General Services Administration

Federal Acquisition Service

Technology Transformation Services

Centers of Excellence

1800 F Street NW | Washington, DC | 20405

IDTBD - OPM App Replacement

DRAFT
Performance Work Statement

1.0 Background and Purpose

1.1 Background

GSA's Centers of Excellence (CoE), in conjunction with the Office of the Chief Information Officer (OCIO) at the Office of Personnel Management (OPM), is modernizing the Federal Annuity Claims Expert System (FACES). Retirement Services (RS) is the OPM program division responsible for the administration of retirement benefits. RS staff members depend on FACES to adjudicate about 80,000 federal retirement benefit actions every year.

FACES is a reliable and accurate system, but it was built with tools that are no longer supported by the manufacturer, which makes it difficult to update and maintain. FACES wasn't originally designed as enterprise software and there is limited documentation that describes how FACES works. Also, there is no disaster recovery plan in place in case the application suffers critical failure.

Legal Administrative Specialists (LAS) depend on FACES to do their jobs. Their retirement benefits expertise is essential to the adjudication of cases, but making up for the legacy app's shortcomings forces them to squander time and focus.

1.2 Purpose

OPM is replacing both the FACES desktop app and the calculator that the app relies on to determine retirement benefits.

The app replacement and the calculator replacement are separate projects, but the teams supporting each will communicate regularly. Both projects will begin at roughly the same time, but the Government expects to complete the replacement app well in advance of the replacement calculator. Early in the process, the Contractor responsible for the replacement calculator will supply the app replacement team with application program interface (API) specifications.

The purpose of the OPM App Replacement contract is to replace the outdated FACES desktop app with a modern web app. The design of the replacement app must help optimize the expertise of the LAS. In the short-term, hand entry of case information will continue to be an aspect of the adjudication experience, but there are opportunities to improve other key interactions between the system and its users.

The Government expects the Contractor to deeply research the needs of FACES users to inform the replacement app's design. After research, the Contractor will continue to work closely with LAS and other users to test and revise designs iteratively in order to deliver a highly effective final product. The Government also expects the Contractor to deliver back-end code that meets the highest standards in app development.

The Contractor will create tools and design training that empowers OCIO staff and contractors to maintain the replacement app's back-end over time. They will also create tools and design training that allows Retirement Services staff to manage many changes to the app's front-end without requiring OCIO resources.

2.0 Scope

The Contractor will research and report on the needs of FACES users, the details of the retirement benefits adjudication process and the role of FACES in adjudication. They will design both the front- and back-end of a replacement app. They will work iteratively and with FACES users in cycles of designing/testing/redesigning so that the final product fully supports the work of the LAS. The Contractor will design and lead training of OCIO staff to support the app back-end and RS staff to support the further evolution of the app's user experience design.

The work outlined below will satisfy each of the objectives listed in Section 2.1.1 of this PWS.

2.1 Performance objectives

2.1.1 PWS Objectives

1. Deliver an app that optimizes LAS adjudication expertise
2. Develop an app that constantly improves
3. Deliver a flexible app that evolves quickly
4. Introduce the capability to process cases in batches

2.1.2 Tasks

In order to achieve the PWS objectives, the Contractor, will perform the following tasks. The first column is the name of the task that will be performed and which of the objectives it fulfills. The second column provides a description of what the task itself entails with a reference to the associated deliverable(s) that will be produced.

Task and Objective	Task Description
First task: Research LAS **Objective Fulfilled:** 1	Deep knowledge of user needs is essential for designing solutions that optimize expertise. The Contractor's user research will include these steps: ● Conduct on-site interviews with LAS and shadow them as they adjudicate cases ● Research the needs of other FACES users ● Analyze and report on all FACES user needs
Second task: Design with users **Objective Fulfilled:** 1	The relationship between the Contractor and FACES users initiated in user research will continue throughout an iterative design process. The Contractor will: ● Manage a constant cycle of designing, testing and retesting design solutions with users ● Create a Minimal Viable Product (MVP) based on an analysis of the needs of FACES users and build out the product to completion ● Design and document navigation, key interaction patterns, page templates, code standards and all functionality
Third task: Develop app **Objective Fulfilled:** 2	As business rules evolve after launch, changes to the replacement app will become necessary so it must be built with a capability for rapid change that has been impossible with the legacy FACES application. Development steps will include: ● Iteratively develop the back-end in conjunction with the front-end design. ● Bring collected knowledge and artifacts from user research into development sprints ● Initiate and lead agile (or similarly iterative) design and development methods to deliver app ● Introduce code libraries and other development tools that will allow OCIO staff to quickly adjust the new FACES back-end after launch
Fourth task: Make app flexible	In order to make the replacement app more flexible than the legacy FACES app, the Contractor must:

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Objective Fulfilled: 3	- Create templates, wizards or other tools that non-technical RS staff can use to make changes to the design of the replacement app's interface after launch - Design and conduct training for these tools - Provide concise documentation for all tools they create and processes they define
Fifth task: Develop batch processing **Objective Fulfilled:** 4	It is expected that case adjudication in the near future will involve some level of automation. The Contractor must include these steps to support that capability: - Create a mechanism for the system to calculate benefits for a set of basic cases - Build functionality that allows an LAS to review and, as needed, adjust the system's calculation for each case - Provide an audit trail of all system and LAS interactions with automated cases

2.1.3 Deliverables

In conjunction with performing the tasks outlined above, the Contractor will provide the following deliverables. The first column is the name of the deliverable and the Task it fulfills. The second column provides a description of what the deliverable itself entails. The third column outlines when the deliverable will be provided (along with reference to any updated version that will be provided) along with objectively quantifiable performance metrics that will permit the Government to accept the deliverable as being complete.

Deliverable	Description	Timing and Acceptance
Name: Research artifacts **Task:** Research LAS (task 1)	All materials the Contractor created to analyze research findings and describe the adjudication experience	**Due:** 60 days after award **Criteria:** Final research report accepted and approved by the Government
Name: Product backlog **Task:** Design with users (task 2)	Design and development efforts tracked on a sprint-by-sprint basis	**Due:** 75 days after award with future drafts to be developed and addressed on a per sprint basis **Criteria:** Reviewed and accepted at the conclusion of each sprint
Name: Foundational design solutions	Navigation, key interactions and screen templates designed with users	**Due:** 90 days after award with future drafts to be developed and addressed on a per sprint basis

Task: Design with users (task 2)		**Criteria:** Solutions accepted after successful testing with users
Name: MVP **Task:** Develop app (task 3)	A working model that can be used to adjudicate a basic retirement benefits case	**Due:** 120 days after award **Criteria:** Accepted after basic case successfully adjudicated and successful testing with users
Name: Product documentation **Task:** Develop app (task 3)	Artifacts that explain key design strategies, technical architecture and basic functionality	**Due:** 150 days after award **Criteria:** Final draft accepted and approved by Government
Name: OCIO instructions **Task:** Develop app (task 3)	Explanation of how to adjust the app's back-end when there have been changes to the retirement benefits calculator	**Due:** 150 days after award **Criteria:** Final draft accepted and approved by Government
Name: RS instructions **Task:** Make app flexible (task 4)	Directions for editing existing front-end elements and adding new interactions	**Due:** 150 days after award **Criteria:** Final draft accepted and approved by the Government
Name: Batch test run **Task:** Develop batch processing (task 5)	Set of basic cases processed without human intervention	**Due:** 150 days after award **Criteria:** Successful results validated by OPM experts
Name: App launch	Switch-over from legacy app to Web app OR release of Web app to limited user base (to be determined after award)	**Due:** 180 days after award **Criteria:** Fully functional app accepted and approved by the Government

2.1.4 Transition activities

In order to ensure the successful implementation of the efforts associated with this PWS, Contractor will perform the following activities upon being notified they must transition the

project to another team (whether a Government team or otherwise). The first column is the name and a description of the transition activity. The second column provides the standard upon which transition activity will be measured.

Transition Activity	Quality Standard
Knowledge transfer. The Contractor will work with RS and OCIO staff to insure that OPM gains the knowledge that will be essential to launching and operating the replacement app.	The PM and Technical Lead will attend daily transition meetings during the final two weeks of the Contractor's service. ● Each transition meeting will last up to 60 minutes each.
Documentation. The Contractor will finalize all documentation including training materials, technical specifications and a final report.	Final report will be delivered to OPM's OCIO. ● The report must be free of any grammatical, typographical, or factual errors, must be submitted no later than seven (7) days prior to the end of the POP, and may not be resubmitted more than once.
Completed and partial artifacts. Ideally, admin interfaces, the BRMS, testing and training artifacts, and the calculation service API will be completed before the end of the Contractor's service. If not, it is expected that the Contractor will make every effort to prepare partial work such that OPM staff (or their agents) will be well-positioned to complete the work.	All artifacts, including software and code, must be delivered to OPM's OCIO at the end of the Contractor's service. Documentation for each artifact must: ● Describe artifact's level of doneness ● Suggest remaining steps for completion

2.2 Operating constraints

2.2.1 Government constraints

The replacement app 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).

3.0 Contractor roles and responsibilities

3.1 Roles and responsibilities

The Contractor must designate a Project Manager (PM), a User Experience Lead and a Technical Lead as Key Personnel for this project. The PM will be a direct liaison to the Government product team, and will be responsible for the supervision and management of all of the Contractor's personnel. The User Experience Lead must have a full understanding of the research and design approach and will be responsible for ensuring that the Contractor's team follows that approach. The Technical Lead must have a full understanding of the technical approach and will be responsible for ensuring that the Contractor's team follows that approach.

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.

3.2 Key Personnel

3.2.1 Project Manager (PM)

The PM will be a direct liaison to the Government product team, and will be responsible for the supervision and management of all of the Contractor's personnel.

3.2.2 User Experience Lead

The User Experience Lead must have a full understanding of the research and design approach and will be responsible for ensuring that the Contractor's team follows that approach.

3.2.3 Technical Lead

The Technical Lead must have a full understanding of the technical approach and will be responsible for ensuring that the Contractor's team follows that approach.

3.3 Conflict of interest

The Contractor recognizes that, as a result of successfully being awarded the work associated with this PWS, they will have to mitigate any potential conflict of interest for future work related to CoE efforts at OPM.

4.0 Government roles and responsibilities

4.1 Makeup of team

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).

4.2 Contracting personnel

4.2.1 Contracting Officer

The CO for this buy is identified on the cover page. 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.

4.2.2. GSA Project Manager

The PM provides primary contract oversight. The PM ensures the contracting officer representative (COR) is trained before performing any COR duties and supports the COR's performance assessment activities. Additionally, the PM will also provide input for the Contractor's performance at periodic points in time.

4.2.3 Other members

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.

5.0 Terms and conditions

5.1 Travel and other direct costs (ODC)

Most of the user research for this contract will occur at the Retirement Operations Center in Boyers, PA. During the research phase, weekly travel for some of the Contractor's team should be expected. Less frequent travel will also be required during the development sprints when solutions are tested with LAS and other FACES users in Boyers.

5.2 Period and place of performance

The estimated period of performance consists of a base for approximately 6 months. Work will occur at OPM locations, primarily in Washington, DC. and Boyers, PA. Limited travel to Macon, GA may also be necessary.

5.3 Payment and invoicing procedures

{{RFQ 5.11}}

6.0 Pricing

Pricing sheet provided via separate cover using the template provided.