting online presentations including audio, video, screen sharing, and a virtual whiteboard. 7. Contact Groups shall allow users to organize their contacts in a manner that is important to them. 8. PC-to-PC and multiparty data sharing capabilities including desktop sharing, application sharing, 9. PowerPoint presentation, virtual whiteboard, annotations, and polling. 10. Enhanced access to instant messaging from within the Agency's enterprise network or from the Internet, anywhere in the world, and through a variety of devices and software. 11. Agency managed instant messaging administration (add/change/delete users) shall enable in-house support personnel to resolve common tasks. 12. Single sign-in capabilities through the Agency’s Enterprise Active Directory (EAD) system. 13. UC dedicated Service Desk shall be available 24/7 to report technical support issues |

#### Unified Communications Configuration Plan & Design

The offeror shall provide a UC configuration plan and design. The following technical and system requirements shall be addressed in the proposed design:

1. System Architecture
2. Functional Requirements
3. Voice Subsystem and Unified Communications
4. Security
5. Operation Support Systems (OSS)
6. Offeror-provided Equipment
7. Government Furnished Equipment (GFE)
8. Performance and SLA

## Task 3: UC Implementation and Deployment

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| This is where the Agency provides requirements for the offeror to propose a strategic approach to implement and deploy the Unified Communications platform including finalizing the physical design and configuration, conducting site survey, deployment roll out plan, testing and acceptance.  ***Section 2.3 – Task 3*** describes the requirements for the implementation and deployment of a unified communication solution and application suite across the enterprise or at select Agency locations.  At a minimum, this section should address the following elements for implementation and deployment :   * Site Survey * Physical Design and Configuration * Implementation Checklist and Deployment Roll out Plan by Location or Site Category * Testing and Acceptance |

The UC Implementation and Deployment Task include the following activities or sub-tasks:

# Sub-task 1: Site Survey

* **Sub-task 2:** Physical Design and Configuration
* **Sub-task 3:** Implementation and Deployment Roll out Plan
* **Sub-task 3:** Testing and Acceptance

### Sub-task 2: Site Survey

Upon execution of a task order by the Agency Contracting Officer, the offeror shall conduct site surveys at each site locations as identified in **Attachment B – Support Locations**.

* When the task order requires installation of equipment at the Government facility, the offeror shall coordinate with the Agency designated POC for the installation. The offeror shall contact the site POC at least [fifteen (15)] calendar days prior to the survey. The Government will provide a list of site POC’s after contract award.
* The offeror shall use the type of survey required by the situation. To the extent possible telephonic coordination shall be used, but there will be times when a basic or complex site survey shall be necessary.
* In performing a basic or complex site survey, the offeror shall dispatch qualified technician(s) with the required clearance level to the Government identified service location, assess the site conditions, and prepare a site survey report.

# Site Survey Report

Site survey results shall be provided to the Agency management and network personnel within [five (5)] working days following the survey. For complex site survey, the window to submit site survey report will be agreed upon between the Agency and the offeror upon order placement.

* Included in a site survey report, the offeror shall validate Government location wiring and other underlying resources needed for coordinated reuse as appropriate; this includes but is not limited to Government interface equipment compatibility, equipment requirements, space and power requirements, uninterrupted power supply (UPS), server location, etc.

### Sub-task 1: Physical Design and Configuration

The physical design and UC configuration shall address the core and critical elements that need to be taken into account, including security and information assurance, when designing a network to support and sustain a unified communications solution.

A Reference Architecture shall be provided to show the different components, equipment, and a mapping of all critical network elements. The design and configuration shall meet the requirements for Call Admission Control (CAC), network performance, quality of user experience, UC network security, and other design components.

The offeror shall provide a comprehensive end-to-end IP network infrastructure solution which provides high levels of reliability, availability, and security in the Agency's enterprise environments.

The convergence of voice, data, and video places heavy demands on the network, and the proposed network infrastructure shall have the ability to give priority to the most critical traffic.

* The offeror's network design shall allow the UC administrator to scale the enterprise infrastructure on demand without impacting the current operating environment.
* In addition, hardware load balancers shall be deployed in front of the UC solution servers to increase application uptime, maximize server farm utilization, and shield servers and applications from malicious attacks.
* The switches shall receive all client requests and distribute them efficiently to the best server among those available in the pool.
* These hardware load balancers shall take into consideration server availability, load, response time, and other user-configured performance metrics when selecting a server for incoming client connections.
* The offeror may propose other alternative solution to meet redundancy requirements and shall provide a transparent, flexible alternate routing capability (overflow and failover routing) to allow calls to route off net (“hop off”) from the VOIP transport service network to the PSTN if the VOIP transport service is unavailable.
* The UC solution components shall address the following at a minimum:

1. Data Center Configuration

* Core Layer
* Ethernet Fabric Access Layer
* Aggregation Layer
* Access Layer
* Hardware Load Balancing

1. Service Performance

* Availability
* Latency
* Jitter/Packet Loss

1. Quality of Service (QoS)

* Configuration Options for QoS
* Traffic Prioritization
* QoS Queuing Methods and Scheduling

1. Server Architecture

* Hardware and Equipment
* Server Roles
* Software Requirements
* Hardware Requirements
* Virtualization

#### **UC Security Requirements**

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| The Agency must be diligent to protect its communications systems as they are vital to the government’s business operations and critical mission.  As the technology has become more complex and more accessible from the public Internet, the security threat has increased. In many ways it is easier than ever to attack an Agency’s enterprise communications. The concept of running voice over an enterprise data network raised many concerns about audio quality and communication security.  Unified communications (UC) presents unique security challenges because it brings together disparate technologies. An Agency’s enterprise-wide phone system that combines VoIP, video, chat, email and presence together into one unified messaging system is vulnerable to such attacks.  The Agency may add requirements for a properly configured firewall that should prevent SIP scanners from being able to reach a UC sever; this additional level of security adds peace of mind and works as a functional backup to round out a security suite in support of a UC solution.  This sub-section provides security requirements for the offeror to implement the appropriate configuration and user authentication for a secured unified communication solution. |

The offeror shall ensure security practices and safeguards are provided to minimize susceptibility to security issues and prevent unauthorized access. This includes SIP-specific gateway security for SIP firewalls, where applicable. The offeror shall ensure security practices and policies are updated and audited regularly.

1. The offeror shall meet and comply with Agency security policies, regulations and procedures. The offeror shall certify unified communication equipment meets Agency’s security requirements and provide evidence of compliance.
2. The offeror shall periodically review UC equipment configurations and address any deficiencies or inconsistencies, and provide Agencies with results with detailed recommendations to remediating security issues that are found
3. The offeror shall deploy a properly configured firewall such that the UC server is properly sequestered and secured within the Agency's firewall.
4. The offeror shall establish a baseline for the secure configuration of unified communication servers based on Agency's technical control specifications (e.g. Center for Internet Security (CIS) benchmark). Configuration for UC servers shall meet Agency security requirements.
5. The offeror shall implement the Agency's security policies and procedures for remote users and remote offices. Access to unified communications platform shall require virtualized private network (VPN) authentication before establishing a connection.
6. Enterprise VoIP phones shall be protected by requiring unique strong Session Initiation Protocol (SIP) passwords. For user login, the offeror shall implement procedures for Agency users to use unique strong Session Initiation Protocol (SIP) passwords.
7. The offeror shall keep UC software up to date. The offeror shall document what has been changed and how the software update could impact the system. Backing up the system first and performing the update during a scheduled maintenance window shall be followed to help to ensure users will have access to the UC system when they need it.
8. The offeror shall regularly review system logs and establish risk mitigation procedures to deter and catch any vulnerabilities and threats and taking action early on. Running regular call log reports on toll calls shall be made by the UC system to help create a baseline for normal activity.

#### IPV6 Requirements

1. All software shall support IPv4 and IPv6 and be able to communicate over IPv4-only, IPv6-only and/or dual-stack networks.
2. If unified communication software includes network parameters in its local or remote server settings, it shall also support configuration of IPv6 parameters.
3. Software that communicates via the IP protocol shall support both protocol versions (IPv4 and IPv6) and the difference must not be noticeable to users.

### Sub-task 3: Implementation and Deployment Roll out Plan

#### Implementation Schedule

The offeror shall provide an implementation schedule for completing the transition from the existing or traditional Voice to Unified Communications platform. The offeror shall develop milestones for all facets of the engineering, implementation, and testing activities required to implement and deploy UC services to each end-user site location or SDP (The SDP is where the provider’s service network ends and the customer premises network begins). The offeror's implementation schedule shall conform to the priorities established by the Government for cutover of specific end-user SDPs.

The implementation of a unified communications (UC) system shall require a comprehensive, well-structured strategy that considers the government requirements, infrastructure and goals while minimizing service disruption and cost.

1. The offeror shall provide both an Implementation Checklist and Deployment Roll-out Plan within 30 calendar days after award, subject to government approval.
2. The offeror’s implementation approach shall leverage existing resources while laying down a realistic roadmap and deployment schedule.
3. The offeror shall develop [or recommend] an Implementation Checklist to deploy and implement UC with minimal disruption. A sample Implementation Checklist is provided in **Attachment H – Implementation Checklist.**

#### Customer Notification

The offeror shall identify its approach for notifying site communications personnel of pending service cutovers and of pending offeror -conducted testing thirty (30) calendar days in advance of the date cutover and/or testing activities will begin.

The offeror shall describe its approach for notifying site communications personnel of procedures for using unified communication services during initial cutover, and the procedures for using new services as they are deployed over the life of the contract. The offeror shall also describe its approach for supporting site communications personnel in the resolution of end user troubles during the transition period.

### Sub-task 4: Testing and Acceptance

Upon installation or when ordered by the Government, the offeror shall execute acceptance testing in accordance with the Acceptance Test Plan approved by the Government. The offeror shall create a Testing and Acceptance Plan for Government approval prior to performing a unified communications testing.

Upon completion of the requested test the offeror shall submit an update to the Testing and Acceptance Report for the site location under test documenting all results of the execution of the test(s).

#### Testing and Acceptance Plan

The offeror shall develop [or recommend] a UC Testing and Acceptance plan and describes how an upgrade to UC will be made operational in the production network.

* The offeror shall provide a draft Test and Acceptance Plan post-award which outlines the testing to be performed at all locations within the Agency’s geographic scope. The Test and Acceptance Plan will be provided for Agency to validate the UC solution based upon a set of acceptance criteria and specifications.
* The Testing and Acceptance Plan shall detail the site locations to be included in the test being conducted, as well as the procedures, applications and equipment for simultaneous operation of all end-user points under test.
* The offeror shall develop clearly defined Agency Acceptance Criteria.
* The offeror shall utilize its own resources for testing at no additional cost to the government.
* The Government will have the right to access to all contractor-provided UC equipment for independent testing and evaluation activities with 24 hours advance notice to the offeror.

## Task 4: Maintenance, Technical Support and Ongoing Training

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| This is where the Agency provides requirements for the offeror to provide maintenance, technical support, and ongoing training.  ***Section 2.4 – Task 4*** describes the requirements for providing maintenance, operations and management support as well as technical support. The Agency may also require an ongoing instructional training as needed.  At a minimum, this section should address the following elements for maintenance and technical support:   * Hardware/Software/Licensing Maintenance * Software upgrades * Performance and SLA (Availability) Monitoring and Reporting * Technical Support (24 x 7 helpdesk support) * Instructional Training |

The Maintenance and Ongoing Support Task includes the following activities or sub-tasks:

* **Sub-task 1:** Hardware/Software/Licensing Maintenance
* **Sub-task 2:** Performance and Service Level Agreements (SLA)
* Sub-task 3: Technical Support
* Sub-task 3: Instructional Training

### Sub-task 1: Hardware/Software/Licensing Maintenance

The Agency has adopted the Information Technology Infrastructure Library [(ITIL) v3] framework for IT Service Management and operates a multi-level service support structure. The Agency currently performs initial reporting and trouble shooting for its data, voice and video systems. Upon initial incident identification, trouble shooting, and resolution attempt, the Agency may contact the offeror for incident response and resolution.

Standard maintenance and support offerings for all hardware, software and licensing, including software upgrades when applicable, shall be provided including a description on how its maintenance and support services adhere to [ITIL v3] standards and practices.

### Sub-task 2: Performance and Service Level Requirements (SLRs)

The offeror shall meet and comply with the SLR requirements in terms of performance objective, risk mitigation method, acceptable quality levels, and ability to resolve the issues in a timely manner.

#### Service Level Requirements (SLRs)

A Service Level Requirements (SLRs) consists of a support service to be measured, a performance objective, and a credit arrangement if the performance objective is not met. The Agency shall meet and comply with the Agency prescribed performance metric for each deliverables required under this SOW.

**Attachment G – Task Order Deliverables Performance Matrix** provide a summary of the task order deliverables required by the [Agency Name]. A few examples of the performance matrix is presented below:

* **System Implementation and Transition** – The offeror shall meet the system implementation and transition requirements measured by adherence to the System Implementation and Transition plan and schedule
* **System Training** – The offeror shall meet the system training performance requirements measured by the student feedback provided in online evaluation forms.
* **Personnel Security Clearance** – The offeror shall meet the personnel security requirements measured by the on time submission date of all personal security clearance related paperwork.

#### SLA for Voice Quality, Availability and Time-To-Restore

The offeror shall provide visibility into the performance of both voice and data traffic in a unified way and shall deliver the required end user experience. The unified communication solution shall meet the call quality service level requirements whether Agency end users are using wired or wireless access. A Matrix of Service Level Agreements (SLA) for Unified Communications is provided in **Attachment J – Service Level Agreement.**

* **Grade of Service (Voice Quality)** - To meet performance requirements, packetized voice traffic shall provide the same voice quality and bandwidth availability than that of a typical Voice application transport. The UC solution shall support increasing capacity demands on the network based on increasing amount of traffic to be supported.
* **System Availability** – measured by the system availability of the telephony systems and UC platform. Accessing e-mail and voice mail is critical to the success of daily operations. To provide continuous access to e-mail and voice mail, the offeror shall correctly plan and implement a solution that meets the Availability requirement of the UC servers that provide these services.
* **System Time-To-Restore (TTR) or Hardware Replacement** – The offeror shall meet the TTR requirements measured by the hours taken to repair or replace a hardware

### Sub-task 3: UC Technical Support

**The offeror shall** support all aspects of the Client's Unified Communications (UC) infrastructure components and applications suite. The offeror shall:

* Provide data communications support for new UC technology upgrade and implementation project activities.
* Provide daily operational and troubleshooting support to resolve voice and data infrastructure technical issues, primarily in the Call Manager/ACD infrastructure.
* Perform installation of voice and data infrastructure components including servers, desk phones, and conference room phones.
* Conduct testing of voice and data UC infrastructure components.
* Support/maintain/administer all aspects of voice and data communications switches, and servers including voice mail, Call Center Publisher/Subscriber IP PBX Call Control, Automated Call Director (ACD) Call Center, Workforce Optimization management and Emergency Responder e911 functionality.
* Monitor network performance utilizing advanced tools.
* Respond to automated alerts, trouble tickets, service requests and severity outages in line with program Service Level Agreement parameters which shall include on-call responsibility.

### Sub-task 3: Instructional Training

The offeror shall deliver an ongoing instructional training for the life of the task order. The unified communications training shall be provided online and via a web-based method.

The unified communication and its technology features and solutions are new and unlike the current telephone system so training must be provided to the end users. Additional training must be provided to the call manager/systems administrator and receptionist/attendant console personnel. Training shall also be provided for the basic system management and configurations and maintenance support training, such as user profile changes, addition and deletion.

1. The offeror shall produce a UC Training Plan that describes the training method, delivery, schedule and curriculum, and the required materials and resources, for Agency review, comment, approval, and signoff.
2. The Government will provide comments, which shall be incorporated in the final Training Plan. The offeror shall provide to the Agency both the draft and final training document deliverables in MS Word format, and any required briefings/presentations in MS PowerPoint format.
3. The offeror shall provide instructional training and user support as needed
4. The offeror shall provide an evaluation page for student to provide feedback and training evaluation upon completing online training.
5. The Government reserves the right to access training evaluation results for verification on the effectiveness of training delivered within 24 hours advance notice to the offeror.

# Staffing and Personnel Requirements

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| This is where the Agency provides staffing requirements and labor types needed in support of the implementation and full life cycle management of Unified Communications solution. If security clearances or screening beyond what is included here are required, specifics of those requirements should be added to this section. |

The requirement under this solicitation seeks the support and expertise from Connections II vendors to carry out the Agency’s UC implementation projects from start to finish. Offerors shall propose adequate staffing to meet the requirements for UC specialists and engineering support to guide the Agency through the initial analysis of current systems, planning, designing and developing roadmaps and timelines for UC implementation. The proposed personnel shall assist the Agency throughout the end-to-end implementation of a unified communication solution, as well as provide ongoing maintenance, training and technical support.

## Labor Types

The offeror shall provide Labor Types for both professional and technical expertise that fully meet the requirements of all tasks in support of the solutions specified in this SOW, including full life cycle management as applicable, and the analysis, planning, design, specification, implementation, integration and management of required services and equipment.

## Personnel Requirements

The offeror has ultimate responsibility for managing the tasks, for achieving the performance results in each of the task areas, and for determining the appropriate staffing pattern in support of its technical approach.

* + - 1. The offeror shall provide experienced personnel to perform the required services. The Government and the offeror understand and agree that the services to be delivered are non-personal services.
      2. Offeror personnel shall conform to standards of conduct and code of ethics, which are consistent with those applicable to Government employees. Offeror personnel shall obtain authorization to have access to Agency support sites and Government facilities, and shall obtain Common Access Cards (CAC) for computer access.
      3. All offeror employees must be fluent in spoken and written English.
      4. Background Checks: All UC offeror employees must submit a Questionnaire for National Security Positions (SF-86) to the [Agency] Personnel Security Manager. A favorable SF-86 is required before gaining access to a U.S. Government LAN. The offeror, when notified of an unfavorable determination by the Government, shall withdraw the employee from consideration from working under the order.
      5. The contracting officer may require the offeror to remove from the job site any offeror employee who is identified as a potential threat to the health, safety, security, general well-being or operational mission of the installation and its population.
      6. In order to ensure a smooth and orderly startup of work, it is essential that the key personnel specified in the offeror's proposal be available on the effective date of the order. If these personnel are not made available at that time, the offeror must notify the contracting officer and show cause. If the offeror does not show cause, the offeror may be subject to default action.
      7. The offeror-supplied personnel are employees of the offeror and under the administrative control and supervision of the offeror. The offeror, through its personnel, shall perform the tasks prescribed herein. The offeror must select, supervise, and exercise control and direction over its employees (including subcontractors) under this order. The Government shall not exercise any supervision or control over the offeror in its performance of contractual services under this order. The offeror is accountable to the Government for the action of its personnel.

### Personnel Security Requirements

1. The Government may require security clearances for performance of this contract. The offeror must obtain these clearances before beginning work on the contract (Agency will not allow contract employees without clearance in any of its facilities). The offeror must obtain these clearances by using the eQIP system. If satisfactory security arrangements cannot be made with the offeror, the required services must be obtained from other sources.
2. The level of classified access required will be indicated on **DD-254** or other appropriate form incorporated into each request requiring access to classified information. Offeror personnel are required to have background investigations for suitability if they occupy positions of trust (e.g., systems administration) even if they do NOT have access to classified information.
3. Necessary facility and/or staff clearances must be in place prior to start of work on the contract
4. Offerors are responsible for the security, integrity and appropriate authorized use of their systems interfacing with the Government and or used for the transaction of any and all Government business. The Government, through the Government's Contracting Officer, may require the use or modification of security and/or secure communications technologies related to Government systems access and use.
5. The Government, at its discretion, may suspend or terminate the access and/or use of any or all Government access and systems for conducting business with any/or all offerors when a security or other electronic access, use or misuse issue gives cause for such action. The suspension or termination may last until such time as the Government determines that the situation has been corrected or no longer exists.

A description of qualifications, skills, and education level for the proposed staffing and personnel requirements is provided in **Attachment C – Labor Types** for a List of Technical and Professional support services.

### Special Qualifications and Certifications

The offeror shall ensure that its employees have all required professional certifications and licenses (current and valid) for each applicable task and labor type category before commencement of work.

The offeror’s personnel shall meet the minimum qualifications and certifications and education level as summarized and identified in the **Attachment C – Labor Types.**

[Agency may add Agency-specific requirements here]

# Travel and Other Direct Costs (ODC) / (Un-priced Items)

## Travel

The offeror shall comply with the Travel and Per Diem requirements as described in Section G.5.1.2 of the Connections II contract including conditions and limitations applying to travel associated with work performed under this SOW.

**Local Vicinity**: If travel within the local vicinity is required, travel reimbursements for local travel are not authorized; neither is the use of a Government vehicle.

**Distance Travel**: If travel outside the local vicinity is required, costs incurred by offeror personnel for travel, including costs of lodging, other subsistence, and incidental expenses, shall be considered reasonable and allowable only to the extent that they do not exceed the rates and amounts set by the Federal Travel Regulations. See **FAR 31.205-46 (a)(2)(i)**.

As part of the Price Proposal, the Offeror shall provide any anticipated travel costs, to include origination, destination, and the number of trips, number of persons, and a breakdown of lodging, meals, transportation and related costs.

Prior written approval by the [Agency] contracting officer is required for all travel directly and identifiably funded by the [Agency] under this order. The Offeror shall therefore present to the contracting officer an itinerary for each planned trip, showing the name of the traveler, purpose of the trip, origin/destination (and intervening stops), and dates of travel, as far in advance of the proposed travel as possible, but in no event less than three weeks before travel is planned to commence.

For cost effectiveness, economy class travel must be used on all official travel funded under this Task Order. Business class travel should only be used under exceptional circumstances, and in compliance with the Federal Travel Regulations (**FAR 31.205.46**). Use of a Government vehicle for distance travel is not authorized.

## Other Direct Cost (ODC)/ Un-priced Items

Other direct costs proposed (e.g. travel, per diem, etc.), which are considered necessary for the completion of the work, shall provide sufficient information to establish the basis for the estimate of such cost.

The Offeror shall provide a breakdown for un-priced items and/or Other Direct Costs (ODCs) in the Price Proposal. The breakdown shall identify any “open market” items.

# Materials, Equipment and Facilities

The offeror shall meet and comply with the baseline general requirements for the management, maintenance, and handling of equipment and equipment services as described in **Section C.2.1 General Requirements** of the Connections II contract.

## Equipment Warranty and Inventory

Agency-specific requirements for equipment and facilities may be provided for each individual task. In addition, the offeror shall:

* Comply with **Section C.2.1.9: Warranty Service** of the Connections II contract to provide, at no additional cost to the Government, a minimum one-year system warranty, or the warranty provided by the Original Equipment Manufacturer (OEM) whichever is longer, for all hardware and software purchased under this order.
* Comply with **Section C.3.6: Inventory Management** of the Connections II contract to establish and maintain an Inventory File of equipment, equipment warranty, and maintenance services purchased under each of the Tasks. Each record of this file shall include the OEM’s name and contact number, the maintenance offeror’s name and local repair number, the date of acceptance, the date maintenance was performed (if available), a description of the maintenance action (if available), and the date that the warranty ends.

***Attachment E – Equipment Support, Warranty and Inventory*** is provided for the offeror to store and track equipment records by the task order number. The [Agency] may also task the Offeror to store additional information in this file.

## Government-Furnished

Government Furnished Property (GFP) which includes Government Furnished Material (GFM), Government Furnished Information (GFI), and Government Furnished Equipment (GFE) may be provided and shall be identified in the individual task order. The offeror shall be responsible for conducting all necessary examinations, inspections, maintenance, and tests upon receipt.

#### Government Furnished Equipment (GFE)

Upon the award and placement of each task order, Government Furnished Equipment (GFE) may be made available by the [Agency] for use by the offeror to support the tasks. The offeror shall use GFE to provide support services as mutually agreed upon by the offeror and Agency. The offeror shall evaluate all equipment as the Agency directs.

[Agency may add Agency-specific requirements here]

#### Government Furnished Information (GFI)

Site floor plans, specifications, and references will be provided by the COTR. Site drawings, cable run sheets and complete technical documentation generated by the offeror, as well as documentation that was provided to the offeror by the COTR or TPOC shall be delivered NLT thirty (30) work days to [Agency]’s POC following the completion of the project.

[Agency may add Agency-specific requirements here]

## Contractor-Furnished

#### Contractor- Furnished Equipment (CFE)

All material and equipment identified on the network design package to accomplish this task will be furnished by the offeror. The offeror will purchase, ship, move, store, inventory, and handle installation material that is identified as CFE. Excess materials and prescribed spares shall be turned over to the COTR at the completion of the project. Material turned over at the completion of the project shall be thoroughly documented including description, part numbers, and quantities.

[Agency may add Agency-specific requirements here]

#### Contractor- Furnished Items (CFI)

The offeror shall identify in their proposal any items to be furnished during the performance of this task order.

The Offeror shall provide all equipment and labor necessary to deploy the UC solution into operational status and ready to provide telecom service to end users. The offeror shall provide documentation for design, detailed design drawings, Softswitch and gateway configuration(s), network topology, training materials including web-based training, support hotline telephone number and e-mail/website, and completion of task letter signed off on by Agency COTR.

## Facilities

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| This section may be remove if the requirements under this sub-section do not apply to this SOW. |

#### Contractor Facilities

Except for those items and services specifically stated above in Section 5.3.1.2 as Offeror -Furnished, the offeror shall furnish everything needed to perform and meet the requirements according to all the terms and conditions of the task order. Such property includes, but is not limited to, facilities, equipment, material, supplies, repair parts, vehicles, data processing equipment, safety clothing, identification system camera and badges, and timekeeping system and facilities.

[Agency may add Agency-specific requirements here]

#### Government Facilities

To the extent it is available and is technically adequate, government facilities shall be used within the Government buildings and is support locations identified by the Agency in ***Appendix C – Support Locations***.

Where offeror equipment is required at the site, the Government will provide space, power, heating, ventilation and air conditioning (HVAC). To the extent that uninterrupted AC power is available and required, it shall be provided to the offeror by the Government. Government furnished equipment (GFE) may be used to satisfy this requirement if it is available.

[Agency may add Agency-specific requirements here]

#### Incidental Construction

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| Requirements for incidental and non-severable construction may be removed if it does not apply to this SOW.  The modification of a facility or space, raised flooring, alteration, addition or any construction work performed must not be a standalone task but rather it is incidental to the task order under this SOW and not a major task on its own.  Agency may add incidental and non-severable construction requirements here specific to their needs to support the solution. |

[Agency may add Agency-specific requirements here]

# Invoice Requirements

The offeror shall meet and comply with the Billing and Invoice requirements as described in **Sections C.3.4 Billing, G.5.1 General Billing Requirements, and G.6 Payment of Bills** of the Connections II contract. The baseline requirements for Connections II contract for Invoicing and Billing including the handling of Associated Government Fee, approval for payment of supplies/services, resolution of billing disputes, and the option for Agency to pay by electronic funds transfer shall apply.

## Detail Billing Requirements

The offeror shall comply with the detail billing requirements defined in **Section C.3.4** and the general billing requirements in **Section G.5** of the Connections II contract when submitting a proper bill for each order.

## Invoice Address, Data Format and Delivery Method

The offeror shall be capable of directly billing each customer at the address given by the Agency in the order and shall also have the capability to centrally bill designated customers through GSA. The baseline requirements for direct and centralized billing as defined **Section C.3.4** of the Connections II contract shall apply.

### Invoice Address

The offeror shall send invoices directly to the address (electronic mail or postal/physical address) designated by the Agency’s authorized Ordering Entity. This address will be determined at the time the order is placed.

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| An Agency can receive invoices by electronic (email method), hard copy, or both. Suggested Requirements:  The offeror shall provide the signed original invoice via email:  [Agency provide email address here]  The offeror shall also provide via postal/physical address an additional copy of the invoice to the Contracting Officer and COR or provide [n] copies of the signed original to:  Name of Agency Department  POC Name/Position and Title  Email  Mailing Address  Street, City, Zip  Inquiries regarding payment of invoices should be directed to [Agency provide email address here] |

### Invoice Submission

The offeror shall comply with the detail billing requirements defined in Section C.3.4 and the general billing requirements in Section G.5 of the Connections II contract when submitting a proper bill for each order.

A proper invoice must include the following items:

1. Contractor name and address

2. Contractor representative

3. Contract number

4. Order number(s)

5. Accounting Control Transaction (ACT) number (assigned by the OCO on the order)

6. Period of performance (month services performed for work request orders, month

deliverable completed for fixed price orders)

7. Bill number

8. Customer’s name and address

9. For Fixed Price Orders, products delivered and accepted, listed by deliverable number;

for Time and Materials orders, labor charges accepted during the period of performance

10. Travel and per diem charges

11. Total billed amount

12. Prompt payment discount offered (if applicable)

### Billing Cycle and Data Elements

The offeror shall invoice on a monthly basis. The invoice shall include the period of performance covered by the invoice. All labor, equipment, equipment services and unpriced items (other direct costs) shall be reported, and shall be provided for the current billing month and in total from project inception to date. If subcontracting is proposed, one consolidated invoice from the prime contractor shall be submitted in accordance with other terms and conditions of the RFQ.​

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| The Agency has option to specify the format and agency-specific data elements for invoice content.  Suggested Requirements:  The offeror shall provide the invoice data in spreadsheet form with the following detailed information.  The listing shall include separate columns and totals for the current invoice period and the project to date. The following data elements shall be provided on the Invoice, at a minimum:   1. Labor Type (Employee) 2. CONNECTIONS II labor category 3. Monthly and total cumulative hours worked 4. Burdened hourly labor rate 5. Cost incurred not billed |

### Electronic Funds Transfer (EFT)

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| Agency has option to specify the method of delivery for invoice and payments.  Insert additional agency-specific requirements here.    Below is a standard ‘boilerplate” requirements for EFT. |

The offeror shall cooperate with the government to allow payment of bills via Electronic Funds Transfer (EFT) to the extent feasible in accordance with **Section G.6.3 Use of Electronic Funds Transfer** of the Connections II contract.

## Billing for Other Direct Costs (ODCs) or Unpriced Item

The offeror may invoice monthly on the basis of cost incurred for ODC or unpriced item.  The invoice shall include the period of performance covered by the invoice and the item number and title.

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| Agency has option to specify the format and agency-specific data elements for ODC and unpriced items.  Suggested Requirements:  The offeror shall provide the following detailed information for each invoice submitted, as applicable.  Spreadsheet submissions, in MS Excel format, are required.   1. ODCs or unpriced items purchased 2. Date delivery accepted by the Government 3. ODC or unpriced item number 4. Project to date totals 5. Cost incurred not billed 6. Remaining balance of each item |

### Invoice for Travel Expenses

The offeror may invoice monthly on the basis of cost incurred for cost of travel comparable with the Joint Travel Regulations/Federal Travel Regulation (JTR/FTR).  Long distance travel is defined as travel over 50 miles.  The invoice shall include the period of performance covered by the invoice, and the CLIN number and title.  Separate worksheets, in MS Excel format, shall be submitted for travel.

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| Agency has option to specify the format and agency-specific data elements for submitting Travel charges. Suggested Requirements:  The offeror shall provide the following detailed information for each invoice submitted for travel expenses. The Total Cost for Travel shall identify all current travel on the project and their total CLIN/Task costs billed.  The listing shall include separate columns and totals for the current invoice period and the project to date:   1. Travel Authorization Request identifier, approver name, and approval date 2. Current invoice period 3. Names of persons traveling 4. Number of travel days 5. Dates of travel 6. Number of days per diem charged 7. Per diem rate used 8. Total per diem charged 9. Transportation costs (rental car, air fare, etc.) 10. Total charges 11. Explanation of variances exceeding 10% of the approved versus actual costs 12. Indirect Handling Rate. |

[Agency may add Agency-specific billing and invoice payment processing requirements here]

# Electronic and Information Technology Accessibility Standards (Section 508)

All Electronic and Information Technology (EIT) procured through this task order must meet the applicable accessibility standards at 36 CFR 1194, unless an Agency exception to this requirement exists. The Section 508 Standards Summary is viewable at: <https://www.section508.gov/index.cfm?fuseAction=stdsSum#technical>.

The offeror shall indicate for each line item in the schedule whether each product or service is compliant or noncompliant with the accessibility standards at 36 CFR 1194. Further, the proposal must indicate where full details of compliance can be found (e.g., the offeror's website or other exact location).

# Proposal Instructions

Connections II offerors are expected to review, understand, and comply with all aspects of this Statement of Work. All proposals received by the closing date and time will be evaluated in accordance with the Evaluation Criteria in **Section 6.0: Evaluation Factors for Award**.

Questions and clarifications concerning this solicitation shall be submitted in writing via email to: [name and email address], no later than [Q&A Closing Date (MM/DD/YYYY)].

## Solicitation Closing Date and Time

All proposals received by the deadline will be reviewed for responsiveness to the specifications outlined in these guidelines and the proposal format. Proposals which are submitted late or are incomplete run the risk of not being considered in the review process.

The proposals should be prepared according to the structural format set forth below. Proposals must be received at the place designated and by the due date specified herein, and must be considered valid for a period of [120] calendar days from the solicitation closing date.

PROPOSALS MUST BE RECEIVED ON OR BEFORE [3:00 PM EDT] ON [RFP\_Closing\_Date].

Any proposal received by the [Agency] after the due date and time will not be considered.

## Preparation and Delivery Instructions

The Proposal shall be delivered to:

[POC Name/Title]

[Email]

[Phone]

[Additional instructions how proposals are to be submitted or delivered]

The offeror’s proposal shall consist of individually titled separate volumes. Proposals shall be submitted in three separate volumes as shown below:

|  |  |  |  |
| --- | --- | --- | --- |
| **VOLUME** | **VOLUME TITLE** | **FORMAT** | **PAGE LIMITATIONS** |
| **Vol. I** | **PRICE PROPOSAL** | **EXCEL** | **No page limit** |
| **Vol. II** | **TECHNICAL/MANAGEMENT PROPOSAL**   * **Technical approach** * **Management approach** | **PDF** | **[n] maximum number of pages** |
| **Vol. III** | **APPENDICES**   * **Project Management Plan (PMP)** * **Past Performance** * **Resume of Proposed Personnel** | **PDF** | **[n] maximum number of pages**  **[n] maximum number of pages**  **[n] maximum number of pages per Resume** |

The following requirements apply to volumes 2 and 3. Volume 1 (Price) must comply with the instructions found within the attached MS Excel workbook.

1. **FORMAT.** All materials shall be in typeface Times New Roman 11 point (or Arial 11 point), on 8-1/2 x 11” formatted pages with one inch margins all around. Tables and illustrations may use reduced font style but not less than 8-point. All material submitted may be single-spaced. **Each page must provide identification of the submitting offeror in the heading or footer.**
2. **MATERIALS SUBMITTED.** The offeror is advised that all submissions and related material become the property of the U.S. Government and will not be returned. The technical and price proposals, if accepted by the Government, will form binding parts of the task orders that results from this solicitation. Therefore, care must be taken to properly address the requirements set forth in this solicitation.
3. **PROPRIETARY DATA.** Each and every page of the offeror’s proposals must be reviewed and marked as to proprietary data content by the offeror in strict compliance with **FAR 52.215-1**. Also see **FAR 3.104-4**. A single blanket statement at the front of the proposal is not acceptable. Failure to mark every page will subject your proposal to public release through Freedom of Information Act (FOIA) requests.

## Price Proposal

The offeror shall submit its Price Proposal in the form of an MS Excel Workbook included as ***Attachment D – Pricing Template***. The Price Model is used to facilitate the delivery of prices in the required format. In populating all Excel worksheets, the offeror shall present the data (e.g., item number, unit prices, quantities, and summarized prices) in a manner where all computations can be traced to the maximum extent possible. The offeror may add rows, columns, or worksheets to accommodate the required pricing information.

The offeror must assemble a project team with the required knowledge and experience as described in **Attachment C – Labor Types**. Pricing for each type of labor shall be proposed in all 4 price types. Proposed Labor Types for each Task shall include the Labor Type description, work location type, business day type, clearance status, and minimum educational qualifications and years of work experience. The Proposed Labor Types for each Task shall be provided in ***Attachment D – Pricing Template.***

For each Labor Types proposed, the offeror shall provide fully loaded hourly labor pricing based on the following price types:

1. Hourly Onsite (on government premises), Normal Business Day
2. Hourly Offsite (on offeror premises), Normal Business Day
3. Hourly Top Secret - TS/SCI, Onsite, Normal Business Day
4. Hourly Top Secret - TS/SCI, Offsite, Normal Business Day

The technical support services required at the government-site are described and identified in ***Attachment B – Support Locations.*** Work locations are defined as Government or offeror sites:

* + - 1. **Government site**: The Offeror shall provide technical support and equipment when required to the locations identified in ***Attachment B – Support Locations***.
      2. **Offeror site:** The Offeror shall provide network and security operations support and monitoring when required, and this work may be performed at the Offeror’s NOC and SOC, respectively.

Failure by the offeror to use the prescribed pricing template may result in non-compliance. The Price Proposal must be submitted under separate cover from the Technical Proposal. While there is no page limit for the Price Proposal, the offeror must provide the necessary detail and supporting information to address the solicitation requirements and to allow a complete analysis of each line item price.

## Technical/Management Proposal

The **Volume II Technical/Management Proposal** shall include the technical approach and management approach as described below. Technical/Management Proposals are limited to [n] pages in length and shall be written in English. Each page must be numbered consecutively. Pages that exceed the page number limitation will not be evaluated.

Any page in the Technical/Management Proposal that contains a table, chart, graph, etc., not otherwise specifically excluded below, is included within the above page limitation for the Technical Proposal. Not included in the page limitation are the following:

* Cover/title page
* Table of contents

The offeror must organize its response in the Technical/Management Proposal to contain the following.

**Executive Summary** (5-page size limit)

The Executive Summary shall summarize the key elements of the offeror’s strategy, approach, methodologies, personnel and implementation plan. The Executive Summary must not exceed 5 pages in length.

**Technical Approach**

The Technical Approach must demonstrate a clear understanding of the requirements and include a description of the overall approach and strategy (i.e., implementation plan, testing methodology and risk mitigation strategy) being proposed. The Technical Approach shall include a detailed description of the offeror’s technical solution for each task including the associated equipment, equipment services, labor, and installation, and addressing each paragraph and subparagraph of Section 2.0: Statement of Work. If the offeror simply restates the requirements in Section 2.0 of this solicitation, the offeror’s proposal will be removed from consideration for award.

The Technical Approach shall be organized by the technical evaluation criteria for “Factor 1 – Technical Approach” listed in **Section 9.3** and shall meet and comply with all requirements in this SOW. Marketing literature is not acceptable. The offeror must stipulate that it has read, understands and will meet the Government’s requirements.

**Management Approach**

The offeror’s Management Approach shall provide a summary of the draft Project Management Plan (see instructions for Appendices) and the rationale behind the selected organization and staff chosen. The plan shall also demonstrate that the offeror has the corporate capabilities to execute the submitted PMP.

## Appendices

# Project Management Plan (no size limit)

The offeror shall submit a draft Project Management Plan (PMP) based on its proposed technical approach using ***Attachment A - PMP Template***. The offeror’s draft PMP will be evaluated as part of Technical/Management. The PMP shall be submitted as an Attachment with no size limit.

The offeror shall identify in the Project Management Plan, by name and by roles and responsibilities, the proposed key personnel (i.e., the key management and technical personnel who will work under this order). The core project team should be composed of qualified professionals with strong technical backgrounds and experience in designing large, complex UC configurations.

# Past Performance

Offerors shall submit the following information as part of their proposal:

1. The offeror shall describe its past performance directly related to contracts it has held within the last [5 years] that are similar in scope, magnitude and complexity. Offerors shall provide a minimum of three (3) relevant examples. There is no maximum number of examples that can be provided.
2. The offeror shall provide relevant past performance documentation and references for services comparable to those described in the SOW. Past performances listed may include those entered into by the Federal Government, state and local government agencies, and commercial customers.
3. The offerors shall notify each of their private-sector (commercial) references that they may be contacted by the [Agency] and authorize them to provide the past performance information requested. References other than those identified by the offeror may be contacted by the Government, and the information received from them may be used in the evaluation of the offeror’s past performance.

The offeror shall provide with the proposal a summary of the required past performance information. The offeror shall provide the information using the worksheet provided in **Attachment F – Past Performance Worksheet**.

**Proposed Personnel**

The offeror shall describe the skills, qualities and capacities of its proposed Project Manager and other key personnel to meet both the minimal qualifications described in **Section 2.0** as well as their ability to meet the technical and implementation challenges of the proposed implementation approach.

The offeror shall include the resumes for all the proposed key personnel candidates and other long-term technical experts, up to a total number of [n]. Key personnel resumes may not exceed [n] pages in length and shall be in chronological order starting with most recent experience.

Each resume shall be accompanied by a signed letter of commitment from each candidate indicating his/her: (a) availability to work in the stated position, in terms of months; after award; and (b) intention to support and work for a stated term of the service. The offeror's proposed personnel shall also submit a minimum of three (3) references of professional contacts within the last three years. The offeror should provide a current phone, fax address, and email address for each reference contact.

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| If the Agency has additional proposal instructions above and beyond the instructions stated in this SOW, they may be provided in this section. An Agency is not required to use any of the instructions contained herein. |

# Evaluation Factors and Basis for Award

The Government will evaluateeach of the offeror’s proposals to determine if the support services offerings satisfy the specific requirements under each task. The evaluations will be based on the evaluation factors defined in this section.

## Evaluation Methodology and Basis for Award

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| **SUGGESTED EVALUATION LANGUAGE**  **(Agency may remove or modify the narratives below)**   1. The Government may award a contract based on the initial proposal without discussions or negotiations with offerors, in accordance with **FAR 52.215-1**. Therefore, it is important that each proposal be fully compliant, without exception to any requirement, clause or provision. Offerors should submit initial proposals which respond most favorably to the SOW’s requirements. 2. The Government intends to evaluate offerors proposals in accordance with **Section 7.0** of this SOW and make a contract award to the responsible offeror whose proposal represents the best value to the U.S. Government. 3. The Technical Proposal will be evaluated by a technical evaluation committee using the technical criteria shown below. 4. Price has not been assigned a numerical weight. Offerors are reminded that the Government is not obligated to award a negotiated contract on the basis of lowest proposed price, or to the offeror with the highest technical evaluation score. Agencies must state the following when using tradeoff process: ‘The solicitation shall state whether all evaluation factors other than cost or price, when combined, are significantly more important than, approximately equal to, or significantly less important than cost or price.’ 5. As technical scores converge, price may become a deciding factor in the award. Therefore, after the final evaluation of proposals, the contracting officer will make the award to the offeror whose proposal offers the best value to the Government considering both technical and price factors. |

## Evaluation Approach – Trade Off or LPTA

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| Note: The Agency is required to select either Trade off or LPTA Approach. Once a method has been selected, delete all information in this SOW relevant to the method that was NOT selected. |

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| **SUGGESTED EVALUATION LANGUAGE**  **IF TRADE OFF APPROACH**  **IS SELECTED BY THE AGENCY**  **(Agency may remove or modify the narratives below)**  The Government anticipates awarding a task order to the offeror whose quote represents the best value, price and other factors considered.   1. The Government intends to evaluate proposals and may award a contract without discussions. However, the Government reserves the right to conduct discussions if determined by the contracting officer to be necessary. Therefore, each initial offer should contain the offeror’s best proposal from both a price and a technical standpoint. 2. Proposals received in response to this solicitation will be evaluated by the [Agency] pursuant to the Federal Acquisition Regulations (FAR) and in accordance with **FAR 52.215-1**, and as set forth in **Section 8.0: Proposal Instructions**, one award will be made by the contracting officer to the responsible offeror whose proposal, conforming to the solicitation, is determined most advantageous to the Government, all technical and price factors considered. 3. The formula set forth herein will be used by the contracting officer as a guide in determining which proposals will be most advantageous to the Government. |

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| **SUGGESTED EVALUATION LANGUAGE**  **IF LOWEST PRICE TECHNICALLY ACCEPTABLE (LPTA) APPROACH**  **IS SELECTED BY THE AGENCY**  **(Agency may remove or modify the narratives below)**  Award will be made to the offeror whose proposal represents the lowest price technically acceptable as defined in **FAR 15, Subpart 15.101-1**. The offeror’s proposal will be evaluated with regard to its ability to meet the tasks set forth in the SOW. To result in an award, the offeror’s proposal must demonstrate the ability to satisfy all technical requirements as set forth in the attached Statement of Work, and must conform to all required terms and conditions.  Lowest price technically-acceptable source selection process.   * + 1. The lowest price technically-acceptable source selection process is appropriate when best value is expected to result from selection of the technically-acceptable proposal with the lowest evaluated price.     2. When using the lowest price technically-acceptable process, the following apply:        1. The evaluation factors and significant sub-factors that establish the requirements of acceptability shall be set forth in the solicitation.        2. Solicitations shall specify that the award will be made on the basis of the lowest-evaluated price of proposals meeting or exceeding the acceptability standards for non-price factors.        3. If the contracting officer documents the file pursuant to 15.304(c) (3) (iii), past performance need not be an evaluation factor in lowest price technically-acceptable source selections.        4. If the contracting officer elects to consider past performance as an evaluation factor, it shall be evaluated in accordance with 15.305. However, the comparative assessment in 15.305(a) (2) (i) does not apply.        5. If the contracting officer determines that the past performance of a small business is not acceptable, the matter shall be referred to the Small Business Administration for a Certificate of Competency determination, in accordance with the procedures contained in subpart and U.S.C. 637(b)(7).     3. Proposals are evaluated for acceptability but not ranked using non-price factors. |

## Technical Evaluation Criteria

The Government will review the responses to this solicitation to ensure that offerors have addressed the requirements for Tasks 1-4 and are sufficient in detail and clarity to allow the Government to determine whether the proposed support services, equipment, and equipment services are acceptable, or if the Government desires to enable the Agency contracting officer to identify items for discussions.

The Government will evaluate the [offerors] offeror’s proposal based upon the following four factors: technical approach, project management, proposed personnel, and past performance*.* Within these factors, the Government will evaluate the sub-factors identified below. To achieve an acceptable rating, the offeror’s Technical Proposal must achieve a pass rating on all sub-factors.

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| The Agency is required to develop a source selection / technical evaluation plan to describe how each of these factors will be rated. Depending on the approach used, the Source Selection Plan/Technical Evaluation Plan (SSP/TEP) may select an adjectival rating system, a points system, or any other approved system. |

The Government will evaluate offerors’ Technical Proposals as described below:

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| **TECHNICAL EVALUATION CRITERIA** |
| **Factor 1: Technical Approach** |
| Sub-factor 1: Task 1 – Assessment of Current Network |
| Sub-factor 2: Task 2 – Planning, Roadmap, and Design |
| Sub-factor 3: Task 3 – UC Implementation, Testing and Acceptance |
| Sub-factor 4: Task 4 – Maintenance, Support, and Training |
| **Factor 2: Proposed Personnel Qualifications/Certifications** |
| Sub-factor 5: Program/Project Manager |
| Sub-factor 6: Key Technical Personnel |
| **Factor 3: Past Performance** |
| Sub-factor 7: Past Performance History/Track Record |

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| **SUGGESTED EVALUATION LANGUAGE**  **FOR TECHNICAL EVALUATION OF TECHNICAL CRITERIA**  **PLEASE NOTE: The standard for evaluation is usually reserved for the SSP/TEP, however an agency may choose to disclose this information in the RFQ/RFP**  **(Agency may remove or modify the narratives below)**  The following evaluation criteria will serve as the standard against which all proposals will be evaluated and will serve to identify the significant discussion items that offerors should address in their proposals.  The factors and sub-factors are presented below. Sub-factors are listed in descending order of importance, showing the evaluation weighting for each.   1. **Factor 1: Technical Approach and Project Management**   The extent to which the proposal demonstrates a clear understanding of the statement of work and the degree to which the proposed implementation approach is technically and managerially sound and likely to meet the objectives of the UC Deployment project as described in this solicitation. The technical approach must be realistic, directly relevant to the achievement of results and must seek to maximize results within budget resources.   * **Sub-Factor 1: Task 1 – Assessment of Current Infrastructure** - The proposed solution shall effectively address each of the critical network elements to perform a comprehensive assessment of the current network systems and infrastructure. * **Sub-Factor 2: Task 2 – Planning, Roadmap, and Design** - The proposed solutions shall demonstrate understanding of the requirements for planning, timeline roadmap and developing a design for a unified communications platform and application suite that is easy to implement, easy to manage, and easy to use. An architecture diagram and proposed logical design will be evaluated with the proposal. The proposed solution shall demonstrate understanding of the requirements for developing a timeline roadmap. A draft PMP and timeline roadmap diagram submitted with the proposal will be evaluated. * **Sub-Factor 3: Task 3 – UC Implementation, Testing and Acceptance** - The proposed solution shall demonstrate the offeror’s clear understanding of the Agency's requirements for a seamless UC deployment throughout the site locations, including risk mitigation procedures that the offeror must adhere to for all the infrastructure changes to ensure minimal disruption during deployment of UC and to ascertain that the production environment is ready for full UC deployment. * **Sub-Factor 4: Task 4 – Maintenance, Technical Support and Training** - The proposed solution shall demonstrate the offeror’s clear understanding of the Agency's requirements to develop Operational Procedures for Administration of UC in operational environment. The proposal will be evaluated regarding the extent to which it demonstrates understanding of the requirements and the administration procedures to be performed after the UC deployment is completed. The contractor lifecycle management approach in managing and maintaining the UC platform, the ongoing training as well the technical support to be provided to end users and system administrators will be evaluated against this criteria.  1. **Factor 2: Proposed Personnel Qualifications/Certifications**  * **Sub-Factor 5: Project Manager/Program Manager** – The proposed Project Manager/Program Manager shall demonstrate the qualifications and ability to successfully lead this project, including the ability to work constructively at multiple levels of organizations, including senior levels of Government and business. The proposed solution shall describe the extent to which it uses a creative and innovative program management approach, and clearly demonstrate how the proposed technical solution for each task will achieve expected results. The Project / Program Manager’s Resume will be evaluated against these criteria. * **Sub-Factor 6: Key Personnel** – The members of the proposed project team, including subject-matter experts (SMEs), shall demonstrate the experience and ability to successfully meet the project milestones, targets, and goals. **The** Resumes of the key personnel will be evaluated against these criteria.  1. **Past Performance**  * **Sub-Factor 7: Past Performance** information will be used for both the responsibility determination and best value decision. The offeror and major subcontractor(s) past performance will be evaluated. A major subcontractor (if applicable) is defined as a subcontractor named in the proposal whose total price exceeds 15% of the offeror’s bottom line total price, including fixed fee. * The contracting officer will utilize existing database of offeror performance information (i.e. PPIRS) and solicit additional information from the references provided in this SOW and from other sources if and when the contracting officer finds the existing databases to be insufficient for evaluating an offeror’s performance. The [Agency] may use performance information obtained from other than the sources identified by the offeror/subcontractor. |

## Price Evaluation Criteria

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| **SUGGESTED EVALUATION LANGUAGE**  **FOR PRICE EVALUATION CRITERIA**  **(Agency may remove or modify the narratives below)**   1. No points are assigned to the price proposal evaluation. While the technical evaluation criteria are significantly more important than price, price remains important. 2. Price will primarily be evaluated for realism, allow-ability, and reasonableness. 3. This evaluation will consist of a review of the price portion of an offeror’s proposal to determine if the overall price proposed is realistic for the work to be performed, if the price reflects an accurate understanding of the requirements, and if the price is consistent with the Technical Proposal. 4. Evaluation of the price proposal will consider but not be limited to the following:  * Price reasonableness, price realism and completeness of the price proposal and supporting documentation * Overall price control/price savings evidenced in the proposal (avoidance of prices that exceed reasonable requirements) * The amount of the proposed fee, if any  1. Price realism is an assessment of the accuracy with which proposed prices represent the most probable cost of performance, within each Offeror’s technical and management approach. A price realism evaluation shall be performed as part of the evaluation process as follows:  * Verify the offeror’s understanding of the requirements * Assess the degree to which the price proposal accurately reflects the technical approach * Assess the degree to which the prices included in the Price Proposals accurately represent the work effort included in the respective Technical Proposals  1. The results of the price realism analysis will be used as part of the Agency’s best value/tradeoff analysis. 2. Although technical evaluation criteria are significantly more important than price, the closer the technical evaluation scores of the various proposals are to one another, the more important price considerations will become. The evaluation of proposed prices may therefore become a determining factor in the award as technical scores converge. |

# Task Order Award

The Task Order Award will be made to the responsible Offeror whose proposal is in the best interest of the [Agency], given the outcome of the [Agency]’s evaluation of each Offeror’s technical excellence, management and business risk factors, and proposed price. In selecting the Task Order Award, the [Agency] will consider the quality offered for the evaluated price. The relative quality of offers will be based upon the [Agency]’s assessment of the tradeoffs between the technical excellence offered in the Offeror’s proposal and whether it provides added value, added capability, and/or reduced management and business risk.

# Organizational Conflicts of Interest

The guidelines and procedures of **FAR Subpart 9.5** will be used in identifying and resolving any issues of organizational conflicts of interest at the task order level. (*Refer to* ***Section H.8 Organizational Conflicts of Interest*** *of the Connections II contract*).

In the event that a task order requires activity that would create or has created an actual or potential conflict of interest, the offeror shall:

* Notify the task order contracting officer (CO) of the actual or potential conflict, and not commence or continue work on any task order that involves a potential or actual conflict of interest until specifically notified by the task order CO to proceed.
* Identify the conflict and recommend to the task order CO an alternate tasking approach which would avoid the conflict.

If the task order CO determines that it is in the best interest of the Government to issue or continue the task order, notwithstanding a conflict of interest, a request for waiver shall be submitted in accordance with **FAR 9.503**.  In the event that the offeror was aware of facts required to be disclosed or the existence of an actual or potential organizational conflict of interest and did not disclose, when known, such facts or such conflict of interest to the task order CO, the Government may terminate this contract for default.

In the event that a task order issued under this contract requires the offeror to gain access to proprietary information of other companies, the offeror shall be required to execute agreements with those companies to protect the information from unauthorized use and to refrain from using it for any purpose other than for which it was furnished.

# Acronyms and Glossary of Terms

## Acronyms and Definition

| **Acronym** | **Definition** |
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| **BGP** | Border Gateway Protocol |
| **DMVPN** | Dynamic Multipoint VPN |
| **EIGRP** | Enhanced Interior Gateway Routing Protocol |
| **EKTS** | Electronic Key Telephone Systems |
| **FAR** | Federal Acquisition Regulation |
| **IM** | Instant Messaging |
| **IPSec** | Internet Protocol Security |
| **ITIL** | Information Technology Infrastructure Library |
| **JTR/FTR** | Joint Travel Regulations/Federal Travel Regulation |
| **LAN** | Local Area Network |
| **MPLS** | Multiprotocol Label Switching |
| **NB-IP VPN** | Network-based IP Virtual Private Network |
| **PBX** | Private Branch Exchanges |
| **QoS** | Quality of Service |
| **SOW** | Statement of Work |
| **SSP** | Source Selection Plan |
| **TDM** | Time Division Multiplexers |
| **TEP** | Technical Evaluation Plan |
| **UC** | Unified Communications |
| **VoIP** | Voice over Internet Protocol |
| **WAN** | Wide Area Network |

## Glossary of Terms

| **Glossary of Terms** | **Description** |
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| **Dial Plan** | For Exchange Unified Messaging, this is a set of telephony-capable endpoints that share a common numbering plan. The details of the plan are determined by the telephone system to which UM is connected. In the simplest case, this can be a private branch exchange (PBX) with its extensions, each with a unique, fixed-length number. |
| **Internet Protocol Private Branch eXchange (IP PBX)** | A telephone switch that natively supports voice over IP (VoIP). An IP PBX uses VoIP-based protocols to communicate with IP-based hosts such as VoIP telephones over a packet-switched network. Some IP PBXs can also support the use of traditional analog and digital phones. |
| **IP Gateway** | * A third-party hardware device or product that connects a legacy PBX to a LAN. An IP gateway translates or converts TDM or telephony circuit-switched protocols to packet switched protocols that can be used on a VoIP-based network. * The Exchange Unified Messaging representation of any SIP peer with which it can communicate using VoIP protocols. It may represent a device that interfaces with a legacy PBX or an IP PBX. |
| **Information Technology Infrastructure Library (ITIL)** | The Information Technology Infrastructure Library (ITIL) is a set of practices for IT service management (ITSM) that focuses on aligning IT services with the needs of business. ITIL describes processes, procedures, tasks and checklists that are not organization-specific, but rather used by an organization for establishing integration with the organization's strategy, delivering value and maintaining a minimum level of competency. It allows the organization to establish a baseline from which it can plan, implement and measure. It is used to demonstrate compliance and to measure improvement. |
| **Presence** | Presence is a feature of real-time communication. Presence information (presence state) constitutes a user's personal availability record (called a *presentity*) and can be made available for distribution to other users (called watchers) to convey his availability for communication. |
| **Private Branch eXchange (PBX)** | A private telephone network in an organization. Individual telephone numbers or extension numbers are supported, and calls are automatically routed to them. Users can call each other using extensions, even across distributed locations. |
| **Unified Messaging** | An application that consolidates a user’s voice mail and e-mail into one mailbox, so that the user only needs to check a single location for messages, regardless of type. The e-mail server is used as the platform for all types of messages, making it unnecessary to maintain separate voice mail and e-mail infrastructures. |

# Attachments

## Attachment A – Project Management Plan



## Attachment B – Support Locations

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## Attachment C – Labor Types



## Attachment D – Pricing Template



## Attachment E – Equipment Support, Warranty and Inventory



## Attachment F – Past Performance Worksheet



## Attachment G – Task Order Deliverables Performance Matrix



## Attachment H –Implementation Checklist



## Attachment I – Network Diagrams and Figures



## Attachment J – Service Level Agreements (SLAs)

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