# General Services Administration (GSA)

# Office of Good Government Stuff

**Usability Initiatives for the XXXXXXX**

**Task Order Request**

**[Date]**

## TASK 1

### 1.1 Task Title

**XXXXXXX Usability Effort**

### 1.2 Background

**U.S. businesses**, particularly small businesses, must comply with numerous federal, state, and local laws and regulations. According to the Small Business Administration (SBA), the average “highly regulated” business (e.g., restaurants, gas stations, dry cleaners) needs to apply for, and receive, an average of 10 to 15 licenses and permits. It can be difficult, time-consuming, and ultimately very costly for businesses to determine which laws and regulations apply and learn how to comply.

Each year, complying with laws and regulations cost American businesses nearly $500 billion and consumes over eight billion hours annually of otherwise productive time. The volume of existing laws (i.e., over 140,000 pages in the Code of Federal Regulations alone), the expense of finding nearly inaccessible information, multi-jurisdictional systems, and the lack of smart on-line tools contribute to this overwhelming cost.

The XXXXXXX will save American businesses time and money by making it easier to find, understand and comply with applicable laws and regulations. It will also enable Federal regulatory agencies to comply with the Government Paperwork Elimination Act (GPEA) and improve their administrative efficiencies. The XXXXXXX will be the cross agency portal for businesses that integrates the content and functionality of a number of federal business Web sites (e.g., XXXXX.gov, businesslaw.gov, sba.gov). Working with businesses, the initiative will design an “XML solution” that significantly reduces the regulatory paperwork burden and changes the way businesses interact with government. The XXX will offer:

- Multi-jurisdictional Business Legal and Regulatory Information: Businesses will be able to access easy-to-find-and-read information about the federal, state, and local laws and regulations that apply to them.

- Compliance Assistance Tools: Businesses will have access to on-line tools, or wizards, designed to help them determine which laws and regulations apply, whether they are in compliance, and if they aren’t, how to achieve compliance.

- Accessible, easy to use Forms,& Transactions: The XXXXXXX will initially focus on creating a government-wide forms portal and reducing the paperwork burden for five industry sectors: trucking, mining, food, healthcare, and chemicals. The Gateway will provide easy access to applicable forms as well as the ability to complete, submit and transmit the completed information to the applicable Federal regulatory agencies.

By providing quick access to forms, legal information, regulatory compliance assistance tools, and on-line transactions in one well-organized, user-friendly portal, the XXXXXXX can reduce the burden hours by 10 percent saving American businesses an estimated $2.4 billion annually and help federal agencies achieve a 75 percent GPEA compliance rate.

### 1.3 Objectives

The goal of this effort is to support the mission of the XXXXXXX by designing a user-friendly, citizen-centric XXXXXXX Web site. This usability initiative will assist the XXXXXXX in analyzing, designing, evaluating, and testing the XXXX.gov Web site to ensure that it is usable, useful, and accessible. The new Web site will be assessed for user performance, user satisfaction, and usefulness.

GSA’s XXXXXXX Project Team requires Contractor support in planning, analyzing, designing, implementing, evaluating, and testing the XXXXXXX.gov Web site. The scope of the project will include:

user and task analysis,

data collection and analysis,

information architecture design,

iterative usability testing.

The Contractor shall also provide ongoing support and consultation to ensure that the design, layout, and organization of the site are intuitive and user-friendly. The Contractor shall rely on research-based Web design and usability methodologies and guidelines to guide these efforts.

The Contractor shall provide usability engineering, an evidenced-based methodology that involves end users in the design and testing process to produce information systems that are measurably easier to learn, remember, and use.

The Office of Good Government Stuff, in the GSA’s Office of Government Info, is responsible for managing, coordinating, maintaining, and promoting the XXXXX.gov Web site. GSA’s User Experience Group oversees the promotion and implementation of usability of federal communication technologies products and services, desires to optimize the usability of these key GSA Web sites, and requires Contractor support of these services.

GSA’s User Experience Group employs research-based, user-centered design and usability engineering in the process of designing many GSA and other Web sites to improve overall usability and accessibility, to add new features and functionality, to establish/meet usability and user satisfaction metrics, and to integrate these sites within the GSA’s and OMB’s overall umbrella Web sites (gsa.gov, omb.gov, egov.gov, and others).

### 1.4 Sub-Tasks

The Contractor responsibilities include the following sub-tasks:

* 1. **Assessment of the Current XXXXXXX Web Site:**
* Conduct interviews with the internal XXXXXXX Project Team to understand the vision, mission, and measurable goals for the Web site.
* Conduct interviews with the external Pilot Project Members.
* Conduct a baseline usability test (consisting of 12 –15 user performance tests) of the current XXXXXXX site to identify user performance and satisfaction metrics.
* Make recommendations for changes to the site (immediate and longer term).
* Assist with immediate changes needed on the site.

**Deliverables include:**

* + - Written usability testing plan
    - Written report of results of interviews
    - Written report of results of baseline usability testing that includes findings of usability testing, video/audio clips of key findings/issues, user performance metrics, user satisfaction metrics, and recommendations for addressing the usability problems on the site.
  1. **Site Purpose & Goals**
* Work with the XXXXXXX Project Team to develop vision, mission, and measurable goals for the Web site.
* Link site objectives with organization goals.

**Deliverables include:**

* Written report of findings and recommendations
  1. **User & Task Analysis**

Identify users of current XXXXXXX site in order to develop a thorough understanding the target audience, their typical tasks, and their specific constraints.

* + Conduct 2 focus groups with external users to identify additional user requirements.

Analyze user needs, requirements, and satisfaction levels. Analysis should address user characteristics, environmental characteristics, and task characteristics.

Conduct online survey of current users, needs, tasks, and satisfaction levels.

* + Develop user profiles (list of user characteristics).
  + Develop task matrix (tasks ranked by user groups), task lists (ranked by importance, frequency, and feasibility), and task flow/process diagrams (diagram of steps in a task/process).

Review/analyze customer service email/calls.

Review/analyze Web logs and search logs.

Collect and review secondary market research related to Business Gateway’s audience.

**User & Task Analysis Deliverables include:**

* + - * Written report of data collection findings and recommendations
      * Written report of task analysis findings and recommendations

* 1. **Information Architecture and Content Organization**

Analyze current site structure and make recommendations for improvements based on user needs and task characteristics.

Perform terminology and labeling analysis to ensure site is using logical and intuitive terminology based on users’ knowledge levels.

Organize site content and main categorization based on users’ needs.

Conduct a card-sorting activity (with participants who represent the user population) to develop high-level categorization that is both flexible and scaleable. The categorization should be citizen-centric and based on users’ organization and terminology.

Develop wireframes, page schematics and interface specifications based on research-based usability engineering practices to assist design and programming teams in implementation of site organization.

Provide consultation on user interface designs to ensure layout, design and organization is useful, usable and accessible.

* + Conduct at least one usability test (consisting of 12- 15 individual user performance tests) of paper prototypes, wireframe mock-ups, or low-level prototypes of information architecture.
  + Create high-level site map and site navigation strategy.

**Information Architecture Deliverables include:**

* + - * Wireframes, page schematics and interface specifications
      * Site map and navigation strategy
      * Written report of findings and recommendations of usability testing of prototype that includes usability test findings, video/audio clips of key findings/issues, user performance metrics, and user satisfaction metrics.
      * Written report of card-sorting findings/recommendations
  1. **Evaluation of Web site**

Conduct usability testing of the redesigned XXXXX.gov site to assess measurable improvements in user performance and satisfaction. The usability testing should include the following:

* 1. Set measurable usability objectives.
  2. Determine usability test strategy and select usability test methodology.
  3. Write usability test plan.
  4. Recruit representative sample of user population and compensate participants for their participation. (Include test participant recruitment and incentives costs in bid. Plan for 12 – 15 individual performance tests.)
  5. Develop test scenarios based on user and task analysis. Set successful completion criteria for each task.
  6. Prepare testing documents and set-up testing environment.
  7. Facilitate usability test.
  8. Report findings ranked by severity.
  9. Provide comparative data from baseline usability testing of original site, prototype testing, and redesigned site testing.
  10. Provide research-based recommendations in an interactive, multimedia report. Report should include screenshots and video clips.
  11. Provide on-going consultation to assist project team with implementation of usability report findings and recommendations.

Develop PowerPoint presentation on the overall XXXXXXX redesign project.

Develop Lessons Learned document of the XXXXXXX usability engineering effort to be placed on GSA’s usability site.

**Web site Evaluation Deliverables include:**

* + - * Written usability test plan
      * Written report of usability testing findings and recommendations that incorporates video/audio clips of key issues
      * PowerPoint presentation on XXXXX.gov usability effort
      * Lessons Learned document on XXXXX.gov usability effort

### 1.5 Deliverables

| **XXXXXXX Deliverables** | **Due Date\*** |
| --- | --- |
| Assessment of the current XXXXXXX Web site (written report of baseline usability testing) | \*60 days after award |
| User & Task Analysis (including focus group results) | \*90 days after award |
| Information Architecture and Content Organization (including prototype of new site) | \*120 days after award |
| Usability testing of the prototype | \*150 days after award |
| Evaluation of Web site (usability testing of the redesigned site) | \*\*180 days after award |
| Evaluation of Web site (PowerPoint presentation and Lessons Learned document) | \*\*210 days after award |
| \*Final deliverable schedule to be determined once project plan and timeline are established during government/contractor meetings.  \*\* Adjustable – actual schedule will be established following revision of software. | |

## 2.0 Place of Performance

The work shall be performed at the Contractor’s site. Meetings and project planning activities performed at Government site.

## 3.0 Period of Performance

The Project Start (PS) date shall be within 10 days after Task Order award. The period of performance is twelve (12) months after Task Order award.

## 4.0 Travel

The Contractor shall not charge local travel costs in the Washington, DC metropolitan area to the Government. All travel, when required, will be billed in accordance with Federal regulations. The Contractor shall submit travel requests to the Contracting Officer’ s Technical Representative (COTR) for approval of travel at least 1 week in advance of travel.

## 5.0 Hours of Work

Hours of work are the normal operational hours plus those hours required for scheduled travel. Offerors are expected to conform to customer agency normal operation hours from 9:00am – 5:00pm (EST). Use of overtime is not applicable.

## 6.0 Acceptance of Deliverables

The User Experience Group will have ten (10) working days to complete its review of the deliverables. The User Experience Group will accept or reject the deliverables in writing. In the event of the rejection of any deliverable, the Contractor shall be notified in writing by the COTR, giving the specific reason(s) for rejection. The Contractor shall have five (5) working days to correct the rejected deliverable and return it to the User Experience Group COTR.

## 7.0 Expertise Requirements

* The Contractor shall provide personnel with expertise in research-based usability engineering of federal government Web sites and online applications. Personnel assigned to this task order must possess professional skills and extensive experience in the area of research-based Web design and usability.
* The Contractor shall provide a senior usability engineer with demonstrated experience in:
  + Developing and evaluating federal Web sites and other online products and services
  + Utilizing research-based Web design and usability guidelines
  + Developing comprehensive usability testing plans
  + Developing comprehensive, practical usability testing reports
  + Setting and attaining usability performance metrics
  + Working with clients and others not familiar with usability engineering
* The offeror shall have excellent skills in writing and editing of human factors/usability publications, plans, and reports.
* The offeror shall furnish the User Experience Group with documentation outlining the qualifications of proposed staff. Resumes of key personnel will be made available. The Contractor shall provide at least 2 weeks advance notice for replacement of staff.

## 8.0 Security

The Contractor shall comply with GSA administrative, physical, and technical security controls to ensure all of the Government’s security requirements are met. In addition, all Contractor personnel must adhere to the GSA Public Building’s rules and regulations.

## 9.0 Organizational Conflict of Interest

The offeror’s attention is directed to FAR Subpart 9.5, Organizational Conflicts of Interest.

## 10.0 Use of Government Facilities or Personnel

Unless directly related to this Task Order, the Contractor and any employees or consultant of the Contractor are prohibited from using U.S. Government facilities (such as office space or equipment) or U.S. Government clerical or technical personnel in the performance of the services not specified in the Task Order.

## 11.0 Contracting Officer’s Technical Representative (COTR)

The COR/COTR is designated by the Contracting Officer to perform technical liaison between the contractor’s management and the Contracting Officer in routine technical matters constituting general program direction within the scope of the contract/task order. Under NO circumstances is the COR/COTR authorized to effect any changes in the work required under this contract/task order whatsoever, or enter into any agreement that has the effect of changing the terms and conditions of this Task Order, or that causes the Contractor to incur any costs.

In addition, the COR/COTR will NOT supervise, direct, or control contractor employees. Notwithstanding this provision, to the extent that contractor accepts any direction that constitutes a change to his contract/task order without prior written authorization of the Contracting Officer, costs incurred in connection therewith are incurred at the sole risk of the contract, and if involved under this Task Order will be disallowed.

On all matters that pertain to the contract terms, the contractor must communicate with the Contracting Officer. Whenever, in the opinion of the contractor, the COR/COTR requests efforts beyond the terms of the contract, the contractor shall so advise the Contracting Officer. If the COR/COTR persists and there still exists a disagreement as to the proper contractual coverage, the Contracting Officer will be notified immediately, preferably in writing.

Proceeding with work without proper contractual coverage may result in nonpayment or necessitate submittal of a contract claim. The prime contractor’s management should clearly communicate this position to its employees working on this contract and to any subcontractors also providing support.

## 12.0 Section 508 Requirements

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. 36 CFR 1194 implements Section 508 of the Rehabilitation Act of 1973, as amended, and is viewable at http://www/acessboard.gov/sec508/508standards.htm.

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

## 13.0 Payment Schedule

A progress payment schedule will be used to recognize the work that has been done toward completion of the total effort. This will ensure that the Contractor has sufficient financing to complete the work. As required by the Prompt Pay Act of 1982, payments shall be made within 30 days of receipt of proper invoice and acceptance of work.

The Contractor shall invoice the firm-fixed-prices as specified below.

| **XXXXXXX Deliverables** | **Firm-Fixed-Price\*** |
| --- | --- |
| Assessment of the current XXXXXXX Web site (baseline usability testing) | \*60 days after award |
| User & Task Analysis (including focus group results) | \*90 days after award |
| Information Architecture and Content Organization | \*120 days after award |
| Usability testing of prototype site | \*150 days after award |
| Evaluation of Web site (usability testing of the redesigned site) | \*\*180 days after award |
| Evaluation of Web site (PowerPoint presentation and Lessons Learned document) | \*\*210 days after award |

## 14.0 Procedures for Payment

The Contractor shall submit invoices in accordance with the instructions specified below.

Payment shall be accomplished in accordance with the contract. The Contractor shall have the invoice certified by the Project Manager. The Contractor’s invoice shall be for one month. The Contractor may invoice only for the hours used in direct support of the project during the invoiced month. A copy of the invoice will be submitted to the COTR along with the monthly status report at the same time that it is submitted for payment. **Failure to comply with the procedures outlined above may result in your payment being delayed.**

Copies of written acceptance will be provided by the Contracting Officer’s Technical Representative (COTR), or other designee, for all deliverable products/services, and must be attached to the invoices and back up.

In addition, the data elements indicated below shall be included on each invoice.

Task order number: *(from GSA Form 300, Block 2).*

Paying Number: *(ACT NO.)* *(From GSA Form 300, Block 4).*

Project Title: E-Forms Catalogue and Portal

The Contractor shall submit invoices to the following:

(1) Send Original Invoice to:

General Services Administration

Finance Division

1500 E Banister Road

Kansas City, MO 64131-3088

Mark Invoice: ORIGINAL

POC: Accounts Payable Branch

(2) Send Copies to:

GSA, Office of Governmentwide Policy

Regulatory Information Service Center (MI)

1800 F Street, NW

Room 3039

Washington, DC 20405

Mark Invoice: COPY

## 15.0 Proposal Submission

The proposal submission should include the Offeror’s Technical and Management approach for providing products and services that comply with 36 CFR Part 1194 – Section 508 of the Rehabilitation Act (29 U.S.C. 794d). The approach shall include the standards that the products and services are compliant with, and the degree of compliance. The Offerors must demonstrate compliance with Section 508 requirements prior to award.

Offerors must prepare and deliver costs proposals that will be evaluated in determining the “best value” proposal. Offerors are requested to limit proposals to 15 pages.

### 15.1 Technical Proposal Instructions

Offerors are requested to submit a statement of qualifications outlining their firm’s capabilities and experience with respect to the effort described herein. Professional Staff resumes are to be no longer than 5 pages. The statement of qualifications should describe the proposed methodology, personnel and corporate experience that are directly relevant to this effort. Resumes of proposed personnel will be submitted with the proposal.

Offerors will specifically address all of the elements listed in the following:

Technical Understanding of Requirements, Methodology Deliverables, and Delivery Schedule

Technical and qualitative descriptions of the proposed methodology that will be used to accomplish the objectives in this statement of work

Past Performance/Corporate Experience

Descriptions of projects similar in scope and size performed during the past two (2) years, including references. Sufficient information should be included to allow the Government to contact the agencies/organizations served and assess the quality of the services provided.

### 15.2 Price Proposal Instructions

Price proposals should be submitted on a Firm-Fixed-Price price basis in accordance with the offeror’s GSA schedule contract terms and conditions.

## 16.0 Method of Award

Award will be based on the Best Value to the Government, price and other factors considered.

**Best value evaluation methodology**

Best value evaluation is, in and of itself, a subjective assessment by the Government of the proposed solution that provides the optimal results to the Government, price and other factors considered. Subjectivity is inherent in the process and is the cornerstone of the source selection decision. In an effort to provide insight to the Offerors as to the decision making process of the Government, the following information is provided:

Evaluation will be made on two factors – Technical and Price. In the evaluation, technical is significantly more important than price. While price is not as important as Technical, it does have significance to the Government.

### 16.1 Technical Evaluation Factors and Evaluation Methodology

Proposals will be evaluated in terms of quality, depth, and relevance of information presented in response to this Statement of Work. In rating the technical proposals, the four factors (Technical Understanding, Corporate Experience, Professional Staff, and Understanding the Government Requirements) are listed in descending order of importance. Technical Understanding is moderately more important than the other three factors combined, while Corporate Experience is slightly more important than Professional Staff and Understanding the Government Requirements.

**Technical Factor One:** Technical Understanding of Requirements, Deliverables, and Delivery Schedule

Basis of Evaluation: Offers will be evaluated to determine the soundness of the technical approach most suitable to this effort.

**Technical Factor Two:** Past Performance/Corporate Experience

Basis of Evaluation: The proposal will be evaluated to assess the corporate experience of the Offeror with respect to projects similar in scope and size to the work described herein.

**Technical Factor Three:** Professional Staff

Basis of Evaluation: The resumes submitted by the Offeror will be evaluated to assess the availability and qualifications of the proposed staff, their experience in similar projects, and their capability to fully and professionally accomplish the objectives stated herein. The successful contractor shall maintain the level of expertise covered by the professional staff proposed with the offer for the duration of the contract. If a staff member leaves the project, his/her replacement must have at a minimum the same level of experience, education, etc. Any replacement staff is subject to the review and acceptance of the COTR.

**Technical Factor Four:** Understanding of Government Requirements

Basis of Evaluation: The proposal will be evaluated to assess the corporate experience of the Offeror with respect to understanding of and compliance with federal requirements including Section 508 accessibility requirements.

### 16.2 Price Evaluation Factors and Evaluation Methodology

Offeror’s aggregate price for Task Order will be evaluated, including any discounts offered off the GSA FSS Schedule contracts.

The Government will perform a price/technical trade-off analysis in accordance with the above methodology and select the offer that provides the best value.