STATEMENT OF WORK

CONNECTIONS II

# STATEMENT OF WORK

# CONNECTIONS II Order Identification Number: [######]

# Operations, Administration and Management

# Support for Voice (OA&M)

## Issued by:

## [Agency Logo]

## [Name of Agency]

## [Address of Agency]

## DATE: [DD MM YYYY]

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| **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 on 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 and/or supported, 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.  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** 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** indicates placeholders where Agency provides a numeric value (e.g. n for number of days, or number of pages) or replaces text 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

**Operations, Administration, and Management (OA&M) Support for Voice**

## Purpose

The purpose of this solicitation is to outsource the operations, administration and management (OA&M) of the Agency’s traditional Voice Private Branch Exchanges / Time Division Multiplexing (PBX/TDM) and/or Internet Protocol (IP) based voice and shifts the responsibilities and support to the Connections II offeror. The OA&M includes running the day-to-day business operations and functions of the voice network enterprise and thereby allowing the Agency to focus on its core mission.

The OA&M for Voice will provide and help the Agency achieve cost-effective operations and administration of its own Voice infrastructure, provide predictable equipment and personnel-related costs, reduce operating and maintenance costs, and minimize expenses and unscheduled outages that can arise from unexpected network incidents and complex voice network problems.

## 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 section is where the Agency may provide additional justification and benefits of outsourcing the management of Voice infrastructure support and equipment.  Why OA&M for Voice?  Effectively managing Legacy Voice communications equipment (including VoIP services) requires tools, resources and expertise that may not be available in-house. Agencies must first determine whether their voice support infrastructure would be best managed in-house or by a support vendor.  The objectives in this SOW can be contained within the full array of operations, administration and management (OA&M) of Voice infrastructure support and associated equipment offered under the Connections II contract or customized to meet Agency-specific needs.  The objective is for the Agency to leverage industry-leading resources and management capabilities for a secure and reliable Voice communications which may include OA&M for complex VoIP communications. |

The [Agency] intends to establish a modern, Agency-wide voice enterprise that supports agency objectives for improving operational efficiency. In accomplishing this objective, the [Agency] would like to leverage the investment in its existing infrastructure to the greatest extent possible. In addition, the [Agency] would like to fund the establishment of OA&M for the voice enterprise through the optimization of existing resources and the reduced operating costs provided by consolidation under a single OA&M program.

The objective of this SOW is to provide OA&M, including any associated equipment and equipment support, in support of the [Agency] Voice communication services across the enterprise. The offeror assumes responsibility for the operations and maintenance of [Agency] legacy systems, PBX, [other Agency voice infrastructure, systems, and applications]. To achieve this objective, the offeror must have the required operations, maintenance, and customer support functions in place to meet [Agency] contract requirements.

The [turn-key or fully managed] voice support solution will provide:

* Network intelligence and insight into the [Agency]’s own network and Voice communications systems including assistance with troubleshooting, network planning, network optimization, tracking and control of inventory of telecommunication equipment and assets, service ordering, billing analysis/verification and monitoring of Voice service performance.
* Opportunity for the [Agency] to leverage for new technologies as they become available while having more control over operational costs, allow its own in-house IT staff to focus on core business tasks, maximize technology performance, uptime and availability of its Voice services.
* A fully managed Voice communications platform such that all hardware, software, phone equipment, and support services will be managed and maintained by the Connections II offeror.

[Additional Agency-specific objectives can be inserted here]

## Scope

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| **OA&M for Voice** allows the Agency to leverage industry-leading resources and management capabilities available from the Connections II contract vendors for secure and reliable legacy Voice and/or VoIP communications.  Developing effective strategies for implementing and managing voice communications service and associated equipment is a constant challenge for many agencies, especially smaller sized agencies that have limited funding to run and operate, on their own, a complex Voice network enterprise.  The Agency and its IT organizations must plan thoroughly and carefully execute an implementation strategy using a well-developed roadmap that takes into consideration whether their current voice services and future Voice technology would be best managed in-house or by a support vendor. The Agency can re-use this SOW template and customize with additional agency-specific requirements for a Voice OA&M solution.  The scope of the OA&M for Voice SOW covers operations, administration, and management (OA&M) of the Agency’s voice network enterprise, voice security, performance monitoring, and general logistics management requirements. Depending upon the Agency needs, the scope may include all or a combination of the following:   * 1. Operations, and engineering support for onsite telephone lines, equipment, and telephony platform   2. Service order coordination for moves, add, change, disconnects (MACDs)   3. Local and Long Distance support including billing statement analysis and tracking of usage and statistics for aggregate call counts, durations, and cost   4. Service Desk Support including 24 x 7 telephony support for equipment repairs and replacement   5. Other Agency-specific Logistics support to manage and maintain voice support such as: * IP telephony (i.e. Traditional PBX, IP PBX, Trunks and Voice Circuits monitoring) * Voice Applications (Interactive Voice Response (IVR), Voicemail, Voice Messaging, Directory Services, Softphones, etc.) * Other Agency-specific Logistics support for Voice |

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| The **SCOPE** section should briefly describe the scope (products and support services) that the agency intends to obtain under this task order.  A brief summary of the scope of acquisition should include required professional support services (labor types), associated equipment, software, and hardware components for a Voice OA&M solution, and whether a turn-key solution or an end-to-end fully managed Voice communication solution is desired.  The scope may require offerors to provide either of the following or both:   1. A turn-key solution (plug and play) for Voice network, equipment, installation, maintenance, and proactive OA&M 2. A complete end-to-end solution for enhanced Voice Management that gives the Agency network intelligence and insight into its own network to assist with trouble shooting, network planning, traffic call routing, Class of Service allocations, and other logistic support.   The scope specifies the volume of coverage or support needed based upon support locations, size and population of users per location, telephony platforms to be supported, desired quantity of equipment, and payment terms for equipment support services such as maintenance and warranty. The Connections II contract offers equipment warranty and maintenance support services in increments of 1, 2, 3, 4 or more years.    The scope of the OA&M for Voice SOW includes 2 sets of requirements:   * + 1. **Core requirements** for voice network OA&M, network security and basic support services for voice. It also includes program management and related functional areas (day to day operations, planning, reporting, training, etc.). * Program Management and General Requirements * Operations, Administration, and Management of the Voice Network   + 1. **Optional requirements** are provided in addition to the core voice OA&M requirements. Tasks 3 to 9 provide support services and expertise in specific functional areas as well as for providing support personnel to manage video/voice conferencing, and customer contact services. The Agency can select only those tasks that apply or meet their needs: * Desk Phone Support Services * Support Services for Local and Long Distance Services * Support Services for Voice Messaging * Support Services for Directory Services * Support Services for Voice Conferencing * Support Services for Video Conferencing * Support Services for Contact Center Services     If the Agency deletes a set of task(s) that do not apply to its SOW in Section 2.0 Statement of Work, then the Agency must also make the same deletion in Section 9.3, Technical Evaluation Criteria. |

The scope of the OA&M support is broadly defined to encompass capabilities available within the [Agency's] current administrative voice environment as well as the next generation of capabilities that will be available as voice telephony systems continue to evolve. In addition to voice telephony, the offeror may provide management support for [directory services, voice conferencing, video conferencing, customer contact center services, etc.].

Should the [Agency] obtain new technology and/or replace the legacy Voice systems with new capabilities during the program life cycle, the Offeror shall also be responsible for operating and maintaining the new Voice Technology and upgrades.

Adequate staffing and personnel requirements including telecommunications subject matter experts (SMEs), technical specialists, network engineers, and other labor categories shall be provided to support the Agency in managing and maintaining its Voice network enterprise.

### **General Description of Requirements**

Network OA&M for Voice provides requirements that will shift the tasks and responsibility of managing the voice network enterprise and associated equipment to the services provider (the Connections II offeror) and thereby enable the Agency to achieve real-time visibility of enterprise-wide trunk resources, enforcing voice network security to verify compliance and detecting toll-fraud, unauthorized ISP calls, and 911 Alerting.

The Agency has a need for robust voice OA&M services that allow its Voice network administrators to use real-time tools to actively enforce telecommunications policies, detect and prevent attacks and abuse, and monitor trunk status across the enterprise. The Agency requires skilled resources to manage the Agency’s Voice network infrastructure, systems, and associated equipment and help minimize the need to find, hire, train and retain experienced personnel as the Agency’s Voice platform and technology evolves.

Section 2.0, Statement of Work, provide details of the task requirements, required functional areas and support services to be provided by the offeror including, but not limited to, the following:

1. OA&M for Voice Network Enterprise: Local Service (dial tone), Long Distance (e.g. dedicated/private line, public switched/PSTN), Hardware, software, licenses and agreements
2. OA&M for Voice application and systems:

* Desk Phone Service
* Voice Messaging (Voicemail)
* Directory Services
* Voice Conferencing
* Video Conferencing
* Contact Center Services, including:
  + Interactive Voice response (IVR)
  + Automated Call Distribution (ACD)
  + Computer Telephony Integration (CTI)

.

[Add Agency-specific information here]

### **Existing** **Communications and Network Infrastructure**

(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 included in Attachment H-1, Current Voice Configuration Diagram; an example diagram is provided in Attachment H-1)

See **Attachment H – 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 OA&M for Voice SOW defaults to **Firm Fixed Price.**  The Agency has the option to specify a **Time and Materials** (T&M) type task order.  A **Time-and-Materials** task 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 FAR 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 support specific requirements in this solicitation. This SOW also contains additional or supplemental requirements to those defined in the Connections II contract.

## 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 Period | <<Performance\_Start\_Date>> | <<Performance\_End\_Date\_BasePeriod>> |
| 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>> |

*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. It 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 the operations, administration, and management of the [Agency’s] Voice network enterprise.

A description and location address of all Agency facility and office locations requiring OA&M support are provided in Attachment B – Support Locations.

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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 for 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] Contracting Officer’s Representative (COR)**.

## Fair Opportunity

This SOW will be released for Fair Opportunity under **FAR 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

[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 Voice OA&M solutions**  Traditionally, voice networks have been managed from the switch room, with limited enterprise-wide visibility. With the increasing proliferation and use of IP-enabled PBXs/Switches, real-time availability of enterprise-wide trunk resources, and the constant need to adapt to new technologies, Agencies are finding voice management to be more of a challenge and difficult to achieve with in-house resources. Support for Voice network security has always been basic or minimal. Many Government agency organizations still attempt to verify compliance and detect toll-fraud, unauthorized Internet Service Provider (ISP) calls, and fax line abuse but only after it has occurred and mainly relying on Billing or Accounting systems that are ill-suited to the task of proactive detection and only provide indications of potential fraud after the fact.    OA&M Voice provided by Connections II offeror can take away much of the complexity that comes from managing all elements of the Agency’s voice network enterprise and equipment in-house.  The OA&M for Voice SOW includes requirements for outsourced Voice OA&M solutions to help alleviate the business challenges and allow the Agency to focus on its core mission.  **OA&M for Voice** is a series of tasks, activities, processes and tools provided by the offeror for the lifecycle management and operations, including engineering support, for the following areas and components supporting Voice services:   1. Operations and administration of Voice network services 2. Agency telephony circuits monitoring 3. Support services for onsite Telephone lines, equipment, and infrastructure for Voice 4. Invoice verification and billing statements analysis of enterprise-wide telephone services 5. 24 x 7 Telephony Support via a contractor-provided service desk 6. Other Agency-specific communications Logistics support   The requirements in this section are suggestive and it is up to the agency to determine the most suitable life-cycle solution to meet their goals and objectives. |

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| **Format and Structure of OA&M for Voice Requirements Statement**  This section describes 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), if known, 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). * **Roles and Responsibilities**   Each task provides a brief summary of roles and responsibilities that identify the party that will be responsible for performing the task. The Agency has an inherent role to review, approve and provision the network services, including voice services that the offeror will support and manage. The Agency may acquire or source the underlying Voice services from another contract such as Networx. The Connections II offeror has a specific set of complementary roles and responsibilities for each task to meet and satisfy the requirements for delivering and supporting the voice OA&M solution.   * **OA&M and General Requirements**   The OA&M for Voice SOW Template provides sample requirements for the offeror to provide the needed skills and expertise (labor types), associated equipment, and equipment services to manage and support Voice network enterprise and systems including Voice security, performance management, Quality of Service (QoS), phone usage auditing and reporting (billing analysis/verification), and other logistics for voice OA&M.   * **Voice network management -** Support services for managing enterprise Voice network: network monitoring; network planning and optimization; trouble-handling; fault management; incident management; and performance managemen**t.**  1. **Voice security management** - Support services for protecting the Agency's enterprise Voice infrastructure: detect and block Time-division multiplexing (TDM) & Voice-over-Internet Protocol (VoIP) attacks over trunk circuits; control enterprise voice network access and service use; provides a solution with the ability to enforce real-time, rule-based policies on a voice network to allow or terminate calls based on the user-specified rules. 2. **Voice usage and traffic accounting -** Provides enterprise-wide call details record (CDR) collection, call accounting, resource utilization reporting, and traffic analysis for proactive network management (be able to support for PBX/TDM and/or PBX-independent VoIP) 3. **Performance management** - Provides a dashboard for enterprise-wide visibility of both TDM and IP trunking infrastructure performance, with real-time and continuous monitoring of circuit health & status and call quality performance and Quality of Service (QOS) 4. **Phone auditing and reporting** - Support for billing analysis for Voice Intrusion Prevention System (IPS) and provide solution for analyzing call pattern anomaly detection and prevention for real-time detection of toll fraud, dialing, and service abuse/misuse for hybrid voice networks. 5. **Billing support -** Support for billing analysis for Voice IPS and provide solution for analyzing call pattern anomaly detection and prevention for real-time detection of toll fraud, dialing, and service abuse/misuse for hybrid voice networks. 6. **Other logistics and OAM tasks -** Support services for operations, administration and general management for Voice including MACD (moves, add, change, disconnects) , equipment repairs, desk phone service, directory services, Voice applications (voicemail, active call directory, IVR, softphones)  * **Service-specific Requirements for Voice Application and PBX/IP Telephony Platforms**   Depending upon Agency needs, goals and objectives for a Voice OA&M solution, the Agency may include all or a combination of the following task-specific requirements for a complete Voice OA&M solution:   1. Desk Phone Support Service 2. Support for Voice Circuits (Trunk Circuit Monitoring) 3. Support for Voice Messaging 4. Support for Directory Services 5. Support for Voice Conferencing Services 6. Support for Video Conferencing Services 7. Support for Contact Center Services. |

This Statement of Work is composed of nine tasks, each containing sub-tasks and a list of requirements that the offeror is expected to meet.

The offeror shall provide the appropriate labor categories (skills and expertise), associated equipment, and equipment services to support and deliver a voice OA&M solution agency-wide including voice network enterprise management, voice network security, performance management, Quality of Service (QoS), phone usage auditing and reporting (billing analysis and disputes), and other logistics support for voice. The scope includes the major tasks and tools associated with Voice service delivery and management of daily operations (post-deployment).

In addition to the support services described in each task, the offeror shall also be responsible for providing the skills and expertise, associated equipment and other logistics in the day to day operations and program management of the [Agency]’s voice network enterprise. The offeror shall propose other labor categories as appropriate to meet the requirements.

## Task List

The list describes the full range of offeror support services, associated equipment, and equipment services required for Voice OA&M, including the performance measures to be used to assess the quality and timely delivery of the following tasks:

* Task 1: Program Management and general requirements
* Task 2: Operations, Administration and Management of Voice Services (OA&M)
* Task 3: Support Services for Desk phone service
* Task 4: Support Services for Voice network services
* Task 5: Support Services for Voice messaging
* Task 6: Support Services for Directory service
* Task 7: Support Services for Voice conferencing services
* Task 8: Support Services for Video conferencing services
* Task 9: Support Services for Contact center service

## Task 1: Program Management and General Requirements

The [Agency] recognizes that Program Management tasks are an essential component for successful contract management and establishing an ongoing successful [Agency]-Offeror relationship. The [Agency] requires a relationship with the offeror based on the following key attributes:

* Appropriate governance structures
* Mutual trust and respect
* Excellent communication
* Well-defined objectives and service levels
* Well-defined roles and responsibilities

Program wide services are the cross functional services that set forth the roles and responsibilities required in each area under this task order for a complete end-to-end lifecycle management that apply to the provision, delivery and management in support of the [Agency] Voice infrastructure, applications and systems.

### **Sub-task 1: General Roles and Responsibilities**

The following table identifies general program management roles and responsibilities associated with Task 1. An “X” is placed in the column under the Party that will be responsible for performing the task. For the roles and responsibilities indicated in the column labeled “offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.1.1-1 – General Roles and Responsibilities**

| **General Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide support services (Labor Types), equipment, and equipment services supporting the processes for the [Agency]’s Voice OA&M business needs, technical requirements, and other end user requirements in support of its enterprise telecommunications including Voice infrastructure, applications, and systems. | **X** |  |
| 1. Approve Services and the supporting processes that support [Agency]’s Voice OA&M requirements, make sure the offeror meets technical requirements and other end user requirements in support of Agency-wide telecommunications including Voice network, applications, and systems. |  | **X** |
| 1. Comply with [Agency] policies, guiding principles , standards and regulatory requirements applicable to [Agency] for information, information systems, personnel, physical and technical security | **X** |  |
| 1. Provide timely creation, updating, maintenance and provision of all appropriate project plans, project time and cost estimates, technical specifications, management documentation and management reporting in a form/format that is acceptable to [Agency] for all Voice OA&M projects and major Service activities | **X** |  |
| 1. Maintain and update a project management plan as changes are made to the project schedule, personnel resources, work load assignments, and other logistics supporting this project. | **X** |  |
| 1. [Add agency-specific roles and responsibilities here] | **X** |  |

### **Sub-task 1: Project Management Plan**

The offeror shall establish and execute [or recommend] a Project Management Plan (PMP) to ensure that all activities from the kick-off meeting to the ongoing lifecycle management of voice services 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 voice OA&M solution.
      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 SOW. 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 services, technical expertise, and administrative skills that fully meet the requirements in Tasks 1 to 9 to provide life cycle management for voice network enterprise. This includes (as applicable): voice network management and monitoring, voice network security, performance, billing analysis, equipment inventory management, helpdesk support and equipment repair and maintenance.
      4. The PMP shall delineate the activities required to prepare and support the voice OA&M solution. The PMP shall capture and establish the SOW goals, identify a critical path, and create general timelines to support and implement appropriate operational procedures for the voice enterprise. The PMP shall contain at a minimum:
  1. Project management approach for Tasks 1 thru 9.
  2. Project Team Organization (Roles & Responsibilities)
  3. Program Tracking and Communication Plan
  4. Project Schedules & Milestones
     + 1. The PMP shall describe the Connections II offeror’s role to perform, coordinate and act as systems integrator for third-party services including services any commercial vendor provide to the Agency.
       2. The PMP shall serve as a repository documenting the processes and methodology for meeting the requirements of each task described in this SOW.
       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 delivery and performance of the voice OA&M solution.
       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: Day-to-Day Management**

The offeror shall be responsible for day-to-day operations support and monitoring activities at the [offeror’s Network Operations Center (NOC) and/or Security Operations Center (SOC)], using offeror-provided network management, security management and monitoring systems. In addition, the offeror will be responsible for the delivery and support of all related customer premise configuration items such as [network routers, Uninterruptible Power Supplies (UPS), firewalls, Intrusion Detection Prevention Systems (IDPS), the data service units (DSU) / channel service units (CSU), and the out-of-band modem].

The offeror shall provide the capability to provision, monitor, and troubleshoot the Voice service for a large number of Government users agency-wide on a continuous basis.

1. The [Agency] approved formal procedural, reporting and communication processes and structures shall be established to manage the delivery of the telecommunications and voice services in an efficient and effective manner.
2. Day-to-day management processes shall be documented and maintained by offeror, as approved by the [Agency], and modified and updated on an ongoing basis to reflect changes to the business and operational relationship.
3. Offeror and the [Agency] will agree upon additional points of contact and a reporting structure covering day-to-day operations and reviews of offeror’s performance.
4. These reviews shall include technical, financial, and service-level requirements reviews as well as the resolution of any contractual issues that may arise.
5. The reporting schedules shall be documented and maintained by offeror in an online repository accessible to the [Agency]’s management team.
6. A regular meeting schedule shall be required for the different reporting levels established, with ongoing 24-hour access to all of offeror points of contact when required.

### **Sub-task 3: Task Order Management and Online Tracking System**

1. For requirements associated with Tasks 1 thru 9 of the SOW, the offeror shall develop and maintain a Task Order Management and Tracking system [or similar online reporting capabilities accessible by the Agency such as a management dashboard provided on the offeror’s web portal]. The online or web-based system shall provide the Agency access to documentation, reports and other information associated with the health and status of Voice services including voice network traffic and usage, billing, ordering, and status of equipment repairs.
2. The offeror shall develop and establish processes and procedures acceptable to the [Agency] that can be used to manage day-to-day relationship with Agency users and other support vendors including:
3. Moves, add, changes, disconnects (MACD)
4. Service order placement and process for handling task orders
5. Billing analysis and disputes
6. Process for managing and analyzing performance reports (e.g., Service Level Agreements (SLAs), project status, outstanding service request status)

### **Sub-task 4: Training**

1. The offeror shall be responsible for all education and skills-based training necessary to ensure that all staff assigned to the project are qualified to perform the work.
2. The offeror shall develop in-house orientation and training courses for new staff regarding the [Name of Project], the work to be performed, and the associated guidelines, procedures, processes, etc. The Agency will review these materials at the request of the Offeror.

### **Sub-task 5: Reporting and other communications**

1. The offeror shall keep the Agency apprised of its activities on a regular basis. The Agency expects the offeror to be in daily or weekly contact via phone, email, or face-to-face with its Agency counterparts. The frequency of these contacts will change depending upon the workload, issues identified, etc.
2. The offeror shall provide a comprehensive calendar year end report, detailing workload, process change or other enhancements.
3. The Offeror shall participate in daily operations teleconferences to provide statuses on the [Name of Project] and [Agency] systems. Teleconferences are generally less than an hour in duration. The offeror shall provide an update on its activities and discuss any achievements, problems, or future activities that may impact the workload.
4. The offeror shall provide ad hoc performance, workload, or other reports at the request of the Agency. These requests generally arise from external requests for information or special projects requiring data other than that normally provided to the Agency during the ’s normal reporting activities.

## Task 2: Operations and Administration (OA&M) for Voice Network

As part of the transition to outsourced Voice OA&M services, the offeror shall provide integrated support services, management and operations processes and a shared knowledge base that meet the requirements of the agency-wide Voice OA&M solution.

Operations, administration, and management of the Voice Network Services shall include, but not limited to, management of user accounts, security management, installation support for moves, add, and changes, and explanation of outages. Support services for billing reconciliation, analysis and disputes shall also be provided.

In addition to the roles and responsibilities described for Tasks 3 through 9, the offeror shall be responsible for the [Agency]’s Voice network enterprise management, including all associated equipment, equipment services and peripheral activities.

Table 2.2.1-1 identifies roles and responsibilities associated with Operations, Administration and Management services that are specific to this task order.

### **Sub-task 1: OA&M Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with Task 2. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “offeror.” For the roles and responsibilities indicated in the column labeled “offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.2.1-1 – Voice Network Enterprise OA&M Roles and Responsibilities**

| **Voice Network OA&M Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide Voice Network strategies, policies and requirements |  | **X** |
| 1. Provide Voice Network design and engineering to meet [Agency] strategies and requirements | **X** |  |
| 1. Approve Voice Network design and engineering |  | **X** |
| 1. Provide, operate and manage current and emerging Voice Network Services required to meet [Agency]’s business and operational requirements as they evolve | **X** |  |
| 1. Install, maintain, and provide problem resolution for all Voice Network services | **X** |  |
| 1. Procure voice network components and carrier services. The Government will be responsible for ordering these services unless stated otherwise.   (*The Agency will procure Voice services through a separate contract vehicle such as the Networx contract.)* |  | **X** |
| 1. Coordinate with and support the provisioning and installation of the [Agency]’s Voice network connectivity through methods such as traditional wired, wireless and emerging methodologies | **X** |  |
| 1. Ensure only [Agency] end points are exclusively registered to the network and performance reporting systems | **X** |  |
| 1. Procure and own all Voice Services related hardware, software, and peripherals |  | **X** |
| 1. Manage and maintain the equipment lines and circuits for all [Agency] locations | **X** |  |
| 1. Coordinate with inter-exchange carriers to provide connectivity | **X** |  |
| 1. Provide [Agency] with a detailed explanation of outages that identify the regional impact, source of outage, and preventative measures being taken to prevent future similar outages | **X** |  |
| 1. Manage user accounts (e.g. account set up, password resets, account deletions and terminations) and provide administrative support (Online Directory services to maintain and update the directory in accordance service levels) for all services contained in this SOW according to [Agency] information security policies | **X** |  |
| 1. Provide proactive and reactive Voice Services security management and reporting | **X** |  |
| 1. Provide physical and logical installations, moves, adds and changes (IMACs) | **X** |  |
| 1. Provide all necessary resources to implement, manage, control, operate, and maintain the required services outlined in this SOW. This includes labor, equipment, and materials (if not Government furnished). In addition to 1 thru 15, the offeror responsibilities shall include the following: 2. Overall coordination, execution, and management of Offeror efforts in support of the program 3. Enterprise planning and engineering 4. Tech refresh of existing systems and implementation of new systems and services as required by the Government 5. Operation, maintenance, and repair of [Agency] assets. 6. Customer Support in responding to requests for new telephone services, changes to existing services, and trouble calls associated with service delivery or performance issues 7. System Verification 8. Voice network security management 9. Configuration Management 10. Quality Assurance 11. Orientation Briefings | **X** |  |
| 1. The offeror shall help the Agency meet Government energy goals and sustainability by recommending and designing a working environment that requires less energy, is less toxic, with less waste. | **X** |  |
| 1. The offeror shall act as the Agency's system integrator to coordinate with access, transport, and equipment vendors and shall act as single point of contact (POC) with all involved third-party contractors and vendors. | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

### **Sub-task 2: [Agency] Voice OA&M Service Environment**

The Voice service environment that shall be supported by the offeror covers the hardware and software, agreements and licenses, voice circuits, applications, and the site locations identified under this solicitation.

The scope of Voice network infrastructure are described in the [Agency]’s service environment appendices provided in ***Attachment J – Voice Service Environment*** , which also includes other relevant materials containing details of Voice Network environment.

#### **Hardware and Software**

The Voice service environment described in the appendices is to be maintained by the offeror. The offeror shall regularly provide a status report on the state and condition of hardware/software (HWD/SWD) components, including risk mitigation for equipment approaching EOL (End of Life). The report shall be made available to the [Agency] on a [quarterly or semi-annual] basis.

The following Attachments specify the Agency-specific hardware, software applications and other relevant materials containing details of the Agency’s Voice Network environment.

1. A listing and description of all hardware to be supported is provided in ***Attachment J.1-Voice Network Hardware.***
2. A listing and description of the software and utilities to be supported is provided in ***Attachment J.2 – Voice Network Software.***
3. A listing and description of the Voice Network circuits to be supported is provided in ***Attachment J.3 – Voice Network Circuits.***
4. A listing and description of the voice data sets and applications to be supported are provided in ***Attachment J.4 - Voice Communications Applications and Data Sets.***

#### **Agreements and Licenses**

The offeror shall maintain a list of Voice Network related agreements and licenses. The offeror shall review and identify redundant and overlapping licensing and provide a summary report and recommendation the Agency should undertake to minimize cost of maintaining redundant licenses and overlaps. A list is provided in ***Appendix K – Voice Network Software Licenses.***

#### **Service Locations**

As a Managed Service Provider (MSP) of the [Agency], the offeror shall deliver voice OA&M solutions at designated Agency locations utilizing the Agency’s existing and new infrastructures, as well as provide personnel, applications and tools.

A description and address of all [Agency] facility and office locations requiring voice OA&M services is provided in ***Attachment B – Support Locations***.

## Site Survey

Upon task order award, the offeror shall perform site surveys. Prior to conducting any site surveys, the offeror must prepare and submit for Government approval a standardized “site survey checklist” that provides a comprehensive list of the information that the offeror intends to collect during site surveys.

At a minimum, site survey checklists must identify site preparation work, space requirements and any other related issues, and any specific assistance that will be required from the Government prior to implementing new systems and upgrades to existing systems, and deploying support services personnel at designated locations.

As ordered by the Government, the offeror must coordinate and conduct site surveys at domestic Government facilities to collect the information identified on the Government-approved checklist. During the site survey, the offeror must address any preliminary data gathering (e.g., existing numbering plans, equipment locations, space and workstations for key offeror personnel, etc.) and coordination activities necessary to ensure the successful completion of the planned implementation activities.

The offeror shall document the outcome of the site surveys in a Site Survey Report. A consolidated Site Survey report must be delivered to document the results of all site surveys conducted at campus locations.

### **Sub-task 3: Voice Network Management and Network Security**

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| While the telecommunications service provider is solely responsible for the management, performance, and maintenance of its service offering up to the service delivery point (customer site locations), GSA and Agencies must have the ability to monitor the Voice services for security, contract compliance and Agency operational requirements.  To implement comprehensive voice network management and security, the Connections II offeror will be required to provide commercially available systems and tools, capability, skills and expertise to assist and support the Agency in managing its complex Voice network enterprise.  The OA&M for Voice SOW Template provides boilerplate requirements for the offeror to have adequate capabilities to operate and manage the Voice services to the level of performance required by the Government.  The Agency can add special notification requirements to be informed of planned and unplanned outages and other service impacting events so that proper action is taken as required. The following narratives are just some of the critical tasks for a reliable Voice OA&M solution. |

Voice network service management encompasses the processes, systems, and data required for the offeror to ensure the quality of services delivered to the Government. This section defines requirements for Voice network management and Voice network security for operational integrity of the Agency’s network infrastructure, from the service provider’s backbone to the demarcation of service delivery point (Agency site locations).

The offeror shall implement the voice OA&M solution with the appropriate system tools for enterprise-wide visibility and control over phone service usage and utilization to enable secure, optimized, and efficiently managed enterprise voice networks.

#### **General Voice OA&M Requirements**

The operations, administration, and management of the [Agency] Voice Network Services includes managing and communicating outages to alert end users (unscheduled outages) and for planning purposes (scheduled outages/maintenance), management of user accounts and telephone devices, voice network security management, and coordinating installs, moves, adds, and changes with the Agency’s voice service provider.

The following functional areas identify requirements associated with operations, administration and management of Voice services.

##### **Scheduled Maintenance and Provisioning Support**

Scheduled maintenance, upgrades, changes, and installs or any other activity affecting telecommunications equipment or software shall be performed after hours or on weekends at the Agency’s discretion. The offeror shall provide/host post stability conference bridges when required by the Agency.

The offeror shall supply to the Agency a scheduled maintenance plan which will include proactive activities to keep the network functioning at peak efficiency. The offeror shall ensure that any and all maintenance activities do not conflict with other scheduled initiatives or application testing/turn-ups.

Acting as the system integrator on behalf of the [Agency], the offeror shall assist the Agency in placing orders for all necessary interconnect equipment and, at the request of [Agency] shall order all telephone circuits, trunks, service features, etc. from the Agency’s carrier or Voice service provider. [Agency] shall be notified of installation dates and furnished a copy of all orders.

##### **Trouble Reporting and Escalation**

[Agency] or [Agency] offerors shall have the ability to collect and centrally monitor major failures, alarms, and any other error conditions that could potentially threaten the success of the voice OA&M solution’s operation.

The offeror shall clearly define each severity alarm type in order to provide the Agency with a clear explanation to be used in assigning severity to alarms throughout the contract term. For example, the offeror shall clearly identify what constitutes a Severity 1 alarm, Severity 2 alarm, etc. This shall be submitted in writing to the Agency within 30 days of the contract award.

The offeror shall provide and clearly define escalation levels for the Agency to utilize in escalating troubles. These levels shall include contact names, numbers and clearly defined procedures for escalating a trouble within the offeror organization.

##### **Inventory Management**

The offeror shall track where equipment is installed/stored at all times as a part of its inventory management responsibilities. This shall include the creation and ongoing maintenance of an inventory database that is readily accessible to the appropriate offeror and [Agency] personnel as needed. The offeror shall provide electronic access to [Agency] inventory data so that the inventory can be reviewed at any time by the Agency.

##### **Change Management**

[Agency] and/or [Agency] designated contractors shall have the option to create, add, delete, and modify agents, routing options, in-queue messages, and any other applications, components, systems, in “real time” and as deemed necessary by [Agency].

The modification tool shall be a flexible web based Graphical User Interface (GUI) solution that meets or exceeds [Agency] security policy. Changes may be restricted to the enterprise or site level and all changes shall propagate across the entire enterprise as appropriate. Management Information (MI) changes should be kept separate and be independent of the system changes.

The offeror shall install and maintain a Configuration Management System (CMS). The CMS shall be a repository of all records and information pertaining to the installation and maintenance of the voice enterprise systems. It will contain a complete inventory, schematics, floor plans, equipment, circuits, etc. associated with each site location.

##### **Enterprise Telephony Management System and Tools**

The offeror shall provide enterprise telephony management system and tools with the ability to monitor, detect, notify in real-time, and control both incoming and outgoing traffic across the enterprise. The tool shall allow [Agency] voice network administrators to address problems, outages and network troubles on an enterprise-wide basis. [It is also possible that the Government will provide its own existing enterprise telephony management system and tools as a Government-furnished property (GFE) and the offeror will be responsible for its management and maintenance. The Agency should adjust wording as appropriate.]

##### **Support for [Agency] Billing Analysis and Billing Disputes**

The Agency will be utilizing [Centralized or Direct] billing method for its Voice network services. The offeror shall provide personnel with billing expertise and the necessary tools and associated equipment to support and administer agency-specific billing processes including the management and maintenance of the [Agency]’s internal billing system.

1. The offeror shall perform billing analysis, reconciliation of invoices, submitting and tracking billing disputes and other billing management and logistic functions in support of the [Agency]’s voice services that are administered under this Task Order.
2. In addition to supporting the Agency internal billing operations, the offeror shall meet and comply with the billing requirements under the Connections II contract as described in Section 6 Invoice Requirements of this SOW.
3. The offeror shall help and assist the Agency resolve billing disputes, including performing billing queries, identifying billing discrepancy, submitting billing disputes, and resolving billing issues with the [Agency] Voice service provider.
4. ***Shared Tenant Billing:*** For Switched Voice services delivered at service locations where shared tenant arrangement is in place, or where the [Agency] is a shared tenant, the offeror shall provide billing analysis support and adheres to the shared tenant billing as required.

#### **Trunk Circuit Monitoring**

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| **Voice Network Circuits Overview**  Telephone system circuits are used to connect various types of premise-based business telephone systems (PBXs, Softswitches, key systems) to telephone company facilities and make the premise system functional. The Connections II offeror can help the Agency get connected with phone numbers.  The Agency customer may already have one or both types of circuits in place or planned to be acquired. This sub-section provides requirements for supporting Voice circuits including support for billing, service order placement, trouble shooting and repairs.  **Trunk Circuit Monitoring**  Real-time notification in the event of trunk outages is one of the critical requirements for a proactive management of distributed Voice network trunk resources. The Agency will require technical expertise and support from the Connections II offeror to perform trunk circuit monitoring. This requires the offeror to have the ability to reach out to any trunk circuit in the enterprise and perform troubleshooting. The offeror must be able to provide real-time “health-and-status” information for all monitored trunk circuits throughout the enterprise.    **About Analog Trunks and Lines**   * A trunk is a communication line between two telephone switching systems. A switching system is equipment either in a central office or at a customer premises, such as a PBX (Private Branch eXchange) or Softswitch. * Trunks can be analog or digital, inward only, outward only, two-way, DID (Direct Inward Dialing), ground start for voice mail systems, or tie. * The various types of central office trunks connect Agency customer equipment to the switching system at the central office. Tie trunks connect PBX/Softswitch and Centrex facilities directly to each other.   **About Digital Voice Circuits (i.e. T-1 PRI (Primary Rate Interface))**   * T-1 PRI is a digital transmission link that has a capacity of 1.544 Mbps (Million bits per second). * A T1 (Trunk level 1) circuit consists of 24 channels of 64 Kbps (kilobits per second) circuits while Analog circuits are a point-to-point dedicated line. * PRI (Primary Rate Interface) is a digital ISDN (Integrated Services Digital Network) telephone facility that can transmit both voice and data services and is often used for IP (Internet Protocol) telephony applications.   This section provides requirements for the offeror to implement the appropriate offeror-provided systems and tools with the capability to monitor and manage trunk circuits. |

In the event of trunk outages, active management of distributed voice network trunk resources requires real-time notification and the ability to reach out to any trunk circuit in the [Agency]'s voice network enterprise and perform remote troubleshooting.

The offeror shall provide the necessary system and tools to perform trunk circuit monitoring tasks and support services:

1. Monitor and enforce Service Level Agreements. The tool shall provide comprehensive historical fault data that can be automatically summarized and distributed to provide monthly analysis of carrier performance.
2. Monitor and manage performance of Voice services. The tool shall provide real-time health-and-status information for all monitored trunk circuits throughout the enterprise.
3. In the event of a fault indication, the offeror’s system and tools shall provide real-time troubleshooting information indicating whether problems are associated with the PBX or the carrier.
4. The system and tools shall have advanced features with the ability to capture ISDN PRI signaling on any monitored trunk circuit in the Agency’s enterprise and to return the logged information to the central enterprise telephony management server.

#### **Trunk Group Traffic Monitoring**

Excessive (or insufficient) aggregate call volume on trunk groups and excessive busy or unanswered incoming calls can be an early indication of routing, PBX, or voice messaging system problems. The offeror's enterprise telephony management system and tools shall support centrally managed, proactive trunk group monitoring across both homogeneous and multi-vendor PBX networks.

The offeror's enterprise telephony system and tools shall perform proactive trunk monitoring by implementing the following:

1. A usage manager to query historical call data and generate detailed statistics on aggregate utilization and busy/unanswered calls for each site and trunk group.
2. Voice Intrusion Prevention System (IPS) rules to monitor aggregate duration on trunk groups and generate real-time notifications when critical capacity measures are exceeded. For example, email notifications could be sent out when a trunk group exceeds 75-80 percent of capacity in any one hour.
3. Voice IPS rules to monitor aggregate count or duration on incoming traffic to call centers and generate notifications when call count or aggregate duration fails to meet expectations during defined daily time periods.
4. Voice IPS rules to monitor aggregate counts of busy and unanswered calls and generate notifications when these counts exceed expectations.

#### **911 Alerting and Reporting**

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| Large organizations are often unaware that an Agency employee has called 911 until the emergency response personnel show up at their facility's front door. Employees may not be able to direct emergency response personnel to the caller because they cannot determine the caller's identity or location. Often, on-site responders are available but cannot be notified or provided with location information.  This section provides requirements for the offeror to implement the appropriate contractor-provided systems and tools with the capability to provide real-time 911 alerts and reporting. |

The offeror shall configure and maintain the E911 database and if the local Public switched telephone network (PSTN) system supports E911, then the Agency telephony system shall be configured to send the required additional information to the PSTN provider. The offeror shall allow the E911 call to go directly to emergency service dispatch for the local area.

The offeror shall adhere to moves, adds, and change (MAC) procedures supporting E911. The Agency will not allow telephones to be moved from their current location and register and operate from another location within a campus or building without following the documented (MAC) procedures. These procedures shall include the proper notifications so that the E911 database can be updated by the offeror as a part of the MAC process. The offeror shall maintain the E911 database and incorporate any changes provided by the Agency on an as needed basis.

The offeror shall implement systems and tools that provide real-time 911 alerting with location information by implementing the following.

1. The offeror shall import the Agency enterprise phone directory into the enterprise telephony system's directory manager.
2. The Voice network administrator shall add appropriate email notifications.
3. The Voice network administrator shall configure email notifications on a site-by-site basis to ensure that local emergency response and security personnel receive email notifications as well as headquarters individuals or groups that desire notification.
4. Once configured, email notifications shall be sent in real-time whenever a 911 call is attempted. The notification shall contain the station number of the caller as well as the caller's name, location, and department (those fields shall be populated in the directory).
5. The system shall provide automatic detection of outgoing 911 calls.

The offeror shall provide a detailed explanation of how it will provide the E911 service as a part of their proposal. The offeror shall inform the Agency if there are Agency requirements that may be needed for the offeror’s solution (local analog lines for example).

#### **Voice Network Security**

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| ***A Primer on Voice Network Security***  The Agency's switched-voice trunk circuits represent their largest unmonitored and unprotected exposure to a PSTN. Modems provide connections between the public network and the Agency's voice network infrastructure, computing resources, and potentially to its data network.  Monitoring and protecting access to authorized modems (and eliminating unauthorized modems) removes the single biggest vulnerability facing most government organizations today. There are two major classes of modem vulnerabilities:   1. Unauthorized access to authorized internal modems by outsiders 2. Unauthorized outgoing modem calls by insiders (most commonly to Internet Service Providers (ISPs).   ***Modems***  The use of modems is driven by the need for vendor support, periodic polling/control, and configuration of remote devices and for providing remote connectivity to these systems for engineering support. Modems can be configured for dial up, auto answer, or direct connection to provide a communication path into control systems. Modems represent an often overlooked “backdoor” to control systems. Modem security, if implemented, should not be limited to a single method.  There are two types of modem connection: (1) dial up through the PSTN and (2) direct connection through a leased or dedicated line. Leased lines are analog compatible point to point connections and are often based on PSTN connectivity.  This section provides requirements for the offeror to implement the appropriate offeror-provided systems and tools with the capability to actively and continuously detect modem traffic in real-time on every trunk channel in the Agency's voice network enterprise and the ability to deter or eliminate both modem vulnerabilities stated above. |

##### **Monitor and Control Authorized Modems**

Authorized modems provide useful remote-access capabilities for support vendors and on-call Agency employees that provide after-hours support. However, unauthorized access to these remote access ports represents a serious threat to the [Agency]'s critical infrastructure.

1. The offeror shall monitor and control authorized modems.
2. The offeror shall implement strong user authentication for Agency's employees and Support vendors.
3. Access to all remote access ports shall be closely monitored and restricted.
4. Unauthorized or unverified remote access ports should be discovered and either brought into compliance or eliminated.
5. The offeror shall enforce controls on authorized modems by implementing the following:
6. Maintain a group of all identified and authorized modems (authorized modem group).

* A periodic review of approved modems should be performed to revalidate the need for the modem resource.
* A periodic review of installed analog phone lines should be performed to determine if any are used by modems.

1. Identify and discover unknown or unauthorized modems using a scheduled, automatically generated weekly or monthly usage report to identify incoming modem calls to numbers that are not in the authorized modem group.
2. Install an enterprise telephony management tool that uses Voice Firewall policy rules to allow incoming calls to authorized modems from known authorized source numbers and terminate the remaining calls from unauthorized sources or to unauthorized destinations.
3. If authorized source numbers change frequently or cannot be determined in advance, the system tool's policies shall be used to remotely open and close the access ports in real-time, eliminating the need to physically connect and disconnect the modem.
4. The Voice Firewall policies shall be used to restrict access to defined time ranges on a port-by-port basis or to restrict PBX maintenance port access to the hours between [9:00 AM and 5:00PM during weekdays].
5. The offeror shall provide an enterprise telephony systems and tool to perform the following tasks:
6. The system tool shall provide real-time notification capabilities to generate email notifications to responsible individuals or groups whenever a remote access port is accessed.
7. The system tool shall use Voice Intrusion Prevention System (IPS) policies to alert when the aggregate call count to authorized modems exceeds historically normal levels. Excessive call attempts could indicate an attack or attempted break-in. The Voice IPS can be configured to temporarily terminate additional attempts once the threshold is exceeded, which can prevent further access.
8. The system tool shall provide usage manager capability to automatically generate weekly or monthly auditing reports on authorized modem activity to demonstrate compliance.

##### **Monitor and Control Unauthorized ISP Access**

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| **Internet Service Provider (ISP) Access**  The use of modems to gain unauthorized access to the public Internet represents a significant vulnerability to the Agency. Agency users that connect to Internet Service Providers (ISPs) through the [Agency] voice network may be bypassing all of the organization's data network monitoring, policy enforcement and detection systems, which presents the following vulnerabilities:   * Users may inadvertently install viruses and spy-ware that data network systems would normally block or remove. * Users can gain access to inappropriate content that is blocked or monitored on the data network. * Users may transfer sensitive or inappropriate information, while evading the monitoring and auditing systems on the data network. * If the user is simultaneously connected to the Agency's data network while connected to an ISP, then the organization's data network is exposed to the public Internet.   This section provides requirements for the offeror to implement the appropriate offeror-provided systems and tools with the capability to actively monitor and eliminate vulnerability of unauthorized ISP access. |

The offeror shall eliminate the vulnerability of unauthorized ISP access by implementing an enterprise telephony system and tool to perform the following:

1. Actively detect modem calls to automatically generate periodic reports of all outgoing modem calls.
2. Identify stations where authorized users have a legitimate business need to place outgoing modem calls.
3. Use the tool's Voice Firewall policy rules to allow authorized modem users to place outgoing modem calls to specific, authorized destinations and terminate the remaining calls from unauthorized stations or to unauthorized destinations.
4. Use the tool’s usage manager capability to automatically generate weekly or monthly auditing reports on authorized outgoing modem activity to demonstrate compliance.

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| **Tasks 3 to 9 are optional requirements.**  In addition to the core OA&M for Voice requirements, the example requirements below are provided for support services and expertise in specific functional areas for Voice as well as for support services to manage video/voice conferencing and customer contact services. The Agency can select only those tasks that apply or meet their needs.  If the Agency deletes a task or a set of tasks in this Section that do not apply to their SOW, then the Agency must also make the same deletion for the same set of tasks identified in Section 9.3 Technical Evaluation Criteria. |

## Task 3: Desk Phone Support Service

The offeror shall support and administer the Agency’s desk phone services. Desk Phone services are necessary to provide telephone services to on-site contractors and employees throughout [Agency] facilities. The telephone and auxiliary equipment includes feature rich single-line telephones, multi-line telephones, consoles, and auxiliary equipment, which also include headsets, speakerphones, and add-on modules.

Desk Phone service shall allow authorized callers to receive incoming calls and to make intra-campus, inter-campus, outside local, outside long distance, and international calls (limited stations).

The support services (Labor Types) and associated equipment to be provided shall include providing planning and assessment, training, integration and testing; implementation and migration; documentation; and Operations and Maintenance of the Desk Phone services.

### **Sub-task 1: Desk Phone Services Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with Desk Phone Service under Task 3. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.3.1-1 – Desk Phone Service Roles and Responsibilities**

| **Desk Phone Service Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide Desk Phone requirements (e.g. number of sets, functions and features) |  | **X** |
| 1. Provide Desk Phone design and engineering to meet [Agency] requirements | **X** |  |
| 1. Approve Desk Phone design and engineering solution proposed |  | **X** |
| 1. Coordinate with the voice network provider to support provisioning and installation of the [Agency]’s Voice network, including hardware and/or peripherals, to achieve end to end internal and external phone connectivity | **X** |  |
| 1. Ensure Emergency 911 services function properly from all desk phones | **X** |  |
| 1. Provide adaptive voice Network equipment as required by laws affecting the support of the disabled |  | **X** |
| 1. Ensure adaptive voice Network services are working as required by laws affecting the support of the disabled | **X** |  |
| 1. Manage and maintain private dial plan | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

## Task 4: Support Services for Local and Long Distance Services

The administration, operation, and management of Voice Networkincludes monitoring, coordinating, and tracking performance of Local Service and Long Distance services to [Agency] phone users with local, intrastate, interstate, and international calling from [Agency]’s facilities.

Long distance calls are those that terminate at locations outside the caller's local calling area to locations in the United States (domestic) and to foreign countries (international). The offeror shall support the Agency’s Local and Long Distance services to include the planning and assessment, implementation, traffic monitoring and ongoing management of the local and long distance services enterprise wide.

The support services (Labor Types) and associated equipment to be provided shall include providing planning and assessment, training, integration and testing; implementation and migration; and documentation. The offeror shall implement system tools for voice network security as well as coordinate, monitor and track performance and usage of the Voice circuits and telephony associated with Local and Long Distance Services.

### **Sub-task 1: Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with enterprise Voice and telephony systems under Task 4. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.4.1-1 – Voice Network Support Roles and Responsibilities**

| **Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide Voice Network Support strategies and requirements |  | **X** |
| 1. Provide Voice Network Support design and engineering to meet [Agency]’s strategies and requirements | **X** |  |
| 1. Approve Voice Network Support design and engineering solution proposed |  | **X** |
| 1. Provide and provision Carrier Network Services (A*gency may procure Voice network services separately such as Networx contract)* |  | **X** |
| 1. Act as system integrator and coordinate with the Agency’s voice carrier and other third party vendors for the provisioning and installation of the [Agency]’s Voice Network Services including implementation of Local and Long Distance services, capabilities and features to support [Agency] phone users with local, intrastate, interstate, and international calling from [Agency]’s facilities. | **X** |  |
| 1. Provide usage monitoring and reporting including the collection of Voice Traffic Accounting data for statistic al analysis and usage history reporting | **X** |  |
| 1. Provide Voice network monitoring and reporting of toll usage and keeping the Agency users closely informed of scheduled and unscheduled outages. | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

#### **Toll Fraud Detection and Prevention**

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| Large-scale toll fraud can occur when a sophisticated attacker finds a PBX or voice messaging system vulnerability that allows outsiders to place unrestricted international calls. Attackers know that the vulnerability will be eliminated once detected, so they will normally exploit the vulnerability as quickly as possible by inundating the target with a high volume of costly international toll calls.  Voice network administrators are often unaware that fraudulent activity is taking place until the organization receives an unusually large bill or is notified by their carrier. Detecting this activity in real-time and as quickly as possible is the key to preventing large losses.  This section provides requirements for the offeror to implement the appropriate offeror-provided systems and tools with the capability to detect and prevent toll fraud. |

The offeror shall implement and provide enterprise telephony system and tools with capability to detect and stop large-scale toll fraud incidents by continuously monitoring aggregate call traffic, detecting anomalous call volume for specific classes of service, and optionally terminating further call attempts matching the identified class of service.

The offeror shall eliminate the threat of large-scale toll fraud by implementing the following.

1. Use the system and tool to generate reports on historical calling statistics for international calls during business- and non-business-hour time ranges. The reports shall provide minimum, maximum, average, and standard deviation statistics for aggregate call counts, durations, and cost (Agency will provide to the offeror the billing plans contracted with the carrier).
2. From the statistics, the offeror shall determine appropriate threshold values for any combination of count, cost, and duration. The offeror shall chose multiple thresholds to generate progressive real-time email notifications as aggregate activity first exceeds cautionary levels and then exceeds warning and alert levels.
3. Implement Voice Intrusion Prevention System (IPS) rules to generate real-time notifications when international calling (or long distance or any other defined call class) exceeds cautionary and alert levels. The Voice IPS shall be configured to automatically terminate all international calls after the alert level is breached or to simply generate email notifications.

## Task 5: Support for Voice Messaging (Voicemail)

The offeror shall support and administer the Agency’s voice messaging system. Voice Messaging services are the efficient exchange of messages between two or more people enterprise wide.

The support services (Labor Types) and associated equipment to be provided shall include providing planning and assessment, training, integration and testing; implementation and migration; documentation; and Operations and Maintenance of the Voice messaging services.

### **Sub-task 1: Voice Messaging Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with Voice messaging services under Task 5. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.5.1-1 – Voice Messaging Services Roles and Responsibilities**

| **Voice Messaging Services Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide Voice Messaging Services strategies and requirements |  | **X** |
| 1. Provide Voice Messaging Services design and engineering to meet [Agency] strategies and requirements | **X** |  |
| 1. Approve Voice Messaging Services design and engineering solution proposed |  | **X** |
| 1. Coordinate and support the provisioning and installation of the [Agency]’s Voice Messaging Services | **X** |  |
| 1. Provide Voice Messaging usage monitoring and reporting | **X** |  |
| 1. Provide Voice Messaging storage capacity management | **X** |  |
| 1. Provide Voice Messaging retention management per [Agency] requirements and external regulations | **X** |  |
| 1. Conduct mailbox moves, adds and changes | **X** |  |
| 1. Maintain mailboxes configurations by user | **X** |  |
| 1. Provide new user training material | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

## Task 6: Support for Directory Service

The offeror shall support and manage the Agency’s directory services. Directory Service is the software system that stores, organizes, and provides access to information in a directory. It provides Agency telephone users with vital communication information and tools including external directories such as white pages and yellow pages. Features include a repository of directory information for internal as well as external contacts.

The support services (Labor Types) and associated equipment to be provided shall include providing planning and assessment, training, integration and testing; implementation and migration; documentation; and Operations and Maintenance of the Directory services.

### **Sub-task 1: Directory Services Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with directory services under Task 6. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.6.1-1 –Directory Service Roles and Responsibilities**

| **Directory Services Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide Directory Services strategies and requirements |  | **X** |
| 1. Provide recommendations to meet Agency strategies and requirements | **X** |  |
| 1. Approve Directory Services recommendations |  | **X** |
| 1. Provide a secure and searchable online directory service with real time updates | **X** |  |
| 1. Provide Intranet access to the directory | **X** |  |
| 1. Provide administrative support for Online Directory services to maintain and update the directory in accordance with agreed upon service levels | **X** |  |
| 1. Perform monthly audits of online directory for employee and offerors to ensure data integrity | **X** |  |
| 1. Maintain internal phone directory including white pages and yellow page directories | **X** |  |
| 1. Manage and maintain Active Directory service   \*\* Active Directory is a directory service provider, where system admin can add new users to a directory, remove or modify, specify privileges, assign policy, etc. It’s similar to a phone directory where every user has a unique contact number. | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

## Task 7: Support for Voice Conferencing Services

The offeror shall support and administer the Agency’s voice conferencing services. Voice Conferencing Services within the [Agency] voice network provide Agency users with conference capabilities. The offeror shall provide support services including planning and assessment, implementation, training, and ongoing management necessary to implement Conferencing Service.

The support services (Labor Types) and associated equipment to be provided for Voice conferencing services shall include support for an array of features delivered with the conferencing services. Table 2.7.1-1 identifies the roles and responsibilities associated Conferencing Services.

### **Sub-task 1: Voice Conferencing Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with Voice messaging services under Task 7. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.7.1-1 – Voice Conferencing Service Roles and Responsibilities**

| **Voice Conferencing Services Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Develop Voice Conferencing Services strategies and requirements |  | **X** |
| 1. Design Voice Conferencing Service solutions to meet [Agency] strategies and requirements | **X** |  |
| 1. Approve Voice Conferencing Services solution proposed by Offeror |  | **X** |
| 1. Provide Voice Conferencing Services, including support for the setup of conferencing sessions | **X** |  |
| 1. Create and maintain a monthly summary report by host, including: conference types, total number of connects, total number of minutes, total call charges, total feature charges, and total charges | **X** |  |
| 1. Provide monitoring, coordination, usage tracking, and other logistic support for Voice Conferencing services. | **X** |  |
| 1. Create and maintain a year-to-date (YTD) summary report by host, including: conference types, total number of connects, total number of minutes, total call charges, total feature charges, and total charges for Voice conferencing services | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

## Task 8: Support for Video Conferencing Services

The offeror shall support and administer the Agency’s video conferencing services. Video Conferencing Services within the [Agency] facility provide Agency users with video conferencing capabilities. The offeror shall provide support services including planning and assessment, implementation, training, and ongoing management necessary to implement Conferencing Services.

The support services (Labor Types) and associated equipment to be provided for conferencing services shall include support for an array of features delivered with the conferencing services.

### **Sub-task 1: Video Conferencing Services Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with Voice messaging services under Task 8. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.8.1-1 – Video Conferencing Services Roles and Responsibilities**

| **Video Conferencing Services Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Develop Video Conferencing Services strategies and requirements |  | **X** |
| 1. Design Video Conferencing Services to meet [Agency] strategies and requirements | **X** |  |
| 1. Approve Video Conferencing Services solutions proposed |  | **X** |
| 1. Provide monitoring, coordination, usage tracking, and other logistic support for the following:  * Point-to-point calls * Multi-point calls * Presentation capabilities, such as PowerPoint and laptop presentations, electronic whiteboard integration, document camera, and videocassette recorder (VCR) presentations | **X** |  |
| 1. Integrate teleconferencing into video conference meetings upon request | **X** |  |
| 1. Monitor and support calls in progress | **X** |  |
| 1. Maintain and manage video conference calendar and scheduling | **X** |  |
| 1. Manage and maintain video room calendar | **X** |  |
| 1. Manage video room clock coordination | **X** |  |
| 1. Provide monthly reports of the number of bridged calls and usage | **X** |  |
| 1. Provide provisioning support for Video Conferencing services | **X** |  |
| 1. Provide new user training material | **X** |  |
| 1. Integrate teleconferencing into video conference meetings upon request | **X** |  |
| 1. Additional Agency-specific requirements | **X** |  |

## Task 9: Support for Contact Center Service

The offeror shall support and manage the operations of the Agency’s contact center services. Contact Center Service provides Toll-free call processing and call flow with integrated ACD (*Automatic Call Distributor*), IVR (*Interactive Voice Response*), Contact Management System, and future CTI (computer telephony integration) support. The CRM (*Customer Relationship Management*) integration for the [Agency]’s contact centers shall also be supported.

The support services (Labor Types) and associated equipment to be provided shall include planning and assessment, implementation, training and ongoing management necessary to deploy Contact Center Services enterprise wide. Table 2.8.1-1 identifies roles and responsibilities associated with Contact Center Service activities.

### **Sub-task 1: Contact Center Services Roles and Responsibilities**

The following table identifies the roles and responsibilities associated with contact center services under Task 9. An “X” is placed in the column under the Party that will be responsible for performing the task. The offeror responsibilities are indicated in the column labeled “Offeror”. For the roles and responsibilities indicated in the column labeled “Offeror”, the offeror shall perform, provide support, and meet the requirements.

**Table 2.9.1-1 – Contact Center Services Roles and Responsibilities**

| **Contact Center Services Roles and Responsibilities** | **Offeror** | **Agency** |
| --- | --- | --- |
| 1. Provide contact center services strategies, policies and requirements |  | **X** |
| 1. Recommend Contact Center Services solution to meet [Agency] strategies and requirements | **X** |  |
| 1. Approve Contact Center Services |  | **X** |
| 1. Provision Contact Center Services | **X** |  |
| 1. Support and coordinate with Agency’s service provider in the installation and provisioning of contact center services | **X** |  |
| 1. Configure Contact Center Services | **X** |  |
| 1. Provide Inbound Toll Free Services |  | **X** |
| 1. Provide administrative support for Inbound Toll Free services | **X** |  |
| 1. Coordinate with internal customers and external carriers to fulfill requests concerning toll-free services including new orders, cancellations, moves, adds and changes (MAC’s) | **X** |  |
| 1. Design and implement customized call flow |  |  |
| 1. Manage call allocation policy |  | **X** |
| 1. Perform agent/queue moves, adds and changes, including desktop connectivity | **X** |  |
| 1. Design all queues based on customer requirements that provide Agent mobility | **X** |  |
| 1. Provide call flow and queue design documentation to each Business Unit | **X** |  |
| 1. Provide consultation to contact center owners in developing new or modifying existing ACD applications | **X** |  |
| 1. Perform and provide the following traffic analysis and call reports:  * 800 in-bound network traffic summary report * Call detail hourly summary * Call detail traffic summary * Report by each 800 number * Call detail traffic summary by state * Trunk utilization for all trunk groups * Call detail by location * Call completion analysis * Resellers summarized traffic by number * Call prompter summary * Traffic by number and date * Unassigned routing termination number (RTN) * Dial number by RTN | **X** |  |
| 1. Monitor IVR functionality, host and PBX connectivity | **X** |  |
| 1. Provide IVR reports on system, network and application availability | **X** |  |
| 1. Generate call volume trend report for all applications including weekly call volumes for decodes, accounts payable and expense reports | **X** |  |
| 1. Provide and maintain monthly reports of all IVR status including hardware (spare, in-use) critical parts, software, interfaces, and scripts by Business Unit | **X** |  |
| 1. Provide an attempted (offered) and handled call volume summary | **X** |  |
| 1. Provide duration, call transferred and abandoned call reports | **X** |  |
| 1. Provide weekly line usage reports with call volume by port number | **X** |  |
| 1. Additional Agency-specific requirements | X |  |

# Staffing and Personnel Requirements

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| This is where the Agency provides staffing requirements and labor types needed in support of the operation, administration, and management of the Agency’s Voice network enterprise. |

The requirement under this solicitation seeks the support and expertise from Connections II vendors to provide adequate staffing to meet the requirements for the operations, administration, and management of the Agency’s voice network enterprise for the life of the task order.

## 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 contractor 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.

A description of qualifications, skills, and education level for the proposed staffing and personnel requirements is provided in section J.1 of the Connections II contract. The offeror shall propose additional skills and labor categories as needed to meet the requirements.

### **Contractor 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 contractor 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. Contractors 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 Contractors 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 section J.1 of the Connections II contract**.**

[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**).

## 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. The ***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.

# 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 and SCRM

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.
* Comply with **Section C.3.3 Supply Chain Risk Management (SCRM)** of the Connections II contract to create a track-able and traceable supply chain, utilizing qualified equipment vendors and suppliers, verifying genuine ICT (Info and Communication Technology) products to ensure such products are not counterfeit or illegally modified. The contractor shall also employ proper labeling of remanufactured or repaired products and verify valid licenses are documented for these products.

***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 COR. 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 COR 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 COR 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]

#### **Offeror 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 voice OA&M 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 COR.

## 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 Government-Furnished, the Offeror shall furnish everything needed to perform this Contract according to all its terms and conditions as stated in specific sections of this SOW. 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 its support locations identified by the Agency in ***Appendix C – Support Locations***.

Where Contractor 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. 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.  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 the 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 detailed 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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| **Remove this context box when finalizing the SOW**  Agency has two options for how to receive invoices whether by electronic (email method) or to require hard copies. Or both. Suggested Requirements:  The offeror shall provide the signed original invoice via email:  [Agency provide an email 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 an email 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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| **Remove this context box when finalizing the SOW**  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 (Contractor 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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| **Remove this context box when finalizing the SOW**  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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| **Remove this context box when finalizing the SOW**  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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| **Remove this context box when finalizing the SOW**  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. **Section 508 Compliance 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 9 - 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:

Provide the following:

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** * **Proposed Personnel** | **PDF** | **[n] maximum number of pages** |

The table above is an example that may be tailored based on Agency requirements.

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 **section 3**. 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 contractor 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 Appendices for instructions) 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.

* **Organizational Structure and Chart**

The proposal shall include the Offeror’s approach to organizational structure, quality management, staffing and effective utilization and distribution of the workforce, including subcontractors, in meeting requirements, cost constraints, and schedules. While the [Agency’s] organizational chart is provided for informational purposes, Offerors shall submit the organizational structure for their workforce that they believe is most efficient and effective to perform the work. Offerors should not simply reflect the Government’s organizational structure as their own.

The Offeror shall describe the proposed organizational structure, including policies, procedures, and techniques for effectively and efficiently managing work, including subcontractors. Include an organizational chart that identifies where this contract fits within the corporate structure. Offerors shall provide a contract resource profile which reflects labor categories, number of positions, and hours grouped by the proposed Work Breakdown Structure (WBS) down to the fourth level. This information shall be included in the draft management plan and will be evaluated.

* **Staffing Approach**

The staffing approach shall describe how the Offeror intends to staff this effort and how the approach will ensure the Offeror meets contract requirements. Consolidations, improvements, and other changes shall be explained in detail with a clear, convincing rationale. The staffing approach shall include a comprehensive hiring approach which presents the approximate rate of incumbent capture, those to be transferred from within the Offeror‘s own organization, and those from other sources.

* **Position Qualifications**

Offerors shall provide position qualifications for each specific labor category. Offerors shall provide the minimum requirements in the position qualifications, to include:

* 1. duties and responsibilities
  2. licensing and/or certifications
  3. education
  4. experience

Organizational structure, staffing approach, and personnel’s position qualifications shall be included in the draft management plan and will be evaluated.

## 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 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 voice network 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.

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 8.0** 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

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 and Management Approach** |
| Sub-factor 1: Task 1 – Program Management and General Requirements |
| Sub-factor 2: Task 2 – Operations, Administration, and Management of Voice Network |
| Sub-factor 3: Task 3 – Support services for Desk Phone Service |
| Sub-factor 4: Task 4 – Support services for Local and Long Distance Services |
| Sub-factor 5: Task 5 – Support services for Voice Messaging |
| Sub-factor 6: Task 6 – Support services for Directory Services |
| Sub-factor 7: Task 7 – Support services for Voice Conferencing |
| Sub-factor 8: Task 8 – Support services for Video Conferencing |
| Sub-factor 9: Task 9 – Support services for Contact Center Services |
| **Factor 2: Proposed Personnel Qualifications/Certifications** |
| Sub-factor 10: Program/Project Manager |
| Sub-factor 11: Key Technical Personnel |
| **Factor 3: Past Performance** |
| Sub-factor 12: 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 voice OA&M solution 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.  The Agency will evaluate the proposed best practices and innovations for reasonableness, realism, and the effectiveness of quantified efficiencies. The Agency will evaluate any assumptions and underlying rationale associated with those assumptions for reasonableness.   * Sub-factor 1: Task 1 – Program Management and General Requirements   **Program Management** - The Agency will evaluate for adequacy, effectiveness, realism, and relevancy, the Offeror‘s proposed responsibilities (such as workflow, staffing) and authorities for program management of this contract. This evaluation will consider the Offeror‘s proposed approach to resolving internal conflicts over resources with other company organizations, degree of autonomy of the Program Executive, and lines of communication among Agency, Offeror, and subcontractor.  **Organizational Structure and Chart** - The Agency will evaluate the realism, effectiveness, and efficiency of the Offeror‘s proposed organizational structure, including policies, procedures, and techniques for managing the proposed work to include subcontractors. This evaluation will include the Offeror‘s approach to quality management of the required services through surveillance, organizational structure, staffing and utilization and distribution of the workforce in meeting contract requirements, cost constraints, and schedules.   * Sub-factor 2: Task 2 – Overall Operational and Technical Approach - Support Services, Administration, and Management of Voice Network   The Agency will evaluate the overall operational and technical approach for tasks 1 to 9 to determine the offeror understands the requirements for accuracy, effectiveness, efficiency, realism, relevancy, and comprehensiveness.  The Agency will evaluate the proposed best practices and innovations for reasonableness, realism, and the effectiveness of quantified efficiencies. The Agency will evaluate any assumptions and underlying rationale associated with those assumptions for reasonableness.  The Agency will evaluate the approach to achieving compliance for accuracy and effectiveness. The Agency will evaluate for effectiveness, efficiency, timeliness, and realism of the Offeror‘s approach to support multiple, simultaneous efforts that may have competing requirements for technical expertise, timelines and delivery schedules that will be supported.  The Agency will also evaluate for effectiveness how the Offeror will implement delivery schedule management, identifying and managing risk, quality assurance, and obtaining user feedback for performance improvement.  The Agency will evaluate the overall operational and technical approach for each of the Tasks identified below to determine the Offeror understands of the requirements for accuracy, effectiveness, efficiency, realism, and comprehensiveness.   * Sub-factor 3: Task 3 – Support services for Desk Phone Service * Sub-factor 4: Task 4 – Support services for Local and Long Distance Services * Sub-factor 5: Task 5 – Support services for Voice Messaging * Sub-factor 6: Task 6 – Support services for Directory Services * Sub-factor 7: Task 7 – Support services for Voice Conferencing * Sub-factor 8: Task 8 – Support services for Video Conferencing * Sub-factor 9: Task 9 – Support services for Contact Center Services  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 Resume of Project Manager 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 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 offer’s bottom line total price, including fixed fee. * The submitted performance worksheet will be evaluated against these criteria. Likewise, the contracting officer will also 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. |
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## 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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| SLR | Service Level Requirements |
| FAR | Federal Acquisition Regulation |
| JTR/FTR | Joint Travel Regulations/Federal Travel Regulation |
| PBX | Private Branch Exchanges |
| QoS | Quality of Service |
| SOW | Statement of Work |
| SSP | Source Selection Plan |
| SCRM | Supply Chain Risk Management |
| TDM | Time Division Multiplexers |
| TEP | Technical Evaluation Plan |
| VoIP | Voice over Internet Protocol |

## Glossary of Terms

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| **Glossary of Terms** | **Description** |
| **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. |
| **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. |
| **Supply Chain Risk Management (SCRM)** | SCRM is "the implementation of strategies to manage both every day and exceptional risks along the supply chain based on continuous risk assessment with the objective of reducing vulnerability and ensuring continuity. SCRM attempts to reduce supply chain vulnerability via a coordinated holistic approach, involving all supply chain stakeholders, which identifies and analyses the risk of failure points within the supply chain. |

# Attachments

## Attachment A – Program Management Plan



## Attachment B – Support Locations

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## Attachment C – Pricing Instructions

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## 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 – Agency’s Existing VoIP Network Architecture



## Attachment I – Service Level Requirements (SLRs)

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## Attachment J– Service Environment (Hardware and Software, Circuits, Applications and Data sets)

[The Agency should include information describing the current inventories of hardware, software, etc. as appropriate.]

Appendix J.1 - Voice Network Hardware

Appendix J.2 - Voice Network Software

Appendix J.3 - Voice Network Circuits

Appendix J.4 - Voice Communications Applications and Data Sets

## Attachment K– Agreements and Licenses

[Insert here a spreadsheet summary of Agreements and Licenses]