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General Services Administration

Federal Acquisition Service

Technology Transformation Services

Centers of Excellence

1800 F Street NW | Washington, DC | 20405

Establish an OCDO and Data Governance

DRAFT Request for Quote

Details

From: {{CO-Name}}, Contracting Officer (CO), General Services Administration (GSA), National Capital Region (NCR), Assisted Acquisition Services (AAS)

Issued for: GSA, FAS, Technology Transformation Services (TTS), Centers of Excellence (CoE)

Subject: DRAFT Request for Quotation (RFQ)

Date: MONTH DD, 20YY

Set-aside: {{Set-aside}}

Contract vehicles: GSA Schedule 70 SIN 132-32 Term Software
GSA Schedule 70 SIN 132-33 Perpetual software license
GSA Schedule 70 SIN 132-34 Software Maintenance Service
GSA Schedule 70 SIN 132-40 Cloud
GSA Schedule 70 SIN 132-45 Highly Adaptive Cybersecurity Services (HACS)
GSA Schedule 70 SIN 132-51 IT Professional Services
GSA Schedule 70 SIN 132-55 Subscription Services
GSA Schedule 70 SIN 500 Order-Level Materials (OLMs)

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Deadlines and response formats

Item	Date responses due	Format
RFQ Questions and Answers	MONTH DD, 20YY at noon, eastern	Google Form (see section 2.1 for details)
Technical Challenge Question	MONTH DD, 20YY at noon, eastern	Google Form (see section 4.2 for details)
Technical Volume	MONTH DD, 20YY at noon, eastern	Google Form (see section 4.3 for details)
Pricing Volume	MONTH DD, 20YY at noon, eastern	Google Form (see section 4.4 for details)

1.0 Statement of Objectives

1.1 Background

The mission of the Centers of Excellence (CoE), housed within the General Services Administration (GSA), is to accelerate Information Technology (IT) modernization, improve the public experience, and reduce legacy IT spending across the Government. CoE accomplishes this by centralizing top government tech talent, leveraging private-sector best practices, and operating with a teaming mindset across Government departments and agencies. To better align with the dynamic effects of such a transformation, CoE provides agency partners with a shared service solution for professional services.

At the U.S. Department of Housing and Urban Development (HUD), the Data Analytics CoE was tasked to define the analytics outcomes and priorities while assessing existing data, tools, and systems used by HUD programs and offices. HUD also desired the development of a strategy for analytics transformation that includes data governance, data management, and use cases for artificial intelligence technologies.

1.2 Purpose

HUD has a need to establish an Office of the Chief Data Officer (OCDO) to manage data as a strategic asset and to create and implement an overall data management strategy. These high-level objectives reflect the need for improving and establishing organizational data standardization, integrity, availability, accessibility, usability, and sharing best practices at an enterprise level, to ultimately improve decision making throughout the agency.

This must be achieved in a manner that allows the selected Chief Data Officer (CDO) and HUD Executives to define the authority of the OCDO, finalize a communication plan, submit a Congressional review/approval package for the OCDO's operations, support that process, and provide base functionalities of an OCDO for HUD on an enterprise-wide level. Additionally, this must be done in a way that establishes and maintains a formal data governance steering committee and working group, data quality and data certification policies, an enterprise-wide data asset inventory, business glossary, metadata and master data management, a HUD Open Data Portal, and a self-service data analytics environment.

1.3 Scope

The solution provider must ensure the OCDO follows [HR #4174](#) to the extent possible, which requires HUD to bring agency data into compliance with any relevant regulations and policies, and maximize the agency's use of data to improve operations and financial management. Furthermore, the provider needs to develop a framework that will enable the OCDO to drive Advanced Analytics and Data Visualization throughout the organization, realize cost savings, improve customer experience, and address high priority data issues (including, but not limited to, compliance with DATA Act, Enterprise Master Data Management, and capitalizing on data integration opportunities).

Additionally, the solution provider must ensure data governance is established on an enterprise-wide framework for data integration that promotes and enables the objectives described in this section.

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1.3.1 Performance objectives

The contractor must achieve the following objectives:

1. **Establish foundations of the OCDO** - Collaborate with HUD stakeholders to understand the agency's need, requirements, costs, and benefits to operationalize an OCDO at HUD.
2. **Manage the setup and rollout of the OCDO** - Collaborate with HUD stakeholders to assess and address program area and enterprise-wide changes caused by OCDO establishment, and support HUD adoption of technical solutions, in order to effectively manage and transition the OCDO to HUD staff.
3. **Operationalize the OCDO and define a vision for analytics leadership** - Collaborate with HUD stakeholders to build enterprise data analytics capacity at HUD to train and empower staff, more effectively utilize data assets, gain more insights into trends, spending, and resource allocation, and better inform decision-making.
4. **Establish enterprise data governance across HUD** - Collaborate with HUD stakeholders to establish data governance across the enterprise to increase awareness around data availability, improve data quality, facilitate internal and external data sharing, ensure compliance with statutes and related laws, and effectively manage data as a strategic asset.
5. **Use data to improve financial decisions** - Collaborate with HUD stakeholders to measure and improve transparency for program financials and outcomes to better assess historic and current financial allocations, more adequately respond to Congressional inquiries, and enhance future program planning.

1.3.2 Deliverables

Deliverable	Objective	Description	Evaluation
OCDO Purview and Authority Statement	Objective 2	Statement defining OCDO purview for data governance, open data, the Paperwork Reduction Act, and	Due: First draft within 60 calendar days after award, continuously updated on a per-sprint basis.

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		CDO's scope and authority to implement these across the enterprise	Criteria: HUD acceptance of the first and following drafts.
OCDO Staffing Plan	Objective 1	Detailed staffing plan with job descriptions, qualifications, reporting structure, and key onboarding dates	Due: First draft within 90 calendar days after award, continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following drafts.
Data Governance Steering Committee Charter	Objective 1	Charter outlining the structure, responsibilities, and authorities of the Committee	Due: First draft within 90 calendar days after award, continuously updated on a per-sprint basis. Criteria: (1) HUD acceptance of the first and following drafts; (2) HUD approval of Charter, members identified; and, (3) Committee meeting on at least a quarterly basis.
OCDO Congressional Submission	Objective 1	In collaboration with HUD, a comprehensive	Due: First draft within 120 calendar days after award,

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Package		package detailing the need, purpose, objectives, staffing requirements, funding requirements, and budget justification to establish an OCDO	continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following drafts and Congressional acceptance of package.
Establishment of Data Analytics Community of Practice	Objective 3	Detailed charter describing data and analytics community of practice, as well as a roster of potential members	Due: Within 120 calendar days after award. Criteria: Number of HUD program areas participating in sharing feedback and changing practices to adopt or improve analytics.
OCDO Communication Plan	Objective 2	Develop an outreach strategy and detailed communication plan to share information with relevant stakeholders and align expectations and understanding across the enterprise	Due: Within 150 calendar days after award. Criteria: HUD leadership approval of Communication Plan and HUD-wide dissemination of approved plan

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OCDO and Data Governance Stakeholder Engagement Working Groups	Objective 2	Host at least three (3) half-day sessions in collaboration with HUD stakeholders to gather feedback from and introduce key OCDO concepts to existing HUD data stewards	<p>Due: Within 180 calendar days after award.</p> <p>Criteria: Three sessions facilitated and final reports delivered to and accepted by HUD leadership.</p>
Training Needs Assessment Report	Objective 3	Detailed information including current and targeted skills for analytic staff, gaps in skills, and prioritized training needs	<p>Due: First draft within 180 calendar days after award, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Data Quality and Data Certification Policies	Objective 4	Detailed policies and procedures defining data quality, describing how to assess and improve data quality, and steps needed to certify data	<p>Due: First draft within 180 calendar days after award, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Change Management Plan	Objective 2	Integrated Change Management Plan based on	<p>Due: First draft within 240 calendar days after award,</p>

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		stakeholder engagements, Enterprise Data Governance Strategy, and workshop session discoveries	continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following drafts.
Enterprise Data Governance Strategy	Objective 4	Comprehensive strategy, including goals, success factors, risks, requirements, and descriptions of discrete tasks to implement data governance enterprise wide	Due: First draft within 240 calendar days after award, continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following drafts.
Data Sharing Strategy	Objective 4	Comprehensive strategy, including goals, success factors, risks, requirements, and roadmap, to facilitate internal and external data sharing practices	Due: First draft within 240 calendar days after award, continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following drafts.
Analytics Training Curriculum	Objective 3	Develop detailed training curriculum to address analytics skill gaps	Due: No later than the end of the base period. Criteria: HUD

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			acceptance of the final draft.
OCFO Key Performance Indicators	Objective 5	Develop and implement a set of Key Performance Indicators (KPIs) for the Office of the Chief Financial Officer (OCFO) to regularly assess program and financial outcomes	<p>Due: Should the Government decide to exercise the option, first draft within 90 calendar days of the start of the option period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Self-Service Data Analytics Environment Prototype	Objective 3	Collaborate with the Office of the Chief Information Officer (OCIO) to develop and introduce a self-service data analytics platform prototype that enables users to perform basic analyses with a set of readily available tools and data	<p>Due: Should the Government decide to exercise the option, the first version is due within 180 calendar days of the start of the option period.</p> <p>Criteria: HUD acceptance of the first and following versions.</p>
Data Asset Inventory	Objective 4	Complete inventory of data products and raw data files that are available to	Due: Should the Government decide to exercise the option, first draft

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		the public, available to all internal HUD staff, and available to specific program area(s)	<p>within 180 calendar days of the start of the option period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Data Dictionaries and Business Glossary	Objective 4	Complete data dictionaries applicable to specific HUD systems and an enterprise-wide business glossary to capture and standardize data taxonomies	<p>Due: Should the Government decide to exercise the option, first draft within 270 calendar days of the start of the option period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Data Standards Documentation and Guidance	Objective 4	Comprehensive package containing documentation and guidance around the data standards identified and implemented	<p>Due: Should the Government decide to exercise the option, no later than the end of the option period.</p> <p>Criteria: HUD acceptance of the final draft.</p>

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Enterprise-wide Key Performance Indicators	Objective 5	Develop and implement a set of KPIs for the agency to regularly assess program and financial outcomes enterprise-wide	<p>Due: Should the Government decide to exercise the second option, first draft within 30 calendar days of the start of the second option period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Metadata Management Policies and Procedures	Objective 4	Detailed policies and procedures defining metadata management, describing how to implement and maintain metadata, and prioritizing metadata needs	<p>Due: Should the Government decide to exercise the second option, first draft within 90 calendar days of the start of the second option period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Master Data Management for the Loan Review	Objective 4	Implement an end-to-end master data management	<p>Due: First version due within 30 calendar days after</p>

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System		process, including comprehensive documentation, for HUD's Loan Review System	award, continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following versions.
HUD Open Data Portal	Objective 4	Consolidate, institute, and manage an open data portal that includes prioritized data sets, user-friendly navigation, data update plans, data integration strategies, and access requirements	Due: Should the Government decide to exercise the second option, first version due within 270 calendar days of the start of the second option period, continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following versions.
Production-ready Self-Service Data Analytics Environment	Objective 3	In collaboration with OCIO, move self-service data analytics platform to a production environment and rollout to select HUD users	Due: Should the Government decide to exercise the second option, first version due within 30 calendar days before the end of the second option period, continuously updated on a

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			per-sprint basis. Criteria: HUD acceptance of the first and following versions.
Self-Service Data Analytics Environment Training	Objective 3	Deliver self-service analytics platform documentation and provide three (3) training workshops to interested HUD users	Due: Should the Government decide to exercise the second option, no later than 30 days before the end of the second option period. Criteria: HUD acceptance of the first and following versions.
Project Schedule	NA	A plan detailing the activities, schedule, resources to implement the assessment recommendations and PWS tasks. Microsoft project is preferred.	Due: First draft within 30 calendar days after award, continuously updated on a per-sprint basis. Criteria: HUD acceptance of the first and following drafts.
Transition Plan	NA	A plan detailing the support activities, milestones, artifacts to transition work from CoE to HUD.	Due: First draft within 90 calendar before the end of each period, continuously

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			<p>updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>
Program Status Reviews	NA	<p>Participate in and contribute to the Program Status Review report and meeting which focuses on the status of the team's schedule, risks, and activities</p>	<p>Due: First draft due within 7 days from kickoff, continuously updated on a weekly basis.</p> <p>Criteria: HUD acceptance of submitted review reports.</p>
Project Close Out Report	NA	<p>Develop a closeout report including a summary of milestones and achievements completed over the period of performance to include a deliverables table, risk register recap, lessons learned summary, and recommendations for the continuation of these support services. Report should also include a financial</p>	<p>Due: First draft due no later than 30 days before the end of each period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>

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		summary of contract funding obligated against the total invoiced.	
Training Materials and Reskilling Activities	NA	Contribute to the development of training materials and reskilling activities. Materials format (e.g. video, document, pilots) may vary and will be agreed upon with the CoE BMO	<p>Due: As defined in the agreed upon Project Plan.</p> <p>Criteria: As defined in the agreed upon Project Plan.</p>
Sustainment Artifacts	NA	Documents for the OCDO to sustain CoE efforts post contract end; includes, but not limited to, prioritizing work to address outstanding critical needs, generating standard operating procedures, templates, and relevant policies	<p>Due: First draft due no later than 90 days before the end of each period, continuously updated on a per-sprint basis.</p> <p>Criteria: HUD acceptance of the first and following drafts.</p>

1.4 Operating constraints

The contractor will be working in an environment with the following operating constraints:

1. An environment with data silos, access challenges, and varying degrees of the use of data in day-to-day operations.

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2. A need for advocacy surrounding data governance standards within internal teams that have varying degrees of data-driven decision making in place.
3. Solutions must comply with all federal systems security regulations, including the National Institute of Standards and Technology (NIST), the Federal Information Security Management Act (FISMA), and the Federal Risk and Authorization Management Program (FedRAMP).
4. Solutions must seamlessly integrate with certain HUD legacy systems, including but not limited to those listed at <https://www.hud.gov/systems>.

Additionally, the contractor must collaborate with other teams at HUD in the following ways:

- Cloud Adoption, Contact Center, and Customer Experience CoE teams: Ensure data governance and related practices are followed.
- HUD's Program Management Office: Ensure required deliverables are documented for HUD leadership review.

1.5 Period and place of performance

The initial (base) period of performance (POP) for this order is twelve (12) months. There will also be two (2) option periods of twelve (12) months each, for a total period of performance for thirty-six (36) months. The POP is expected to begin on the date of the official kickoff meeting.

The place of performance is primarily at GSA's headquarters, located at [1800 F St NW, Washington, DC 20006](#). However, work may be required to be performed at HUD's headquarters, located at [451 7th St SW, Washington, DC 20410](#), or at the contractor's facilities. Any contractor-managed facilities and all work-from-home personnel must be located within the United States of America. Additionally, work may be required to be performed at other locations, with travel and expenses to be paid in accordance with section 5.4 of this solicitation.

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1.6 Order Type

The Government intends to issue a {{contract-type}} task order under an existing contract under {{vehicle}}, {{SIN}}: {{SIN-title}}, and all quotes must be submitted on that basis. The Government estimates the cost of services to range from \$XXX to \$XXX for the aggregate cost of the POP.

2.0 Special Instructions

2.1 Questions

All questions concerning this RFQ must be submitted electronically through this **RFQ Questions & Answers Google Form** by the deadline provided on the cover page.

Questions should be written in a way that enables clear understanding of the contractors' issues or concerns. Statements expressing opinions, sentiments, or conjectures are not considered valid inquiries and will not receive a response. Further, contractors are reminded that the Government will not address hypothetical questions aimed at receiving a potential "evaluation" decision.

Answers will be provided via an amendment to the RFQ. Similar questions may be answered by referring to a previous answer for efficiency.

2.2 Quotation requirements

A complete quote must include complete responses, by the dates and times listed on the cover sheet, to the Technical Challenge Question form, the Technical Volume form and the Pricing Volume form.

2.3 Conflicts of Interest

2.3.1 Potential Organizational Conflicts of Interest (OCI) statement

No award will be made until any potential conflict of interest has been neutralized or mitigated to the satisfaction of the CO in accordance with FAR Subpart [9.5 - Organizational and Consultant Conflicts of Interest](#). Acknowledgement of this statement is to be made within the Technical Volume submission.

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2.3.2 Conflicts of interest between Phase One and Phase Two at HUD

If a contractor performed work in a specific functional area during discovery and assessment (Phase One) at HUD, they will not be able to receive an award in that same functional area during implementation (Phase Two). However, if a contractor performed work in a specific functional area during discovery and implementation (Phase One) at HUD, they may be able to submit a quote against a different functional area during implementation (Phase Two) at that same agency as long as they submit a mitigation plan and that mitigation plan is accepted by the CO.

2.4 Communications before award

The contractor must direct all communications to the CO.

3.0 Basis of Award

This procurement is being conducted in accordance with FAR Subpart 8.4 - Federal Supply Schedules. This is not a FAR Part 15 - Contracting by Negotiation, procurement. All submissions in response to this RFQ are considered quotations and proposals or offers, even if labeled as such. The contractors will be required to agree to and be bound by all instructions, procedures, and rules of this RFQ. The Government is not obligated to determine a competitive range, conduct discussions, solicit final revised quotations, or use other techniques associated with FAR Part 15. The contracting techniques associated with FAR Subpart 15.3 do not apply.

3.1 Best value trade-off

The Government will evaluate quotes that are technically acceptable on a competitive best value basis using a trade-off between technical and price factors. Technically acceptable submissions will be evaluated based on five (5) evaluation factors. These factors are:

1. Technical Approach
2. Performance Work Statement (PWS)
3. Management Approach

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4. Similar Experience
5. Price

The four (4) technical, non-price evaluation factors, when combined, are significantly more important than price. The Government may make an award to an Offeror that demonstrates an advantage with respect to technical, non-price factors, even if such an award would result in a higher total price to the Government. The importance of price in the evaluation will increase with the degree of equality between Offerors with respect to the non-price factors, or when the Offeror's price is so significantly high as to diminish the value to the Government of the Offeror's advantage in the non-price factors.

3.2 Evaluation approach

The Government intends to utilize a phased approach for this procurement. To be considered for award, contractors must successfully pass through each phase. The technical evaluation will be made up of the following phases:

1. **First Phase:** Technical Challenge
2. **Second Phase:** Technical Volume, consisting of the Technical Approach, PWS, Management Approach, and Similar Experience
3. **Third Phase:** Oral Interview

While pricing will be evaluated separately from the technical volume, it will be evaluated concurrently with the same.

3.3 Evaluation scale

3.3.1 First Phase

A contractor's ability to approach work similar to that envisioned by this solicitation will be evaluated on an **Acceptable/Unacceptable** basis. To be considered "Acceptable", the Contractor must address the following:

CHALLENGE QUESTION WILL BE PLACED HERE.

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Contractor quotes failing to achieve an “Acceptable” rating will not be further evaluated.

3.3.2 Second Phase

A contractor’s Technical Approach and PWS will both be evaluated using the following ratings:

- **Exceptional:** Quotations receiving an “Exceptional” rating will explain how specific methods or techniques will be used by the contractor to successfully achieve each performance objective associated with this solicitation. Further, “Exceptional” quotations will specify methods or techniques that will allow the contractor to exceed all performance objectives in a specific way that benefits the Government. Finally, “Exceptional” quotations will explain how the methods or techniques to be used by the contractor are free from issues requiring Government intervention to address.
- **Good:** Quotations receiving a “Good” rating will explain how specific methods or techniques will be used by the contractor to successfully achieve each performance objective associated with the solicitation. Further, “Good” quotations will specify methods or techniques that will allow the contractor to at least meet all performance objectives. Finally, “Good” quotations will explain how the methods or techniques to be used by the contractor either free from issues identified during evaluation, or are associated with issues determined during evaluation to be correctable. A quotation identifying methods or techniques that exceed all performance objectives will receive no better rating than a “Good” rating if that quotation contains correctable issues.
- **Poor:** Quotations receiving a “Poor” rating fail to meet the basic requirements of this solicitation. A quotation that fails to explain how specific methods or techniques will be used by the contractor to successfully achieve any performance objective associated with the solicitation will receive a “Poor” rating. A quotation that specifies methods or techniques that fail to meet all performance objectives, or a quotation that contains uncorrectable issues will receive a “Poor” rating.

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A contractor's Management Approach and Similar Experience will be evaluated using the following ratings:

- **Very Likely:** Management approach and similar experience indicate that the contractor is very likely to perform the technical approach as proposed. Contractor's approach mitigates all identified risks; demonstrates exceptional control over the proposed personnel or team; and, displays substantial experience in the performance of similar requirements.
- **Likely:** Management approach and similar experience indicate that the contractor is likely to perform the technical approach as proposed. Contractor's approach mitigates most identified risks; demonstrates satisfactory control over the proposed personnel or team; and, displays some experience in the performance of similar requirements.
- **Unlikely:** Management approach and similar experience indicate that the contractor is unlikely to perform the technical approach as proposed. Contractor's approach does one of more of the following: mitigates few to none of the identified risks; demonstrates unsatisfactory control over the proposed personnel or team; or, displays little to no experience in the performance of similar requirements.

Contractor quotes failing to achieve at least "Good" and "Likely" ratings in all rated factors will not be further evaluated.

3.3.3 Third Phase

The portions of the oral interviews that are technical in nature, they will be evaluated according to the same scale as the Technical Approach and PWS submissions, outlined in 3.3.2, above. The portions of the oral interviews that are related to the management approach or similar experience, they will be evaluated according to the same scale as the Management Approach and Similar Experience submissions, outlined in 3.3.2, above.

4.0 Submission instructions and processes

4.1 Submission instructions

To satisfy each required factor, the contractor must submit the following:

1. **Technical Challenge Question Google Form** - The response must include answers to all the required questions
2. **Technical Volume Google Form** - The response must include answers to all the required questions in the Technical Approach, PWS, Management Approach (which will include Contractor Teaming Arrangement (CTA) / Subcontractor questions), and the Similar Experience sections.
3. **Pricing Volume Google Form** - The response must include an attached Pricing Sheet using the Excel template provided.

Please note: For any questions that indicate a character limitation, Google Forms considers punctuation (e.g., commas, semi-colons, quotation marks, etc.) and spaces as characters.

The contractor must also accept and understand the following:

- If any contractor has made any assumption as part of their quotation, they must identify and explain such assumptions in their Technical Volume submission. If technical assumptions are not noted, it will be expected that the contractors quotation reflects no technical assumptions for award and agrees to comply with all of the terms and conditions set forth in the solicitation. It is not the responsibility of the Government to seek out and identify any assumptions, conditions, or exceptions for each contractor's quotation.
- Contractors taking exception to any terms and conditions of the RFQ will not be considered for award.
- Incomplete quotes will be considered unacceptable and will not be further evaluated.

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- Quotations must be submitted pursuant to the deadlines provided on the cover sheet, above.

4.2 Technical Challenge Question submission process

Contractors are required to submit a response to the Technical Challenge Question via a Google Form. **This sentence will be a link to the Google Form and published via an amendment that will be posted no earlier than two business days before the close of the response period.**

The Technical Challenge Question response will be submitted as part of the overall quote and will be limited to 1500 characters (about 1/2 a page).

4.3 Technical volume submission process

Contractors are required to submit a response to this **Technical Volume Google Form**.

The Technical Volume response will be submitted as part of the overall quote. Various questions have various character limitations, outlined in the description of the relevant questions.

4.3.1 Technical Approach

The contractor must demonstrate their understanding of the Government's requirements by addressing individually and fully their technical understanding of the needs outlined in this solicitation and the technical methodology they will use to address those needs. The contractor's responses should describe the approach, methods, and techniques proposed to effectively achieve the performance objectives stated in this solicitation. Additionally, the contractor must outline any constraints they would face in achieving those objectives, and the operational requirements they would need to be successful.

4.3.2 PWS

The contractor should describe their understanding of the performance objectives for the requirements (described in full in the statement of objectives section). The

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contractor's proposed PWS must contain all tasks and subtasks in response to the SOO.

The contractor must discuss the following elements:

- Approach and methodology utilized to ensure that the Government's requirements are satisfied.
- Rationale for each task listed in the PWS and how the objectives will be achieved.
- Identify the personnel that will be designated as Key Personnel.

4.3.3 Management Approach

The contractor must provide a narrative detailing their staffing approach, including how they will approach hiring to fill gaps to fulfill this requirement, and what skill sets, roles, and responsibilities of the individuals involved on their team. If subcontracting or teaming, the contractor must discuss their approach to working with their partner(s) in providing a solution to the objectives outlined within the solicitation, how they will support Agency Partner requirements as a cohesive unit, and the nature of how they will work together as an integrated entity in general. Documentation of CTAs is required and will be confirmed. The contractor should identify all associated risks, and provide their strategy to mitigate each risk.

4.3.4 Similar Experience

This criteria considers the extent of the contractor's experience as a firm in providing like or similar services. The contractor must explain in a detailed narrative how the characteristics of the selected experience are related to this solicitation. The contractor must detail its similar experience in a maximum of three (3) contracts, either public or private experience, that reflects and identifies experience on projects currently being performed or which has been completed within the last three (3) years. The contractor must describe the client, project title, scope of work, the period during which the work occurred, the dollar value of the work performed, the specific responsibilities of the contractor, major deliverables produced, performance measures/service levels applied, any awards that were received for superior performance, quality assurance, risk management methodologies used, lines of communication used, and any problems or

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issues that occurred, and the corrective action taken. The contractor must provide point of contact data sufficient for the Government to verify the information.

4.4 Pricing volume submission process

The contractor is required to submit a response to this **Pricing Volume Google Form**.

The Pricing Volume response will be submitted as part of the overall quote. The main requirement is to use this **Pricing Sheet template**, without editing the structure, and submitting it in response to the appropriate question.

Prices submitted should reflect the following:

- Contractors are encouraged to provide discounts on their contract rates without compromising quality.
- Prices submitted should map to a contractor's GSA Price List.
- GSA Price Lists for the last three (3) years should be provided for verification that pricing does not exceed schedule pricing.
 - If submitting a quote as a CTA, each member must submit their GSA Price Lists for the last three (3) years as well.
- Evaluation of options under FAR [52.217-8](#) will be accomplished by using the prices offered for the last option period to determine the price for a 6-month option period, which will be added to the base and other option years to arrive at the total price. Evaluation of options will not obligate the Government to exercise the option(s).

4.5 Oral interview process

The oral interview associated with this RFQ does not and will not constitute discussions or negotiations as defined in FAR Part 15. The Government will not determine a competitive range, conduct discussions, nor solicit or allow revised quotes. The entire oral interview will be conducted remotely via video conference. Contractors must not bring or present slides, graphs, charts, or any other written or visual presentation materials nor will the Government accept or receive such materials.

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Agenda Item	Time Allotted
Team Introductions	5 minutes
Interview	30 minutes
Government Question and Answers	10 minutes

4.5.1 Interview

The interview will consist of the contractor answering the Government's core questions related to the contractor's Technical Volume submission. While the technical factors are identified in the RFQ, the core questions are not. The questions are related to the contractor's technical understanding and methodology, proposed PWS, management approach, and similar experience. This part of the interview will not exceed 45 minutes.

4.5.2 Government Question and Answer

During this time, the Government may ask questions on any information that had been presented by the contractor that the Government feels is unclear or needs elaboration. The Government questions may differ among the contractors based on what needs elaboration.

4.5.3 General Information

4.5.3.1 Location

The interview sessions will be conducted by video chat, though audio may be substituted as needed. The Government will coordinate and set up the virtual meeting space accordingly (by providing dial-in or links).

4.5.3.2 Date and Time

The Government will schedule the date and time of the interview with each contractor after the RFQ closing date and receipt for technical understanding and methodology and PWS of "Good" or "Exceptional" and "Likely" or "Very Likely" for management approach and similar experience submissions. The Government reserves the right to reschedule any contractor's interview date at the discretion of the CO.

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4.5.3.3 Participants

Contractors may include as many participants as it feels is necessary. Contractors are advised to have technical personnel present since the Government will ask technical questions during the interview. Type and number of participants included is at the contractor's discretion and is the full responsibility of the contractor. All proposed personnel currently employed by the quoter or its teaming partners must attend the session. The Government is most interested in hearing from staff that will have a direct role in performing on the task. After the oral interview, contractor must provide an email to confirm attendance with names of participants to the meeting organizers to the CO.

5.0 Administration

5.1 Points of Contact (POC)

The Government team consists of the CO, the Contracting Officer's Representative (COR), the Alternate Contracting Officer's Representative (ACOR), a CoE Lead, and (if applicable) a Technical POC (TPOC).

The CO for this buy is {{CO-name}}. Questions, comments, issues, or responses must be submitted through the methods outlined in this solicitation. Any other forms of communication will not be considered. After award, the CO will delegate most of the day-to-day tasks to the COR, ACOR, CoE Lead, and (if applicable) TPOC.

A delegation letter for both the COR and ACOR will be provided to the awardee, outlining the contractual roles and responsibilities of the COR and ACOR. The roles and responsibilities of the CoE Lead and TPOC will be provided no later than the kickoff meeting that will follow award. The names and email addresses of the entire team will also be provided no later than the kickoff meeting as well.

5.2 Key Personnel

5.2.1 Roles

The Contractor must designate both a Project Manager (PM) and a Technical Lead/Subject Matter Expert as Key Personnel for this project. The PM will be a direct

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liaison to the Government product team, and will be responsible for the supervision and management of all of the Contractor's personnel. The Technical Lead/Subject Matter Expert must have a full understanding of the technical approach to be used by the Contractor's team and will be responsible for ensuring that the Contractor's team follows that approach.

5.2.2 Substitutions

Key Personnel substitutions must be approved by the Government in writing, and will only be justified by the Government request, sudden illness, death, change of employment, or termination of employment for cause. Contractor requests for a substitution of Key Personnel must include a detailed explanation of the justifying circumstances, and a complete résumé for the proposed substitute or addition, including skills, experience, education, training, and security level. The Government's failure to approve a proposed substitution will not constitute grounds for non-performance by the Contractor, or form a valid basis for any claim for money or any equitable adjustment.

5.3 Quality management

The method of quality verification that will take place for each deliverable is outlined in the deliverables table in section 1.3.2, above.

5.4 Travel and Per Diem

Travel is anticipated as part of performance. If authorized as part of performance and as approved by the CO, COR, or ACOR, travel expenses may be reimbursed in an amount no higher than that allowed by [Federal Travel Regulations](#) (FTR) in effect at the time of travel. Normal commuting expenses, including but not limited to commuting expenses between GSA's headquarters and HUD's headquarters or the contractor's office, are not allowed per the FTR.

If approved in writing by both the CO and COR or ACOR before incurring such travel expenses, to be reimbursable, expenses must be:

- Allowable under the FTR;

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- Approved by the CO and COR/ACOR prior to travel expenditure; and,
- Allocable and necessary to the services under this order.

Contractor must submit and receive “request for travel” approval from the CO and COR or ACOR at least two (2) weeks prior to the anticipated time of the travel, and must identify:

- Name of the traveler;
- Destination(s) including itinerary;
- Purpose of the travel; and,
- Cost breakdown.

Invoices for travel expenses must include original or legible copies of receipts as prescribed in the FTR including, but not limited to, the following:

- Actual airfare or other public conveyance expenses;
- Transportation including car rental expenses for each rental day; and,
- Lodging expenses.

Any burden added to the travel cost will be allowed only as defined in the contractor’s standard accounting practice or disclosure statement.

5.5 Badge and Key Control

The contractor must ensure that all keys and/or badges issued to contractor support personnel are accounted for and controlled. At a minimum, the contractor must be responsible for the following:

1. Ensuring keys and badges are only used by the contractor’s employees.
2. Prohibiting the opening of locked areas by the contractor’s employees to permit entrance of persons other than the contractor or appropriate Government employees engaged in the performance of assigned work in those areas.
3. Ensuring keys and badges issued to the contractor by the Government are not duplicated.
4. Ensuring keys and badges issued by the Government are not lost or misplaced.

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5. Reporting the loss of any key or badge in writing to the COR and ACOR within six (6) hours of occurrence or at the beginning of the next scheduled workday, whichever occurs first.
6. In the event of a conflict between these requirements and those of a specific agency, the specific agency requirements must prevail.

5.6 Hours of Operation

Expected program support must be required at a minimum between the hours of 9 am to 5 pm Monday through Friday, but may vary depending on circumstances. Personnel must be on duty at these times at the identified place(s) of performance necessary to provide the support services described. However, exceptions to these guidelines may be required as approved by the CO, COR, ACOR, CoE Lead, TPOC, or other individual identified by the CO, COR, or ACOR.

5.7 Transparency Policy

Contractors are advised that the Government reserves the right to publish documents associated with this acquisition on a publicly-available website, including any RFQs or their amendments, as well as question and answer exchanges with contractors without source-identifying information removed. The Government reserves the right to publish any other relevant information that is not confidential or proprietary in nature, but will not publish any source-selection sensitive information that would otherwise implicate procurement integrity concerns.

Upon award, the Government may publish the total price of the selected quotation and certain non-source-identifying data (e.g. the number of bids, the mean price, the median, and the standard deviation of price). During the performance of this order, the Government may similarly publish data related to project management (e.g. user stories, milestones, and performance metrics) and top-line spending data.

5.8 Data Rights and Ownership of Deliverables

It is the CoE's intent that any data or deliverable created as a result of the work performed under this order, be committed to the public domain, if reasonable.

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It is the intention of the CoE to consider committing the following items, among other items created during the period of performance, to the public domain: all data, documents, graphics, and code created under this call order including but not limited to, plans, reports, schedules, schemas, metadata, architecture designs, and the like; new open source software created by the contractor and forks or branches of current open source software where the contractor has made a modification; new tooling, scripting configuration management, infrastructure as code, or any other final changes or edits to successfully deploy or operate software.

The contractor must use open source technologies wherever possible. All licenses must be expressly listed in the deliverable. Regardless of license(s) used (e.g., MIT, GPL, Creative Commons 0), the license(s) must be clearly listed in the documentation.

If an open source license provides implementation guidance, the contractor must ensure compliance with that guidance. If implementation guidance is not available, the contractor must attach or include the license within the work itself. Examples of this include code comments at the beginning of a file or contained in a license file within a software repository.

If the contractor needs to use work that does not have an open source license, the contractor is required to request permission from CoE, in writing, before utilizing that work in any way in connection with the order. If approved, all licenses must be clearly set forth in a conspicuous place when work is delivered to CoE and must be owned, without any restrictions, by the Government.

5.9 Non-disclosure of Sensitive and Proprietary Information

The contractor must protect from unauthorized disclosure any materials or information made available by the Government, or that the contractor has access to by virtue of the provisions of this order, that are not intended for public disclosure. This includes disclosure to individuals within the contractor's company who are not specifically assigned to work on this order. To affirm and acknowledge this responsibility, the contractor must sign a "Non-Disclosure Agreement" to cover the entity itself.

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All contractor employees assigned to perform under this order must sign a “Non-Disclosure Agreement and Conflict of Interest Statement”, affirming and acknowledging that the information, technical data or proprietary software to be made available in the performance of this order are restricted for Government use only. The Non-Disclosure Agreement and Conflict of Interest Statement is a permanent agreement and must survive the employee’s employment by the contractor. The Non-Disclosure Agreement and Conflict of Interest Statement must be signed by contractor employees prior to any work commencing on this order.

In the event that this order requires the contractor to gain access to the proprietary or sensitive information of Government agencies or organizations, the contractor must be required to execute written agreements with those entities, to protect the information from unauthorized disclosure and refrain from using it for any purpose other than for which it was furnished. A copy of all executed agreements must be delivered to the CO.

At the conclusion of the order, contractor representatives will conduct a thorough audit of the contractor’s facilities/files to ensure that no unauthorized information, technical data, or proprietary software exists in its possession.

5.10 Electronic invoicing process

GSA employs Electronic Commerce in Contracting to the maximum extent practicable. Contractors must use the GSA Assisted Acquisition Service Business System (ASSIST), also known as IT Solutions Shop (ITSS), at <https://portal.fas.gsa.gov> to submit invoices. All invoice information, to include attached documents, must be submitted to ASSIST via the Central Invoice Service (CIS).

For each invoice, the contractor must complete the required fields provided in ASSIST CIS and must attach a copy of the invoice. Assistance in using the GSA ASSIST CIS application and answers to related questions may be obtained via email at aasbs.helpdesk@gsa.gov or by calling (877) 472-4877.

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The Invoice Form will include all active Contract Line Item Number(s) (CLIN) on the contract. The contractor must enter the invoice amount in dollars and cents for each CLIN.

Additional instructions may be provided by the CO, COR, or ACOR, immediately following the award of the contract or during contract administration to further enhance the use of Electronic Commerce in Contracting or to ensure compliance with GSA requirements or policies.

6.0 Clauses

FAR 52.252-1 -- SOLICITATION PROVISIONS INCORPORATED BY REFERENCE (FEB 1998)

This solicitation incorporates one or more solicitation provisions by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. The offeror is cautioned that the listed provisions may include blocks that must be completed by the offeror and submitted with its quotation or offer. In lieu of submitting the full text of those provisions, the offeror may identify the provision by paragraph identifier and provide the appropriate information with its quotation or offer. Also, the full text of a solicitation provision may be accessed electronically at this/these address(es):

(<https://www.acquisition.gov/browsefar>)

(End of provision)

52.217-5 Evaluation of Options (July 1990)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Applicable clauses in the quoter's Schedule contract flow-down into this order.

FAR 52.252-2 -- CLAUSES INCORPORATED BY REFERENCE (FEB 1998)

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make

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their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): (<https://www.acquisition.gov/browsefar>)

(End of clause)

FAR 52.203-18 Prohibition on Contracting with Entities that Require Certain Internal Confidentiality Agreements or Statements-Representation (JAN 2017)

FAR 52.203-19 Prohibition on Requiring Certain Internal Confidentiality Agreements or Statements (JAN 2017)

GSAR 552.212-4 - Contract Terms and Conditions—Commercial Items (Feb 2018)(DEVIATION FAR 52.212-4)

GSAR 552.232-39 Unenforceability of Unauthorized Obligations. (FAR Deviation Feb 2018)

GSAR clause 552.238-82, Special Ordering Procedures for the Acquisition of Order-Level Materials

FAR 52.232-18 Availability of Funds (APR 1984)

Funds are not presently available for this contract. The Government's obligation under this contract is contingent upon the availability of appropriated funds from which payment for contract purposes can be made. No legal liability on the part of the Government for any payment may arise until funds are made available to the Contracting Officer for this contract and until the Contractor receives notice of such availability, to be confirmed in writing by the Contracting Officer.

FAR 52.217-8 - Option to Extend Services (Nov 1999)

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within 5 calendar days before the contract expires.

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(End of clause)

FAR 52.217-9 - Option to Extend the Term of the Contract (Mar 2000)

- (a) The Government may extend the term of this contract by written notice to the Contractor within 5 days provided that the Government gives the Contractor a preliminary written notice of its intent to extend at least 15 days before the contract expires. The preliminary notice does not commit the Government to an extension.
- (b) If the Government exercises this option, the extended contract shall be considered to include this option clause.
- (c) The total duration of this contract, including the exercise of any options under this clause, shall not exceed 5 years.

(End of clause)

7.0 Appendix

7.1 HUD Future State Report

Please see [the file](#) with the same file name as the heading above in [our acquisition repository](#).

7.2 HUD OCDO Charter

Please see [the file](#) with the same file name as the heading above in [our acquisition repository](#).

7.3 HUD Enterprise Data Management Access and Analytical Tools

Please see [the file](#) with the same file name as the heading above in [our acquisition repository](#).

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